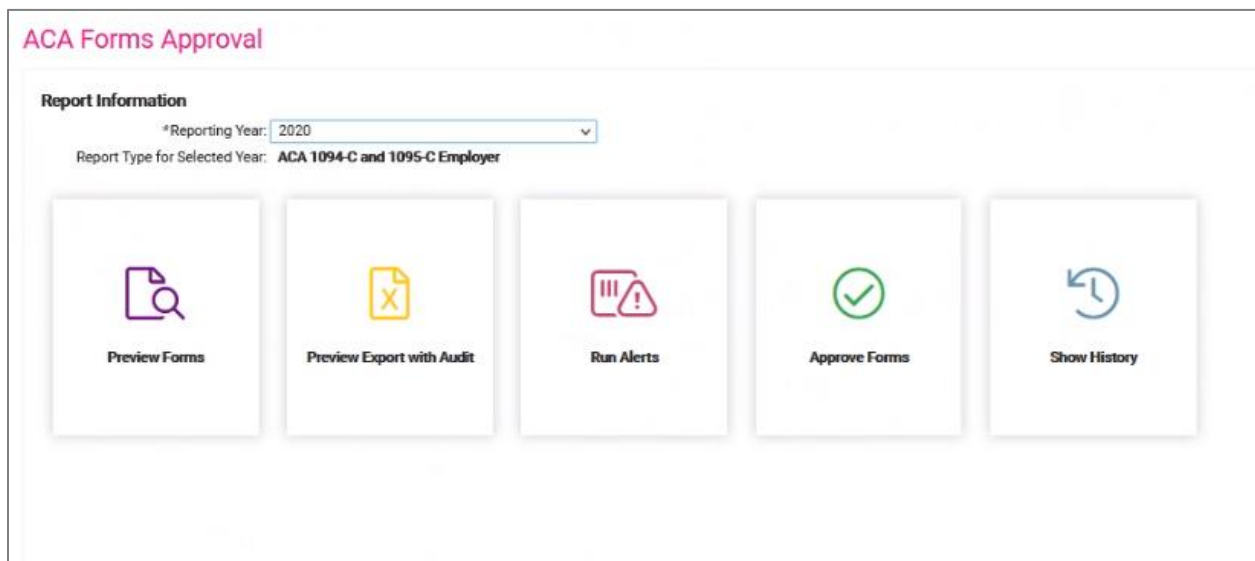


Introduction

The **ACA Forms Approval** section includes options to preview the forms before they are approved. Previewing the forms is one of the most important steps of the ACA process. It is important to preview the forms before clicking to “Approve Forms” them. Fixing a form error is easier to do before they are approved. Once you click approve, the forms are immediately sent to a queue to be printed. Once you click “Approve Forms,” if you need changes made to the forms, there may be additional fees incurred.

ACA Forms Approval

Navigate to Client Management > ACA Setup Options > ACA Forms Approval This will display cards that allow you to do different items. These items include Preview Forms, Preview Export with Audit, Run Alerts, Approve Forms, and Show History. We will review each card in turn.



Preview Forms

This card when selected produces a full version of the 1094 and 1095 form, it does not highlight known issues. The first three pages are the 1094 (aka client cover page for the IRS) which includes the company data. The remaining pages are the 1095 forms which include the employee data. These are what will be filed to the IRS so accuracy is paramount. Forms will be placed in the My Reports Queue.

- Review the forms for incorrect information.
- Make corrections as needed inside of isolved.
- Re-Preview to be sure everything is now pulling correctly, repeat if needed until all is correct.
- This must be done for each legal company that is filing.

