



ADP TotalSource

ACA Monthly Measurement Period

Client User Guide

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How to Use This Guide

Employer Shared Responsibility Provision

The employer shared responsibility provisions of the Affordable Care Act (ACA) state that an applicable large employer (ALE) must offer affordable health coverage that provides minimum value to its full-time employees. For this purpose, employees are considered full-time if they work at least 30 hours per week, or 130 hours per month.

There are two methods available for determining whether an employee is a full-time employee:

- Look-back Measurement Method: determines whether an employee is a full-time employee for a future period (referred to as the stability period) based upon the employee's average hours of service in a prior period (referred to as the measurement period).
- Monthly Measurement Method: determines whether an employee is a full-time employee by counting the employee's hours of service for each month.

This User Guide is for use by clients utilizing the Monthly Measurement Periods. If you do not use a Lookback Measurement Period, then you are using Monthly Measurement Periods. If you are using a Lookback Measurement Period, please refer to the ACA Lookback Measurement Period Client User Guide instead.

ADP TotalSource provides clients with guidance and tools to assist them with complying with the Employer Shared Responsibility provisions under the ACA and other Health Care Reform initiatives; however, it remains each client's responsibility to comply with the law and to ensure that medical coverage is offered to its full-time employee population that meets the ACA's minimum coverage and affordability requirements as required under the law. Of course, your ACA Benefits team is here to help you with issues that you cannot resolve on your own.

The Purpose of This Guide

This guide gives you step-by-step guidance on how to access and use the ACA tools in ADP TotalSource. The Table of Contents is clickable – you can jump to any section of the Client User Guide by clicking on a heading in the Table of Contents. You can return to the Table of Contents from any page by clicking on the **Return to Table of Contents** link at the bottom of every page.

Appendices – once you are comfortable with the processes described within the guide, you may find the appendices useful as a quick reference. Each appendix has a step-by-step process listed, but without the accompanying screen captures found in the main body of the guide.

Additional Resources

Information such as reporting timelines and additional guides are posted on our [Insights & Solutions Healthcare Reform page](#).

Determining Benefits Eligibility for New Hires

Choosing Eligibility in the New Hire Wizard

When adding an employee through the New Hire Wizard it is essential for you to choose the correct Benefit Eligibility Class and ACA Benefit Status calculation method to ensure adherence to compliance requirements. The applicable ACA Benefit Status calculation method – calculated or designated – will vary and should be based on the worksite employee's situation.

This Job Aid reviews fields in the New Hire Wizard which are key to ensuring an employee is properly coded for Health Care Reform reporting:

- Employee Benefit Eligibility Class: choosing the correct benefits eligibility class ensures that employees are offered benefits in keeping with the ACA definition of full-time employee so that you can avoid penalties associated with failure to provide Minimum Essential Coverage (MEC).
- ACA Benefit Status: selecting the correct ACA Benefit Status Calculation method – 'Designated Full-time' or 'Calculated' – will ensure that 1095C forms are generated for full-time employees and employees are included (or not included) in 1094C employee counts.

ACA fields can be found in Section 2. Employment of the New Hire Wizard. Clients who use Lookback Measurement Periods and clients who use Monthly Measurement Periods will use different ACA settings for their employees. If you do not use a Lookback Measurement Period, you are using Monthly Measurement Periods.

Calculate an Employee's Benefit Status Using Monthly Measurement Period (MMP)

If you are not using a Lookback Measurement Period, your company calculates an employee's benefit status monthly by using the Monthly Measurement Period (MMP).

All Employees

Action	Screen
<p>All Employees:</p> <p>If your company measures benefits with a MMP, for all new employees, choose:</p> <p>Benefit Eligibility Class field: If you are hiring someone who is expected to work 30 hours or more a week make sure that you select an Eligibility Class that is eligible for benefits.</p> <p>ACA Benefit Status options: Select Calculate Using Measurement Periods</p>	

