

# HRLOGICS USER GUIDE ACA TRACKING AND REPORTING SOLUTION



[Version 2.0 – 09.30.2024]



## Introduction

This guide is the go-to resource for understanding SET SEG's ACA tracking and reporting (ACATR) process within our reporting system, HRlogics ACA. Read on for instructions on how to access HRlogics and locate meaningful reports.

## The Basics

- Basic Navigation
- Viewing Employee Demographics and Data
- View, Filter, and Export HRlogics ACA Reports and Tables

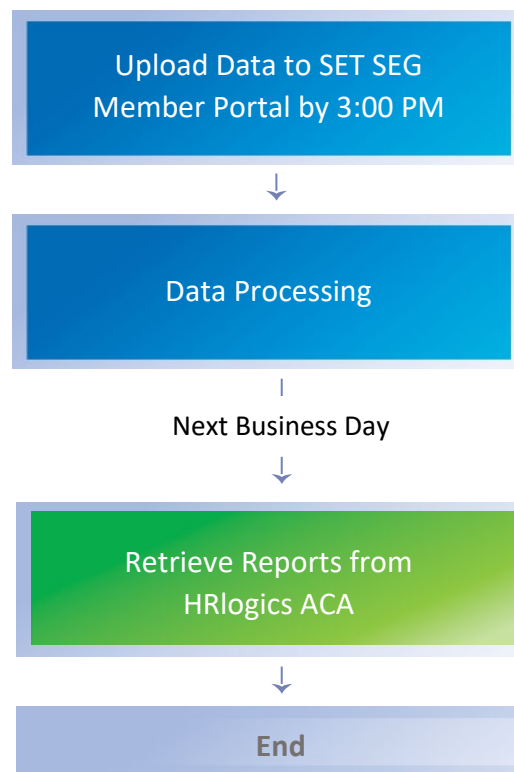
## Monthly Report Review Process

This section offers instructions for locating your compliance reports within HRlogics ACA.

How Do I ...	HRlogics ACA Report
... monitor district's monthly compliance and employer shared responsibility provisions (ESRP) risk?	Compliance Risk Reports
... determine 95% fine risk and employees causing the risk?	Compliance Risk Reports
... see who I need to offer coverage to?	Eligibility and Measurement Reports
... check current measurement statuses and projected eligibility and/or view employee measurements?	Eligibility and Measurement Reports



## Data Upload & Retrieval Process



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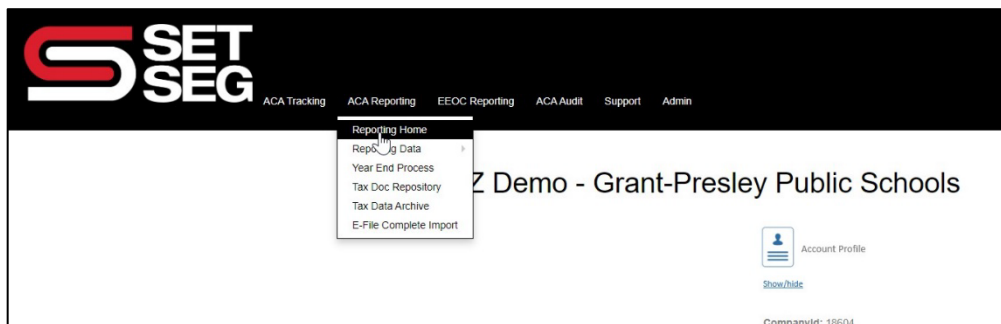
### Compliance Risk Reports

Report Purpose: Display and analyze ACA compliance risk regarding ESRP fines through the Penalty A and Penalty B HRlogics ACA Compliance Reports. Identify which employees are causing the compliance risk.

