# ACA Employee Eligibility Page

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## Document History

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## Overview

### What is the ACA

The Patient Protection and Affordable Care Act (PPACA), commonly called the Affordable Care Act (ACA), is a United States federal statute signed into law on March 23, 2010. The ACA was enacted to increase the quality and affordability of health insurance, lower the uninsured rate, and reduce the costs of healthcare. The ACA definition of full-time employee has changed the way employers must now determine eligibility for employer sponsored health care.

On Feb.10, 2014, the U.S. Department of the Treasury and the Internal Revenue Service (IRS) issued final regulations implementing the employer responsibility provisions of the ACA which requires reporting of full-time employees showing the information for the offer of health care coverage.

### The Employee Eligibility Page

Using the ACA Employee Eligibility page in PeopleSoft is important for the following reasons:

The page will:

* Reflect what the initial employment ACA status was determined to be for each employee
* Reflect the evaluation and testing periods for employees who are not full-time ACA eligible employees
* Reflect the date medical coverage was offered to each employee, as applicable.
* Support the annual 1094C and 1095C IRS regulatory reporting.

## Key Terms

**Patient Protection and Affordable Care Act (PPACA)**

The United States federal statute signed into law on March 23, 2010, commonly called the Affordable Care Act (ACA).

**Full-Time Employee**

A full-time employee is an employee who is employed on average, per month, at least 30 hours of service per week (or at least 130 hours of service in a calendar month).

**Seasonal Employee**

A seasonal employee, as federally defined, is generally an employee/class of employees working a given (specifically defined) season (generally the same time each year), such as,

* The mowing season
* The pool/aquatic season
* The legislative season

**Note:** Current state statute specifies agencies that are authorized to employ seasonal employees. If uncertain whether your agency may employ seasonal employees, contact OMES HCM for guidance.

**Variable Hour Employee**

An employee who is hired with an irregular work schedule, and it is unknown if he/she will work on average more than 30 hours per week.

**Measurement Period\ Evaluation Period**

The measurement period is also known as the look-back period. According to the ACA, it must be a fixed period that is used for all employees. The measurement period allows employers an opportunity to look back at the hours worked by an employee to determine the status of an employee as a full-time employee during a future period (referred to as the stability period).

The State of Oklahoma has chosen 12 months for the measurement period, the longest period possible. New employees will be tested during their first anniversary month. Annual testing of on-going employees will occur every October.

**Administrative Period**

The administrative period is the period of time used by the employer to perform administrative duties related to counting hours, and, if applicable, make an offer of coverage to an employee.

For ongoing employees, the administrative period occurs after the measurement period ends and before the associated stability period begins. It cannot be longer than 90 days between the end of the evaluation and the beginning of the stability period.

The administration period must overlap with the prior stability period; so that, during the administrative period, you continue to offer coverage to ongoing employees until the new stability period begins.

For new employees who are immediately benefits eligible, this period cannot be more than 90 days from the date of hire.

The initial measurement period and administrative period together cannot extend beyond the last day of the first calendar month beginning on or after the first anniversary of the employee’s start date.

**Stability Period**

The period following a measurement period (and administrative period) during which variable hour employees determined to be eligible (those that worked an average of more than 30 hours per week) are offered coverage. The State of Oklahoma stability period is 12 months.

## ACA Employee Eligibility Page Overview

This page will support the compliance needs for the ACA.

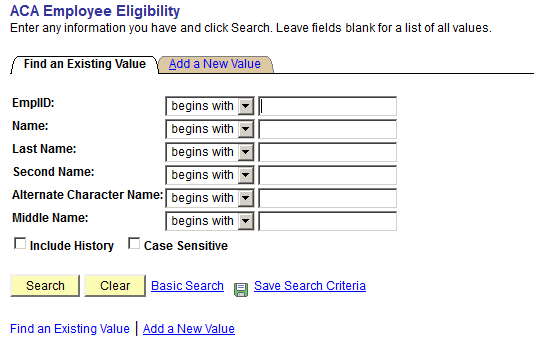
Navigation: Benefits > Administer Base Benefits > Employee/ Dependent Information > ACA Employee Eligibility

### Search for an Employee

Your search box will resemble the following image.

**Note:** It is recommended you use the employee’s EmplID to ensure you have the correct employee. When you use an employee’s name, there is a greater risk of selecting the wrong employee.

If you choose not to search by EmplID, you will need to enter as much information as you can into one field to narrow the search. For example, if the employee’s last name is Smith, type the whole name and not just an S or Sm. If you type part of the name, you will get a list of all employees whose name matches the part you entered.