ACA Measurement Period Dashboard – Monthly Measurement Period

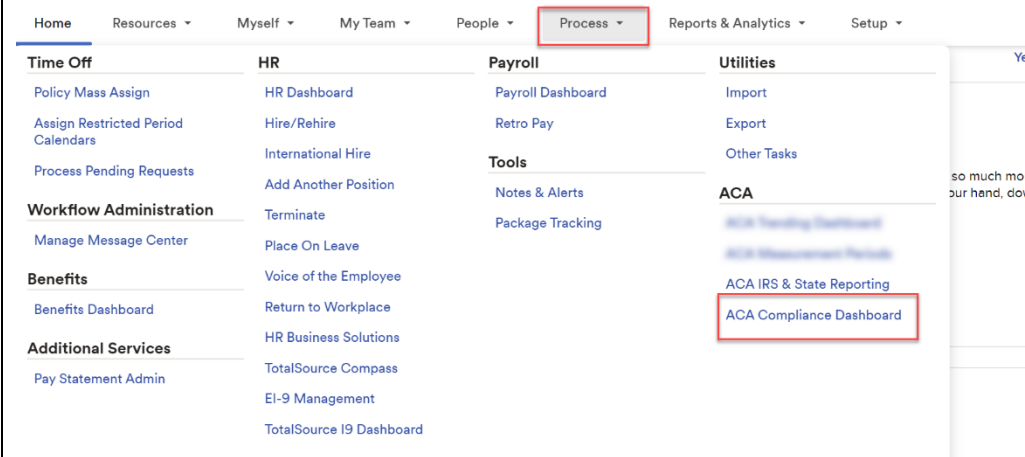
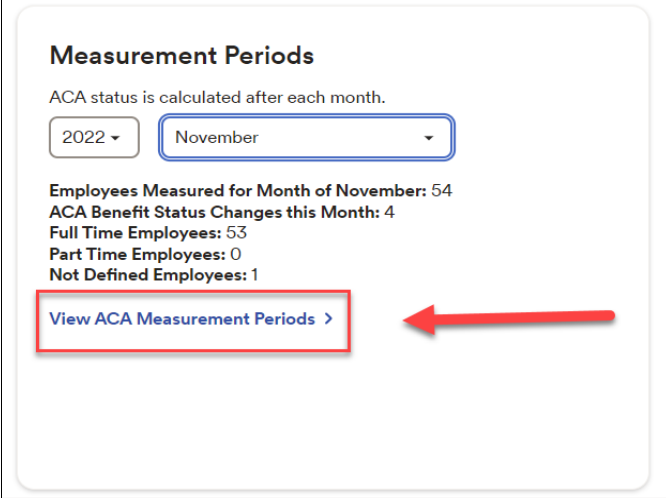
What is the ACA Measurement Period Dashboard?

The ACA Measurement Period Dashboard is a feature that displays:

- Employee Medical Enrollment Breakdowns
- Employee ACA Benefit Status by month
- Monthly Hours – You have the ability to review the hours for all your employees for each month

ADP TotalSource provides its clients with guidance and tools to assist them with complying with the Employer Shared Responsibility provisions under the ACA and other Health Care Reform initiatives; however, it remains each client's responsibility to comply with the law and to ensure that medical coverage is offered to its full-time employee population that meets the ACA's minimum coverage and affordability requirements as required under the law. Of course, your ACA Benefits team is here to help you with issues that you cannot resolve on your own.

Accessing the ACA Measurement Period Dashboard

Action	Screen
From the navigation menu at the top of the page, select Process , then under ACA , select ACA Compliance Dashboard .	 <p>The screenshot shows the top navigation bar with 'Process' highlighted. Below it, the 'ACA' section is expanded, and 'ACA Compliance Dashboard' is highlighted with a red box.</p>
Select the View ACA Measurement Periods link from the Measurement Periods section at the bottom left of the screen.	 <p>The screenshot shows the 'Measurement Periods' section with a summary of employee counts for November 2022. The 'View ACA Measurement Periods >' link is highlighted with a red box and a red arrow pointing to it.</p>

ACA Measurement Period Dashboard

The ACA Measurement Period Dashboard allows you to view employees calculated ACA Benefit status each month based on hours worked, as well as see if any employee's ACA Benefit status has changed month to month.

- Use the dropdowns to change the month and year.
- You can filter the list by clicking on the tiles at the top.
- Employees with a Not Defined ACA Benefit Status are those for which the system was not able to determine a status. For example, if the employee did not have a paycheck during the measurement period.
 - If you see someone in Not Defined and it is not clear why, contact your Human Resources Business Partner

ACA Measurement Periods



[Go to ACA Compliance Dashboard](#)

Monthly Measurement Period

2022 November

<input checked="" type="checkbox"/> 54 Employees Measured for Month of November	<input type="checkbox"/> 4 ACA Benefit Status Changes this Month	<input type="checkbox"/> 53 Full Time Employees	<input type="checkbox"/> 0 Part Time Employees	<input type="checkbox"/> 1 Not Defined Employees
--	---	--	---	---

Employees whose ACA Benefit Status has been manually designated will not be displayed.

