

Affordable Care Act - Generating and Maintaining ACA Period Records for 1095 Reporting in EERP

Office of Education Technology: Division of School Technology Services

Questions: eerp@education.ky.gov

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Overview

This document is intended to provide Kentucky school districts with an explanation of the Affordable Care Act (ACA) Period Tracking functionality in Enterprise ERP (EERP/Munis). Users who understand the Affordable Care Act relating to tracking and determining insurance eligibility will find tracking and reporting 1095s in EERP much easier to understand.

For those districts that have not used EERP for ACA reporting, the “*Affordable Care Act- EERP Implementation Guide*” is available by contacting the KDE EERP team via email (EERP@education.ky.gov).

More information on ACA and other year-end processing can be found on [2025 Affordable Care Act Wiki](#) found on Tyler Community. You must be logged into your Tyler support account to access Tyler Community.

Please note that the information presented is intended for general guidance. Legal counsel should be consulted to ensure compliance with all aspects of the ACA.

ACA Command Center

The ACA Command Center is a program that tracks all possible steps to process ACA records and 1094/1095 processes. It’s a central place to organize the steps required by your organization and track when the steps are completed. You can find the ACA Command Center by going to:

Human resources/Payroll > Payroll > 1095-B/C Processing > ACA Command Center

Step #1 -Mass Generate Initial ACA Period Records

Initial ACA Period Records can automatically be created at the time the new employee’s Employee Master Record is entered in EERP. For those districts that are just implementing ACA tracking in EERP this year, a function is available to mass-add Initial Period Records. It is also suggested to generate a report to ensure all new hires have Initial Period Records.

If you currently do not have Initial Records for your new hires who started during the 2025 reporting year, you will want to run Generate Initial Period Records. The following menu path can be used, or you can access ‘Generate Initial Period’ from the ACA Command Center.

Human Capital Management > Payroll > 1095-B/C Processing> Affordable Care Act Setup > ACA Period Records

After selecting **Generate Initial Records** from the menu, the following screen appears. Selecting “Define” will allow the definition of the criteria to be used to generate records.

- **Important!** Select the appropriate Date Type utilized by your district (Hire Date, Original Hire Date, First Day of Service, etc.) so that records are only generated for employees who were newly hired during 2025 or after the standard definition measurement period that begins on October 3, 2024.
 - *If any Initial Period records are created for employees who were employed before 10/3/2024 (standard measurement begin date), it may cause incorrect codes to be populated on the employee's 1095-C form during the generation process. This could happen depending on what Date Type is utilized in the Period Definitions setup or the Date Type selected during the period record generate process. The Initial Period Record may need to be deleted as the employee will have a Standard Period Record that will be created in the next step.*
- Enter the Start Date and End Date (10/4/2024 to 12/31/2025)

For 1095 reporting, each new employee hired in 2025 should have an Initial Period record. The date of 10/4/2024 is used to capture all employees hired after the standard measurement period began for this reporting period.

The Date Type: Hire Date is used as an example only. Select the appropriate Date Type utilized by your district (Hire Date, Original Hire Date, First Day of Service, etc.).

The “Include Inactive Employees” box is marked so that a record is created for Full-Time employees who were hired in 2025 but are no longer with the district. This is required because generally, an ALE member must file Form 1095-C for each employee who was a full-time employee of the ALE for any month of the calendar year, including those employees who are now inactive.

Generate Initial Records Field	Generate Initial Records Description
Date Type	This determines which employees to generate Initial records for by checking the specified date against the Start and End dates specified. They relate to dates on the “Dates” tab in the Employee Master.
Start and End Date	An Initial Period record will be added for any employee whose date falls within this date range.

After completing the definition criteria and selecting “**Execute**”, if there are any period records to be created, the system will perform a proof/post-process. If you receive an error message that “No ACA Group found for Group/BU UNPD, this can be ignored. These individuals are not employed by the district and should not be reported.



Generate Errors



Back



Cancel



Output



Print



Display



PDF



Save



Excel



Word

ACA Period Records [KDE] > Generate Errors

Error Message	Status Error	ISAM Error	System Log Id
Employee 1526: No ACA Group found for Group/BU UNPD.	0		
Employee 1527: No ACA Group found for Group/BU UNPD.	0		
Employee 969696: No ACA Group found for Group/BU UNPD.	0		

A report listing the ACA Period Records to be generated :

KDE										
ACA INITIAL GENERATE REPORT										
EMP #	EMP NAME	EMP SSN	ACA GRP	GRP TYPE	VAR	FT	MEASURE/ WAIT START	END	ADMINISTRATIVE START	END
										STABILITY START
										END
Location: 000										
929292	KEBTEST, KEB K	929-29-2929	ALL	INIT	N	Y	MM/DD/YY	MM/DD/YY	09/02/25	10/31/25
										11/01/25 10/31/26

The program will then ask if you wish to post those records. If “Yes” is selected, the proofed records will be added to the system.

If new hire employees already have an Initial Period Record and therefore don't need another Initial Period Record, a Generate Errors report will be created.

