Instructions for IT9004 Entry - Non-FT New Hire to Non-FT after IMP

OSUP is providing the following information as a refresher. If you have any questions, please send an email to the OSUP Benefits & Financial Administration Unit at the following email address: _doa-osup-bfa@la.gov.

Please begin working on your missing IT9004 records. You can find the missing IT9004 records for your agency by running ZP189 for the current year and then sorting the results by the "Start Date" column. Any record with a missing start and end date is an IT9004 record that is needed for that employee. As indicated below, it is likely that more than one record will be needed for each employee. You can also run ZP189 for the ACA Audit option and filter on the error message "No IT9004 for EE".

As a reminder, an ACA full-time EE is defined as working 30 or more hours per week on average. If you are not certain when you hire an EE what their hours might be then you have 24 pay periods to determine their FT/PT status for ACA purposes. This is their initial measurement period (IMP).

New hire, Non-FT Employee (per ACA rules), Hire Date = 5/8/17

Initial Measurement Period [The IMP begins the first day of the first full pay period after hire date and extends 24 pay periods. Refer to the Measurement Period Chart available on the OSUP Website:
(http://www.doa.la.gov/osup/ACA/ACAMeasurementPeriodChart.pdf) or the ACA Dates Calculator (LaGov HCM transaction code ZP250.)
IMP = PP 12 2017 – 9 2018 (5/22/17 – 4/22/18)
Create IT9004:
Start Date = 5/1/17 (First day of the month of hire)
End Date = 4/30/18 (Last day of the month of 24th pay period, end of IMP)
N = ACA Reportable Indicator
1H = ACA Offer Code (No offer of coverage – EE is in an initial measurement period)
2D = ACA Coverage Code (Not enrolled; limited non-assessment period – EE is in an initial measurement period)
NE = Plan Option (Not Eligible – EE is in an initial measurement period and not eligible for coverage)
IMP dates: 5/22/17 to 4/22/18
ISP dates: 6/1/18 to 5/31/19

Measure EE's hours around 4/1/18 – Run ZP136 for PP 12 2017 – 8 2018 using the ACA Hours time parameter to determine if employee averages 30 or more hours per week. Measure EE's hours again after PP 9 2018 to confirm ACA FT or Non-FT Status.

If EE is NOT averaging 30 or more hours per week then they will not be eligible for insurance at the end of their IMP. However, they will begin to transition to a continuing employee (no longer a new hire).

Initial Administrative Period (IAP begins the first day after the IMP ends and expires the day before the health coverage effective date; this period includes the 30 days for the employee to make a decision per OGB)
IAP = 4/23/18 – 5/31/18
Create IT9004:
Start Date = 5/1/18 (First day of the month following the end of the IMP)
End Date = 5/31/18 (Last day of the month before first date of stability period)
N = ACA Reportable Indicator
1H = ACA Offer Code (No offer of coverage – EE is in an initial admin period)
2D = ACA Coverage Code (Not enrolled; limited non-assessment period – EE is in an initial admin period)
NE = Plan Option (Not Eligible – EE is in an initial admin period)

Employee would be measured with all other continuing employees during the upcoming Standard Measurement Period (SMP PP 22 2017 – PP 21 2018) to determine eligibility for the Standard Stability Period also.

Initial Stability Period (ISP begins the day after the IAP expires and extends 12 months; the employee remains ineligible for insurance coverage)
ISP = 6/1/18 – 5/31/19
Create IT9004:
Start Date = 6/1/18 (First day of the month following the end of the IAP)
End Date = 5/31/19 (Last day of the 12th calendar month)
N = ACA Reportable Indicator
1H = ACA Offer Code (No offer of coverage – EE is in an initial stability period)
2B = ACA Coverage Code (Not enrolled; not full time – EE is a non-FT employee)
NE = Plan Option (Not Eligible – EE is in an initial stability period)

Measure EE's hours during the Standard Measurement Period – Run ZP136 for PP 22 2017 – 21 2018 using the ACA Hours time parameter to determine if employee averages 30 or more hours per week.

If EE measures Non-FT for the Standard Measurement Period calculation then they continue to be ineligible for insurance through the Initial Stability Period and the Standard Stability Period.
SSP = 6/1/19 – 12/31/19
Create IT9004:
Start Date = 6/1/19 (First day of the month following the end of the ISP)
End Date = 12/31/19 (Last day of the month of the plan/calendar year)
N = ACA Reportable Indicator
1H = ACA Offer Code (No offer of coverage – EE is ineligible)
2B = ACA Coverage Code (Not enrolled; not full time – EE is a non-FT employee)
NE = Plan Option (Not Eligible – EE is ineligible)

If EE measures ACA FT for the Standard Measurement Period calculation then they become eligible for insurance coverage for the Standard Stability Period which now begins on 1/1, the start of the next plan year.
SSP = 1/1/19 – 12/31/19

If EE Enrolls in coverage:
Create IT9004:
Start Date = 1/1/19 (First day of the plan/calendar year)
End Date = 12/31/9999 (Infinity date should be used since EE enrolled in coverage; end date would be changed if EE changes their insurance enrollment decision in a future year)
Y = ACA Reportable Indicator
1E = ACA Offer Code (Minimum essential coverage/value offered)
2C = ACA Coverage Code (Enrolled in coverage)
EN = Plan Option (Enrolled)

If EE waives coverage during annual enrollment then you would enter a new IT9004 record (unless EE waives coverage through LEO):
Start Date = 1/1/19 (First day of the new plan year; this will delimit the previous Initial Stability Period record as of 12/31/18)
End Date = 12/31/19 (Last day of the plan/calendar year)
Enter waiver dates in Offer/Declination of Coverage box, waiver period is 1/1/19 - 12/31/19; enter date EE signed waiver (i.e. 10/22/18, obtain signed GB01 from EE for documentation)
DO NOT ENTER Initial Measurement Period (IMP)/Initial Stability Period (ISP) DATES ON IT9004 RECORD FOR AN ACA FT EMPLOYEE
Y = ACA Reportable Indicator
1E = ACA Offer Code (Minimum essential coverage/value offered)
Blank = ACA Coverage Code (EE waived coverage)
WA = Plan Option (Waived – EE waived coverage)

EE is now in a Standard Measurement Period and should have their hours counted during the Standard Measurement Period going forward.