

- Verify all 2023 Medical Plans are added under Client Management>Benefit>Benefit Plans. Verify that all coverage levels and rates are accurate for the year. If you had a mid-year rate change both the old rates and the new rates with the correct effective dates and end dates should be listed under the “rates” tab for each medical plan.
- Verify each medical plan has accurate New Hire Probationary Periods and Termination Rules under the “Dates” tab of the medical plan.
- Verify the ACA Plan Options are setup correctly on each Benefit Plan under Client Management>Benefits>Benefits Plans and Navigate to the “Plan” Tab on each Medical Plan. If your plan is ACA Compliant the boxes should be checked for both Minimum Essential Coverage and Minimum Value. [Note: Some “MEC” plans are not Minimum Value]. If you have a self-insured plan, ensure the “self-insured” box is checked for that plan.
- Verify your ACA Aggregate Group, if any, includes all FEINs under ACA Setup Options>ACA Reporting Groups.
- Verify your 2023 ACA Report Settings are accurate under ACA Setup Options> ACA Report Options. If you reported with us in 2022, CTR should have copied the same selections from your 2022 reporting year. Please confirm that these are still accurate for the 2023 reporting period. If you have more than one FEIN, you will need to confirm the settings for each FEIN separately.
- Review Employment Category Assignments for each employee under Employee Management>Employee Maintenance>Employment ensuring correct employment categories throughout the year and correct effective dates. For any Variable Hour employees for which you are using a measurement period to determine full-time status, you should see the date which the employee “Met the Hours” for ACA Full-Time Status.
- Verify employee medical start and stop dates ensuring employees who were enrolled the entire year have medical start dates on or prior to 1/1/2023. If an employee changed plans mid-year, the start date for the prior plan year and the start date for the new plan year should be reflected on the employee’s benefit record with no gaps in coverage.
- Verify all employees have correct hire dates, rehire dates, leave of absence dates, and termination dates in iSolved by reviewing the Employment Status History Screen. Terminated employees or permanent layoffs must be marked as terminated in the system. They cannot be marked as “Inactive.”
- If self-insured or partially self-insured, verify that all dependent enrollment information is in the system including dependent Social Security numbers. You will receive a TIN error from the IRS if the Social Security number is invalid or missing for both dependents and employees.
- Enter information on COBRA participants in the ACA Overrides area (*See the information on entering COBRA in the ACA Form Preview Guide*)
- Preview and then approve your ACA Forms following your last payroll in 2023 but prior to the January 9, 2024 approval deadline. If you are requesting an extension past the January deadline, please notify us at aca@ctrhcm.com.