You need to type in one of the following: EmplID, Name, or Last Name. Middle Name is optional and should be used in conjunction with EmplID, Name or Last Name.

\***EmplID** – The employee’s EmplID.

\*Again, it is recommended you use the employee’s EmplID, as opposed to other options.

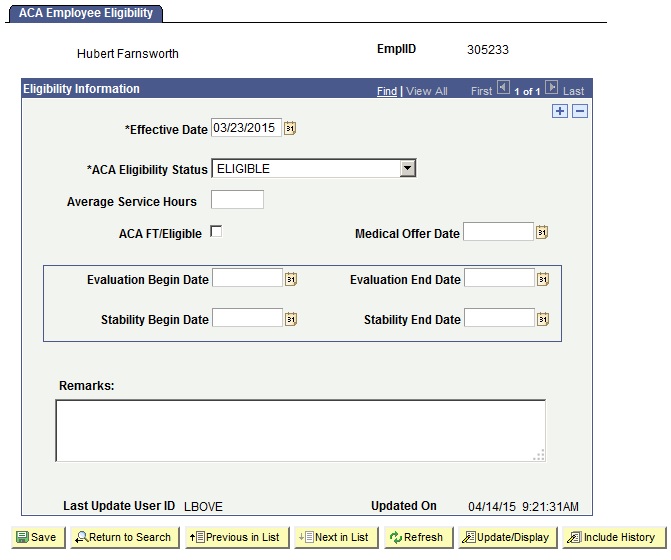
**Name** – The employee’s first name and then last name, e.g. Tom Jones. You can also type in a partial name, e.g. Tom J

**Last Name** – The employee’s last name.

**Middle Name** – The employee’s middle initial.

**Second Name** and **Alternate Character Name** – **Do not use**.

### Page Image



### Field Descriptions

| **Field Name** | **Description** |
| --- | --- |
| Effective Date | Enter the date on which the ACA eligibility status becomes effective.  The effective date is usually the start of a stability period, but can be different if required. |
| ACA Eligibility Status | Choose the ACA eligibility status from the following values:  • Eligible: An employee whose average hours is equal to or above the minimum hours/week or hours/month so the employee is considered Benefits Full Time. The employee is eligible for benefits.  • Ineligible: An employee whose average hours is below the minimum hours/week or hours/month so the employee is considered Benefits Part Time. The employee is not eligible for benefits.  • Ineligible but Offered: An employee who is ineligible for medical coverage by ACA standards, but offered medical coverage for other reasons.  • Variable-Hour: An employee whose average hours are not yet known. This employee may or may not end up working more than 30 hours per week on average. Human Resources will determine the employee’s eligibility after the evaluation period.  •Terminated: The employee has terminated employment with the State of Oklahoma. |
| Average Service Hours | Enter the average hours based on all the jobs the employee has. For a variable-hour employee, this can be determined by the average hours calculated during the look-back period. |
| ACA FT/ Eligible? | Check this box if this employee has been offered medical benefits as a condition of employment. Generally, this is for an employee who it is known will work more than 30 hours per week.  Note: With this box marked, the evaluation and stability fields will be greyed out, no entries will be needed. |
| Medical Offered Date | Enter the date the employee will be eligible for medical coverage from the State of Oklahoma (should always be the first of a month). |
| Evaluation Begin Date | Enter the start date of the Look Back period to be used to determine the employee’s average service hours. |
| Evaluation End Date | Enter the end date of the Look Back period to be used to determine the employee’s average service hours. The evaluation period cannot be more than 12 months. |
| Stability Begin Date | Enter the start date of the stability period in which the ACA eligibility status or average hours of service is effective.  The ACA stability period begin date must be after the evaluation period end date. |
| Stability End Date | Enter the last day of the stability period.  For the State of Oklahoma, the date must be 12 months after the ACA stability begin date. |
| Remarks | This is an open text field where you can type notes about the employee’s status. The field is here to support you and your efforts to track an employee’s status. |
| Last Update User ID/ Updated On | Review the timestamp to keep track of when and by whom the data was previously updated. This can be a system update or manual update by the HR Administrator. |

## New Hire

After you enter new hire information on the Job Data pages, you must enter ACA information. The following table outlines the field values for newly hired employees based on their status.

