

Introduction

The **Report Options** tab is used to define the Reporting Year, Company Contact, select the appropriate Reporting Form and Certifications of Eligibility, select the months that the legal is part of the Aggregate Group, and change the Employee Count Method, if desired.

The **Employer Overrides** tab allows you to override the information that pulls on the 1094 (ie: cover page to the IRS).

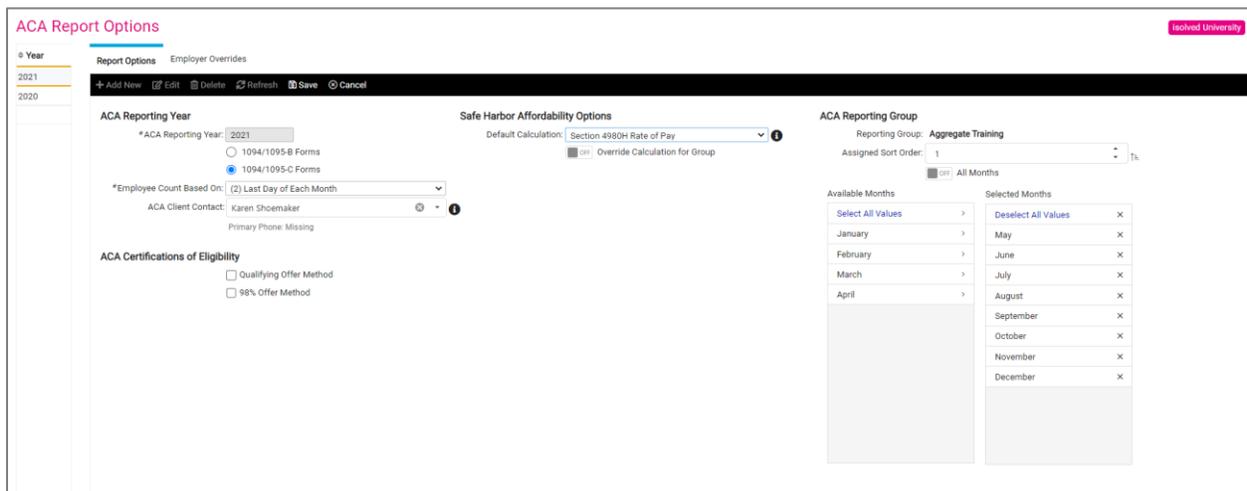
ACA Report Options Setup

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

- Click on the **Add New** icon.
- **ACA Reporting Year:** Key in the year that the forms are being filed.
- Select if you want to print and file B or C Forms for your ACA needs.
 - **1094/1095-B Forms:** Filed by self-insured employers who are not considered “Applicable Large Employers.”
 - **1094/1095-C Forms:** Filed by “Applicable Large Employers,” whether self-insured or fully insured.
- **Employee Count Method:** the system defaults to count the employees on the last day of the month. If wanting the employees counted at a different time of the month, select from the following:
 - First Day of Each Month
 - Last Day of Each Month
 - First Day of the First Payroll Period that Starts During Each Month
 - Last Day of the First Payroll Period that Starts During Each Month
 - 12th Day of Each Month
- **ACA Client Contact:** Select the contact that should be listed on the 1094, this is the person that the IRS will contact if they need additional information.
 - options pull from those that are set up as Client Users in Security.
 - System will point out if you are missing the Primary Phone as that is required on the 1094 and you may be rejected if this data is missing.
- **ACA Certifications of Eligibility:** isolved staff are not able to determine which option is appropriate, select which is accurate for this company from:
 - **Qualifying Offer Method:** Selecting this will populate “A” on Line 22 of the 1094-C.
 - **98% Offer Method:** Selecting this will populate “D” on Line 22 of the 1094-C.
 - **Section 4980H Transition Relief:** Only available if filing for 2015/2016.
 - **Code A (50-99 Transition Relief):** Only available if filing for 2015/2016. And Section 4980H Transition Relief is selected.
 - **Code B (100 or more Transition Relief):** Only available if filing for 2015/2016. And Section 4980H Transition Relief is selected.
 - **98% Offer Method:** Only available if filing for 2015/2016

- **Safe Harbor Affordability Options:** Select out of the drop-down what default calculation the company would like to use for their Safe Harbor.
 - **Section 4980H From W-2:** Select this if company would like to use the W-2 Wages for their Safe Harbor.
 - **Section 4980H Rate of Pay:** Select this if company would like to use the employees Rate of Pay for their Safe Harbor.
 - **Override Calculation for Group:** This can be used if you need to assign eligibility rules to the Safe Harbor Affordability Options. Example of this could be Salaried employees only are applicable for this Safe Harbor
- **ACA Reporting Group:** This is used in conjunction with the ACA Reporting Groups. Do not complete this if this company is not part of an Aggregate Group. Fly over and pullover the months that should be included selected months that this company was a part of this reporting group. If the legal company does have a reporting group created an option must be defined in this section. It cannot be left blank. You would also assign the Sort Order for each company that is defined in the Reporting Groups.

Note: Refer to the [ACA Reporting Groups](#) article for details on using this section.



Employer Overrides Tab within ACA Report Options

Navigate to Client Management > ACA Setup Options > ACA Report Options > Employer Overrides tab.

- **Minimum Essential Coverage Offer Indicator Overrides:** Allows you to override all months or specific month(s) for Column (a) Lines 23-35 of the 1094-C.
 - The system will populate this information based on the Benefit Plan setup and the Report Options selected.
- **Full-time Employee Count for ALE Member Overrides:** Allows you to override all months or specific month(s) for Column (b) Lines 24-35 of the 1094-C.
 - The system will populate this information based information from the system setup.
 - Per IRS instructions, if Option D is selected from the Report Options page, do not complete Column (b).

- **Total Employee Count for ALE Member Overrides:** Allows you to override all months or specific month(s) for Column (c) Lines 23-35 of the 1094-C.
 - The system will calculate, by month, using information from the system using the Count Method designated on the Report Options tab.

ACA Report Options

Year: 2019

Report Options | **Employer Overrides**

✓ Edit Refresh Save Cancel

Minimum Essential Coverage Offer Indicator Overrides

1094-C Part III Column (a) Lines 23-35 will be populated using information from the Benefit Plan setup and the Report Options selected. Use the field below to override the value for a month. If the override value applies to all months, select the override value in the ALL MONTHS drop-down.

ALL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MONTHS												

Full-time Employee Count for ALE Member Overrides

1094-C Part III Column (b) Lines 24-35 will be calculated, by month, using information from the system. Per IRS instructions, if Option D is selected from the Report Options page, do not complete Column (b). Use the fields below to override the calculated count for any month. If the override value applies to all months, add the override value in the ALL MONTHS field.

ALL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MONTHS												

Total Employee Count for ALE Member Overrides

1094-C Part III Column (c) Lines 24-35 will be calculated, by month, using information from the system using the Count Method designated on the Report Options. Use the fields below to override the calculated count for any month. If the override value applies to all months, add the override value in the ALL MONTHS field.

ALL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MONTHS												