Dynamics GP 2013 and GP 2015
Affordable Care Act

Prepared by
Georgia Stewart
support@crestwood.com
Version 1.0
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### DOCUMENT VERSION CONTROL

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Initials</th>
<th>Summary of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>V1.0</td>
<td>May 19, 2015</td>
<td>GS</td>
<td>Initial document</td>
</tr>
</tbody>
</table>

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240 East Lincoln Street • Mount Prospect, IL 60056 • Phone: 847-394-8820

Crestwood Associates LLC
1 REQUIREMENTS

There are several requirements for tracking and processing the forms related to the Affordable Care Act

- You must be on Dynamics GP 2013 or later release.
- **The Affordable Care Act changes will not be implemented or supported for GP 2010 or earlier versions**
  - Mainstream support for GP 2010 ends on 10/13/2015
  - You will not get any year-end or tax updates for GP 2010 for 2015
- You must have Human Resources and Payroll installed
- It is recommended that you also install the Human Resources And Payroll Suite to be able to use Deductions In Arrears
  - Deductions In Arrears allows you to track uncollected deductions to ensure they are recovered in a future pay run.
- You must install the January 2015 Hotfix if you have not already done so
- Changes were also made in the March 2015 Hotfix
- Be sure you add employee dependents
- If you already have employee dependents set up, be sure to review any to make sure they are marked appropriately as being Covered or Not Covered
- Be sure you update Health Insurance Benefit information in Human Resources

2 NEW YEAR END FORMS

Two new forms will be required to be filed at the end of 2015 for employers with 50 or more full-time employees or full-time equivalents. These forms are used to determine whether the employer is liable for penalties under the employer shared responsibility requirements of the ACA. These will be available in Dynamics GP 2013 and GP 2015 (and beyond). The new forms are **NOT** available for versions of GP prior to GP 2013.

- **1094-C**
  - This is a summary the employer fills out for all employees that receive the 1095C.
  - A 1094-C form must accompany any 1095-C form that is sent to the IRS
  - It is a transmittal of Employer Provided Health Insurance Offer and Coverage Information Return

- **1095-C**
  - This must be provided to the employee from the employer (similar to a W2)
  - This is the Employer Provided Health Insurance Offer and Coverage
  - [http://www.irs.gov/uac/About-Form-1095-C](http://www.irs.gov/uac/About-Form-1095-C)

- ACA, Tax and Year End Changes for 2015 for Microsoft Dynamics GP 2010 (and earlier) are **NOT** available.
3 NEW TABLES

New tables were added to Dynamics GP 2013 and GP 2015

- UPR40105 – 1095-C Setup table
  - This new table is designed for purposes of filling out the boxes on the 1095-C form
  - This holds the ACA codes and descriptions
- UPR00904 – ACA Dependent Master
  - Contains the ACA information related to dependents
  - Health Insurance Dependent Coverage field (HealthInsDependentCov)
    - 1 = Covered
    - 2 = Not Covered
  - This information can be updated throughout the year and is tracked on a monthly basis
- UPR00905 – ACA Employee Master
  - Contains the ACA information related to employees
  - ACA Codes can be updated in the Health Insurance Enrollment Window
  - These codes are tracked monthly throughout the year
- UPR10108 – ACA Year End Dependent History
  - This will be used by the year end close process and populated from the UPR00904 table.
  - This can be edited after you process the payroll year end close
- UPR10109 – ACA Year End Employee History
  - This will be used by the year end close process and populated from the UPR00905 table
  - This can be edited after you process the payroll year end close

4 CHANGES TO EXISTING TABLES

Changes have been made to the following existing tables in GP 2013 and GP 2015

- BE010130 – HR Benefit Master
  - OfferOfCoverageCode
  - SafeHarborCode
- BE020230 – HR Benefit Setup
  - OfferOfCoverageCode
  - SafeHarborCode
- UPR10100 – Year End Header

The changes to the tables were made because the ACA forms have check boxes for each month. If you installed the January 2015 Hotfix for GP 2013 and GP 2015, the above tables will be used to track benefit information.

If you have not already installed the January 2015 Hotfix, there is an Edit window that you will be able to access from the Edit W2 window that allows you to edit the information prior to submitting it. This will allow you to edit any months that are not marked as covered for your employees after you process the payroll year end close.
5  CHANGES TO EXISTING WINDOWS

5.1  Employee Dependents

HR and Payroll area page > Cards section > Human Resources section > Employee section > Dependents/Beneficiaries

Health Ins. Coverage field was added and allows you to select Covered or Not Covered. When you install(ed) the January 2015 Hotfix, all dependents in the system are automatically set to Covered. Note that this is a required field and defaults to Covered. You will need to review and change any dependents to Not Covered as needed.

