AFFORD-reporting for Affordable Care Act

overview

The AFFORD Report will assist in determining if an employee will exceed 30 hours per week or 130 hours per month and therefore, be classified as full-time under the Affordable Care Act (ACA). The report will use the "retire hours" functionality that is already built into the software in the UPDCAL program as well as use any AD RH entries in the ADTSCN . The report will be available in txt and csv format.

The report files created are called AFFORD.TXT and AFFORD.CSV.

accessing the program

The program may be executed by typing:

```
$ RUN OECN$PAY:USPRPT
```

at the $ prompt, then select AFFORD from the main menu.

In the menu system type:

```
Menu>AFFORD
```

sample screens

Screen 1 of 2

```
--------------------------------------------------------------------------------
|                     AFFORD - Affordable Care Act Reporting                    |
|                                                                              |
|Report File Specifications:                                                    |
| Print options page? (Y,N)    Y                                               |
|                                                                              |
|Sort Options:                                                                  |
| Sort       :              ID                                                 |
|                                                                              |
|Selection Criteria:                                                            |
| Beginning Date:             02/19/2013                                        |
| Ending Date:                08/31/2013                                        |
|                                                                              |
| Exclude based on termination date? (Y/N):          y                         |
| Exclude employees with insurance? (Y/N):           Y                         |
| Calculate based on number of weeks or months? (W/M): W                       |
| Calendar for calculating breaks:                   E                         |
|                                                                              |
|Retrieve retire hours from history                          1 of  2           |
|                                                                              |
|  XX  Execute        XX  Cancel         XX  Next Screen                        |
|  XX  First Screen   XX  Reset                                                |
|  XX  First Screen   XX  Reset                                                |
|  XX  Exit           XX  Prev Screen                                          |
  --------------------------------------------------------------------------------
```

Field Definitions

- Information in the **Print options page** includes a summary of the selected options on the report.

- **Sort** the report based on the available selection options. Options include:
    - ID - Employee ID
    - N - Employee Name

- Enter the **Beginning Date** of your measurement period. When running for the weekly option, the beginning date should always be the first period beginning date from the first payroll you want included. When running for the monthly option, you should enter the first day of the month for the first payroll you want included in the measurement period. A warning message will appear for the monthly option if the beginning day is not "01". This is just a warning and can be overridden by hitting the Accept key again. The beginning date option offers the following choices:
    - For WEEKLY calculations - Enter the payroll beginning date for the start of the measurement period in MM/DD/YYYY format.
    - For MONTHLY calculations - Enter the first day of the month for the start of the measurement period in MM/DD/YYYY format.

    > For Semi-Monthly districts that don't use the 15 and last day of the month as your paydates, you will want to use the Beginning Period Date of your first payroll of the month.

- Enter the **Ending Date** of your measurement period. When running for the weekly option, the ending date should always be the last period ending date from the last payroll you want included. When running for the monthly option, you should enter the last day of the month for the last payroll you want included in the measurement period. A warning message will appear for the monthly option if the ending day is not greater than "27". This should be the last day of the month. This is just a warning message and can be overridden by hitting the Accept key again. The ending date option offers the following choices:
    - For WEEKLY calculations - Enter the payroll ending date for the end of the measurement period.
    - For MONTHLY calculations - Enter the last day of the month for the end of the measurement period.

    > For Semi-Monthly districts that don't use the 15 and last day of the month as your paydates, you will want to use the Ending Period Date of your last payroll of the month.

- **Exclude based on termination date?** If answered "Y" and an employee's BIOSCN termination date is prior to the ending date entered, the employee will not be included on the report. This will allow the district to optionally exclude terminated employees from the report since they would not be eligible for coverage per ACA rules. The exclude based on termination date options are:

- Y - Do not report if termination date is prior to the ending date
- N - Report (even if terminated) if they meet all other specifications

- **Exclude employees with insurance?** If answered "Y", the program will exclude any employee that currently has an active health insurance deduction setup. It will use the USPSDAT/DEDNAM "Include as employer-sponsored health coverage?:" flag set to "Y" to determine which deduction types to consider as health insurance. A deduction will be considered active if the start date on the deduction is before the ending date entered and if the stop date on the deduction is after the ending date entered. A deduction is also considered active when no starting or ending date is present on the deduction.The exclude employees with insurance options are:
    - Y-Exclude employees who have Employer-Sponsored insurance
    - N-Include ALL employees (with or without Employer-Sponsored Insurance)