Help Docs

Preview Export with Audit

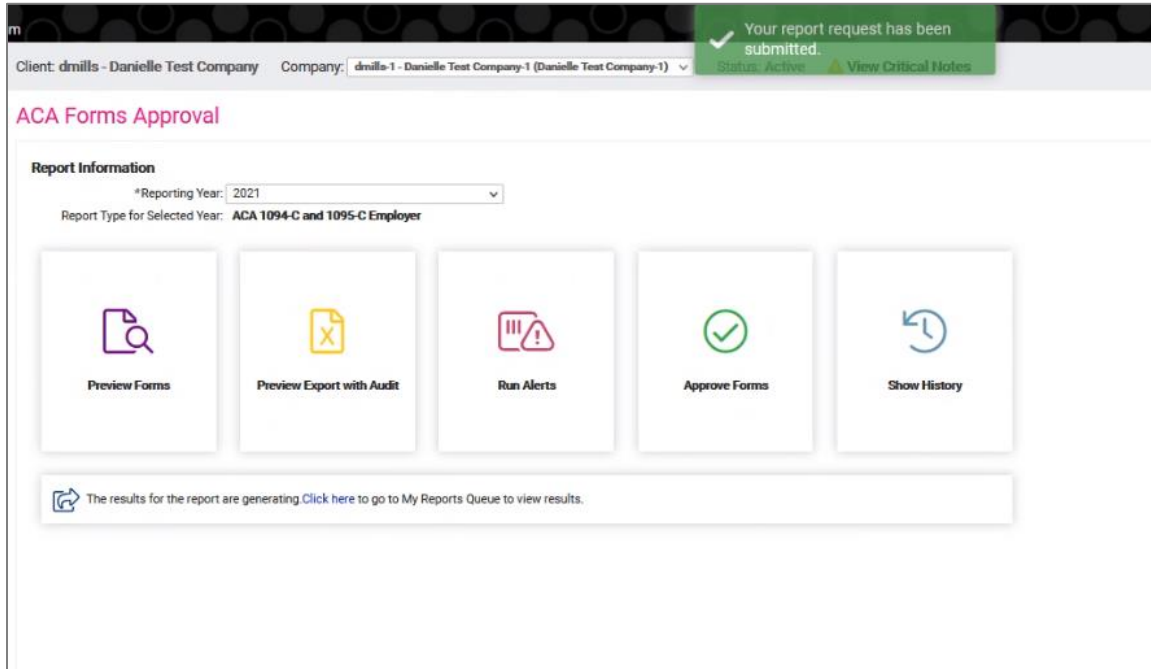
This card will pull an excel condensed version of the ACA Forms. This will highlight issues that should be addressed prior to approving forms. Yellow will highlight possible issues, these should be checked and fixed if needed. Red will highlight errors that will need to be corrected prior to form approval. Tabs in excel will also list out the Full-time Employee Counts for each month, and any employees that were not included in the Full-time Employee Count. Once you click to run you will find this report in the My Reports Queue.

Row	Col	Value
70	F	2F
71	G	2F
72	J	2F
73	K	2F
74	M	2F
75	N	2F
76	O	2F
77	P	2F
78	Q	2F
79	R	2F
80	S	2F
81	T	2F
82	U	2F
83	V	2F
84	W	2F
85	X	2F
86	Y	2F
87	AA	2F
88	AB	2F
72	7, EB Test	
73	456 Main	
74	Emp #: 1309 CLEARFIELD, UT, 84056	
75	Original Hire Date: 1/1/2017 12:00:00 AM	
76	Rehire Date:	
77	Term Date:	
78	All 12 Months	Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec
79	1K	1K 1K 1K 1K 1K 1K 1K 1K 1K 1K 1K
80	\$	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$
81	2F	2F 2F 2F 2F 2F 2F 2F 2F 2F 2F 2F
82	8, EB Test	
83	564 Main	
84	Emp #: 1310 Lehi, UT, 84043	
85	Original Hire Date: 1/1/2018 12:00:00 AM	
86	Rehire Date:	
87	Term Date:	
88	All 12 Months	Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec
89	1K	
90	(\$0.90)	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$
91	2F	
92	0123456789, Scenario	
93	132 Main	
94	Emp #: 1267	
95	Original Hire Date: 3/6/2019 12:00:00 AM	
96	Rehire Date:	
97	Term Date:	
98	All 12 Months	Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec
99	1K	1K 1K 1K 1K 1K 1K 1K 1K 1K 1K 1K
100	\$	(\$0.74) (\$0.74) (\$0.74) (\$0.74) (\$0.74) (\$0.74) (\$0.74) (\$0.74) (\$0.74) (\$0.74) (\$0.74) \$
101	2F	2F 2F 2F 2F 2F 2F 2F 2F 2F 2F 2F
102	Arnold 5-13-19, Hazel	
103	Emp #: 1295	
104	Original Hire Date: 5/13/2019 12:00:00 AM	
105	Rehire Date:	
106	Term Date:	
107	All 12 Months	Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec
108	1K	
109	\$0.00	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$
110	2F	

Help Docs

Run Alerts

This produces a condensed version of the forms and highlights issues that should be addressed prior to approving the forms in PDF version. The report will only show the items that the system is pulling or calculating, it will exclude the normal form layout so it has condensed information making it easier to preview what will pull on the forms. This report will be available once you select that to be ran in the My Reports Queue.



- Items highlighted in red are critical issues which will cause the file to fail when submitted to the IRS.
- Items highlighted in yellow are warnings which should be corrected but won't prevent the file from sending.
- The first page reflects what will populate on the 1094 (aka the customer cover page for the IRS).