Generate Errors

Error Message	Status	Error	ISAM Error	System Log Id
No insert due to existing record:				
Proj Emp # ACA Grp Grp Type Stab Start Stab End				
* 0 1521 ALL INITIAL 04/01/2025 03/31/2026		0		
* 0 1524 ALL INITIAL 04/01/2025 03/31/2026		0		
* 0 1531 ALL INITIAL 06/01/2025 05/31/2026		0		

□ Step #2 - ACA Standard Period Records - 2025

This process should be completed near the end of each standard measurement period (October) to create new measurement period records for the next cycle. Standard Records for 2025 reporting should already have been created. **If this step has been completed, the step may be skipped.**

If you are not sure if Standard records were already generated, select **Search** and search for Period Group Type “Standard” and Stability Period (01/01/2025 to 12/31/2025).

ACA Period Records [KDE]

Close Accept Cancel Query

ACA Period Records [KDE] > 🔍

Employee Identification

Employee * SSN * Last Name * First Name * Middle Name MI Suffix

Group/Employee Info

ACA Group * Period Group Type * STANDARD Full Time * Variable

ACA Dates

Measurement/Wait Period Start to End

Administrative Period Start to End

Stability Period * 01/01/2025 to 12/31/2025

Offer

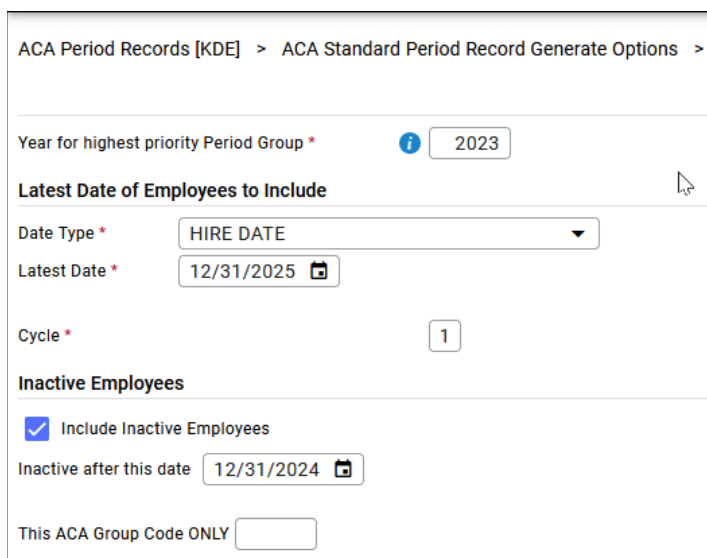
Coverage Offered

Employee Coverage Dates

Start End

- If **NO** Standard records are found for 2025, ACA Period Records must be created. *If records exist, you can skip to the next section of the guide.*
- Select **Generate Standard Records** to create a set of Standard Period Records with 2025 stability dates.
- **Year for highest priority Period Group:** Enter 2023 as the Year for the highest priority group, as the tracking period began in October 2023 through October 202.
- **Date Type:** Enter the Date Type used by your district; in this example, we used the Hire Date.

- **Latest Date:** 12/31/2025. The Date Type and Latest Date field will function as a limiter on which employees have Standard Period ACA records created.
- **Cycle:** Enter “1”
- **Include Inactive Employees:** Mark “Include Inactive Employees” to create records for those employees who are now inactive, however, were employed and were either offered or had insurance during the 2025 calendar year.
- **Inactive after this date:** Enter 12/31/2024. Employees inactive after 12/31/2024 will not have a period record created since they are not required to be reported in 2025.
- **ACA Group Code:** Leave the ACA Group Code blank to generate for all employees.
- Select **Execute**.



ACA Period Records [KDE] > ACA Standard Period Record Generate Options >

Year for highest priority Period Group * 2023

Latest Date of Employees to Include

Date Type * HIRE DATE

Latest Date * 12/31/2025

Cycle * 1

Inactive Employees

☒ Include Inactive Employees

Inactive after this date 12/31/2024

This ACA Group Code ONLY

After generating, all employees who were employed on or before the start of the measurement period (October 2023) should have a Standard Measurement Period record with the information below:

- **Measurement/Wait:** Start: 10/3/2023 End: 10/2/2024
- **Administrative:** Start: 10/3/2024 End: 12/31/2024
- **Stability:** Start: 1/1/2025 End: 12/31/2025

Selecting **Yes** creates the period records indicated in the proof. After records are generated, users can view and edit them in the ACA Period Records program.

If the generate process is unable to create an ACA Period Record for an employee due to overlapping dates, a prompt will be provided. Because an employee can have initial and standard tracking and stability dates that may fall over a portion of the same dates, it is suggested to “Add Standard Period Record, Keep Initial Period Rec”. However, this could vary by situation and how your district chooses to manage data. Each employee listed should be reviewed to determine what option to select.

