AFFORDABLE CARE ACT (ACA)
MONTHLY COMPLIANCE CHECKLIST

This checklist is intended to outline the steps you should take as an employer to proactively manage your ACA compliance. While the checklist below identifies general to-do tasks, detailed instructions can be found on the SET SEG member portal by selecting ACA Tracking & Reporting under Quick Links.

COMPLETED FOR:

January 20____

February 20____

March 20____

April 20____

May 20____

June 20____

July 20____

August 20____

September 20____

October 20____

November 20____

December 20____

MANAGE YOUR DATA

Upload Data to the SET SEG Member Portal

Employee File: After each payroll cycle, upload a new employee file to include all active and inactive employees since the previous calendar year

Payroll File: After each payroll cycle, upload a payroll file

Unpaid Leave File: Upload the unpaid leave, also known as Leave of Absence (LOA) file, to identify employees on an ACA-qualified leave

IRS Offer of Coverage File: Upload for any newly hired or terminated employee, changes to enrollment election, or monthly cost
- *If your district offers self-insured medical benefits, upload the dependent and/or COBRA data files as well*

MITIGATE RISK

Schedule a 30-minute virtual ACA Monthly Check In meeting with your ACA Account Representative:
https://setseg.org/my-set-seg/my-account-overview.

In SyncStream, review the Payroll Report to ensure all payroll has processed successfully

In SyncStream, generate the Compliance Reports

A Penalty Risk Check
- *Confirm that Percentage Offered is at or above 95%*

B Penalty Risk Check
- *Identify any employees showing compliance risk*
- *Verify if the risk is expected and/or accurate. If the risk was not expected, or you are unsure*

MONITOR MEASUREMENTS AND ELIGIBILITY

In SyncStream, review the Designated Full Time Report
- *All newly hired full-time (FT) designated employees are required to be offered coverage no later than the first day of the fourth calendar month following their hire date*

In SyncStream, review the All Tracked Employees Report
- *All new and ongoing employees that average over 30 hours during the measurement period (i.e., Calculated Full-Time), are considered ACA eligible and are required to be offered coverage by the Stability Period Start Date*

Extend offers to employees as necessary