Employee Name	ACA Benefit Status - October	ACA Benefit Status - November	Calculated Hours - October	Calculated Hours - November
John Doe	Full-Time	Full-Time	165.71	171.43
Jane Smith	Part-Time	Full-Time	120.14	130.43
Mike Wilson	Part-Time	Full-Time	128.50	172.71
Bob Brown	Full-Time	Full-Time	165.71	171.43

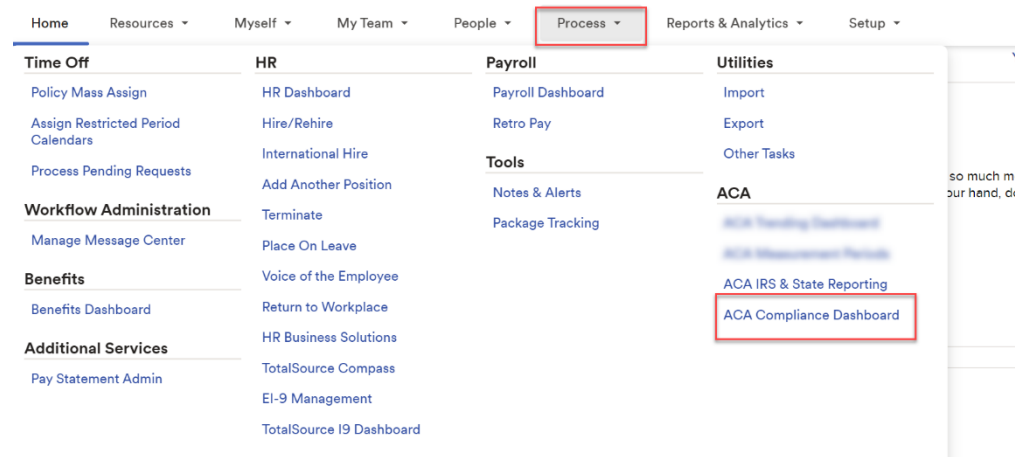
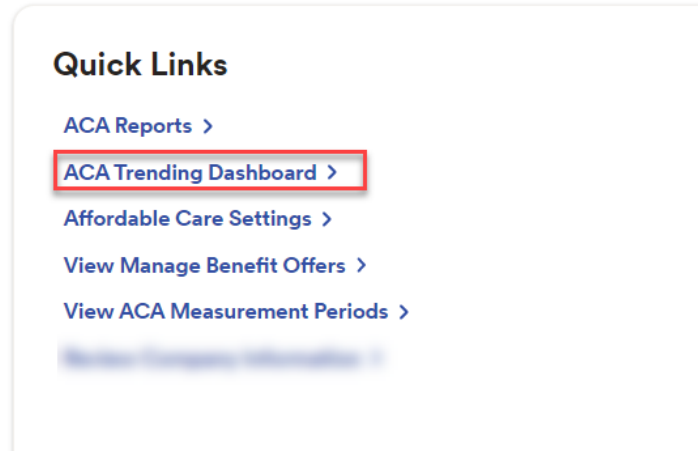
Need Help?

ACA Trending Dashboard

What is the ACA Trending Dashboard?

The ACA Trending Dashboard is a feature that gives you a monthly and YTD view of the Shared Responsibility requirement to offer Minimum Essential Coverage (MEC) and Minimum Value (MV) coverage to eligible employees.

Accessing the ACA Trending Dashboard

Action	Screen
From the navigation menu at the top of the page, select Process , then under ACA , select ACA Compliance Dashboard .	 <p>The screenshot shows the top navigation bar with the 'Process' dropdown menu open. The 'ACA' section is expanded, and the 'ACA Compliance Dashboard' link is highlighted with a red box. Other links visible include 'ACA Trending Dashboard' and 'ACA Measurement Periods'.</p>
Select ACA Trending Dashboard from the Quick Links section at the bottom right of the screen.	 <p>The screenshot shows the 'Quick Links' section with several links. The 'ACA Trending Dashboard >' link is highlighted with a red box. Other links include 'ACA Reports >', 'Affordable Care Settings >', 'View Manage Benefit Offers >', and 'View ACA Measurement Periods >'.</p>

