



# aca\_extract\_records



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## Extract records

Use the [Personnel > Utilities > Extract Insurance Data to 1095 Data](#) page to extract insurance data from the [Personnel > Maintenance > Staff Demo > Insurance](#) tab to the [Personnel > Maintenance > ACA 1095 YTD Data maintenance](#) page(s).

Under **Extract Option**, select one of the following options:

- **Insert new records from Staff Demo Insurance Records.** - This option only inserts new information entered on the Staff Demo page since the last time 1095 data was extracted.
- **Delete all existing records and insert all records from Staff Demo Insurance Records.** - This option clears previously extracted 1095 data for the calendar year indicated and replaces it with the current data available in the Staff Demo insurance records.

Under **Plan Options**, select **Self-Insured Plans**.

Under **Record Type**, select **ACA 1095-C**.

In the **Calendar Year (YYYY)** field, type the calendar year for which you want to extract data.

In the **Plan Start Month**, type *09*.

In the **Offer of Coverage** field, select *1E (offer to Employee, Spouse and Dependents)*.

In the **Safe Harbor** field, select *2C (Employee enrolled in coverage offered)*.

Under **Employees with Calendar YTD Data Who Do Not Have Staff Demo Insurance Records**, select one of the following options:

- **Pay Type 1-3 Employees** (excludes subs)
- **Pay Type 1-4 Employees**



**TIP:** Most will extract once for pay types 1-3, then again for pay types 4, changing the Lowest Cost Monthly Premiums to the full amount for subs.

Under **Employee Share of Lowest Cost Monthly Premium**, in the **All** field, type the set share of the lowest-cost monthly premium amount for employees in each pay type (1-4). This is the lowest premium the employee could have paid to obtain coverage.

**For example**, if your LEA pays \$225 toward insurance for all employees, the amount will be \$153 for Jan - Aug 2020 and \$161 for Sept - Dec. ( $\$378 - \$225 = \$153$  and  $\$386 - \$225 = \$161$ .)

### Notes:

- This will make all employee forms indicate they were offered coverage all year and chose to enroll in that coverage all year. We know this won't be true, but assume it will be true for the majority of your employees.
- You will need to manually correct those employees whose situations differed. For example, employees who did not work all year for you, employees who chose not to take out the

insurance, subs for whom you do not pay the \$225, etc

- To make those manual corrections, go to Maintenance > ACA 1095 YTD Data and Retrieve the desired employee for Calendar Year 2020. Change fields as needed and Save the changes.

## Screenshot

In the example above, it was necessary to change the following: Offer of Coverage:

- 1H (No offer) for January through August because Woody didn't come to work for the district until late August
- 1E (Offer to Employee, Spouse and Children) for September - December. This was extracted so we didn't have to change these months.

Employee Share:

- The Employee Share would be 0.00 for January - August since no coverage was offered
- \$161.00 extracted for September - December, assuming the district's contribution was \$225.00 and shouldn't need to be changed

Safe Harbor:

- 2A (Employee was not employed on any day of the month) for January - July,
- 2B (Employee was not a full-time employee and not enrolled in coverage for August because I assumed Woody started late in August and didn't enroll until September
- 2C (Employee enrolled in coverage offered) for September - December

Marked the line for the Employee.

Checked the boxes for September - December since those are the only months of coverage.