

Managing the ACA Lookback Report:

Step One:

- Define the Measurement Type:
 - Establish the Measurement Period, Administrative Period and Stability Period for both the Initial Measurement and Standard Measurement Periods.
As a disclaimer, we (Selerix) are not consultants or legal counsel and cannot dictate the employer's Measurement Method.
- Schedule Monthly Lookback Report(s):
 - **Initial Measurement Period:** used for new hires, or employees newly classified as variable hour employees in their first measurement period. The start date of each new employee's Initial Measurement Period is based upon the new employee's hire date.
 - **Standard Measurement Period:** used for ongoing employees, once they have been employed for a full measurement period. The employer selects the start date as well as the duration of the Standard Measurement Period. (e.g. November 1st – October 31st)

Step Two:

- Review & Analyze the Data:
 - The Employer will review each report, specifically any eligibility changes that have populated. The list of employees must be reviewed and approved by the employer prior to any changes.

Step Three:

- Approve & Initiate Eligibility Changes, as needed:
 - Once approved by the employer, the updates to employee(s) job classification can be completed using one of the following methods by the employer:
 - 1.) uploaded using the Lookback Report format originally provided to update any employee eligibility as needed via the census upload **OR**
 - 2.) Manually perform a "Life Event" change within enrollment system for each employee using the "I changed job status, changed salary, or transferred to a new location" option

Final Step:

- Employee Communication & Enrollment, if applicable:
 - The employer should notify individuals of any change in eligibility based on the new status:
 - 1.) Determined to be full-time: enable the enrollment system for any newly eligible employee to enroll (or decline) the offer of medical coverage. **OR**
 - 2.) Determined to be part-time (no longer meet the hours in the next measurement period): any active medical coverage will expire the last day of the benefit plan year and exclude any enrollment for medical coverage into the new benefit plan year.