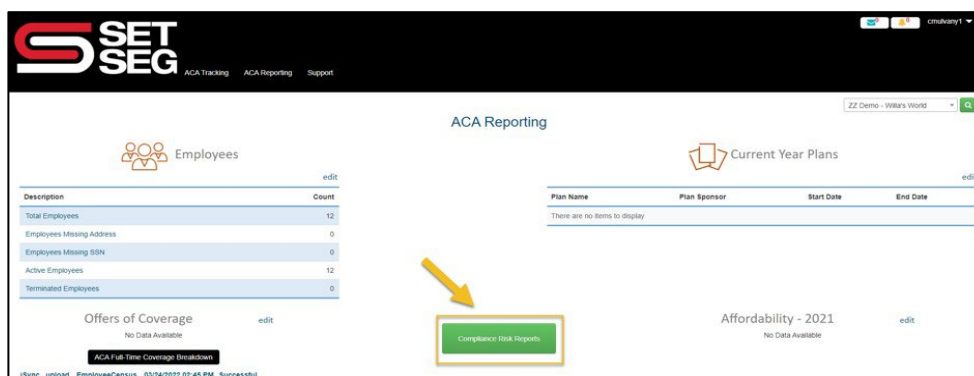
HRlogics ACA reports can be viewed within the system or exported to Excel. [View the “View, Filter, Export, and Analyze Data” section](#), which will demonstrate some basic functionality shared across many of HRlogics ACA’s reports.

### Run Compliance Reports

1. From the dashboard homepage, under the ACA Reporting tab, select **Reporting Home**.



2. Select **Compliance Risk Reports**.



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### 3. Helpful report features:

- a. Select **tax reporting year**. This will select the reporting for both the A Penalty and B Penalty Risk reports.
- b. Export to Excel File.
- c. To display the number of employees eligible for benefits in a district for a single month, click on the number under the Number of Eligible Employees column.

The screenshot displays the HRLogics ACA Reporting interface. At the top, there is a navigation bar with the SET SEG logo and menu items: ACA Tracking, ACA Reporting, iSync, EEOC Reporting, ACA Audit, Support, and Admin. The user's email address, vparkey-dennison@setseg.org, is visible in the top right corner.

The main content area is titled "Compliance Risk Reports" and "ZZ Demo - SET SEG Test Account (99980)". A dropdown menu labeled "a." is set to "Select Reporting Year: 2024".

The "A" Penalty Risk Check report is displayed below. It features a table with the following columns: Month, Year, Number Of Eligible Employees (highlighted with a red box and labeled "c."), Number Offered at least MEC, Percentage offered, Penalty A Risk, and # of employees with Compliance Risk. The data shows zero employees offered at least MEC for all months from January to August 2024. An "Export Report" button (labeled "b.") is located to the right of the table.

Below the "A" report is the "B" Penalty Risk Check report, which includes a table with columns: Month, Year, FT Eligible Employees No offer Or MEC Only offer, FT Eligible Employees unaffordable, and B Penalty Risk. The data for January 2024 shows 0 employees in the first category and 75144 in the second. An "Export Report" button is also present for this report.

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### “A” Penalty Risk Check

View the risk of eligible employees that were not offered minimum essential coverage.

1. View the A Penalty Risk (4890H-A) Check table.
2. Under the Percentage offered column, verify that the Percentage offered is greater than 95% and is accurate for the corresponding month and year.
3. The “# of employees with Compliance Risk” column shows how many employees represent a potential compliance risk because they are eligible for coverage but are not documented as being offered Minimum Essential Coverage.
4. To generate a table of specific employees who present a potential compliance risk for a specific month, click the number under # of employees with Compliance Risk column and in the desired month row.

1. “A” Penalty Risk Check Export Report

Month	Year	Number Of Eligible Employees	Number Offered at least MEC	Percentage offered	Penalty A Risk	# of employees with Compliance Risk
January	2024	202	0	2. 0.00%	42570	384. 202
February	2024	202	0	0.00%	42570	202
March	2024	202	0	0.00%	42570	202

### “B” Penalty Risk Check

View the risk of eligible employees that were offered unaffordable coverage.