ACA Benefit Status Trending Tab

Action	Screen																																																																	
To use the ACA Benefit Status Trending Tab, in the Select Year drop-down, select the appropriate year, then in the Filter By drop-down, select FEIN.	<div><h3>ACA Trending Dashboard</h3><div><div>← Go to ACA Compliance Dashboard</div><div>ACA Benefits Status TrendingACA Potential To</div><div>Select Year2022Filter ByFEIN</div></div><div><div>1. Select Year</div><div>2. Select FEIN</div></div><div><p>Employees who are in a Limited Non-Assessment Period will display in the Part-Time count. Employees who are terminated mid-month and whose offer of coverage and enrollments end on the termination date are displayed in the Part-Time count for that month.</p><p>Monthly Employee Count</p><p>Legend: Full-Time (dark teal), Part-Time (light teal), Not Defined (yellow), Not Available (orange)</p></div></div> <table><thead><tr><th>Month</th><th>Full-Time</th><th>Part-Time</th><th>Not Defined</th><th>Not Available</th></tr></thead><tbody><tr><td>January</td><td>48</td><td>6</td><td>0</td><td>0</td></tr><tr><td>February</td><td>52</td><td>1</td><td>0</td><td>0</td></tr><tr><td>March</td><td>49</td><td>6</td><td>0</td><td>0</td></tr><tr><td>April</td><td>51</td><td>2</td><td>0</td><td>0</td></tr><tr><td>May</td><td>43</td><td>9</td><td>0</td><td>0</td></tr><tr><td>June</td><td>42</td><td>5</td><td>0</td><td>0</td></tr><tr><td>July</td><td>43</td><td>10</td><td>0</td><td>0</td></tr><tr><td>August</td><td>51</td><td>4</td><td>0</td><td>0</td></tr><tr><td>September</td><td>51</td><td>3</td><td>0</td><td>0</td></tr><tr><td>October</td><td>52</td><td>3</td><td>0</td><td>0</td></tr><tr><td>November</td><td>54</td><td>0</td><td>0</td><td>1</td></tr><tr><td>December</td><td>1</td><td>1</td><td>0</td><td>53</td></tr></tbody></table>	Month	Full-Time	Part-Time	Not Defined	Not Available	January	48	6	0	0	February	52	1	0	0	March	49	6	0	0	April	51	2	0	0	May	43	9	0	0	June	42	5	0	0	July	43	10	0	0	August	51	4	0	0	September	51	3	0	0	October	52	3	0	0	November	54	0	0	1	December	1	1	0	53
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The system sorts the information by employee status and month. All counts are as of the last day of the measured month. *See definitions of each status below	<div><table><thead><tr><th>Month</th><th>Full-Time</th><th>Part-Time</th><th>Not Defined</th><th>Not Available</th></tr></thead><tbody><tr><td>January</td><td>48</td><td>6</td><td>0</td><td>0</td></tr><tr><td>February</td><td>52</td><td>1</td><td>0</td><td>0</td></tr><tr><td>March</td><td>49</td><td>6</td><td>0</td><td>0</td></tr><tr><td>April</td><td>51</td><td>2</td><td>0</td><td>0</td></tr><tr><td>May</td><td>43</td><td>9</td><td>0</td><td>0</td></tr><tr><td>June</td><td>42</td><td>5</td><td>0</td><td>0</td></tr><tr><td>July</td><td>43</td><td>10</td><td>0</td><td>0</td></tr><tr><td>August</td><td>51</td><td>4</td><td>0</td><td>0</td></tr><tr><td>September</td><td>51</td><td>3</td><td>0</td><td>0</td></tr><tr><td>October</td><td>52</td><td>3</td><td>0</td><td>0</td></tr><tr><td>November</td><td>54</td><td>0</td><td>0</td><td>1</td></tr><tr><td>December</td><td>1</td><td>1</td><td>0</td><td>53</td></tr></tbody></table></div>	Month	Full-Time	Part-Time	Not Defined	Not Available	January	48	6	0	0	February	52	1	0	0	March	49	6	0	0	April	51	2	0	0	May	43	9	0	0	June	42	5	0	0	July	43	10	0	0	August	51	4	0	0	September	51	3	0	0	October	52	3	0	0	November	54	0	0	1	December	1	1	0	53
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You can review monthly information in greater detail by selecting the number for the corresponding month/employee type.	<div><table><thead><tr><th>Month</th><th>Full-Time</th><th>Part-Time</th><th>Not Defined</th><th>Not Available</th></tr></thead><tbody><tr><td>January</td><td>48</td><td>6</td><td>0</td><td>0</td></tr><tr><td>February</td><td>52</td><td>1</td><td>0</td><td>0</td></tr></tbody></table></div>	Month	Full-Time	Part-Time	Not Defined	Not Available	January	48	6	0	0	February	52	1	0	0																																																		
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Action	Screen																																																								
<p>Select the employee's name to view additional employee ACA information.</p> <p>Select Download button to export information.</p>	<div><div><div>← Back</div><div>Full-Time Employee List for January</div><table><thead><tr><th>Employee N...</th><th>Date Of Hire</th><th>Status</th><th>Position ID</th><th>Business Unit</th><th>Location</th><th>Eligibility C...</th></tr></thead><tbody><tr><td></td><td>04/18/2013</td><td>Active</td><td></td><td></td><td></td><td>All FT Eligible</td></tr><tr><td>10</td><td></td><td></td><td></td><td></td><td></td><td>All FT Eligible</td></tr><tr><td></td><td>11/07/2016</td><td>Active</td><td></td><td></td><td></td><td>All FT Eligible</td></tr><tr><td></td><td>08/28/2002</td><td>Active</td><td></td><td></td><td></td><td>All FT Eligible</td></tr><tr><td></td><td>08/01/2017</td><td>Active</td><td></td><td></td><td></td><td>All FT Eligible</td></tr><tr><td></td><td>06/05/2017</td><td></td><td></td><td></td><td></td><td>CLC's - out of area</td></tr><tr><td></td><td>10/29/2019</td><td>Active</td><td></td><td></td><td></td><td>All FT Eligible</td></tr></tbody></table><div><div>Close</div><div>Download</div></div></div><div><div>Select Employee Name to review additional ACA information</div><div>Download a full report</div></div></div>	Employee N...	Date Of Hire	Status	Position ID	Business Unit	Location	Eligibility C...		04/18/2013	Active				All FT Eligible	10						All FT Eligible		11/07/2016	Active				All FT Eligible		08/28/2002	Active				All FT Eligible		08/01/2017	Active				All FT Eligible		06/05/2017					CLC's - out of area		10/29/2019	Active				All FT Eligible
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The ACA Benefits Status Trending Tab provides information on the monthly employee count categorized by Full-Time, Part-Time, Undefined, and Not Available.

