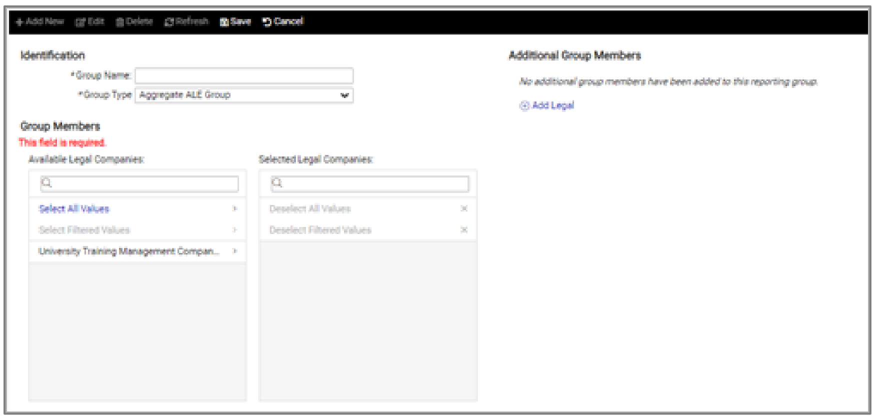
Introduction

It is important to understand how to properly configure ACA and to approve your ACA forms that will be printed and filed to the IRS.

ACA Reporting Groups

Reporting Groups must be set up in order to print and file your ACA forms. The setup will remain in place, there is no need to update yearly.

Navigate to Client Management > ACA Setup Options > ACA Reporting Groups. If you have an aggregate configuration, don't forget to also navigate to ACA Report Options to add the ACA Reporting Group month(s).



Aggregate Group: If you have multiple FEINs under your company umbrella that will be reported in an aggregate group, it must be determined which companies will be grouped together.

- Click the Add New icon.

ACA Group Type

- Group Name: Enter the group name (the company name is commonly used).
- Group Type: Select from "Aggregate ALE Group" (most commonly used) or "Designated Governmental Entity (DGE)."

Group Members

- Available Legal Companies: All legal companies will be listed here.
- Selected Legal Companies: Move companies that are to be part of this aggregate group.

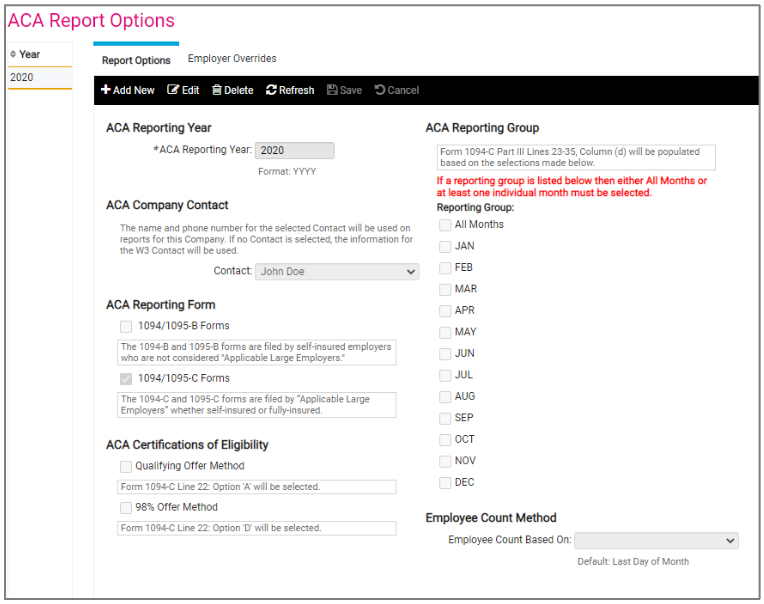
Additional Group Members

- Legal Name: FEIN: If you have a company that is not on isolved but is included in this aggregate group, click the Add Legal icon, and enter in the name and FEIN.

Report Options Tab

The set-up steps below must be completed yearly *for each legal company*.

Navigate to Client Management > ACA Setup Options > ACA Report Options.



- Click the **Add New** icon.