Single Overlap Resolution

Accept

ACA Period Records [KDE] > Single Overlap Resolution >

Uniform Standard Period Overlaps
☒ Resolve all overlaps the same
 ADD STANDARD PERIOD REC, KEEP INITIAL PERIOD REC

Individual Standard Period Overlaps

Emp	ACA Grp	Full Time	Variable Pay	Standard Stability Start	Standard Stability End	Initial Stability Start	Initial Stability End	Resolution Choice
1232	ALL	☐	☒	01/01/2025	12/31/2025	08/01/2024	07/31/2025	ADD STANDARD PERIOD REC, KEEP INITIAL PERIOD REC
1521	ALL	☒	☐	01/01/2025	12/31/2025	04/01/2025	03/31/2026	ADD STANDARD PERIOD REC, KEEP INITIAL PERIOD REC
1524	ALL	☒	☐	01/01/2025	12/31/2025	04/01/2025	03/31/2026	ADD STANDARD PERIOD REC, KEEP INITIAL PERIOD REC
1531	ALL	☒	☐	01/01/2025	12/31/2025	06/01/2025	05/31/2026	ADD STANDARD PERIOD REC, KEEP INITIAL PERIOD REC
8881	ALL	☒	☐	01/01/2025	12/31/2025	03/01/2024	02/28/2025	ADD STANDARD PERIOD REC, KEEP INITIAL PERIOD REC
929292	ALL	☒	☐	01/01/2025	12/31/2025	11/01/2025	10/31/2026	ADD STANDARD PERIOD REC, KEEP INITIAL PERIOD REC

Understanding the ACA requirement for tracking initial and standard periods will better equip users to determine what option should be selected. This will vary by district and employee record.

□ Step #3 - Mark “Coverage Offered” on Standard Period Records

An offer of coverage to full-time employees must be reported on 1095-Cs. To report on the offer of coverage, all FT employees (***assuming coverage was offered***) need to have the Coverage Offer flag marked on the ACA period record. While there is an option to "set coverage offered" when importing the Participant file in step #7, that process will not mark the coverage offered flag for full-time employees who decline health insurance; therefore, **this step is required.**

1. Select **Search** and find on:
 - a. **Period Group Type:** Standard
 - b. **Full Time:** Yes
 - c. **Stability Period:** 01/01/2025 to 12/31/2025

Group/Employee Info

ACA Group *
 Period Group Type * STANDARD
 Full Time * YES
☒ Variable

ACA Dates

Start to

Measurement/Wait Period to

Administrative Period to

Stability Period * 01/01/2025 to 12/31/2025

Offer

☒ Coverage Offered

Employee Coverage Dates

Start to

2. Select the **Excel** button on the menu bar and then select “Export Period Record Information to Excel”.

Options

Choose an option

☒ Export Period Record Information to Excel

☐ Export Employee Coverage Dates to Excel

Cancel OK

3. Deselect the SSN field as it is not needed to export and import into EERP if the Employee Number is available. Select **Accept** to download the Excel file to your computer.

Select	Field
☒	Employee Number
☒	Employee Name
☐	SSN
☒	ACA Grp
☒	Grp Typ
☒	Variable
☒	FullTime
☒	Meas/Wait Start
☒	Meas/Wait End
☒	Admin Start
☒	Admin End
☒	Stab Start
☒	Stab End
☒	Coverage Off

4. Open the Excel file on your computer. Save the file locally to your computer.
5. In the Excel file, update the Coverage Offered cells to "Y". If an employee listed on the Excel spreadsheet was not offered insurance, the Coverage Offered field should remain "N".

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Employee Number	Employee Name	ACA Grp	Grp Typ	Variable	FullTime	Meas/Wait Start	Meas/Wait End	Admin Start	Admin End	Stab Start	Stab End	Coverage Off
2	14	CARSON, JACQUELYN J	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	Y
3	49	MATTHEWS, ENEDINA L	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	Y
4	55	BURGESS, VERONICA A	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	Y
5	151	KINGSTON, ISA C	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	Y
6	218	MCBRIDE, SANDY M	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	N
7	251	WALKER, FRANCIS M	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	N
8	292	CAIN, SHIRLEY L	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	N
9	324	BAGLAND, CAROL F	ALL	STND	N	Y	10/03/2023	10/02/2024	10/03/2024	12/31/2024	01/01/2025	12/31/2025	N

6. Save and close the Excel file.
7. In EERP, select **Import** from the menu and then select "**Import Period Record Information**".

Options

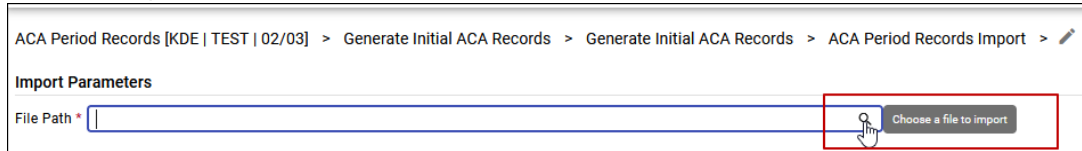
Choose an option

☒ Import Period Record Information

☐ Import Employee Coverage Dates

Cancel OK

8. Select **Define** and select the import file by navigating to the file on your computer, and then **Accept**. Note that after selecting the file, the import file name will automatically change to a temporary file name used by the system to upload the file. No action to change the file name is required.



9. Select **Import** from the menu. Review the report and if correct, select **Yes** to post.
10. Select **Back** and review the employee's ACA Period Record to ensure the "Coverage Offered" flag was marked. **Any FT employee who did not receive an offer of coverage should have the flag removed from their record.**
11. To protect employees' Personally Identifiable Information (PII), the Excel file should be deleted from your computer and the Recycle Bin emptied.