1. Scroll down from “A” Penalty Risk Check to view “B” Penalty Risk (4890H-B) Check table.
2. The “Full-Time (FT) Eligible Employees No Offer” column contains the same information as the “A” Penalty Risk Check’s “# of employees with Compliance Risk” column. It shows how many employees represent a potential compliance risk because they are eligible for coverage but are not documented as being offered Minimum Essential Coverage.
3. The “FT Eligible Employees unaffordable” column shows how many employees represent a potential compliance risk because they were offered coverage that isn’t affordable based on their rate of pay.

1. “B” Penalty Risk Check Export Report

Month	Year	FT Eligible Employees No offer Or MEC Only offer	FT Eligible Employees unaffordable	B Penalty Risk
January	2024	2. 202	3. 0	75144
February	2024	202	0	75144
March	2024	202	0	75144

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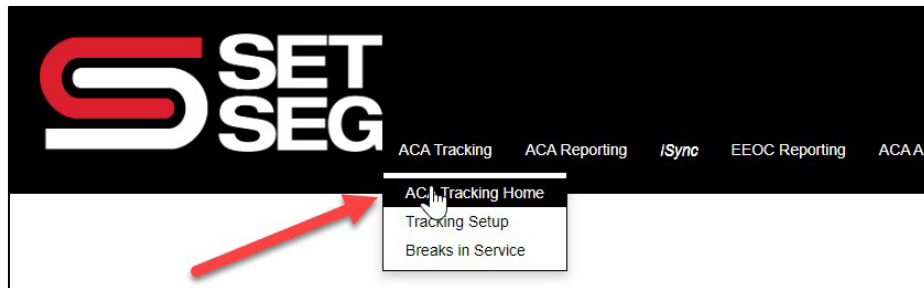
## Eligibility and Measurement Reports

HRlogics ACA reports can be viewed within the system or exported to Excel. [Review the View, Filter, Export, and Analyze Data section](#), which will demonstrate some basic functionality shared across many of HRlogics ACA's reports.