ACA Reporting Year

- **ACA Reporting Year:** Enter year you are reporting for. Note that the years set up will appear under the **Year** column on the left.

ACA Company Contact

- **Contact:** Select contact to be used if isolved or IRS has any questions regarding your ACA (this is set up under Client Management > Contacts). The selected contact must have a phone number.

ACA Reporting Form

Select one of the following:

- 1094/1095-B Forms
- 1094/1095-C Forms (most common, as it is for Large Employers)

ACA Certifications of Eligibility

Select from the options available:

- What you mark here will appear on the 1094. The IRS can change these options yearly, and those changes are typically released in the Fall.

- Select from the available options. For more information on the options, please visit the IRS website or appropriate contact. isolved will not be able to provide guidance on which options you should select.

ACA Reporting Group

- If part of an Aggregate group, select the boxes for each month as applicable.
  Example: The company could have been merged or acquired mid-year so only July – Dec would be selected.

Employee Count Method

Employee Count Based On: Select as applicable. The default is "Last Day of Month."

- Click on the **Save** icon. Be sure to complete these steps *for each legal company*. Use the **Company** drop down menu at the top of the page to select company.

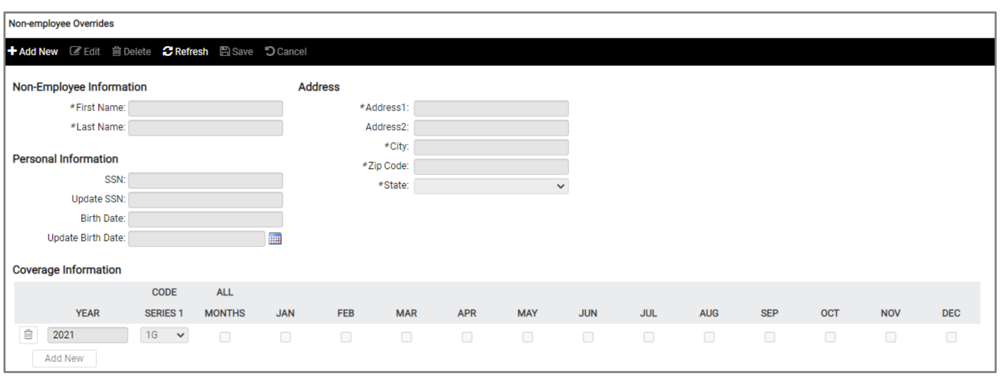
Employer Overrides Tab

- Employer side overrides would be entered here. Review the verbiage under each heading to understand where the override would apply.
- Click on the **Save** icon. Be sure to complete these steps *for each legal company*. Use the **Company** drop down menu at the top of the page to select company.

ACA Non-Employee Overrides

Applies to Self-Funded Plans only. Any individual on the health plan but not on payroll such as an executive, or a spouse of a former employee that chose COBRA independently. This is for Line 14, Line 15 and 16 would not be populated.

Navigate to Client Management > ACA Setup Options > ACA Non-Employee Overrides.



Enter:

- **Non-Employee Information**, **Personal Information**, **Address** and **Coverage Information** (select months the non-employee had coverage for that year)
- Click on the **Save** icon. Be sure to complete these steps for <u>each legal company</u>. Use the Company drop down menu at the top of the page to select company.

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Help Docs

ACA Forms Approval

It is important to PREVIEW before Approving Forms.

Preview Report/Preview Forms

- Click on the **Preview Report** / **Preview Forms** icon. Make any changes as needed and preview again to confirm. The preview reports will be displayed in the My Reports queue.
    - **Preview Report** provides a condensed version of the forms and highlights issues that should be corrected before the forms are approved.
    - **Preview Forms** provides a full version of the forms to use for auditing for accuracy prior to approving the forms.

Approve Forms

- Navigate to Client Management > ACA Setup Options > ACA Forms Approval.
- The 1094/1095 forms cannot be printed until you **Approve Forms**.
  Important: Only do this after you have previewed the forms, made **all** corrections and are ready to approve the forms to be printed.
- Be sure to complete these steps *for each legal company*. Use the **Company** drop down menu at the top of the page to select company.