□ Step #4 - Import "Coverage Offered" for Initial Period Records

Initial period records are created based on the date a new employee is hired. Because the hire date varies for new employees, the Admin and Stability date ranges on the ACA period record will vary. ACA period records that have a stability period that falls anywhere within the calendar year 2024+ may need to be modified to indicate coverage was offered to full-time employees.

1. Select **Search** and find on:
 - a. **Period Group Type:** Initial
 - b. **Full Time:** Yes
 - c. **Stability Period:** >01/31/2024 to blank.
 - i. This will return all Initial and FT employee records where the stability period falls during any month during the 2024 calendar year, but also crosses calendar years. (Employees hired in February of 2024 forward will have an initial period record that crosses into the calendar year 2025.) Note that there will likely be some employees who exported that already have the Coverage Offered flag marked (Yes) from the prior year. The Coverage Offered Flag should remain as Y for Yes.

Group/Employee Info		Period Group Type * INITIAL		Full Time * YES		Variable	
ACA Group *							
ACA Dates				Offer		Employee Coverage Dates	
	Start		End	Coverage Offered		Start	End
Measurement/Wait Period		to					
Administrative Period		to					
Stability Period *	>01/31/24	to					

2. Mark these records as “Coverage Offered” by repeating the steps listed in the prior section of this document, starting at step #2. Alternatively, you may choose to individually update the “Coverage Offered” flag on each record assuming these FT employees were offered coverage.

□ Step #5 - Adjust ACA Period Records as Needed

Administrative and Stability Dates on the ACA Period Record determine which codes are generated on the employee’s 1095-C record. Adjustments may be made to either the period record so that the correct codes are generated on the 1095 form, or the individual 1095s may be manually corrected. Below are a few common scenarios. Note that there may be different variables per district and employee.

Users may also elect to manually fix or change the employee’s 1095-C after the forms are generated.

Scenario #1: PT/Substitute that becomes a Full-Time Employee

An employee who was employed in a position other than Full Time (substitute or PT), switched to Full Time during the calendar year, and therefore was offered insurance, may require two period records (one as variable and one as FT). The employee would already have a Standard Period record for the Part-Time position, and an additional Standard Period record is required for the Full-Time position.

This scenario assumes the Hire date from the substitute position in EERP remains on the Employee Master and was not updated to reflect the new position. EERP offers flexibility in what employment dates are used for the ACA Period Definitions and the 1095-C Generate process. Because of this and how your district manages employment dates on the Employee Master, your results may differ. Users can change the codes manually on the 1095-C forms in EERP to ensure correct reporting to the IRS.

As seen in the examples below, a longtime employee who was a variable hour employee (Substitute) needs an ACA Period Record with the following items set:

- Period Group Type: **Standard Record**
- Full Time: **Undetermined**
- Variable Marked

This indicates the employee was not eligible for insurance; therefore, no offer of coverage is marked.

ACA Period Record – Substitute Position

Group/Employee Info		Period Group Type * STANDARD		Full Time * UNDETERMINED	☒ Variable
ACA Dates		Offer		Employee Coverage Dates	
	Start	End	☐ Coverage Offered	Start	End
Measurement/Wait Period	10/03/2023	to 10/02/2024			
Administrative Period	10/03/2024	to 12/31/2024			
Stability Period *	01/01/2025	to 12/31/2025			

The employee switched to a Full-Time position on 8/25/2025. An Initial Period Record may be entered (if it doesn't already exist) to show the status change and health insurance coverage (example follows). Remember, the Administrative and Stability Dates drive what codes the IRS requires on the 1095-C forms.

As seen in the example, once a variable status employee becomes a full-time employee, an additional ACA Period Record may be required with the following items set:

- Period Group Type: **Initial**
- Full Time: **Yes**
- Coverage Offered Flag Set
- Administrative Period Dates entered
- Stability Period Dates entered

ACA Period Record – Full-Time Position

Group/Employee Info		Period Group Type * INITIAL		Full Time * YES	☐ Variable
ACA Dates		Offer		Employee Coverage Dates	
	Start	End	☒ Coverage Offered	Start	End
Measurement/Wait Period					
Administrative Period	08/25/2025	to 09/30/2025			
Stability Period *	10/01/2025	to 09/30/2026			

After the 1095 record is generated, the proper codes are reported. Manual changes may be made to the 1095 record for proper reporting if needed.