- **Calculate based on number of weeks or months?** If answered "W", the program will calculate based on 30 hours per week. If answered "M", the program will calculate based on 130 hours per month. Calculate based on number of weeks or months options are:
    - W-All calculations will be based on a per WEEK calculation
        - This option is required to be used when 26 pays (bi-weekly) is used for payroll processing.
    - M-All calculations will be based on a per MONTH calculation
        - This option should only be used when 24 pays (semi-monthly) is used for payroll processing, because a semi-monthly payroll would include the first day of the month and last day of the month respectively.The monthly option will NOT provide accurate amounts when ran for a district with 26 pays since a single pay period may stretch across multiple months.

- **Calendar for calculating breaks**. Per the ACA any break of 4 or more weeks cannot be included in the counts used to determine if an employee has averaged 30 or more hours per week (or 130 hours per month) in a given measurement period. This prompt is an effort to support this rule. If you enter a calendar type it will use the given calendar to determine if there is a break stretching more than 27 days and will exclude these days from the calculated average. Any combination of 28 consecutive days with a blank, C (calamity), or H (holiday) on the calendar will be excluded. In theory you could create one or more calendars to be used specifically for this report.

Screen 2 of 2

```
| -------------------------------------------------------------------|
|                  AFFORD - Affordable Care Act Reporting            |
|                                                                    |
|Pay Groups: __ __ __ __ __ __ __ __ __ __ __ __ __ __ __            |
|            __ __ __ __ __ __ __ __ __ __ __ __ __ __ __            |
|                                                                    |
|Employee Selection: _____ _____ _____ _____ _____      |
|                    _____ _____ _____ _____ _____      |
|                    _____ _____ _____ _____ _____      |
|                    _____ _____ _____ _____ _____      |
|                    _____ _____ _____ _____ _____      |
|                    _____ _____ _____ _____ _____      |
|                                                                    |
|                                                                    |
|                                                                    |
|                                                                    |
|                                                                    |
| Retrieve retire hours from history                      2 of  2    |
|                                                                    |
| XX  Execute         XX  Cancel        XX  Next Screen              |
|  XX  First Screen   XX  Reset                                      |
|  XX  Help           XX  Save/Recall                               |
|  XX  Exit           XX  Prev Screen                               |
 --------------------------------------------------------------------
```

Field Definitions

- The **Pay Groups** allows up to 30 individual pay groups to be selected. If pay groups are entered, only the pay groups specified would be included on the report.

- The **Employee ID's** allows up to 30 specific employees to be selected. Only the selected employees will be included on the report.

sample report-AFFORD.TXT

The AFFORD.TXT is a detail report that contains a break down by employee. It contains each payroll and it's corresponding retirement hours from the payroll history files, along with any adjustment hours. It also provides a per employee total of this information and the calculation to determine the average hours per week or per month. If the employee averages 30 or more hours per week or 130 hours per month a pound sign (#) will print next to the Total hours per week or month for the employee. In addition, the report will provide a Total number of employees exceeding 30 hours per week or 130 hours per month count at the bottom of the report..

```
DATE: 09/04/13                    RETIRE HOURS FOR AFFORDABLE CARE ACT        AFFORD
TIME:  9:31 am                       TIGER TEST VILLAGE SCHOOLS           PAGE:
1

Employee                   Start      Stop      Job Pay          Check   Retire  AD
RH    Total Hrs/(Total Days/7)
ID         Employee Name    Date       Date      Nbr Grp Pay Date  Number Hours  Adj
Hours = Total Hours Per Week
XXXXXXXXX1 FIELDER, PRINCE A. 02/19/2013 08/31/2013
                                                 01 M   07/12/2013 573231  18.00
0.00
                                                 01 M   07/26/2013 573428  44.00
0.00
                                                 01 M   08/09/2013 573625  40.00
0.00
                                                 01 M   08/23/2013 573824   4.00
0.00

--------- ---------
                                                         TOTALS:       106.00
0.00   106.00/( 13/7)= 56.99 #
XXXXXXXX2 MARTINEZ, VICTOR C   02/19/2013 08/31/2013
                                                 01 M   03/22/2013 571219  22.00
0.00
                                                 01 M   04/19/2013 571753  24.00
0.00
                                                 01 M   05/03/2013 572034  24.00
0.00
                                                 01 M   05/17/2013 572308  16.00
0.00
                                                 01 M   05/31/2013 572580  40.00
0.00
                                                 01 M   06/14/2013 572820  29.50
0.00
                                                 01 M   06/28/2013 573029   5.00
0.00
                                                 01 M   07/12/2013 573232  56.00
0.00
                                                 01 M   07/26/2013 573429  65.50
0.00
                                                 01 M   08/09/2013 573626  62.50
0.00
                                                 01 M   08/23/2013 573825   9.00
0.00
                                                 01 M   09/06/2013 574041  71.00
0.00
                                                 00     06/21/2013      0   0.00
20.00

--------- ---------
                                                         TOTALS:       424.50
20.00   444.50/(115/7)= 27.05
```

```
  TOTAL NUMBER OF EMPLOYEES ON REPORT                 :    2
  TOTAL NUMBER OF EMPLOYEES WITH HOURS/WEEK =>  30:   1 (# NEXT TO TOTAL HOURS/WEEK,
DENOTES => 30 HOURS PER WEEK CALCULATED)
```