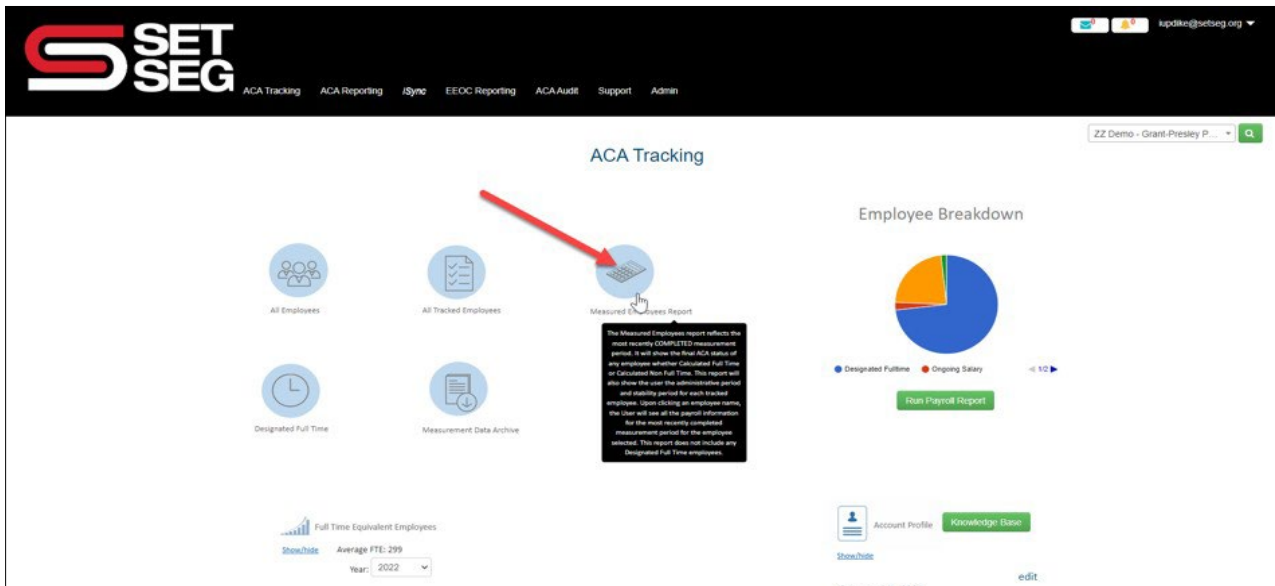
### Measured Eligibility Report

Report Purpose: Identify the part-time/variable-hour employees that are currently in their stability period that need to be offered coverage.

1. From the dashboard homepage, select **ACA Tracking Home** under the ACA Tracking tab.



2. Select **Measured Employee Report**.

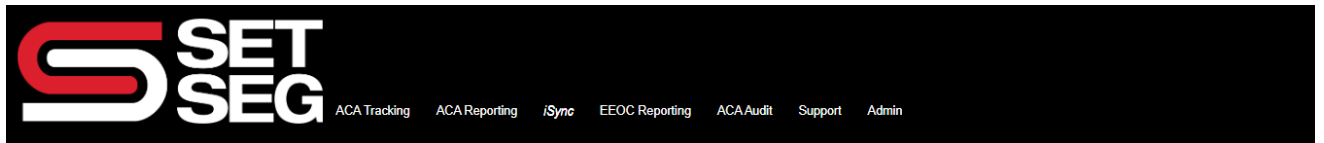


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- Filter Current ACA Status for Calculated Full-Time to see employees who have measured eligible and are entitled to an affordable offer of coverage starting on their stability period start date.



### Measured Employees Report - ZZ Demo - SET SEG Test Account (99980)

Print Send To Excel

Employee Id	Employee Name	Current ACA Status	Measurement Period	Measurement Period End Date	Admin Period Start Date	Admin Period End Date	In Admin Period	Stability Period Start Date
102887840	MICHAEL BANGIARD	Calculated Non-Full-Time		06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
105456513	MATTHEW WATERLOO	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
108535435	RACHEL DAVENHILL	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
108960613	MICHELLE LAPWOOD	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
109494138	JEAN TOAST	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
109651837	EDWARD SIMESTER	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
110435113	WILLIAM BARTTRUM	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
114871036	AMY BOHL	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
115488041	DYLAN MARVEN	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024
115500665	WENDY EDWIN	Calculated Non-Full-Time	07/01/2023	06/30/2024	07/01/2024	08/31/2024	No	09/01/2024

Showing items 1 through 10 of 477 Show more

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### All Tracked Employees Report

Report Purpose: Identify the part-time/variable-hour employees that are currently in their measurement period to track and manage their average weekly hours.

1. From the dashboard homepage, select **ACA Tracking Home** under the ACA Tracking tab.



2. Select **All Tracked Employees**.





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3. This table displays the measurement period currently in progress and is used to track employees during that specific measurement period.

Employee Id	Employee Name	Employment Type	Tracked Projected Status	Employment Date	Average Weekly Hours	Maximum Average Weekly Hours to Maintain Non-Full-Time Status	Measurement Type	Measurement Start Date	Measurement End Date	Current Period	Total Hours Paid	Admin Period Start Date	Admin Period End Date	Employee Department
102887840	MICHAEL BANGIARD	Hourly	Calculated Non-Full-Time	12/31/2020	0.00	16.27	Ongoing Hourly	7/1/2024	6/30/2025	Measurement Period	0.00	07/01/2025	08/31/2025	Registered Nurse
105456513	MATTHEW WATERLOO	Hourly	Calculated Non-Full-Time	12/31/2020	0.00	16.27	Ongoing Hourly	7/1/2024	6/30/2025	Measurement Period	0.00	07/01/2025	08/31/2025	Associate Professor
108535435	RACHEL DAVENHILL	Hourly	Calculated Non-Full-Time	12/31/2020	0.00	16.27	Ongoing Hourly	7/1/2024	6/30/2025	Measurement Period	0.00	07/01/2025	08/31/2025	Assistant Professor
108960613	MICHELLE LAPWOOD	Hourly	Calculated Non-Full-Time	12/31/2020	0.00	16.27	Ongoing Hourly	7/1/2024	6/30/2025	Measurement Period	0.00	07/01/2025	08/31/2025	Account Coordinator

