

Client ACA Management

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

Note: Please contact your support team if you do not have this option in your directory or if you receive a message that you are not set up for this feature.

Reporting Year

Select the appropriate reporting year to view the status of the ACA filing for each legal company.

Client ACA Management								isolved University
Reporting Year: 2020 V								
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Drag a column 2018 re to group by that column								8 9
Legal Name 🍸	Reporting Year 🍟	Approval Status 🍸	Last Approved Date 🍸	IRS Receipt ID 🍟	Acceptance Status 🍸	Legal Effective Date 🍸	Legal Status 🍸	
Q	Q	Q	Q	Q	Q	Q	Q	
DEF Company	A					10/22/2021	Conversion	
GHI Company	A					10/22/2021	Conversion	
JKL Company	A					10/22/2021	Conversion	
MNO Company	A					10/22/2021	Conversion	
ABC Company	2020	Approved	10/22/2021 3:33:36 PM			9/12/2018	Active	
PQR Company	2020	Not Approved				10/22/2021	Conversion	

Information displayed:

- Legal Name
- Reporting Year
 - If you find an exclamation mark, hover over it to see the message & make the appropriate changes, things like:
 - Required legal service is not active for legal company
 - Reporting year is not set up for legal company
- Approval Status: will provide the status of the ACA forms for the selected reporting year, such as:
 - o Approved
 - o Not Approved
 - o Unapproved
 - o Approval error that occurred during the approval process
 - If you have multiple legal companies, this is a great way to easily identify any legals you may have missed approving the forms
- Last Approved Date reflect the date & time stamp of the last time the forms, for this reporting year, were approved
- IRS Receipt ID: this feature will be included in an upcoming release
- Acceptance Status: this feature will be included in an upcoming release
- Legal Effective Date: reflects the date the ACA legal service was enabled for each company
- Legal Status: reflects the status of the legal company

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Help Docs

ACA Process – Client ACA Management

In the upper right, use the xIs icon to export the data to excel or the column chooser to make changes to the columns

- Additional columns:
 - o Legal ID
 - o DBA
 - o Form type
 - o Reporting Group
 - User (who approved the forms)