Employee 1095-C

Employee Offer	Covered Individuals	Address	Indicates no offer of coverage on line 14 and not full time on line 16							Admin Waiting Period - Code 2D on line 16		Employee offered coverage and enrolled in coverage		
Plan Start Month *	All 12		Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
Offer of Coverage			1H	1H	1H	1H	1H	1H	1H	1H	1H	1A	1A	1A
Employee Required Contribution														
Safe Harbor			2B	2B	2B	2B	2B	2B	2B	2D	2D	2C	2C	2C

- Jan–July: 1H & 2B
- Aug–Sep (Admin Period): 1H & 2D
- Oct–Dec (Coverage): 1A & 2C
- **Note: Records are produced based on several settings in each district’s EERP system and results may differ. Because districts manage employee hire and end dates on the employee master differently, results may vary. The 1095 codes are based on, at a minimum, the following items:**
 - Period Record Type: Initial or Standard
 - Dates on the ACA Period record:
 - Measurement Period
 - Administrative Period
 - Stability Period
 - Employment Dates Start and End Indicator used in the 1095-C generate process.
 - Dates listed on the Employee Master record

Scenario #2: Full-Time Employee who transfers into your school district

Employees who transfer into your district who already have health insurance are not treated the same as new full-time employees during the Administration Period. A new employee typically has a waiting period before insurance starts; however, a transfer may already have coverage, and it is just a matter of when the employee is transferred to your district’s health insurance bill. Because the Admin and Stability date ranges vary from a traditional new employee, the ACA period record that was automatically created will need the Administration Period (if applicable) and Stability Period modified to reflect individual transfer employee circumstances.

For example, if an employee transfers into the receiving district, there may not be a waiting period. Example: Employee A was hired on 8/15/2025 (when the contract was given), and the insurance with the sending district went through the end of August. The employee was hired by the receiving district on 8/15/2025 with insurance starting on 9/1/2025, with no lapse in coverage. This would have to be manually addressed either on the period record reflecting a shorter admin period or on the 1095 record. The 1095-C would reflect a one-month waiting period, then 1A and 2C beginning in September instead of October. Again, this is only an example, and each situation may be different and vary by the employee.

ACA Period Record

Group/Employee Info		Period Group Type *		Full Time *		☐ Variable
ACA Group *	ALL - ALL EMPLOYEES	Period Group Type *	INITIAL	Full Time *	YES	

ACA Dates	Offer	Employee Coverage Dates
Measurement/Wait Period	☒ Coverage Offered	Start End
Administrative Period		08/15/2025 to 08/30/2025
Stability Period *		09/01/2025 to 08/31/2026

Example: Dates changed to reflect the shortened Administrative Period.

Employee 1095-C

Employee Offer	Covered Individuals	Address	One month Admin Period	Employee offered coverage and enrolled in coverage.
Plan Start Month *	All 12		Aug	Sep Oct Nov Dec
Offer of Coverage	Jan: 1H Feb: 1H Mar: 1H Apr: 1H May: 1H Jun: 1H Jul: 1H		1H	1A 1A 1A 1A
Employee Required Contribution				
Safe Harbor	Jan: 2A Feb: 2A Mar: 2A Apr: 2A May: 2A Jun: 2A Jul: 2A		2D	2C 2C 2C 2C

- Jan – July: 1H & 2A
- August (Admin Period): 1H & 2D
- Sep-Dec (Coverage): 1A & 2C

□ Step #6 - Import Health Insurance Dependents

The KY Department of Employee Insurance (DEI) provides dependent and participant/employee information to assist Kentucky school districts with ACA reporting. DEI will create a file of dependent coverage dates with delivery to districts in January. Once the file is available, an email will be distributed notifying districts about the file's availability.

Each district will receive an import file that is saved to the spool directory. The file is named 20xxACADep###-000#.txt, where xx is the reporting year, ### is the district's KHRIS number, and # is the file iteration. Please refer to the communication from the KDE Enterprise ERP Team for more information on the file names that should be downloaded.



Beginning in 2025, a new file retention policy requires the periodic purging of all Kentucky health-related files containing personally identifiable information (PII) from KHRIS - including the ACA files - from Enterprise ERP (EERP). ACA files will be purged from EERP on March 30th.

To ensure proper data retention, both the Dependent Health Coverage File and the Employee Health Coverage File must be downloaded and imported into Enterprise ERP before the end of March each year.

Download the ACA Dependent file to your computer using File **Transfer** or **Transfer a File** program. You can find these programs by going to:

- **ASP Admin > Transfer a File**
- **System Administrator > Miscellaneous Administrator > File Transfer**

If you do not have access to either program or are unable to locate the file in your spool directory, please contact your EERP system administrator (typically the Finance Officer) to review your security rights. Review your Munis System Role information to verify your Spool file maintenance access. It may be set to Personal or Departmental access only.

Select Download from the spool directory.

File Transfer Program >

Download a file from the Munis application server to your PC:

☒ Include extended file attributes: date/time, byte size, and user ID if viewing spooled files

Download from export directory

Download from spool directory

Upload a file from your PC to the Munis application server:

Upload to import directory

Upload to Crystal Reports directory

Find the files using the search or filter option located at the bottom of the screen (search for *ACA*). Please refer to the communication from the KDE Enterprise ERP Team with information on the file names that should be downloaded.

