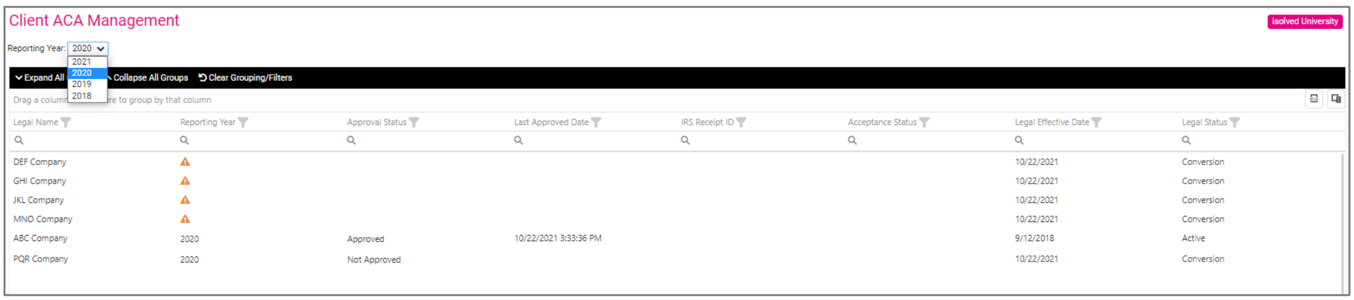
Client ACA Management

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.



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:
  - Approved
  - Not Approved
  - Unapproved
  - 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

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

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