| **Field Name** | **Full-Time Employee (30 or more standard hours per week)** | **Part-Time or Seasonal Employee** | **Part-Time Employee but Offered Medical Coverage** | **Variable-Hour Employee** |
| --- | --- | --- | --- | --- |
| Effective Date | Employee’s Hire Date | Employee’s Hire Date | Employee’s Hire Date | Employee’s Hire Date |
| ACA Eligibility Status | Eligible | Ineligible | Ineligible but Offered | Variable-Hour |
| Average Service Hours | Standard Hours | Standard Hours | Standard Hours | Expected Average Standard Hours |
| ACA FT/ Eligible? | Select the checkbox | Do Not Select | Do Not Select | Do Not Select |
| Medical Offered Date | Medical Coverage Begin Date | Blank | Medical Coverage Begin Date | Blank |
| Evaluation Begin Date | Leave blank for a new hire. | | | |
| Evaluation End Date | Leave blank for a new hire. | | | |
| Stability Begin Date | Leave blank for a new hire. | | | |
| Stability End Date | Leave blank for a new hire. | | | |
| Remarks | You can type notes that assist you with tracking an employee’s status. | | | |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. | | | |

## Updating the ACA Employee Eligibility Page

The State of Oklahoma has adopted a 12-month measurement period for reviewing the average number of hours employees are working to ensure eligible employees are offered coverage. This means you must measure an employee’s eligibility after one year of employment, and during the annual look-back. After reviewing the results from the look-back reports, you must update data on the ACA Employee Eligibility page for all part-time, variable-hour, and seasonal employees. The page will serve as a record to show you performed the measurements, as required by law.

Other instances that might require an update to data on the ACA page include an employee status change, such as a change from full-time to part-time, part-time to full-time, or an employee termination.

You must insert a new row to update the data on the ACA Employee Eligibility page after the initial record for a new hire is added to the system. Use the following steps as a guideline on how to enter the new information.

Navigation: Benefits > Administer Base Benefits > Employee/ Dependent Information > ACA Employee Eligibility

1. Enter the employee information.
2. Click  to enter the ACA Employee Eligibility page.
3. After the page appears, click Plus (+) button. to insert a new Effective Dated row for the employee.

## Status Change

You will need to insert a new row on the ACA Employee Eligibility page for the following types of status changes.

* Part-time, seasonal or variable-hour to full-time
* Full-time to part-time, seasonal or variable-hour

### On-Going Employees

| **Field Name** | **Any change to Full-Time (30 or more standard hours per week)** | **Full-time to Part-Time, Seasonal or Variable-Hour** |
| --- | --- | --- |
| Effective Date | Date of the change | Date of the change |
| ACA Eligibility Status | Eligible | Eligible |
| Average Service Hours | Standard Hours | Standard Hours |
| ACA FT/ Eligible? | Select checkbox | Do Not Select |
| Medical Offered Date | 1st of the month following the date of the change | Medical Coverage begin date will default from previous row |
| Evaluation Begin Date | Field will be grey | Most recent annual October testing begin date |
| Evaluation End Date | Field will be grey | Most recent annual October testing end date |
| Stability Begin Date | Field will be grey | January 1 of current year |
| Stability End Date | Field will be grey | December 31 of current year |
| Remarks | You can type notes that assist you with tracking an employee’s status. In the case of a status change, you can note that the employee changed status. | |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. | |

### Employees within the First Year of Employment

If an individual changes their employment status within the first year of their employment with the state, contact OMES HCM for guidance on how to handle the employee’s ACA status.

### Examples

**Scenario 1, Status Change, On-Going Employee, Part-time to Full-time:** An individual who has been a part-time employee working 15 hours per week since 2010 is offered a full-time position beginning August 31, 2015. Refer to the following table to view the field values you should enter for the employee.

| **Field Name** | **Original Row** | **New row: August 31, 2015, date of status change** |
| --- | --- | --- |
| Effective Date | 1/1/2015 | 8/31/2015 |
| ACA Eligibility Status | Ineligible | Eligible |
| Average Service Hours | 15 | 40 |
| ACA FT/ Eligible? | Do Not Select | Select the checkbox |
| Medical Offered Date | Blank | 9/1/2015 |
| Evaluation Begin Date | 10/1/2013 | Field will be grey |
| Evaluation End Date | 9/30/2014 | Field will be grey |
| Stability Begin Date | 1/1/2015 | Field will be grey |
| Stability End Date | 12/31/2015 | Field will be grey |
| Remarks |  | This employee changed status mid-year |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. | |

**Scenario 2 Status Change, On-Going Employee, Full-time to Part-time:** An individual who has been a full-time, 40-hour per week employee since 2010 decides on March 2, 2015 to go to part-time, 15 hours per week. The employee continues to have benefits through the end of 2015 because of the stability date rules.