Dependent coverage data is not updated retroactively. Therefore, if the dependent is entered into the system on 3/15/2015, the coverage data table (UPR00904) will store records for that dependent starting in March of 2015 and going forward.
5.2 Health Insurance Setup and Enrollment

HR and Payroll area page > Cards section > Human Resources section > Employee-Benefits section > Health Insurance
ACA fields have been added to the Benefit Setup and Benefit Enrollment windows for Health Insurance. You can enter the data in the Health Insurance setup and roll it down to all employees who are enrolled in the benefit.

When you do a lookup on the Offer of Coverage Codes – Line 14, you will see the following codes are available:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1A</td>
<td>Full-time employee, spouse and dependents</td>
</tr>
<tr>
<td>1B</td>
<td>Employee Only</td>
</tr>
<tr>
<td>1C</td>
<td>Employee and dependents (not spouse)</td>
</tr>
<tr>
<td>1D</td>
<td>Employee and spouse (not dependents)</td>
</tr>
<tr>
<td>1E</td>
<td>Employee and at least dependent(s) and spouse</td>
</tr>
<tr>
<td>IF</td>
<td>Not providing Minimum Value to employee, spouse and or dependents</td>
</tr>
<tr>
<td>1G</td>
<td>Offer of coverage to employee not full-time for any month of the year</td>
</tr>
<tr>
<td>TH</td>
<td>No offer of coverage</td>
</tr>
<tr>
<td>1I</td>
<td>Qualified Offer Transition Relief</td>
</tr>
</tbody>
</table>

When you do a lookup on the Safe Harbor Codes – Line 16, you will see the following codes are available:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2A</td>
<td>Employee not employed during the month</td>
</tr>
<tr>
<td>2B</td>
<td>Employee not employed employee</td>
</tr>
<tr>
<td>2C</td>
<td>Employee enrolled in coverage offered</td>
</tr>
<tr>
<td>2D</td>
<td>Employee in a section 4980H(a) limited non assessment period</td>
</tr>
<tr>
<td>2E</td>
<td>Multiemployer interim rule relief</td>
</tr>
<tr>
<td>2F</td>
<td>Section 4980H affordability Form W-2 safe harbor</td>
</tr>
<tr>
<td>2G</td>
<td>Section 4980H affordability federal poverty line safe harbor</td>
</tr>
<tr>
<td>2H</td>
<td>Section 4980H affordability rate of pay safe harbor</td>
</tr>
<tr>
<td>2I</td>
<td>Non-calendar year transition relief applies to this employee</td>
</tr>
</tbody>
</table>

You may need to consult your CPA or benefit provider to determine the correct codes to use for each of your health insurance benefits.
5.3 Payroll Year End Edit W-2 Information

HR and Payroll area page > Routines section > Payroll section > Edit W-2s

During the Payroll Year End Close process, Dynamics GP will build the information for the 1095-C file based on the data you have been tracking based on the setup of the employee dependents and the health insurance enrollment information. The data will be accumulated into the year end wage tables.

After you process the Payroll Year End Close, you will be able to edit the 1095-C information and 1095-C Covered Individuals information.

Select an employee and click the 1095-C button to display and edit the 1095-C information. Click the Dependents button to edit the 1095-C Covered Individuals information.
6 HUMAN RESOURCES SETUPS

6.1 User Setup: Payroll View For Human Resources

Administration area page > Setup section > System secton > User

It is very important to mark the box next to Payroll View for Human Resources in the User Setup window.

- If Payroll View for Human Resources is selected, a message will prompt the user to set up corresponding benefit/deduction codes in Payroll to complete the integration between HR and Payroll when a user creates a benefit or deduction in HR.
- If Payroll View for Human Resources is not selected, the benefit enrollment will be incomplete. As such, users need to use the Reconcile Human Resources window to update the benefit definitions appropriately.
6.2 Benefit Preferences: Automatically Update Payroll Benefits & Deductions

HR & Payroll area page > Setup section > Human Resources section > Benefits and Deductions section > Benefit Preferences

You should consider unchecking the box next to Automatically Update Payroll Benefits & Deductions. This will force you to update the Payroll Deduction and/or Benefit associated with the HR Benefit whenever a new HR Benefit is set up or whenever an employee is enrolled in an HR Benefit. This allows you to watch the flow from HR to PR and will reduce the chances of failed HR to PR integrations.

