

## Introduction

Reporting Groups are only to be used by customers that have multiple FEIN's under their company umbrella that will report as an Aggregate Group. If they do not have an Aggregate Group, do not add anything here.

If they will be reported in Aggregate Groups, set the aggregate group(s) up under Client Management > ACA Setup Options > ACA Reporting Groups and ACA Report Options.

## Setting up the ACA Reporting Groups

Navigating to Client Management > ACA Setup Options > ACA Reporting Groups.

- Click on the **Add New** icon.
- **Group Type:** Select the appropriate option:
  - "Aggregate ALE Group," which is most common, is used for a group of entities that are under common control (for example: parent and subsidiary).
  - "Designated Governmental Entity (DGE)" can be used for a government entity that is appropriately designated to file for another governmental unit.
- **Group Name:** Key in the name for the Aggregate Group you are setting up. You can have more than one Group Name with selected entities in each.
- **Group Members:** A list of related companies that are set up in the isolved system will display in the **Available Legal Companies** box. Select and move those companies that make up the Group that you are working on setting up to the **Selected Legal Companies** box.
- **Additional Group Members:** Used to add in the Legal Name and FEIN for companies that are included in the Aggregate but are not set up in the isolved system.
  - Click on **Add Legal** and key in the **Legal Name** and **FEIN**.
  - This must match what the IRS expects for that FEIN.

The screenshot shows a web application interface for setting up ACA Reporting Groups. At the top, there is a toolbar with icons for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. The main content area is divided into three sections:

- Identification:** Contains two input fields: '\*Group Name' with the value 'Aggregate Name' and '\*Group Type' with a dropdown menu set to 'Aggregate ALE Group'.
- Additional Group Members:** Contains the text 'No additional group members have been added to this reporting group.' and a blue '+ Add Legal' button.
- Group Members:** This section is split into two columns:
  - Available Legal Companies:** Features a search bar and two buttons: 'Select All Values' and 'Select Filtered Values', both with right-pointing chevrons.
  - Selected Legal Companies:** Features a search bar and a list of companies: 'Acme Corporation' and 'Acme Heating and Cooling'. Each company name has a blue 'x' icon to its right for removal. Above the list are two buttons: 'Deselect All Values' and 'Deselect Filtered Values', both with right-pointing chevrons.

- If you selected "Designated Governmental Entity," the following fields will appear and will need keyed in with data that will match what the IRS expects for that EIN.
  - DGE Name
  - EIN
  - Address
  - City
  - State
  - Zip
  - Contact
- This must be set up in each legal.

**Designated Governmental Entity (DGE)**

\*DGE Name:

\*EIN:

\*Address:

\*City:

\*State:  ▼

\*Zip:

\*Contact:  ▼

## Setting up the ACA Report Options > ACA Reporting Groups

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

- Click on the **Add New** icon.
- **ACA Reporting Year:** Add in the year that will be filed, which may not be the current year.  
**Example:** If setting this up in January 2021, the reporting year is 2020.
- **ACA Reporting Group:** This is used in connection with the ACA Reporting Groups and is only added if there is an aggregate group set up in the ACA Reporting Groups section. Select the month(s) or "All Months" to represent the months that this legal is part of the aggregate group.
- This must be set up in each legal.
- The rest of the fields in this section are covered in a separate article.

Report Options    Employer Overrides

+ Add New    Edit    Delete    Refresh    Save    Cancel

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**ACA Reporting Year**  
\*ACA Reporting Year:   
Format: YYYY

**ACA Company Contact**  
The name and phone number for the selected Contact will be used on reports for this Company. If no Contact is selected, the information for the W3 Contact will be used.  
Contact:

**ACA Reporting Form**  
 1094/1095-B Forms  
 1094/1095-C Forms

**ACA Certifications of Eligibility**  
 Qualifying Offer Method  
 98% Offer Method

**ACA Reporting Group**  
Form 1094-C Part III Lines 23-35, Column (d) will be populated based on the selections made below.  
**If a reporting group is listed below then either All Months or at least one individual month must be selected.**  
Reporting Group: One  
 All Months  
 JAN  
 FEB  
 MAR  
 APR  
 MAY  
 JUN  
 JUL  
 AUG  
 SEP  
 OCT  
 NOV  
 DEC

**Employee Count Method**  
Employee Count Based On:   
Default: Last Day of Month