Choose the Spooled File to Download to the Client PC :: FILTER ACTIVE				
Back	Accept	Cancel	Search	Output
Print	Display	PDF	Save	Excel
Word				
File Name	Date Modified	Size (bytes)	User ID	
2020ACAEMP-0000.txt	2021/01/11 10:07	131,227	Unknown	
2020ACAEMP-0001.xlsx	2021/01/11 22:01	44,567	** Unknown **	
2021ACAEMP-0001.xlsx	2022/01/06 23:03	45,491	** Unknown **	
2022ACADep-0009.txt	2022/01/07 08:31	133,401	** Unknown **	
2022ACADep-0010.txt	2022/01/12 08:31	108,886	** Unknown **	
2022ACAEMP-0001.xlsx	2023/01/10 19:56	45,609	** Unknown **	
2023ACADep-0011.txt	2023/01/11 09:25	137,411	** Unknown **	
2023ACADep-0012.txt	2023/01/11 09:26	247,158	** Unknown **	

Files from: \\kdefsv\MU_SYS\m

Search / Filter

ACA File Name New Filter Go

Record (Filtered)

1 of 22

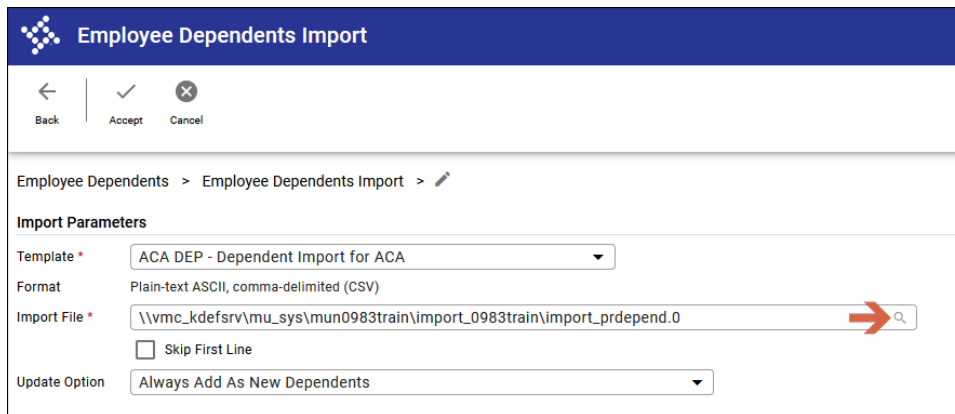
Double-click on the file or select Accept and save it to your computer. Continue with the instructions that follow to import the file.

Employee Dependent Import

More information can be found via a document found via Tyler Search and entering ‘Employee Dependents and Employee Beneficiaries Import’.

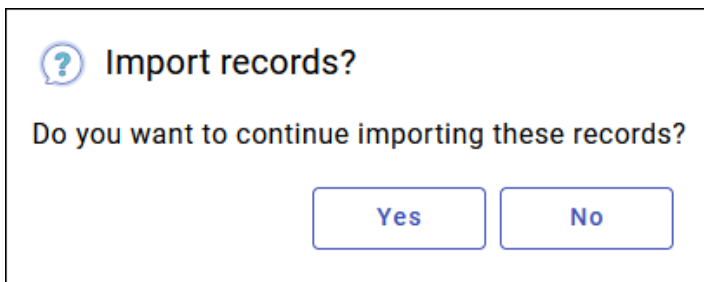
Human Resources/Payroll ► Human Resources ► Benefits Administration ► Employee Dependents

1. Select **Import** from the menu.
2. Select **Define**.
3. Template: select **ACA DEP– Dependent Import for ACA** from the drop-down box.
4. On the **Import File**, select the downloaded file by selecting the file picker and navigating to the file on your computer. Note that after selecting the file, the import file name will automatically change to a temporary file name used by the system to upload the file. No action to change the file name is required.
5. For the **Update Option**, either option will work. If you select “Always Add As New Dependents”, it will add new records leaving prior year records intact.



The screenshot shows the 'Employee Dependents Import' form. At the top is a blue header with the title and a logo. Below the header is a navigation bar with 'Back', 'Accept', and 'Cancel' buttons. The main content area has a breadcrumb trail: 'Employee Dependents > Employee Dependents Import >'. Under the 'Import Parameters' section, there are four fields: 'Template' (a dropdown menu set to 'ACA DEP - Dependent Import for ACA'), 'Format' (a text field showing 'Plain-text ASCII, comma-delimited (CSV)'), 'Import File' (a text field with a file path and a search icon), and 'Update Option' (a dropdown menu set to 'Always Add As New Dependents').

6. Select **Accept** and then select your report output option to review the report. If there are errors listed in the report, please see the next section.
7. After reviewing the report, select **Yes** to import the dependent records.



The dialog box has a title 'Import records?' with a question mark icon. Below the title is the text 'Do you want to continue importing these records?'. At the bottom are two buttons: 'Yes' and 'No'.

8. To protect employees’ Personally Identifiable Information (PII), the downloaded file should be deleted from your computer and the Recycle Bin emptied.

Import Errors

During the import process, the proof report may display error messages.

1. In this example, the following error report states that the import file includes an employee SSN not found in EERP. Either EERP or KHRIS has the wrong SSN on file. Users can open the download file and review the names of the dependents for more information.

Users will need to research to determine the valid SSN and add the dependent manually.

In this example, lines 1, 2, and 3 are referenced in the error report below. Using a text editor (Notepad) or Excel, users can find the invalid SSN by reviewing the line number in the file.