4. The All Tracked Employees Report contains the following information:

a.	Employment Type	Payroll classification of employee (hourly, salary, etc.).
b.	Average Weekly Hours	The average number of hours that an employee has worked weekly up to the current week of payroll in HRlogics ACA.
c.	Maximum Average Weekly Hours to Maintain Non-Full-Time Status	If an employee's hours are lowered to an average below what is displayed in this column, the employee will calculate as Non-Full-Time under ACA Regulations. This can be used by scheduling and HR departments to keep part-time personnel under the threshold of being insurance eligible.
d.	Measurement Type	Displays the type of measurement period for each employee (either Ongoing Hourly or New Variable Hour).
e.	Measurement Dates	The start and end dates of this employee's measurement periods. These are the dates where their hours are tracked to see if they are eligible to receive benefits during their next stability period.
f.	Current Period	Displays either Measurement Period of Administrative Period. If an employee is in an Administrative Period and lists as Calculated Full-Time under the Tracked Projected Status column, it is time to offer insurance coverage.

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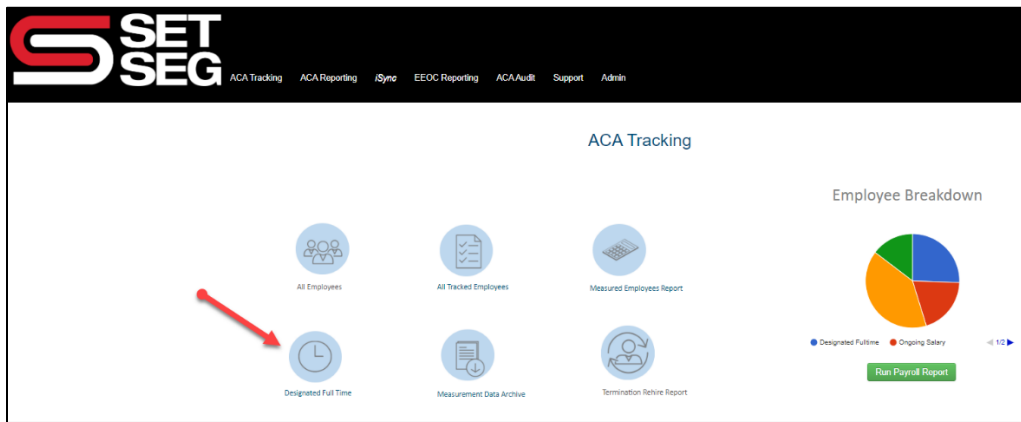
## ACA TRACKING AND REPORTING SOLUTION



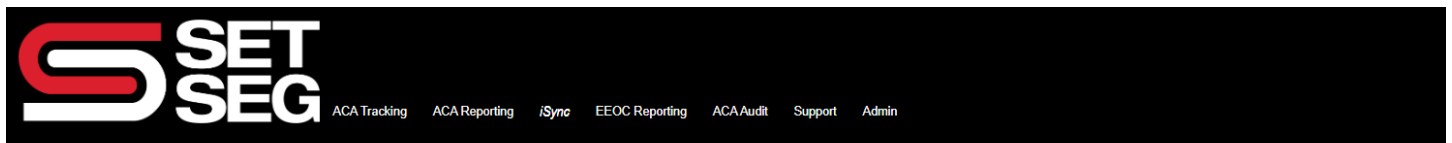
### Designated Full Time Report

Report Purpose: Identify the designated full-time employees that are required to be offered coverage.