- Full Time: 130+ hours/month
- Part Time: less than 130 hours/month
- Undefined: employee was not a part of any pay periods during the month measured
- Not Available: the calculation for the month has not completed (For example: the last payroll for the month is still pending or the employee is a New Hire)

ACA Potential Trending Assessments

Action	Screen																																																																	
The ACA Potential Trending Assessments tab provides a graphical representation of the percentage of employees who were offered Minimum Essential Coverage (MEC), were NOT offered Minimum Essential Coverage (MEC) or were in a Limited Non-Assessment (LNA) period.	<div><h1>ACA Trending Dashboard</h1><div>← Go to ACA Compliance Dashboard</div><div><div>ACA Benefits Status Trending</div><div>ACA Potential Trending Assessments</div></div></div>																																																																	
Click on the bar graph of the desired month to view the details on eligibility and affordability. (Detail screens are shown below.)	<div><h2>ACA Trending Dashboard</h2><div>← Go to ACA Compliance Dashboard</div><div><div>ACA Benefits Status Trending</div><div>ACA Potential Trending Assessments</div></div><div>Select Year: 2022Filter By: FEIN</div><div>Employees who are terminated mid-month and whose offer of coverage and enrollments end on the termination date are not displayed in the offered MEC list for that month.</div><div><table><thead><tr><th>Month</th><th>Employees Not Offered MEC</th><th>Employees Offered MEC</th><th>LNA</th><th>Total</th></tr></thead><tbody><tr><td>Jan</td><td>1</td><td>49</td><td>1</td><td>50</td></tr><tr><td>Feb</td><td>1</td><td>57</td><td>1</td><td>58</td></tr><tr><td>Mar</td><td>1</td><td>49</td><td>1</td><td>50</td></tr><tr><td>Apr</td><td>1</td><td>44</td><td>1</td><td>45</td></tr><tr><td>May</td><td>1</td><td>41</td><td>1</td><td>42</td></tr><tr><td>Jun</td><td>1</td><td>42</td><td>1</td><td>43</td></tr><tr><td>Jul</td><td>1</td><td>45 (31%)</td><td>1</td><td>122</td></tr><tr><td>Aug</td><td>1</td><td>56</td><td>1</td><td>57</td></tr><tr><td>Sep</td><td>1</td><td>61</td><td>1</td><td>62</td></tr><tr><td>Oct</td><td>1</td><td>52</td><td>1</td><td>53</td></tr><tr><td>Nov</td><td>1</td><td>54</td><td>1</td><td>55</td></tr><tr><td>Dec</td><td>1</td><td>1</td><td>1</td><td>2</td></tr></tbody></table></div><div>Export Details</div></div>	Month	Employees Not Offered MEC	Employees Offered MEC	LNA	Total	Jan	1	49	1	50	Feb	1	57	1	58	Mar	1	49	1	50	Apr	1	44	1	45	May	1	41	1	42	Jun	1	42	1	43	Jul	1	45 (31%)	1	122	Aug	1	56	1	57	Sep	1	61	1	62	Oct	1	52	1	53	Nov	1	54	1	55	Dec	1	1	1	2
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Dec	1	1	1	2																																																														

