



AVIONTÉ

**HOW IS THE HEALTH OF YOUR
CURRENT ACA PROCESS?**

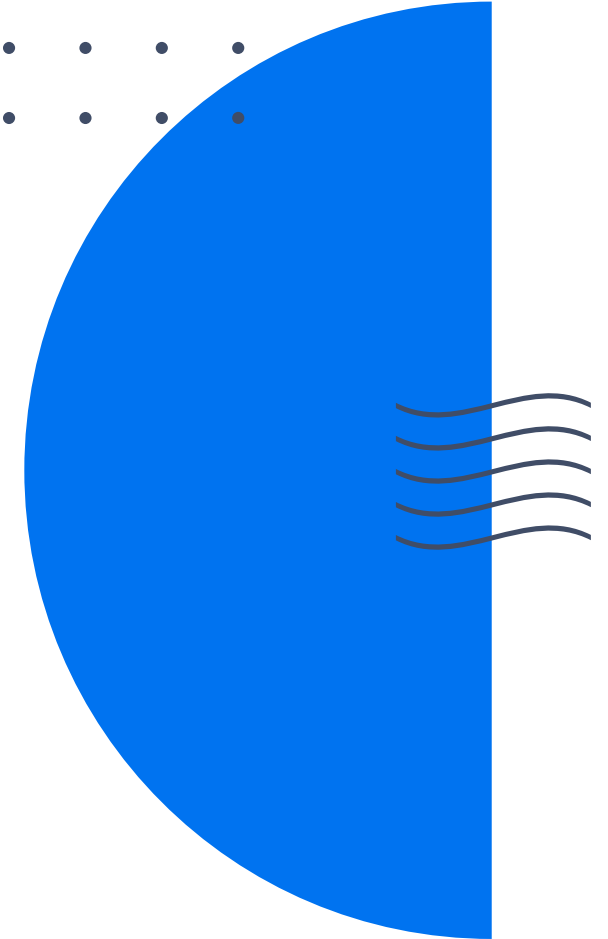


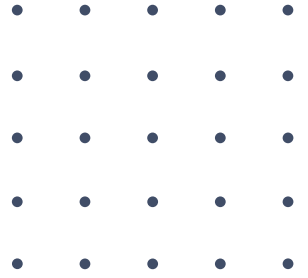
Agenda

WE'RE GOING TO COVER...

- 1 Why start now?
- 2 Creating a plan
- 3 Taking action

- 4 Helpful resources
- 5 Q&A





It's nice to meet you!

BECKY FOX

SR. PRODUCT TRAINER



Disclaimer

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- Avionté expressly **disclaims all liability in respect to actions taken or not taken** based on the contents of this webinar.



The background is a solid blue color. On the left side, there are several overlapping, rounded shapes in a darker shade of blue. One large shape is at the top left, another is below it, and a circular shape is at the bottom left. The text 'Why now?' is centered in the middle of the page in a white, sans-serif font.

Why now?

Important dates:

JANUARY 31

- 1095-C forms delivered to employees (proposed automatic extension to March 2)
- State filing mandates for CA, DC, NJ, MA, RI (due dates vary)

FEBRUARY 28

- Paper filing of 1094-C with IRS*

MARCH 31

- Electronic filing of 1094-C with IRS

JANUARY 2023

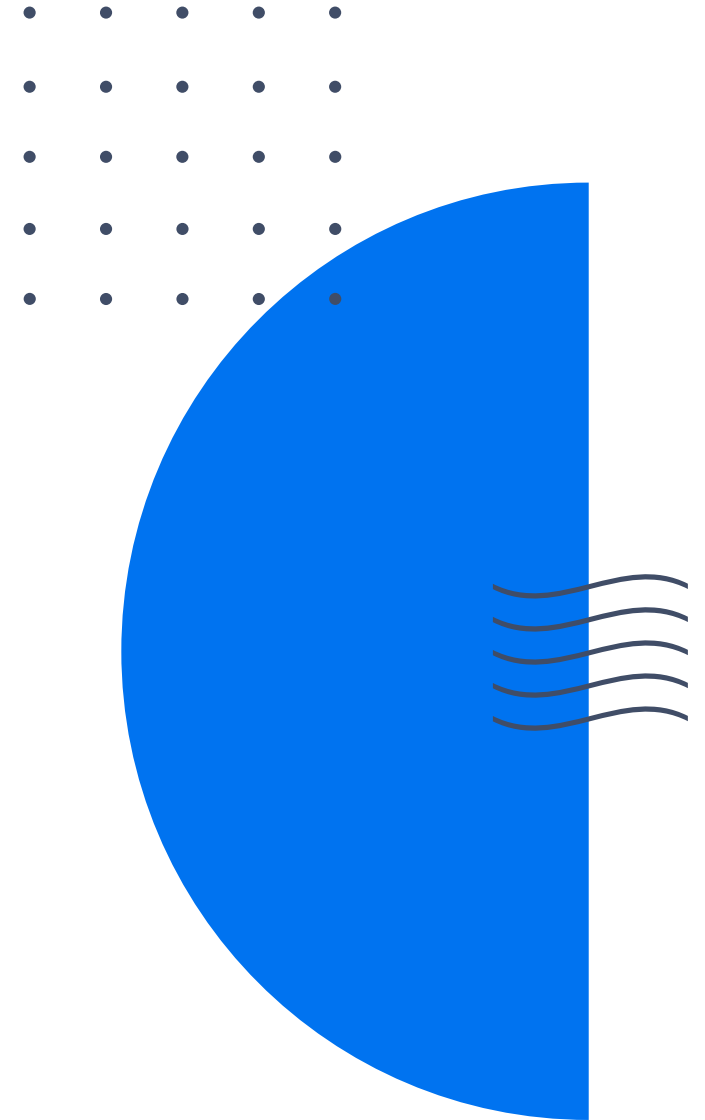
SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