1. From the dashboard homepage, select **ACA Tracking Home** under the ACA Tracking tab.
2. Select **Designated Full Time**.



3. The Designated Full-Time Employees table will appear.
  - a. Export the report to Excel.
  - b. Filtering the employment date column can help identify new full-time hires who need an offer of coverage.
  - c. The Average Weekly Hours column can be used to identify employees designated as FT who are measuring less than 30 average weekly hours.



### Designated Full-Time Employees - ZZ Demo - SET SEG Test Account (99980)

Print Send To Excel a.

Employee Id	Employee Name	Employment Type	Current Status	Employment Date	Average Weekly Hours	In Waiting Period	Employee Department
103049892	CATHERINE ORTIZ	Salary	Designated Full-Time	12/19/2019	0.00	No	Internal Auditor
106430477	BETH DARNODY	Salary	Designated Full-Time	12/19/2019	0.00	No	Web Designer I
111996932	ALLISON MURFIN	Salary	Designated Full-Time	12/19/2019	0.00	No	Systems Administrator III
113908054	MARY BEARCOCK	Salary	Designated Full-Time	12/19/2019	0.00	No	Dental Hygienist

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## All Employees Report

Report Purpose: View and audit employee demographic information, including historical data submitted for each employee.

HRlogics ACA reports can be viewed within the system or exported to Excel. [Review the View, Filter, Export, and Analyze Data section](#), which will demonstrate some basic functionality shared across many of HRlogics ACA's reports.

1. Select **ACA Tracking Home** under the ACA Tracking tab.
2. Select **All Employees**.



3. Select **Update Basic Info** from Payroll Data to update/replace data shown in the Employee File with data from the Payroll File (specifically hire dates, termination dates, and status).
4. Select **Export Basic Template** to download the table to Excel.
5. Select **List Dependents** to display employee dependents for groups with employees enrolled in a self-insured medical plan.
6. The report will automatically show 18 months of records. Select **Show All Employees** to display employees including those terminated more than 18 months ago.

**ZZ Demo - SET SEG Test Account (99980)**

3. Update Basic Info from Payroll Data

4. Export Basic Template

5. Knowledge Base

6. List Dependents Show all Employees

Remove	Employee Id	Employee Name	First Name	Middle Name	Last Name	SSN	Hire Date	Term Date	Status	Type	PayType	Address	City	State	Department	Location	Date Of Birth	Email	Primary Worksite ZipCode
<input type="checkbox"/>	<a href="#">Edit</a> 003425B8EDFB4FF4B215FD0DA384170D	MICHAEL BACCUS	MICHAEL		BACCUS		12/19/2019	09/15/2023	Inactive	Seasonal	Hourly				Web Developer IV				
<input type="checkbox"/>	<a href="#">Edit</a> 004B09D60344408BA002E7B108C1DD4A	TIMOTHY CACCAVELLA	TIMOTHY		CACCAVELLA		12/31/2020	09/15/2023	Inactive	Seasonal	Hourly				VP Quality Control				
<input type="checkbox"/>	<a href="#">Edit</a> 00AA342F225B4F52B52FABD8801068491	BRUCE BELL	BRUCE		BELL		09/02/2023	09/15/2023	Inactive	Full Time	Salary				Instructor				
<input type="checkbox"/>	<a href="#">Edit</a> 00AE908F19C4441F9EA717E0835CAB4	TARA BUSEN	TARA		BUSEN		09/23/2021	09/15/2023	Inactive	Part Time	Hourly				Payment Adjustment Coordinator				

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### View, Filter, Export, and Analyze Data

This section will demonstrate some basic functionality shared across many of HRlogics ACA's reports, using the All Tracked Employees Report as an example.

