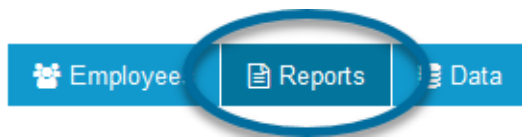


How to Run ACA Penalty Report

An **ACA Penalty Report** is run prior to approving forms and transmitting data to the IRS. This report identifies items that may be considered as failures to meet ACA requirements.

1. Select **Reports** on the top toolbar of the Main Page of PlanSource



Reports

Report History

Available Reports

2. Select **Available Reports** on the left toolbar and then **ACA Monitoring Report**

ACA Monitoring Report
An easily customizable report

3. Uncheck **Gaining FT Status** and **Losing FT Status and Coverage**. Leave **1095-C Penalties**. Ensure you are on the correct Reporting Year

Reporting Tabs

<input type="checkbox"/>	Gaining FT Status
<input type="checkbox"/>	Losing FT Status and Coverage
<input checked="" type="checkbox"/>	1095-C Penalties
Reporting Year:	2016

4. Select your specific criteria

View or Export ACA Monitoring Report

Show Test Subscriber

Subscriber Fields	Selected Subscriber Fields
ACA_DAYS	First Name
ACA_FEIN	Last Name
ACA_HOURS	SSN
ACA_Hours_Category_Type	Hire Date
ACA_MarketLink_Client_ID	Termination Date
ACA_Payrate	
ACA_Payrol_Ends_On	
ACA_Payrol_Starts_On	
ACA_SEASONAL	
ACA_UNION	
ACA_W2_Box1	
ACA_W2_Box1 2015	
Address 1	

5. Run the report and select OK to the Pop up

Run Now Run In Background Schedule Report Report Queue

Excel

Run Now

Subscriber Id, Last Name, First Name and SSN are used to identify the individual
 FEIN Name and FEIN identify the Company
 NO_OFFER, NOT_MV, BAD_TIER, UNAFFORDABLE identify possible penalties to the Employer