This image gives an example of an error that must be corrected:

Client ID: BEN1808	ACA 1095-C FORM PREVIEW			ACA Year: 2020	
Client: 1808-Quick Clips					
Companies: Quick Clips					
Report Generated on: 11/3/2020 11:03:53 AM					
PART I: ALE Member					
ALE Member Name	Quick Clips	ALE Member Address	123 Unicorn Lane		
ALE Member EIN	56-1900004	ALE Member City, State, Zip	St Helena, CA, 94574		
ALE Member Contact Name	Stacey Boyd	ALE Member Contact Phone			
DGE Name		DGE Address			
DGE EIN		DGE City State, Zip			
DGE Contact Name		DGE Contact Phone			
PART II: ALE Member Information					
Total Number of Forms	27	Total Number of Forms Filed	27		
Is ALE Member	False	ALE Member Group			
Certifications of Eligibility	D				
PART III: ALE Member Information - Monthly					
	(a) Minimum Essential Coverage Offer Indicator	(b) Full-Time Employee Count for ALE Member	(c) Total Employee Count for ALE Member	(d) Aggregated Group Indicator	(e) Section 4980H Transition Relief Indicator
All 12 Months					
Jan	Yes		29		
Feb	Yes		29		
Mar	Yes		29		
Apr	Yes		29		
May	Yes		29		
Jun	Yes		28		
Jul	Yes		28		
Aug	Yes		28		
Sept	Yes		27		
Oct	Yes		27		
Nov	Yes		27		
Dec	Yes		27		
PART IV: Other ALE Members of Aggregated ALE Group					
	Name	EIN	Name	EIN	

- The ensuing pages will include the employee data as it will populate on the forms based on the current setup.
 - The image below shows employee data that will pull and a few examples of things to look for.
 - The data that populates is based on what data is set up within the system and will be custom for this particular customer.

Client ID: BEN1808		ACA 1095-C FORM PREVIEW										ACA Year: 2020	
Client: 1808-Quick Clips													
Companies: Quick Clips													
Report Generated on: 11/3/2020 11:03:53 AM													
Arnold, Hazel D		39248 Shamrock Ct						Original Hire Date: 07/19/2005					
Emp #: 1229		Pittsburgh, PA, 15239						Rehire Date:					
111-22-3361								Term Date: 06/16/2020					
	All 12 Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
	1A	1A	1A	1A	1A	1A		1H	1H	1H	1H	1H	1H
	2C	2C	2C	2C	2C	2C		2A	2A	2A	2A	2A	2A
Baldino, Riley		1600 E Steuben St						Original Hire Date: 09/03/2008					
Emp #: 1230		Pittsburgh, PA, 15205						Rehire Date:					
111-22-3362								Term Date:					
	All 12 Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
	1A												
	2C												
Brock, Michelle		123 My Street						Original Hire Date: 06/10/2019					
Emp #: 1232		COLDWATER, MI, 49036						Rehire Date:					
123-45-6789								Term Date:					
	All 12 Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
	1A												
	2C												
Castillo, Issac A		22126 E Princeton Circle						Original Hire Date: 12/10/2019					
Emp #: 1224		Pittsburgh, PA, 15205						Rehire Date:					
111-22-3356								Term Date:					
	All 12 Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
	1A												
	2C												

- The yellow highlight shows an employee SSN that the system knows is not real and should be corrected.
- When reviewing the data, you may find it helpful to look at the hire and term dates first. You would then have an idea what codes you may see for particular months.
- Keep in mind, Line 14 does not reflect if they had coverage. Rather, it reflects if they had an offer of coverage.
- You may find it helpful to have the ACA Codes Cheat Sheet open while reviewing the data. You may want to flag this as a favorite, so it is added to your University Dashboard for future reference. Doing this will ensure that you are always viewing the most recent version of this article. If you print or save this to your desktop, you will not have a current article if/when it is updated.

- Review the data for incorrect information and make corrections as needed.
- Re-Preview to be sure everything is now pulling correctly, repeat if needed until all is correct. This must be done for each legal company.
- The last page will include an Error Count for Potential & Critical Errors in case you missed it in the previous pages.

ACA 1095-C FORM PREVIEW		ACA Year: 2020
Client ID: BEN1808		
Client: 1808-Quick Clips		
Companies: Quick Clips		
Report Generated on: 11/3/2020 11:03:53 AM		
ERROR COUNT		
Potential Errors:		1
Critical Errors:		1

Approve Forms:

Only after you have thoroughly reviewed the forms via the Preview Forms, Preview Export with Audit and/or Run Alerts, and you check off that you certify and confirm that all data is correct on the forms and that you have used the audit utilities, you can then select to “Approve Forms.”


- Once you select Approve Forms, the system will commit the forms to the Year End Batch Print for printing and filing.
- Don't select Approve Forms prior to 1/1 of the next year to avoid any possible changes to employee data that may impact the forms.