Expectations

ENSURE SUCCESS BY...

- ✓ Review current insurance and benefit plans
- ✓ Resolve any sync errors or missing employee data
- ✓ Gather consent for electronic 1095-Cs
- ✓ Identify internal ACA resource(s)



An abstract graphic on the left side of the slide, consisting of several overlapping, organic, rounded shapes in various shades of blue. The shapes are positioned on the left side of the frame, extending from the top-left towards the bottom-left.

Create a plan

Quick check

BEFORE YOU GET STARTED...



Must use Avionté as your Back Office & process payroll



Must be on Greenshades Basic Package with Avionté

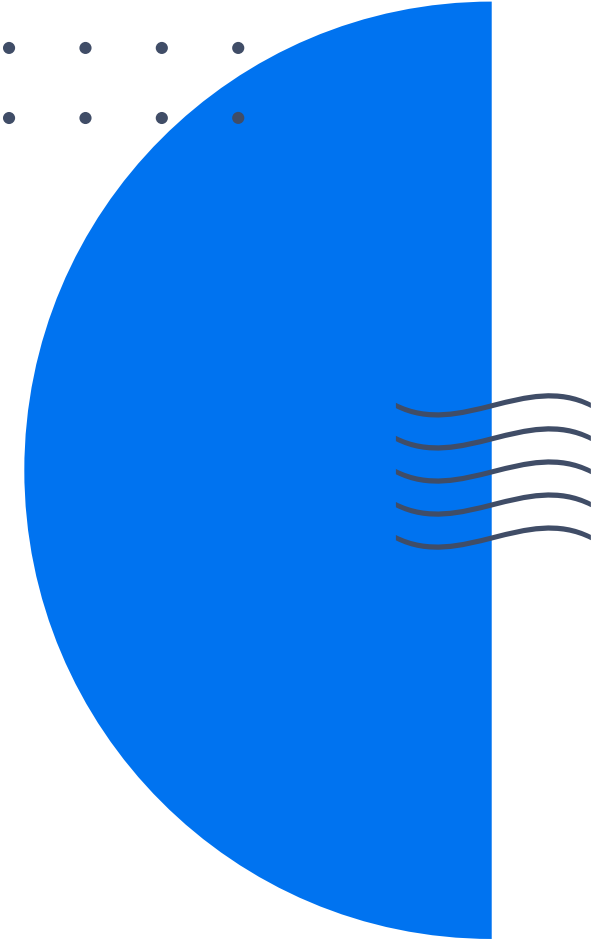
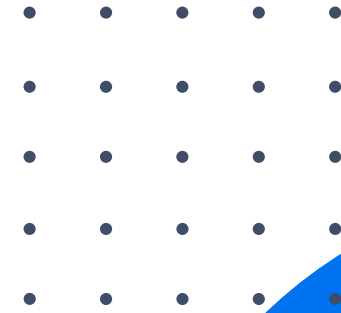
- Allows you to pass XML file to Greenshades for annual filings