7 FREQUENTLY ASKED QUESTIONS

7.1 What is the best way to set up benefit and deduction codes to facilitate ACA reporting?

Review the information from Microsoft’s blog:

Set up HR Benefits and link them to Payroll Deductions and/or Payroll Benefits. If you currently have Payroll installed and are adding Human Resources, there is an HR Reconcile process that allows you to create the HR Benefits from the Payroll codes and then enroll the employees into the HR Benefits based on the employee deduction and/or benefit codes that are established.
7.2 We have never used HR but we are using Payroll. How can we integrate our deductions and benefits from Payroll into HR?

We have a document that describes how to run the HR Reconcile to Update Benefit Setups and Update Benefit Enrollments.

7.3 I don't want to install Human Resources. Is there a way to track ACA information in Payroll only?

Human Resources must be installed to use the Affordable Care Act functionality.

7.4 What if I did not upgrade at the beginning of 2015?

Microsoft Dynamics GP will not retroactively update ACA tracking. It will track ACA information going forward only. However, you can use the Edit 1095-C and Edit 1095-C Covered Individuals windows after you process the Year End Close to record ACA information from prior to when you upgraded.

7.5 Where can I track Lowest Coverage Offered in GP?

Currently there is no tracking available for Lowest Coverage Offered. Development has not yet determined how or where this will be tracked.

7.6 Can I submit my 1095-C’s and 1094-C electronically in Microsoft Dynamics GP?

Currently ACA Electronic Filing is not scheduled to be implemented in Microsoft Dynamics GP in 2015.

7.7 Can I track employee hours worked in Microsoft Dynamics GP?


Dynamics GP does track hours and benefit information but Microsoft has indicated that you need to create reports that fit your needs in SSRS, Excel Reports, or SmartList Builder. The above video describes tables in detail to assist you with the reporting requirements.

- Look Back Period
  - Microsoft does not have a specific report related to the Look Back Period
  - Possible reports/tables where you can pull the information:
    - Time clock information
    - UPR30300 detail by check, employee, code, year
    - UPR30301 summary by month
    - Employee Pay History Report

7.8 Do you have an information about the Affordable Care Act Hours Reporting?

1. Full Time Employee – works an average of 30 hours per week or at least 130 hours per month
2. Hours of service include hours worked and hours for which an employee is paid but does not work, such as vacation, holiday, illness or disability, jury duty, military duty, or leave of absence (up to a maximum of 160 hours for any continuous period)

3. Hours of service must be tracked on an actual hours-basis for hourly employees

4. There are optional days-worked and weeks-worked rules for salaried employees

5. Employers may determine each employee’s full-time or part-time status each month

6. Employers can choose and analyze a prior period of 3 to 12 months to determine whether employees met the hours of service thresholds. This is called the measurement period.
   a. For employees determined to be full-time, the stability period must be at least 6 months and no shorter than the measurement period
   b. For employees determined not to be full-time, the stability period can be no longer than the measurement period
   c. Generally, the measurement periods of between 3 and 12 months allow employers to determine whether new ‘variable hour’ employees are full-time

7. Employees are variable hour employees when it cannot be determined at the time of hire whether a new employee is expected to work full-time or if an employee’s full-time status is reasonable expected to be of limited duration

8. Employees who are expected to work full time at the time of hire qualify immediately as full-time and should be offered health coverage with no more than a 90-day waiting period

9. Employers may determine when measurement periods start and end

10. Employers can apply different measurement and stability periods only to certain specified categories of employees, which are collectively bargained employees and noncollectively bargained employees; salaried and hourly employees; employees of different entities; and employees located in different states.

7.9 Additional Tracking Software

Contact your Client Account Manager

https://www.sypnio.com/

8. MICROSOFT GP HOTFIXES IN 2015 RELATED TO ACA

8.1 January 2015 Hotfix


- GP 2013 (12.00.1826)
- GP 2015 (14.00.0619)
- Corrected issues related to ACA

8.2 March 2015 Hotfix

https://community.dynamics.com/gp/b/dynamicsgp/archive/2015/05/08/the-march-hotfix-has-released-what-is-all-the-excitement-about

- GP 2013 (12.00.1894)
- GP 2015 (14.00.0661)
- The ACA Forms were made available for the Year-End process
8.3 Future

- GP 2015 R2 is scheduled to be released in June
- US Payroll mid-year tax table will be released (no date has been provided yet)
  - New York City released a tax table change effective June 1
  - North Dakota also published a change