ACA Forms Approval


Report Information

*Reporting Year:


Report Type for Selected Year: **ACA 1094-C and 1095-C Employer**




Preview Forms




Preview Export with Audit



Run Alerts



Approve Forms

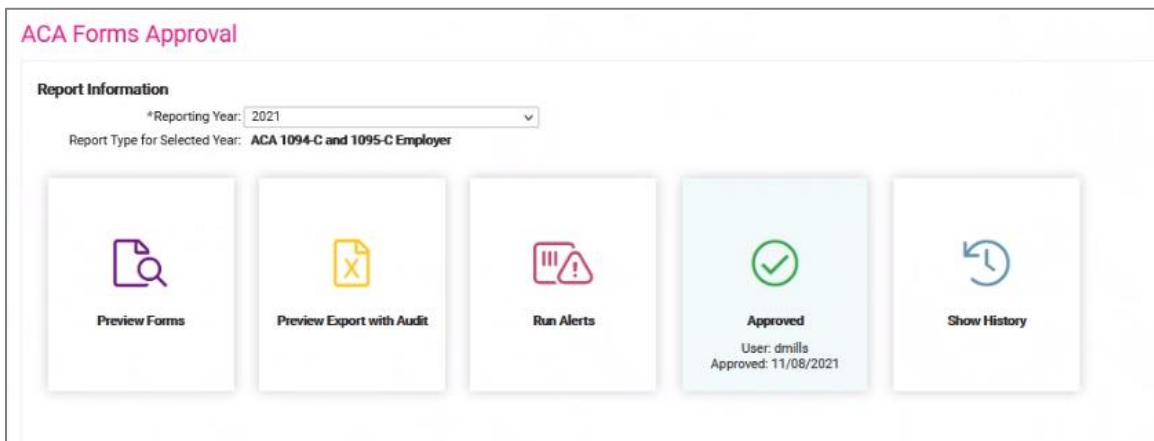


Show History

Certification Statement

I hereby certify I have utilized the audit reports and alert tools to identify and correct potential or critical errors detected. I also certify that to the best of my knowledge, the forms are true and correct.

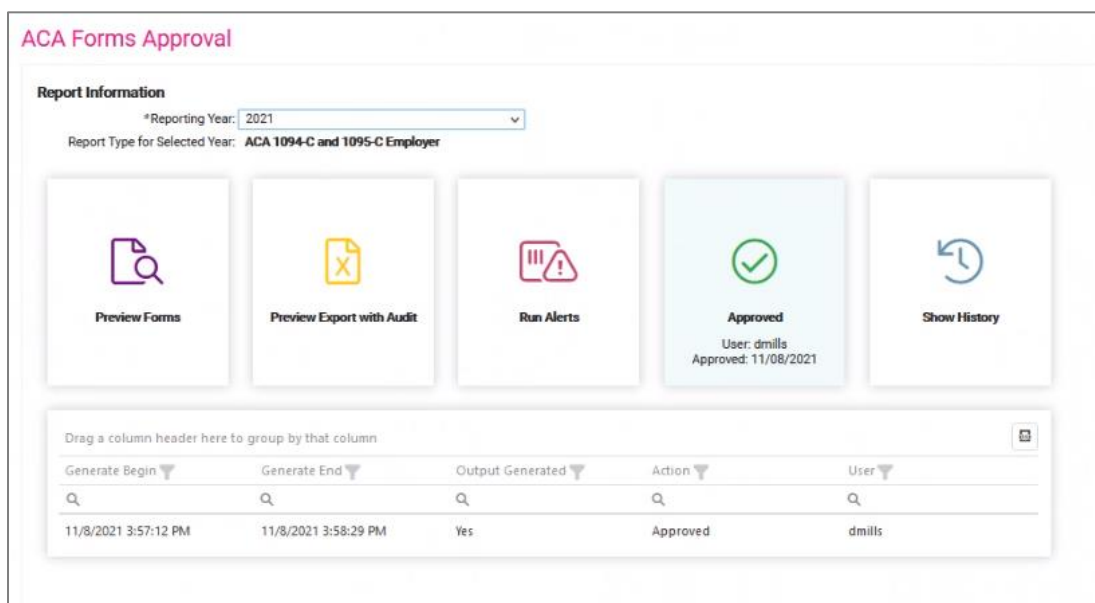
- If you discover an error after selecting “Approve Forms”, you must contact your Support team to:
 - Have them unapproved the forms.
 - Provide details to them if you would like all the forms reprinted, just a particular form reprinted or don't reprint.
 - The employee will see the updated form in ESS once they are posted here.
 - If having forms reprinted, you may be charged again for the printing and shipping.
 - The User data that approved and the Approved date will populate once the forms have been approved and sent to be printed and filed.



- The forms will be submitted to the IRS Air system after the IRS has opened their site for submission.

Show History

This tab can be used to show the history of the forms approval, including the user ID, Begin and End date.



1094/1095 B Forms

For the 1094/1095 B forms the Preview Export with audit and the Run Alerts card is not applicable and will only show the three applicable cards for B forms. Same functionality for these cards apply to the B forms as they do to the C forms.