Must have ACA package and set up ACA Companion Application



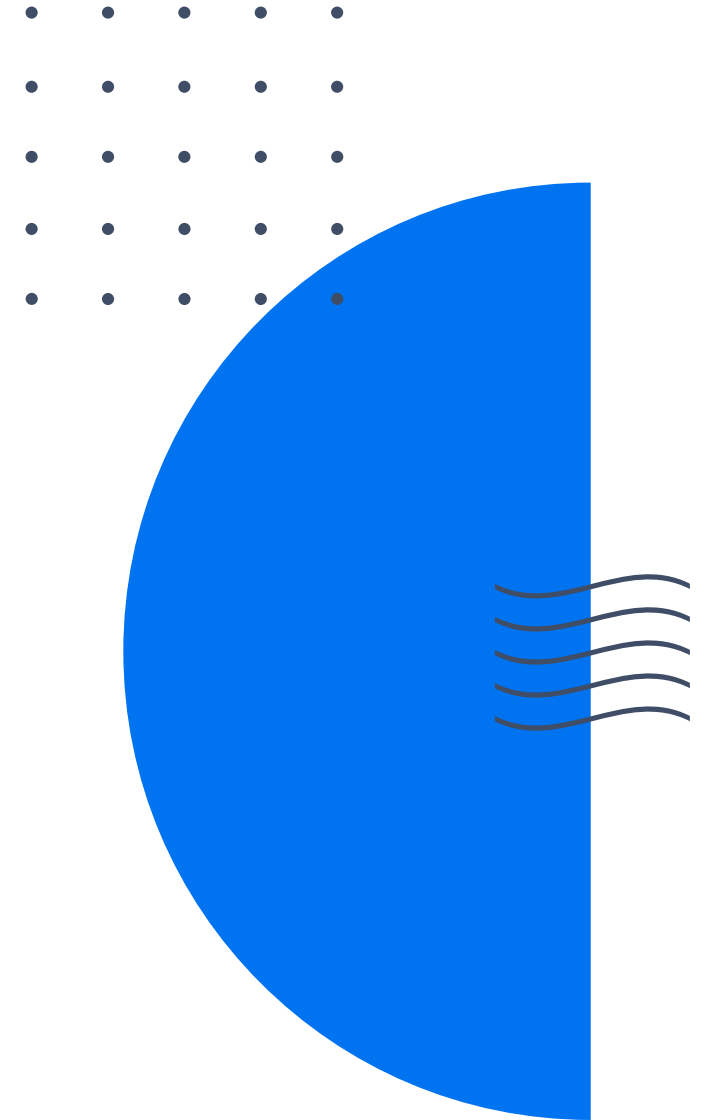
Must be properly tracking data in your system



Preparation = Success

What can I do now...

- ✓ Organize your internal ACA team
- ✓ Review what worked well? What were the challenges?
- ✓ Gather resources and address any knowledge gaps or challenges
- ✓ Start data review and audit early



Take action





- Employee > Payroll > ACA Eligibility

- ACA Counters
- ACA Reports

- Benefit Package
- Benefit Offer Date

- Enrollment – Plan choice
- Declination – Reason

Core Application

ACA Companion Application

Both



ACA Eligibility

- ACA Eligibility Dropdown – refers to whether or not an employee is ACA Full Time, **not** if you offered insurance
- ACA only requires forms for people who are ACA Full Time or enrolled in a self-insured plan.
- **Best practice, make determination on assignment.**
- By default, all new employees are undetermined.

Employee Resource Type: Set Processed Search Type: Set Name Search Criteria: asdf asdf:654-54-5444 Current Employee

Main Menu: Start Page Search Summary Detail ACA Eligibility

Front Office: Employee Customer Call-Em-All Order DH Order Contact Assignment Agency Roster Resume Parser Favorites Email Back Office: Time Entry Payroll Requirements Interview Employment Category Users Dates Extra Documents Payroll Accrual Tax Deduction Contribution Direct Deposit ACA Eligibility History

Is employee ACA eligible? No

Measurement type: N/A Measurement start date: Hours measured to date:

Completed Employee Eligibility Measurements

Employer	Measurement type	Measurement start date	Measurement end date	Total hours	Measured eligibility	Admin period start date	Admin period end date	Stability period start date	Stability period end date	Active measurement?	Reason for deactivation
test	Initial	12/09/13	12/09/14	100.00	Full time	12/13/13	12/12/14	12/16/13	12/14/14	<input checked="" type="checkbox"/>	Employment terminated...
test	Standard	12/09/14	12/09/15	100.00	Full time	12/12/14	12/11/15	12/14/14	12/12/15	<input type="checkbox"/>	Employment terminated...
test	Standard	12/09/15	12/09/16	100.00	Full time	12/11/15	12/09/16	12/12/15	12/09/16	<input type="checkbox"/>	Employment terminated...