| **Field Name** | **Original Row** | **New row: March 2, 2015, date of status change** |
| --- | --- | --- |
| Effective Date | 1/1/2015 | 3/2/2015 |
| ACA Eligibility Status | Eligible | Eligible |
| Average Service Hours | 40 | 15 |
| ACA FT/ Eligible? | Checkbox is on | Do not select |
| Medical Offered Date | 1/1/2015 | 1/1/2015 |
| Evaluation Begin Date | Field is greyed-out for a full-time employee. | 10/16/2015 |
| Evaluation End Date | Field is greyed-out for a full-time employee. | 10/15/2015 |
| Stability Begin Date | Field is greyed-out for a full-time employee. | 1/1/2015 |
| Stability End Date | Field is greyed-out for a full-time employee. | 12/31/2015 |
| Remarks | Blank | This employee changed status mid-year |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. | |

## Evaluation Period Results

After the employee’s first year of employment and annually in October, agencies will test the employees to see who is working at least 30 hours per week. For those employees who are part-time, variable-hour or seasonal, the ACA Employee Eligibility page must be updated with the results of the test.

As an example, the following image outlines the testing cycles for 2015 given to you by OMES HCM. They will provide an updated example for 2016 testing. The cycle you are measuring will drive the data you enter on the ACA Employee Eligibility page.

The image displays the monthly and annual testing cycles for the State of Oklahoma. If you have questiongs about the testing cycles, please contact OMES HCM.

### Examples

**Scenario 1 Evaluation Period Results, First Year of Employment, Variable-hour Employee:** In this example, you have an individual who is a variable-hour employee. This employee was hired on February 9, 2015. When you hired the employee, you were unsure whether the employee would be working at least 30 hours per week on average. You believe the employee’s average hours per week are closer to 25. The initial row on the ACA Employee Eligibility page will reflect that. However, when you test the employee after their first year of employment in February 2016, you will find the employee’s actual average hours are 32 hours per week.

| **Field Name** | **Original Row** | **New row after 1 year of employment** |
| --- | --- | --- |
| Effective Date | 2/9/2015 | 4/1/2016 |
| ACA Eligibility Status | Variable-Hour | Eligible |
| Average Service Hours | 25 | 32 |
| ACA FT/ Eligible? | Do Not Select | Do Not Select |
| Medical Offered Date | Leave Blank | 4/1/2016 |
| Evaluation Begin Date | Leave Blank | 3/1/2015 |
| Evaluation End Date | Leave Blank | 2/29/2016 |
| Stability Begin Date | Leave Blank | 4/1/2016 |
| Stability End Date | Leave Blank | 3/31/2017 |
| Remarks |  | Employee hired variable-hour, found to be eligible for medical |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. | |

**Scenario 2 Evaluation Results, On-Going Employee, Annual Testing:** Building on Scenario 2 from the previous Status Change section, the employee who changed from full-time to part-time on March 2, 2015 will need to be measured in October 2015 to see if they qualify for medical benefits during the 2016 stability period. In this example, the status change was early in 2015, and therefore the employee’s average hours will most likely measure less than 30 hours per week when measured in October.

| **Field Name** | **Original Row** | **New row: March 2, 2015, date of status change** | **New Row: October Look-back** |
| --- | --- | --- | --- |
| Effective Date | 1/1/2015 | 3/2/2015 | 1/1/2016 |
| ACA Eligibility Status | Eligible | Eligible | Ineligible |
| Average Service Hours | 40 | 15 | 15 |
| ACA FT/ Eligible? | Checkbox is on | Do not select | Do Not Select |
| Medical Offered Date | 1/1/2015 | 1/1/2015 | Blank |
| Evaluation Begin Date | Field is greyed-out for a full-time employee. | 10/16/2015 | 10/19/2014 |
| Evaluation End Date | Field is greyed-out for a full-time employee. | 10/15/2015 | 10/17/2015 |
| Stability Begin Date | Field is greyed-out for a full-time employee. | 1/1/2015 | 1/1/2016 |
| Stability End Date | Field is greyed-out for a full-time employee. | 12/31/2015 | 12/31/2016 |
| Remarks | Blank | This employee changed status mid-year | Employee found ineligible for 2016 during Oct 2015 lookback |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. | | |

**Scenario 3 Evaluation Results, On-Going Employee, Annual Testing:** In the previous scenario, the employee changed from full-time to part-time on March 2, 2015. What if the change was later in the year? How might the data be different if an employee changed from full-time (40 hours per week) to part-time (15 hours per week) in September? Most likely, when measured in October, you will find that employee has an average greater than 30 hours per week for the evaluation period, and is therefore eligible for medical during the next stability period.

