

## Data Template Standards & Instructions

Applicable to the Payroll Data & Medical Plan Data prior to system upload

To identify and highlight areas where some users experience system issues, we've created the following list of standards for reference. Our system has been developed to adhere to the standards of the Affordable Care Act Information Returns (AIR) system which requires strict data format compliance.

- 1) **Only templates downloaded from our system are accepted.** Additionally, any alterations to the column order will cause errors and require a resubmission that is compliant.
- 2) **Special characters and extras spaces in text cannot be used in Columns A-K.** Only exceptions being a dash(-) in SSN, it is preferred to include a dash(-) in SSN. Common special characters not allowed include period(.), comma(,), hashtag(#), dash(-). *Instructions to remove extra spaces: <https://exceljet.net/excel-functions/excel-trim-function>*
- 3) **SSN is required for every person** as it is our unique identifier in the system for record generation. Please include a dash(-) if SSN contains a leading zero. Note, using special formatting (Social Security Number) in Excel must be converted to Text before exporting to CSV file format.  
*Example: [012-34-5678] ✓ Correct [012345678] ✗ Incorrect*
- 4) **All zip codes limited to five digits only.**  
Leading zeros in zip code should be formatted with the Special format "zip (5 digit)".  
*Online reference: <https://exceljet.net/lessons/how-to-use-special-formatting-in-excel>*
- 5) **Use State abbreviations only, limited to two characters.** *Example: [SC] ✓ Correct*
- 6) **Medical Plan Class Name fields must** be labeled with our system naming format "Plan Class #1" or "Plan Class #2", etc. Specifically, this is directed at column O in the Payroll Template and must match exactly to the applicable label. *See table below for correct example.*
- 7) **Employee Status fields** must be labeled with our system naming format "FT" or "PT".  
*[Full Time, Part Time, Full, Part] ✗ Incorrect See table below for correct example.*
- 8) **Don't Apply Waiting Period fields** are only labeled "Yes" when an affirmative result is desired. Both a "No" entry or a blank entry will result in no action. *See table below.*

| O                         | P              | Q  |
|---------------------------|----------------|--|
| Medical Plan Class Name 1 | FT/PT Status 1 | Don't Apply Waiting Period (Yes or No) 1 |
| Plan Class #1             | FT             | No                                       |
| Plan Class #2             | PT             | No                                       |
| Plan Class #1             | FT             | Yes                                      |
| Plan Class #1             | FT             | No                                       |

- 9) **Connected Employee SSN fields** are required. Specifically, this is directed at column P in the Medical Plan template. As the table below illustrates, the SSN in column E will always refer to the individual (Employee, Dependent of Employee, Dependent of a Non-Employee or Non-Employee enrolled). Column P will refer to the employee SSN (or Non-Employee Enrolled SSN) that a dependent would connect to as to associate that individual on the appropriate 1095 form. An employee without dependents will still have their SSN entered in both column E and column P.

| E           | O                           | P                        |
|-------------|-----------------------------|--------------------------|
| SSN         | Person Type 1               | Connected Employee SSN 1 |
| 123-45-6789 | Employee                    | 123-45-6789              |
| 987-65-4321 | Dependent of Employee       | 123-45-6789              |
| 654-98-7123 | Non-Employee Enrolled       | 654-98-7123              |
| 147-25-8369 | Dependent of a Non-Employee | 654-98-7123              |

- 10) **No future dates are allowed in the system.** Only use dates that refer to the calendar year for which the reporting is being conducted regarding termination dates, coverage end dates or rehire dates. Leaving this cell blank is acceptable for any employee without an end date, however, please do adhere to the requirements as outlined in step 2 regarding no extra spaces. To avoid the extra space issue, an employee can assume an end date as the last day of the calendar year (12/31) and be compliant.
- 11) **All dates should be formatted using Short Date only.** In this instance, a slash(/) is acceptable and will import properly into our system.