ACA Eligibility

- *CLASSIC > Employee > Payroll > ACA Eligibility*
- Eligibility will auto-change to:
 - **Yes** - Employee reaches end of measurement period and meets or exceeds full time hours requirement
 - **No** – Employee reaches end of measurement period and does not meet hours requirement
 - **Undetermined** – Employee hits break in service
 - (e.g. 13 weeks with no ACA hours; also rules of parity)

YES

Undetermined

NO



Monitor ACA Eligible Counters

The screenshot shows the 'Admin System Counter' application window. The main area displays a table of counters with columns for Counter Name, CountSQLFunction, and OnClick.Event. The 'aca' counter is selected, showing details for 'ACA Full Time w/o Offer', 'ACA End Active Ded/Cont.', and 'ACA End Active Offer'. Below the table are 'Add New' and 'Cancel' buttons. The 'Counter Users' section shows a list of users with checkboxes for selection, including 'User', 'Training1', 'Heidi.Wojcik', 'mandy.krohn', 'dsayotovich', and 'ajonson2'. A 'Save' button is located at the bottom right.

Counter Name	CountSQLFunction	OnClick.Event
aca		
ACA Full Time w/o Offer	clu_AcaFullTimeWithoutOffer	Avionte.Suite.Win.Application.Common.ActionLibrary.Show...
ACA End Active Ded/Cont.	clu_ACA_EndDeductionAndContribution	Avionte.Suite.Win.Application.Common.ActionLibrary.Show...
ACA End Active Offer	clu_ACA_EndEmployeeHealthInsuranceEnrollments	Avionte.Suite.Win.Application.Common.ActionLibrary.Show...

Counter Details:

Counter Name	Appointment
Count SQL Function	clu_GetAppointment
On Click Event	Avionte.Suite.Win.Application.Common.ActionLibrary.ShowCounterInfo
Category	Calender

Counter Users:

User	Selected
User	<input checked="" type="checkbox"/>
RootUserGUID : Training (1739 items)	
User	<input checked="" type="checkbox"/>
Training1	<input checked="" type="checkbox"/>
Heidi.Wojcik	<input checked="" type="checkbox"/>
mandy.krohn	<input checked="" type="checkbox"/>
dsayotovich	<input checked="" type="checkbox"/>
ajonson2	<input checked="" type="checkbox"/>

- *Admin Tools > Counter*
- Permission user based
- 3 counters available
 - ACA Full Time w/o Offer
 - ACA End Active Ded/Cont
 - ACA End Active Offer



Insurance Plans and Benefit Packages



Add or Update Insurance Plans

Setting up Insurance Plans:

- Plan and Provider Name
- EE Monthly Contribution (Line 15 value)
- Plan Start Month
- Open Enrollment Dates
- Self-insured?
- Safe Harbor Code (Line 16, Code Series 2)
- Offer of coverage Code (Line 14)

Adding a New Health Insurance Plan

The screenshot shows the 'Avionté ACA Companion' software interface. The 'Insurance plan' tab is selected. The 'Insurance plan setup' form is displayed, with the following fields and values:

- Plan name: 2021 MEC Plan
- Provider Name: ESC
- Monthly employee only minimum contribution: Set amount \$ 51.34
- Plan start month: January
- Open enrollment start date: 9/ 6/2021
- Open enrollment end date: 12/ 1/2021
- Is this a self-insured plan?: Yes
- Safe harbor code (opt.):
- Offer of coverage code: 1F

The 'Insurance plans' sidebar on the right lists several plans, with '2021 MEC Plan' highlighted. Below the form, a 'Plan summary' box contains the following text:

- Plan covers employee and any combination of spouse and dependent(s).
- Provides ACA minimum essential coverage.
- Does NOT provide ACA minimum essential value.

An 'Edit' button is located at the bottom of the form.





Insurance Plans

Plans to Add

- ACA Compliant Healthcare Plans:
 - Minimal Essential Coverage Plans (MEC)
 - Minimum Value Plans (MVP)
 - PPO
 - Healthcare Plan + HSA

Do not add

- Fixed Indemnity Plans
- Non-Healthcare Plans
 - Dental
 - Vision
 - Life
- Tiers of Plans (optional)
 - EE + Spouse
 - EE + Children



Add or Update Benefit Packages

Setting up Benefit Plans:

- Benefit Packages comprised of one or more healthcare plans
- Healthcare plans can be included in more than one package
- External vs Internal employees
- Plans offered at the same time to an employee, bundle plans under one benefit package

Avionté ACA Companion

Home | Employee plan details | ACA employer | Insurance plan | **Benefit package** | Report preparation

Benefit package setup

[Add a benefit package](#)

Complete the settings below and then identify plans to include in the package

Benefit package name

First offered date

Last offered date

Plans to include in the benefit package

Plans
<input type="checkbox"/> 2017 Mec Plan
<input type="checkbox"/> 2019 MEC \$11-14
<input type="checkbox"/> 2019 MEC \$7-10
<input type="checkbox"/> 2019 Mec Plan
<input type="checkbox"/> 2020 Example
<input type="checkbox"/> 2020 AVI Plan
<input checked="" type="checkbox"/> 2021 MEC Plan
<input type="checkbox"/> Blue Cross Blue Shield MVP
<input type="checkbox"/> Bronze
<input type="checkbox"/> MEC plan

[Delete](#)

Available benefit packages

This is a listing of currently defined benefit packages. Packages can be edited or removed if they have not yet been offered.

