

UnifyHR Web App Guide

The purpose of this guide is to assist in looking up an employee and viewing an employee's record on the UnifyHR web app.

Looking up an Employee

Step 1: login to your ACA dashboard <https://app.unifyhr.com>

Step 2: select the employees tab and a search window will appear like the below image:

Employee Search

Navigate To...

Employee Search

Account Number

First Name

Last Name

Employer

-Select All-

Employee ID

Record Status

Active Only

Email Address

Segment

-Select All-

Search Dependents

Search Clear Insert

[View UnifyHR ADA Compliant Page](#)

There are several data elements that can be used to look up an employee:

- **Account Number**- this is the UnifyHR assigned account number
- **First Name**- Employee's first name as sent on the files
- **Last Name**- Employee's last name as sent on the files
 - Any combination of letters can be used when doing a name search.
 - You can also search by First or Last Name only. Both names are not required to search.
- **Employee ID**- this is the unique employee ID that has been generated by CFA.
 - Leading zeros (if applicable) required.
- **Email Address**- This is the email address that has been sent on the demographic files

Notes

- **Multiple Records**
 - If you search via name search and more than one record appears, click on the [Select](#) link next to the name of the employee you were searching for. *****Nothing happens when the [Select](#) link is clicked on. Taking this action lets our system know what record you are trying to view.***
- **Single Record**
 - You **do not** need to click on the [Select](#) link if only one record appears. Move to the next step under this scenario.

Navigating an Employee Record

Once you have located the employee, select the page you are trying to view from the drop-down menu that is below the **Employee Search** Title Bar.

The screenshot displays the 'Employee Search' interface. At the top is a navigation bar with links: Dashboard, Employers, Employees (selected), Portals, Cases, Reports, Tools, Communications, Tax Forms, and Admin. Below this is a dark blue header with a magnifying glass icon and the text 'Employee Search'. A yellow 'Navigate To...' dropdown menu is open, showing options: Search, Demographics, Benefits, ACA, Cases, Communications, Tax Forms, Offer of Coverage, Paid Sick, Docs, and Payments. The main search area contains several input fields: First Name, Last Name, SSN, Employee ID, Record Status (set to 'Active Only'), Enrollment Type (set to '-Select All-'), Email Address, and Segment (set to '-Select All-'). There is also a checkbox for 'Search Dependents'. At the bottom left are buttons for 'Search', 'Clear', and 'Insert'. A small link 'View UnifyHR ADA Compliant Page' is at the bottom left.

For ACA, you have the option of viewing the below pages:

- **Demographics:**
 - This page will allow you to view all of the Demographic data that has been passed to UnifyHR via file transfer.
 - This includes Employee name, Date of birth, Address, Hire Date, and other Employee information
- **Benefits:**
 - This page will allow you to view the Employee (and applicable Dependent) enrollment info. This is also passed to UnifyHR via file transfer.
 - Please note: UnifyHR is still working with the benefit administrator to load the medical benefits into the UnifyHR system. No benefit info is currently showing on this screen.
- **ACA:**
 - This page displays the Employee's ACA status and ACA Measurements that have completed and are currently ongoing.
 - The table on this page also shows the Stability Outcome and what subsequent (or current) Stability Period looks like.
 - Please reach out to an ACA Expert, via the Hub, for assistance navigating this page
- **Communications**
 - This page will display all communications that have went out to the employee.
 - This also includes official electronic copies of all 1095s that have been mailed by UnifyHr.
 - Operators will have the functionality to lookup a previously mailed 1095 form and download or print the form so that it can be forwarded to the requesting employee.
- **Offer of Coverage**
 - This page shows a current snapshot of what ACA codes would appear in Section II, lines 14, 15, and 16 on the Employee's 1095 form.
 - This section is updated monthly based on data received and UnifyHR processes ran.