Action	Screen
<p>Click on the graph to view a full list of employees in that category.</p> <p>The percentage next to the top graph displays the relevant MEC percentage for the month selected. The IRS has stated that ALEs with 100+ full-time employees need to offer coverage to at least 95% of them to meet MEC and qualify for a Safe Harbor. (Employers with fewer than 100 employees need to offer to all but 5 full-time employees)</p>	<div><div><div>← Back</div><div>Jul-2022</div><div>ACA FT Employees Offered Minimum Essential Coverage ⓘ 100.00%</div><div><div><div>Offered MEC</div><div>Not Offered MEC</div><div>Limited Non-Assessment Period</div></div><div>Total Of 52</div></div></div><div><div>Full time employees with Affordable coverage ⓘ 97.67%</div><div><div><div>Affordable</div><div>Not Affordable</div><div>Limited Non-Assessment Period</div><div>Not Calculated</div></div><div>Total Of 52</div></div></div></div>

APPENDIX A

Job Aid: Determining Benefits Eligibility for New Hires

Calculate an Employee's Benefit Status Using Monthly Measurement Period (MMP)

All Employees:

If your company measures benefits with a Monthly Measurement Period, for all new employees, choose:

Benefit Eligibility Class field: If you are hiring someone who is expected to work 30 hours or more a week make sure that you select an Eligibility Class that is eligible for benefits.

ACA Benefit Status options: The system should default to **Calculate Using Measurement Periods**. If it does not, select the **Calculate Using Measurement Periods** radio button.

APPENDIX B

Job Aid: ACA Measurement Period Dashboard – Monthly Measurement Period

Accessing the ACA Measurement Period Dashboard

Steps:

1. From the navigation menu at the top of the page, select **Process**, then under **ACA**, select **ACA Compliance Dashboard**.
2. Select the **View ACA Measurement Periods** link from the **Measurement Periods** section at the bottom left of the screen
 - a. Use the dropdowns to change the month and year.
 - b. You can filter the list by clicking on the tiles at the top.
 - c. Employees with a Not Defined ACA Benefit Status are those for which the system was not able to determine a status. For example, if the employee did not have a paycheck during the measurement period.
 - i. If you see someone in Not Defined and it is not clear why, contact your Human Resources Business Partner

APPENDIX C

Job Aid: Accessing the ACA Trending Dashboard

Steps:

1. From the navigation menu at the top of the page, select **Process**, then under **ACA**, select **ACA Compliance Dashboard**.
2. Select **ACA Trending Dashboard** from the **Quick Links** section at the bottom right of the screen.

ACA Benefit Status Trending Tab

Steps

1. To use the ACA Benefit Status Trending Tab, in the **Select Year** drop-down, select the appropriate year, then in the **Filter By** drop-down, select **FEIN**.
 - a. The system sorts the information by employee status and month. All counts are as of the last day of the measured month.
2. Select the number under the corresponding month/employee type to review monthly information in greater detail.
3. Select the employee's name to view additional employee ACA information.
4. Select **Download Employee List** to export information.

ACA Potential Trending Assessments Tab

Steps

1. To use the ACA Potential Trending Assessments Tab, in the **Select Year** drop-down, select the appropriate year, then in the **Filter By** drop-down, select **FEIN**.
2. Click on the bar graph of the desired month to view the details on eligibility and affordability.
3. Click on the graph to view a full list of employees in that category.

Credits

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