ACA Notify Employee of Offer - Instructions

Activity Macro: **ACA Notify Employee of Offer**

Description: Create Offer pdf and Email or Print per DistributionEmail

Macro Type: Record Loop

Record Type: ACA Records (Payroll)

For each ACA Record selected this macro does the following:

1. Validation (Displays error and skips record when not valid)
   1. Must be an ACA Result record, not a Designation record
   2. Must have a Notify Note referenced
   3. Must not already have a Notified Note
2. Creates a PDF file to be used as the Employee Health Insurance Offer
   1. Using a Word template file: **AA-Employee\_HealthInsOffer.docm**
   2. The PDF includes the Employee name, Coverage Begin date and other helpful info about the employee
   3. The Word template can be easily modified for coverage options and layout
3. Email the PDF to employees with DistributionEmail selected
4. Print the PDF for employee without DistributionEmail selected
5. Create **Notified** Note records with the PDF attached and the Note Description stating how the employee was notified (via Print or via Email to <email address>)
6. Update the reference field of the ACA Result record with the GUID of the **Notified** Note record that was just created

Setup Instructions:

1. Copy the Word template file to a shared location that ACA users can access
2. Modify the Word template match the Insurance options at this customer site
3. Create an Activity Macro record on the company database as specified at the top of this document and then copy the Visual Basic code from **ACA Notify Employee of Offer.vb**
4. Adjust the Visual Basic code by changing the **file\_path** variable assignment to match the shared folder path used for the Word template file

HR Staff Instructions for how to use this Activity Macro:

1. Click the “**Pending Notification of Offer**” link on the **ACA Monthly Operations** dashboard gadget.
2. Select the employees listed in the filtered view of ACA Result Records
3. Run the Activity Macro named **ACA Notify Employee of Offer**
4. Verify any PDFs that print to your default printer match the newly created Note records with a description saying “Notified via Print”
   1. Of course any printed notification must be delivered to the employee
5. Verify sent email from Outlook matches the newly created Note records with a description saying “Notified via Email sent to <email address>”