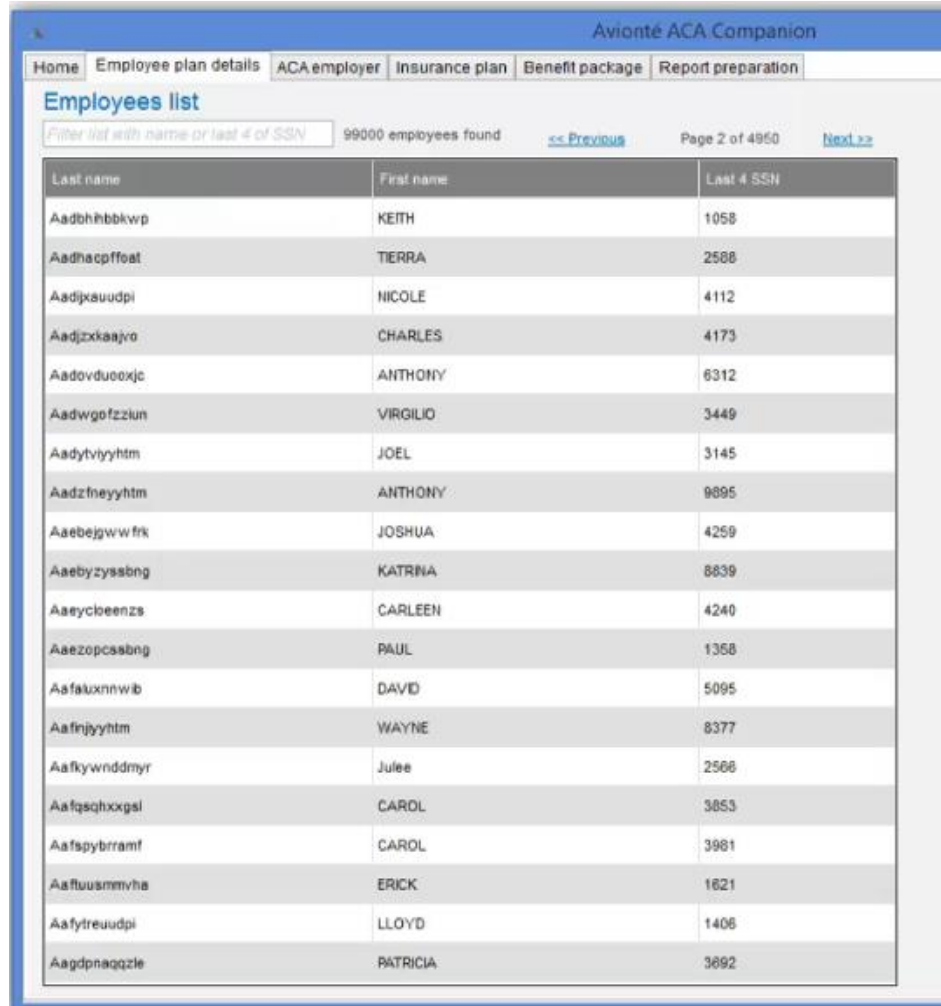
2019 \$11-14
2019 \$7-10
2019 Temp Employees
2020 AVI Plan
2020 Example
2021 AVI Plan
Bronze Package



Tracking Coverage Offers



Entering Offers



The screenshot shows the 'Avionté ACA Companion' software interface. At the top, there are navigation tabs: Home, Employee plan details, ACA employer, Insurance plan, Benefit package, and Report preparation. Below the tabs is the 'Employees list' section. A search bar contains the text 'Filter list with name or last 4 of SSN'. To the right of the search bar, it says '99000 employees found'. There are navigation links for '<< Previous' and 'Next >>'. Below this is a table with three columns: 'Last name', 'First name', and 'Last 4 SSN'. The table contains 20 rows of employee data.

