



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 the month for which you want to extract data. In this example, we will use *09*.

In the **Offer of Coverage** field, indicate the offer of coverage for which you want to extract. In this example, we will use *1E (offer to Employee, Spouse and Dependents)*.

In the **Safe Harbor** field, indicate the safe harbor code for for which you want to extract. In this example, we will use *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**

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 and TRS ActiveCare Primary had the lowest premium for employee only coverage, the amount will be \$161 for Jan - Aug and \$192 for Sept - Dec. ($\$386 - \$225 = \$161$ and $\$417 - \$225 = \$192$.)

Notes:

- This allows all employee forms to indicate that they were offered coverage all year and chose to enroll in that coverage all year. Although, this may not be the exact scenario, it will most likely be the case for the majority of employees.
- Be sure to manually correct the data for those employees who had a different situation. For example, employees who did not work all year at the LEA, employees who opted out of the

insurance, substitutes for whom the LEA did not pay the \$225, etc.

- You can make the manual corrections on the Personnel > Maintenance > ACA 1095 YTD Data. Be sure to retrieve data for the appropriate calendar year, update the necessary fields, and save the changes.

The below example provides a possible scenario of changes for this employee:

The screenshot shows the 'Maintenance > ACA 1095 YTD Data' interface for employee '000070 : BARBOUR, ANGEL M'. The 'Offer of Coverage' section is highlighted with a green box. It shows a grid where 'Offer of Coverage' is set to '1H - N' for months Jan through Aug, and '1E - O' for Sep through Dec. 'Employee Share' is '0.00' for Jan through Aug and '161.00' for Sep through Dec. 'Safe Harbor' is '2A - E' for Jan through Jul, '2B - E' for Aug, and '2C - E' for Sep through Dec. The 'Covered Individuals' section shows a checkbox for 'Employee' checked, 'Self-Insured' checked, and 'Plan Start Month' set to '09'. A table below lists the employee's details: Angel Barbour, SSN --, DOB 09-15-1985, with coverage status checked for all months from Sep to Dec.

Offer of Coverage:

- 1H (No offer) for January through August assuming that the employee started at the LEA in late August.
- 1E (Offer to Employee, Spouse and Children) for September – December. This was extracted so no changes were made.

Employee Share:

- The Employee Share would be 0.00 for January – August since no coverage was offered as the employee started late August.
- \$161.00 extracted for September – December, assuming the LEA's contribution was \$225.00 and should not require a change.

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 with the assumption that the employee started late in August and did not enroll in coverage until September.
- 2C (Employee enrolled in coverage offered) for September – December

Covered Individuals:

- Selected **Self-Insured** as the LEA provided coverage.
- In the **Plan Start Month**, type 09 as the coverage started in September.
- Selected the **Employee** check box.

- Selected the September - December check boxes as those are the only months of coverage.