The data you enter for the status change and the October look-back will resemble the data in the following table. Data that is different from the previous scenario is highlighted and marked with an asterisk\*.

| **Field Name** | **Original Row** | **New row: September 14, 2015, date of status change** | **New Row: October Look-back** |
| --- | --- | --- | --- |
| Effective Date | 1/1/2015 | 9/14/2015\* | 1/1/2016 |
| ACA Eligibility Status | Eligible | Eligible | Eligible\* |
| Average Service Hours | 40 | 15 | 15 |
| ACA FT/ Eligible? | Checkbox is on | Do not select | Do Not Select |
| Medical Offered Date | 1/1/2015 | 1/1/2015 | Blank |
| Evaluation Begin Date | Field is greyed-out for a full-time employee. | 10/16/2015 | 10/19/2014 |
| Evaluation End Date | Field is greyed-out for a full-time employee. | 10/15/2015 | 10/17/2015 |
| Stability Begin Date | Field is greyed-out for a full-time employee. | 1/1/2015 | 1/1/2016 |
| Stability End Date | Field is greyed-out for a full-time employee. | 12/31/2015 | 12/31/2016 |
| Remarks | Blank | This employee changed status mid-year | Employee found eligible\* for 2016 during Oct 2015 lookback |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. | | |

## Termination

When an employee terminates employment with your agency and your agency is the only employer of the employee, you must indicate the employee has terminated.

There are cases where an employee terminates from your agency, and you know the employee has another job with a different agency or the employee will be transferring to a new agency within 13 weeks of the termination. If that is the case, you do not need to enter anything on the ACA Employee Eligibility page.

To ensure that you have updated all the terminations for your agency, you can run the GO\_HR\_ACA\_TERMS\_NO\_ACA\_STATUS query. It will list terminated employees on the Job record who do not have a termination status on the ACA page.

| **Field Name** | **Termination, Employee has one job** |
| --- | --- |
| Effective Date | Date of Termination |
| ACA Eligibility Status | Terminated |
| Average Service Hours | Leave blank |
| ACA FT/ Eligible? | Leave blank |
| Medical Offered Date | Leave blank |
| Evaluation Begin Date | Leave blank |
| Evaluation End Date | Leave blank |
| Stability Begin Date | Leave blank |
| Stability End Date | Leave blank |
| Remarks | Leave blank |
| Last Update User ID/ Updated On | System will automatically update with your user ID and the system date. |

## Reporting Tools

### ACA Queries

The following queries were created for you to assist with entering data on the ACA Employee Eligibility page. It is highly recommended that you run the following queries weekly to ensure that your employees have the proper ACA eligibility status.

* GO\_HR\_ACA\_HIRE\_NO\_ACA\_STATUS - This query will list newly hired employees who have no ACA data, as well as rehired employees who have a termination row on the ACA table. The purpose is to assist you with ensuring you update the ACA data for a new hire or rehire.
* GO\_HR\_ACA\_TERMS\_NO\_ACA\_STATUS - This query lists terminations who do not have a termination status on the ACA data record.
* GO\_HR\_ACA\_EMPL\_LIST - This query provides you with a list of your currently active employees with their benefit program and ACA eligibility status.

### ACA Reports

The Office of Management and Enterprise Services (OMES) Human Capital Management (HCM) Division created reports within the State’s PeopleSoft Payroll system and made them available to all agencies to assist in determining employee eligibility for ACA purposes. This is especially important for employees with dual State employment (employment with more than one State agency or institution). The State elected a one year look back period for determining employee eligibility.

The following two reports are now accessible:

* **Annual ACA Eligibility Report** – Used to verify ACA eligibility for employees who have worked more than a year; located at:
  + Main Menu > OK Custom Reports/Processes > OK Reports > HR > ACA Eligibility Hrs Rpt (0666)
  + Run each year, using the Payroll Period End Date which includes October 15th as the report Effective Date.
  + Run this report after the Payroll Period has been confirmed by the Payroll Department.
* **Monthly ACA Eligibility Report** – Used to verify ACA eligibility for employees who have reached their one year anniversary; located at:
  + Main Menu > OK Custom Reports/Processes > OK Reports > HR > Monthly ACA Hrs Rpt (0668)
  + Run each month beginning in November.
  + Use the last day of the previous month as the Effective Date.
  + Run this report after the Payroll Period has been confirmed by the Payroll Department.