Last name	First name	Last 4 SSN
Aadbhbbkwp	KEITH	1058
Aadhacpffat	TIERRA	2588
Aadjxauudpi	NICOLE	4112
Aadjzkaaajro	CHARLES	4173
Aadovduooxjc	ANTHONY	6312
Aadwgofzzlun	VIRGLIO	3449
Aadytviyyhtm	JOEL	3145
Aadzfneyyhtm	ANTHONY	9895
Aaebejgwwfrk	JOSHUA	4259
Aaebyzyssng	KATRINA	8839
Aaeycloeezsz	CARLEEN	4240
Aaezopcasing	PAUL	1358
Aafaluxnnwb	DAVID	5095
Aafnjyyhtm	WAYNE	8377
Aafkywddmyr	Julee	2566
Aafsqhxxgsl	CAROL	3853
Aafspybrramf	CAROL	3981
Aaftuasmvha	ERICK	1821
Aafytreuudpi	LLOYD	1408
Aagdnpaqqzle	PATRICIA	3892

- 2 options
 - Manual entry
 - Data import
- Navigate to Employee Plan Details tab in ACA Companion
- Search for employee
- Double click on name



Employee Plan Details

Avionté ACA Companion

Home Employee plan details ACA employer Insurance plan Benefit package Report preparation

[Back to list](#)

Employee plan details [Add a covered individual](#)

ACA employer ABC Staffing

Employee

Employee's coverage history
The treeview below displays future, current, and past history of the employee's insurance coverage decisions based on offers from the selected employer. Clicking on a tree node will reflect the associated coverage in the fields below.

Benefit package offers **Make offer**

Employee name LISAMAcqacpffloat
Social Security Number 441-63-2405
Street address 123 Fake St
City Syracuse
State NY
Country and ZIP US, 55555

Benefit package offered Temporary Employees 2016
Benefit offer date 2/15/2016

Add Cancel

- Select ACA Employer in top right corner
- Select “Make Offer”
- Select Benefit Package
- Benefit Offer Date = date employer sent the offer
- Click ADD



Employee Plan Details

- Single click on Enrollment or Declination from the tree to insert employee response

The screenshot displays the 'Avionte ACA Companion' web application. The breadcrumb trail at the top reads: Home > Employee plan details > ACA employer > Insurance plan > Benefit package > Report preparation. The main heading is 'Employee plan details' with a sub-heading 'ACA employer: ABC Staffing Inc.'. The 'Employee' tab is selected, showing 'Employee's coverage history'. A tree view under 'Benefit package offers' is expanded to show 'Temporary Employee Package - 12/1/2017', which contains 'Enrollments' and 'Declinations' (both highlighted in yellow). A 'Make offer' button is visible next to the tree view. The right side of the page contains a form with the following fields: Employee name (Antonio Alaska), Social Security Number (493-85-2340), Street address (900 Fern Lane), City (Juneau), State (MN), Country and ZIP (US 99801), Benefit package offered (Temporary Employee Package), and Benefit offer date (12/ 1/2017). 'Update' and 'Cancel' buttons are at the bottom right.



Employee Plan Details

- If employee enrolled, single click on “Enrollments” and enrollment box will populate
- Add Deductions or Contributions in core application for payroll purposes (Employee>Payroll)

The screenshot displays the 'Avionte ACA Companion' web application. The breadcrumb trail shows: Home > Employee plan details > ACA employer > Insurance plan > Benefit package > Report preparation. The main content area is titled 'Employee plan details' and includes a 'Back to list' link and an 'Add a covered individual' link. The 'Employee' tab is selected, showing 'Employee's coverage history' and a 'Benefit package offers' section. The 'Benefit package offers' section has a tree view with 'Enrollments' highlighted. To the right, there is a form for 'Plan accepted or declined?' with fields for 'Date enrolled', 'Coverage dates', and 'Health plan selected'. The 'Plan accepted or declined?' field has radio buttons for 'Accepted' (selected) and 'Declined'. The form also includes 'Add' and 'Cancel' buttons.



Covered individuals

- Need to track if self-insured!
- Spouse & Dependents
- Need SSN and/or DOB
- Enter Date Enrolled
- Enter Dates of Coverage (can differ from Employee)

Avionté ACA Companion

Home Employee plan details ACA employer Insurance plan Benefit package Report preparation

Back to list Employee plan details Add a covered individual ACA employer ABC Staffing

Employee Covered individual 1

Individual's coverage history

The grid below displays future, current, and past history of the employee's health plan enrollments for the selected employer. Clicking on a row will reflect the associated coverage of this individual in the fields to the right.