sample report-AFFORD.CSV

The AFFORD.CSV is a comma separated file that can be viewed/modified using a spreadsheet program such as Excel. It provides one entry per employee (summarized). The CSV file contains the following fields: Employee Id, Last Name, First Name, Middle Initial, Total Hours Calculated for the Measurement Period, Start Date used for counting, Stop Date used for counting, Total Number of days in the period, Total Number of weeks or months in the period, Average Hours calculated, A Flag Signifying if the employee's average exceeded 30 hours/week or 130 hours/month, Federal EIN Number, Taxable Gross Pay, Total Gross Pay, Calculated Hourly Rate. Calculated Obligation and Current YTD Taxable Gross.

The **Federal EIN numbe**r (unique for each district) The Federal EIN number is a 9 digit field. The csv heading for the Federal EIN number is "FEIN".

The **Taxable Gross Pay** field is the total taxable gross amount from the deduction history from the Federal (001) DEDSCN record for the time period specified. The csv heading for the total taxable gross pay is "TAX_GROSS".

The **Total Gross Amount** is coming from the deduction history from the Federal (001) DEDSCN record for the time period specified. The csv heading name is "TOT_GROSS".

The **Calculated Hourly Rate** is calculated as the total gross divided by the total retire hours. If the employee does not have hours associated with a given pay (examples include ACC, LPA, LPE entries, which never have hours, or MIS entries where no hours were entered in UPDCAL), then the calculated hourly rate would be zero. The csv heading name is "CALC_HR_RATE".

The **Calculated Obligation Amount** is only looking at active jobs. If the end date is after the JOBSCN contract start date, it will use that JOBSCN's obligation amount. If the end date is before or the same as the JOBSCN contract start date, it will use the most recent job history contract amount. The job history contract amount should be the amount from the last contract (before the contract was purged). The csv heading name is "CALC_OBL_AMT".

The **Current YTD Taxable Gross Amount**, is from the Federal (001) DEDSCN record. The csv heading name is "CUR_YTD_TX_GROSS".

> These new calculated fields are calculated with our best attempt to provide you with this information. If an employee is close to the cutoff measurement standard being used, then we ask that you re-calculate and verify the amounts.

```
"EMPLOYEE_ID","TRUE_SSN","LAST","FIRST","MI","START_DT","STOP_DT","TOTAL_HOURS","TOTAL
_DAYS","NUM_WKS_OR_MTHS","HRS_PER_WK_OR_MTH","MORE_30_HR_FLAG","FEIN",
"TAX_GROSS","TOT_GROSS","CALC_HR_RATE","CALC_OBL_AMT","CUR_YTD_TX_GROSS"
"XXXXXXX1","xxxxxxxx1","FIELDER","PRINCE","A","20130219","20130831",106.00,13.00,1.86,
56.99,"Y",123456789,2088.26,2498.23,33.31,64954.02,42241.64
"xxxxxxxx2","xxxxxxxx2","MARTINEZ","VICTOR","C","20130219","20130831",444.50,115.00,16
.43,27.05,"N",123456789,174.00,200.00,25.00,.00,878.00
[End of file]
```

> -If a calendar stop date is not entered for an inactive job, that job will be considered active and could be included on the report if other criteria is met.
>
> -Only those jobs meeting the input specifications that have **retire hours** or **AD RH entries** in ATDSCN will be included on the report.