Error report:

RECORDS ANTICIPATED TO FAIL:	
LINE	ERROR MESSAGE
1	Invalid Employee SSN: No matching Employee
1	No valid SSN or Employee Number provided
2	Invalid Employee SSN: No matching Employee
2	No valid SSN or Employee Number provided
3	Invalid Employee SSN: No matching Employee
3	No valid SSN or Employee Number provided

An example of a file supplied by DEI is seen below using Notepad++. Notepad++ will display the line number referenced in the error report making it easier to identify any errors. You can also open the file in Excel to view the line/row of data.

Emp Dep.txt	
1	123155030,Simpson, Lisa,111119999,03/22/2009,04/01/2023,04/30/2023
2	123155030,Simpson, Lisa,111119999,03/22/2009,10/01/2023,12/31/2023
3	123155030,Simpson, Bart,111129999,04/01/2005,01/01/2023,04/30/2023

The file is laid out in the following format:

Employee SSN, Dependent Last Name, Dependent First Name, Dependent SSN, Dependent DOB, Coverage Start Date, Coverage End Date

2. You can manually **Add** the dependent record to the Employee Dependent program once you determine the employee to which the dependent belongs. **Do not import the file again unless you have reviewed all records and updated any record that contains SSN 999-99-9999 (next step).**
3. To protect employees' Personally Identifiable Information (PII), the downloaded file should be deleted from your computer and the Recycle Bin emptied.

Review Dependent Records – **CRUCIAL!**

1. Select **Search** and find any dependent with an SSN of 999-99-9999 by entering 999-99-9999 in the Dependent SSN field.



The screenshot shows the 'Dependent' form in the EERP system. The 'SSN' field is highlighted with a red rectangle and contains the text '999-99-9999'. Above the SSN field are fields for 'Last *', 'First *', 'MI', and 'Suffix'. Below the SSN field are fields for 'Date of Birth' and 'Gender'. A 'Dependent Last Name' button is located between the first and last name fields.

2. The IRS requires that all dependents have a valid SSN reported, and if not available, the Date of Birth should be supplied in its place. Print a report showing all the dependents with a 999-99-9999 social security number.

The IRS requires that an effort be made by the employer to contact the employee to request the SSN. The SSN should be updated in the KHRIS system and within the Employee Dependent record in EERP.

3. Update all records that have a 999-99-9999 SSN with either a valid SSN or delete 999-99-999 from the Dependent SSN field and save.

□ Step #7 - Importing Employee Coverage Dates

The KY Dept. of Employee Insurance (DEI) provides dependent and employee/participant information to assist Kentucky school districts with ACA reporting. DEI will create a file of employee coverage dates for delivery to districts in January. Once the file is available, an email will be distributed notifying districts about the file's availability.

Before importing the coverage dates for employees, double-check that both Standard and Initial Period records have been generated.



Beginning in 2025, a new file retention policy requires the periodic purging of all Kentucky health-related files containing personally identifiable information (PII) from KHRIS - including the ACA files - from Enterprise ERP (EERP). ACA files will be purged from EERP on March 30th.

To ensure proper data retention, both the Dependent Health Coverage File and the Employee Health Coverage File must be downloaded and imported into Enterprise ERP before the end of March each year.

Download the Participant/Employee file to your computer using the **File Transfer** or **Transfer a File** program. You can find these programs by going to:

- **ASP Admin > Transfer a File**
- **System Administrator > Miscellaneous Administrator > File Transfer**

If you do not have access to either program or are unable to locate the file in your spool directory, please contact your EERP system administrator (typically the Finance Officer) to review your security rights. Review your Munis System Role information to verify your Spool file maintenance access. It may be set to Personal or Departmental access only.

The participant file is named **20XXACAEMP###-000#.txt**, where xx is the reporting year, ### is the district's KHRIS number, and # is the file iteration. Use the filter option located at the bottom of the screen to locate the file. Please refer to the communication from the KDE Enterprise ERP Team with information on the file names that should be downloaded.

An example:

Double-click on the file or select Accept and save the file to your computer. The downloaded file is in an Excel format (xlsx) and must be in this format to import into EERP.

1. In the ACA Period Records program, from the menu select the Import button.
2. Select the radio button for “Import Employee Coverage Dates”.

3. Click the Define button. Click the File Finder icon on the far right of the box to locate the file on your workstation.

ACA Period Records [KDE | TEST | 02/03] > Import Employee Coverage Dates >

Import Parameters

File Path * Choose a file to import

☐ Set coverage offered

4. Locate and select the 20XXACAEMP###-000#.xlsx file (where xx is the reporting year, ### is the district's KHRIS number, and # is the file iteration). Please refer to the communication from the KDE Enterprise ERP team on the file names that should be downloaded.
5. After selecting the file, the import file name will automatically change to a temporary file name used by the system to upload the file. No action to change the file name is required.
6. Optional: Mark "Set coverage offered". All full-time employees should have had this marked in Step #4, but it is suggested to mark the flag.
7. Click the Import button and you are prompted to print/display the posting report. Please review this report as it contains both records to import and errors - records that cannot be imported. Although the file may be imported with the errors left off, KDE suggests resolving any issues before clicking Yes to post the import.
8. To protect employees' personal information (Personally Identifiable Information (PII)), the downloaded file should be deleted from your computer and the Recycle Bin emptied once all errors have been resolved.

Import Errors

Any import errors will display at the end of the report stating which line of the Excel file did not import.