Individual enrollments

Health plan name	Start date	End date
Plan 1	1/1/2017	12/31/2017

(Employee name (primary)) HOLLY Aabjstammha

Covered individual's first name Jenny

Covered individual's middle name

Covered individual's last name Aabjstammha

SSN or other TIN* 555229999

Birthdate* 5/2/1995

*Provide Birthdate if SSN or other TIN is not available

Update Cancel

Date enrolled 12/29/2016

Coverage dates 1/1/2017 to 12/31/2017

Update Cancel Remove



Employee Declines Coverage

- If employee declines, single click on “Declinations” and declination box will populate

The screenshot shows the Avionté ACA Companion interface. The breadcrumb trail is: Home > Employee plan details > ACA employer > Insurance plan > Benefit package > Report preparation. The page title is "Employee plan details" with a link to "Add a covered individual". The ACA employer is "ABC Staffing Inc.". The "Employee" tab is active. The "Employee's coverage history" section contains a treeview with "Enrollments" and "Declinations" (highlighted). The "Benefit package offers" section has a "Make offer" button. The employee details are: Antonio Alaska, Social Security Number 493-85-2340, Street address 900 Fern Lane, City Juneau, State MN, Country and ZIP US 99801. The benefit package offered is "Temporary Employee Package" and the benefit offer date is "12/ 1/2017". The declination form is highlighted with a red box and contains: "Plan accepted or declined?" with radio buttons for "Accepted" and "Declined" (selected); "Date range of offer" with two dropdown menus; "Decline reason" with a text input field; and "Add" and "Cancel" buttons.



Import process

- [ACA Import](#)
 - Imports enrollments & declinations from an Excel spreadsheet
 - Mapping required!
 - Template available in Knowledge Base article
 - Our partner ESC will send you a file in this format
- [ACA Declination Export AQ](#)
 - Enrollments must be added first (manual or through ACA Import)
 - Adds declinations for all employees who worked in the reporting year & did not enroll
 - Great for employers who offer to all employees upon hire!



Resolving errors



Missing data or employees in ACA Companion

MANUAL FIXES

- Make fixes in the core application
 - Name
 - SSN
 - Primary address
- Reimport Employee Data
- Companion Application > Home

MASS UPDATES

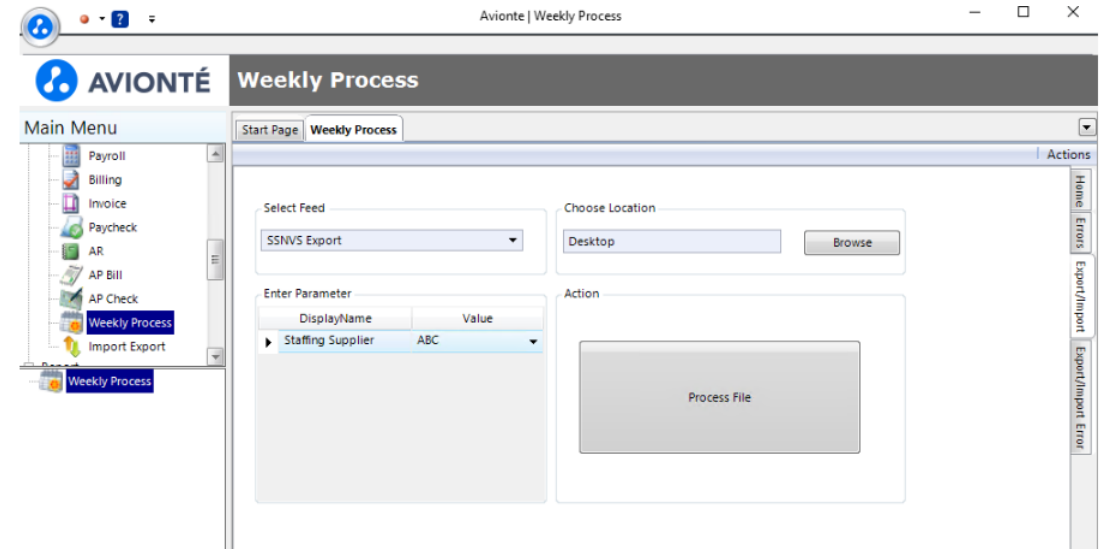
- Run ACA Companion Employee Sync Error AQ in Reports
 - Displays Name, SSN, Address, Last Check Date
- Export AQ to Excel
 - Edit employee information
- Import spreadsheet via Import/Export main menu
- Reimport Employee Data
- Companion App > Home

[Fix ACA Companion Application Employee Sync Errors](#)



Verify employee SSNs

- Free services offered by SSA Business Services Online
- Verify names and SSNs of employees against SSA records
- Upload electronic files of up to 250,000 names and SSNs (takes at least 1 business day)
- Feeds and report setup in Admin Tools >Report



Reports



ACA Reports

1

ACA Companion Census AQ

Shows an employee's total hours and ACA Eligibility as well as wages, benefits, etc

CHECK IT OUT

2

ACA Companion Employee Offers AQ

Displays a list of all offers made in the Companion

TAKE A LOOK

3

ACA Companion Employee Sync Error AQ

List of employees who did not import and why

LEARN MORE

4

1095 C & 1094 C Report

Generate the 1095 C and 1094 C reports

GET STARTED



Report Preparation

ACA data preparation for reporting

For each ACA employer, use the options below to generate ACA data for review. Once the forms have been submitted, finalizing the data locks it and makes corrections batches available.