Employee Department	Employment State	Residence State	Employee ID	Employee Name	Employment Type	Tracked Projected Status	Employment Date	Average Weekly Hours	Maximum Average Weekly Hours to Standard Non-Full-Time Status	Measurement Type	Measurement Start Date	Measurement End Date	Current Period	To: Ho: Pal
Assistant Professor	MI	MI	10852425	Nathalie Davenport	Hourly	Calculated Non-Full-Time	1/9/2015	0.00	9.85	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Account Coordinator	MI	MI	108960613	King Lapwood	Hourly	Calculated Non-Full-Time	3/5/2019	0.00	11.20	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Help Desk Technician	MI	MI	109651827	Nan Simester	Hourly	Calculated Non-Full-Time	12/31/2018	0.00	12.75	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Assistant Professor	MI	MI	122159828	Leesa Petrasch	Hourly	Calculated Non-Full-Time	7/8/2018	0.00	8.32	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Internal Auditor	MI	MI	127275188	Kala Hornung	Hourly	Calculated Non-Full-Time	7/1/2015	0.27	57.89	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	7.0
Technical Writer	MI	MI	142862086	Suzi Aalde	Salary	Calculated Full-Time	1/4/2012	22.12	25.87	Ongoing Salary	7/1/2021	6/30/2022	Measurement Period	826
Biostatistician II	MI	MI	151919055	Danica Varlander	Hourly	Calculated Non-Full-Time	11/7/2017	0.00	5.62	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Structural Analysis Engineer	MI	MI	162119224	Katie Clutton	Hourly	Calculated Non-Full-Time	10/15/2018	6.71	51.41	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	174
Nurse Practitioner	MI	MI	169628186	Celestia Lowe	Hourly	Calculated Non-Full-Time	2/25/2019	0.00	8.27	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
GIS Technical Architect	MI	MI	186077779	Suzanne Phipp	Salary	Calculated Non-Full-Time	8/12/2021	18.50	27.48	New Variable Hour	8/12/2021	8/11/2022	Measurement Period	210

#### 1. Send to Excel:

- HRlogics ACA reports can be viewed within the system or exported to Excel.
- This will download the table as an Excel spreadsheet.
- On other report pages, this option can appear as Export Basic Template.

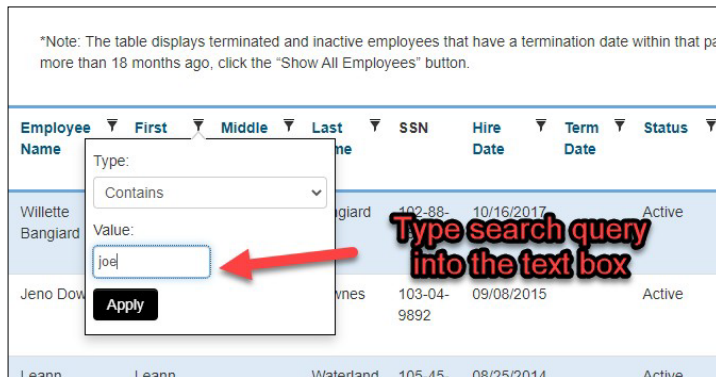
# HRLOGICS USER GUIDE

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### 2. Filter Function:

- This function allows you to filter the table to show certain rows. Select the filter icon to begin.
- For undefined text data fields, such as Employee Name, any text can be typed into the filter value box to search for a name. The Type drop-down menu indicates filter logic and includes options for Contains, Equals, StartsWith, and EndsWith.



- For numeric data fields or dates, the filters include logic to filter for values Equals, Greater than, and Less than.
  - For date values, selecting Greater than will filter for values after the date entered, and Less than will filter for values before the entered date.
  - For pre-defined data fields, such as status, a drop-down menu will appear with a filter option.
3. Use the Page Size drop-down menu to show more or less records at once.
  4. Selecting show more will quickly populate the page with additional records.
  5. Refresh the page to reset filters.