10/16/2023 15:19 [KDE TEST 02/03] ERP ERP SOLUTION P 1									
EMPLOYEE COVERAGE DATES IMPORT PROOF									
EXCEL ROW	EMP NUMBER	EMPLOYEE NAME	ACA GRP	GRP TYPE	STABILITY START	PERIOD END	COVERAGE START	DATES END	
COVERAGE OFFERED FLAG BEING UPDATED									
2	14	CARSON, JACQUELYN	ALL	S	01/01/2023	12/31/2023			
5	49	MATTHEWS, ENEDINA	ALL	S	01/01/2023	12/31/2023			
6	55	BURGESS, VERONICA	ALL	S	01/01/2023	12/31/2023			
7	151	WING, ISA	ALL	S	01/01/2023	12/31/2023			
8	218	MCBRIDE, SANDY	ALL	S	01/01/2023	12/31/2023			
9	251	WALKER, FRANCIS	ALL	S	01/01/2023	12/31/2023			
10	292	CAIN, SHIRLEY	ALL	S	01/01/2023	12/31/2023			
11	324	RAGLAND, CAROL	ALL	S	01/01/2023	12/31/2023			
3	8888	DUCK, DONALD	ALL	S	01/01/2023	12/31/2023			
COVERAGE DATES BEING UPDATED									
2	14	CARSON, JACQUELYN	ALL	S	01/01/2023	12/31/2023	01/01/2023	02/15/2023	
5	49	MATTHEWS, ENEDINA	ALL	S	01/01/2023	12/31/2023	01/01/2023	12/31/2023	
6	55	BURGESS, VERONICA	ALL	S	01/01/2023	12/31/2023	01/01/2023	12/31/2023	
7	151	WING, ISA	ALL	S	01/01/2023	12/31/2023	01/01/2023	12/31/2023	
8	218	MCBRIDE, SANDY	ALL	S	01/01/2023	12/31/2023	12/01/2023	12/31/2023	
9	251	WALKER, FRANCIS	ALL	S	01/01/2023	12/31/2023	01/01/2023	12/31/2023	
10	292	CAIN, SHIRLEY	ALL	S	01/01/2023	12/31/2023	01/01/2023	12/31/2023	
11	324	RAGLAND, CAROL	ALL	S	01/01/2023	12/31/2023	01/01/2023	12/31/2023	
3	8888	DUCK, DONALD	ALL	S	01/01/2023	12/31/2023	09/01/2023	11/15/2023	
ROWS CONTAINING ERRORS (WILL NOT IMPORT)									
4	Employee SSN 123- is invalid.								

Employees who started and stopped coverage more than once during the year will have multiple coverage date records imported.

□ Step #8 - Generate 1095s

Once all the preceding steps have been completed, users can begin generating 1095s forms. A separate guide titled **ACA- 1095 Generate (2025 Reporting)** will be available in January to assist with that process.

You must import dependent and employee health insurance coverage into EERP (steps 6 and 7) before proceeding with the creation of the 1095s.

□ Step #9 - Generate Period Records for Future Years

Generate Standard Records for 2026

In the **ACA Period Records** program, select **Generate Standard Records** to create a set of Standard Period Records with 2026 stability dates (if not already done so).

- Create standard records for the calendar year 2026. **Tracking for 2026 insurance started in October 2024. It is important to run the process as close to the October 3rd start date as possible.**
- Enter 2024 in the “Year for highest priority Period Group”
- Enter the Date Type used by your district. In this example, we used Hire Date.
- Latest Date: 10/3/2024
- Enter “1” for Cycle
- Do **NOT** Mark “Include Inactive Employees”.
- Leave the ACA Group Code blank to generate for all employees

Once the generate process is completed, all employees who were employed on or before the start of the measurement period should have a Standard Measurement Period record with the following information.

- | | | |
|----------------------------|------------------|-----------------|
| • Measurement/Wait: | Start: 10/3/2024 | End: 10/2/2025 |
| • Administrative: | Start: 10/3/2025 | End: 12/31/2025 |
| • Stability: | Start: 1/1/2026 | End: 12/31/2026 |

Generate Standard Records for 2027

In the **ACA Period Records** program, select **Generate Standard Records** to create a set of Standard Period Records with 2027 stability dates (if not already done so).

- Create standard records for the calendar year 2027. **Tracking for 2027 insurance started in October 2025. It is important to run the process as close to the October 3rd start date as possible.**

- Enter 2025 in the “Year for highest priority Period Group”
- Enter the Date Type used by your district. In this example, we used Hire Date.
- Latest Date: 10/3/2025
- Enter “1” for Cycle
- Do ***NOT*** Mark “Include Inactive Employees”.
- Leave the ACA Group Code blank to generate for all employees

Once the generate process is completed, all employees who were employed on or before the start of the measurement period should have a Standard Measurement Period record with the following information.

- | | | |
|----------------------------|------------------|-----------------|
| • Measurement/Wait: | Start: 10/3/2025 | End: 10/2/2026 |
| • Administrative: | Start: 10/3/2026 | End: 12/31/2026 |
| • Stability: | Start: 1/1/2027 | End: 12/31/2027 |