Year

zz	2021 data last generated 11/5/2021 by avi-training.Cxr1, pending review	Regenerate data	Finalize data
zzComp	2021 data last generated 11/5/2021 by avi-training.Cxr1, pending review	Regenerate data	Finalize data
zzz	2021 data last generated 11/5/2021 by avi-training.Cxr1, pending review	Regenerate data	Finalize data
Alphabet Staffing	2021 data last generated 11/5/2021 by avi-training.Cxr1, pending review	Regenerate data	Finalize data
Olympia	2021 data last generated 11/5/2021 by avi-training.Cxr1, pending review	Regenerate data	Finalize data
ABC Staffing Inc.	2021 data last generated 11/5/2021 by avi-training.Cxr1, pending review	Regenerate data	Finalize data
zzzz	2021 data has not yet been generated	Generate data	

- Generate Data
 - Pushes data into reporting table
- Regenerate data
 - Updates reports if changes are made
- Finalize data
 - Initiates correction process
 - Adjustments will result in corrected 1095-C
 - Only done after confirmation from IRS



Electronic Consent



Gather Electronic consent

The screenshot displays the AVIONTÉ user interface. The top navigation bar includes the AVIONTÉ logo, a 'myDashboard' menu, and links for 'Timesheets', 'Profile', 'Pay History', and 'My Ready'. A 'Select Language' dropdown is also present. On the left, there is a user profile icon and a section for 'Assigned Tasks' which currently shows 'No Assigned Tasks.'. The main content area is titled 'Paychecks Taxes' and is divided into two sections: 'W2' and '1095C'. The 'W2' section contains the text 'No W2's are available at this time'. The '1095C' section features a table with the following data:

Employer	Tax Year	Download
ABC	2021	Download
ABC	2020	Download

- Electronic delivery of 1095-C to the Talent portal in BOLD
- Opportunity to gather consent during onboarding using ADOBE integration
- Use ADOBE mapping fields for 1095-C Consent mappings
- [Setup the Electronic 1095-C](#) and make visible in Talent portal



Helpful Resources



Additional resources



AVIONTÉ UNIVERSITY

Interactive on-demand
eLearning.



SUPPORT CENTER

Tickets and guide articles.



WEBINARS

Live virtual training hosted
monthly.



BOLD BULLETIN

Weekly newsletter.

NOTE: Your account manager is always happy to help. If you have questions, be sure to reach out!



Avionte University Courses

ACA

- ACA Companion set up
- ACA 1094-C and 1095-C Reporting

The screenshot displays the Avionte LMS interface. At the top, the Avionte logo is on the left, and search, notification, and user profile icons are on the right. Below the logo is a pink header bar with 'ONGOING LEARNING' and a back arrow. A blue owl mascot wearing a graduation cap is on the right. The main content area shows a breadcrumb 'My Courses > Ongoing Learning' and a 'My Courses' icon. A dropdown menu is set to 'Alphabetical'. Eight course cards are listed, each with a 'Start' button. The first card, 'ACA Companion Application Curriculum', has a 'Resume' button and a notification badge with the number '2'. The other cards are 'Admin Tools - Employee and System', 'Avionte General Ledger Course', 'Go Paperless: Using Adobe Sign in AvionteBOLD', 'Portals in CLASSIC', 'Quarterly Tax Filing with Avionte Course', 'Reports and Advanced Search', and 'Worker's Comp and Unemployment'.

Course Title	Type	Action
ACA Companion Application Curriculum	Curriculum	Resume
Admin Tools - Employee and System	Online Course	Start
Avionte General Ledger Course	Online Course	Start
Go Paperless: Using Adobe Sign in AvionteBOLD	Online Course	Start
Portals in CLASSIC	Online Course	Start
Quarterly Tax Filing with Avionte Course	Online Course	Start
Reports and Advanced Search	Online Course	Start
Worker's Comp and Unemployment	Online Course	Start



Knowledge Base highlights

1

ACA DIRECTORY

Links to helpful ACA year-end articles and training modules

CHECK IT OUT

2

SSNVS FEEDS

Export up to 250,000 names and SSNs to verify employees against SSA records using BSO

TAKE A LOOK

3

YEAR-END

Preparing for Year-End – CONNECT 2022 session
Cheat sheet

LEARN MORE

4

ACA SECTION

Collection of all articles related to the Avionté ACA solution

GET STARTED



Q&A



Thanks!

