

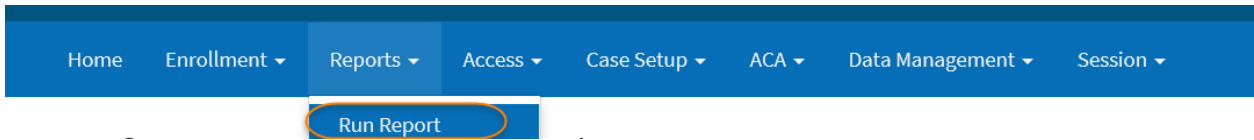
Step Schedule Quarterly ACA Summary Reports How-to Guide

1. Create the Dashboard Deliverable:
Note: Owner/Subscriber will be the name of the user assigned to manage the ACA reporting


Example:

▼	✓ Quarterly ACA Summary_EIN 27-2278940 (Quarterly)	6/22/2017	7/5/2017	★ ✎ ✕
<p>Previously Ran: 06/22/2017 Memo: Quarterly ACA Summary (1st, 2nd & 3rd only)</p> <p>Owner: Kelli Smith (kelli.smith@selerix.com) Subscribers: Kelli Smith (kelli.smith@selerix.com)</p>				
▶	✓ Quarterly ACA Summary_EIN 20-2601360 (Quarterly)	6/22/2017	7/5/2017	★ ✎ ✕
▶	✓ Quarterly ACA Summary_EIN 46-2722855 (Quarterly)	6/22/2017	7/5/2017	★ ✎ ✕
▶	✓ Quarterly ACA Summary_EIN 93-1153931 (Quarterly)	6/22/2017	7/5/2017	★ ✎ ✕

2. Generate and schedule ongoing quarterly ACA Summary reports
Go to Reports > Run Reports



Locate the report using the search bar (e.g., ACA Summary 2022 Tax Year) and click “Run Now”



ACA Summary 2022 Tax Year ★

In excel format, this report outputs demographic and coverage information found on individual ACA 109(4|5)-(B|C) reports.

ACA Summary

Run Now >

3. Run Now>ACA Summary report

Note: A separate ACA Summary report must be generated for each unique EIN on file for the client.

General Parameters

Employee:	<All Employees>	▼
EIN:	36-1234567	▼
Calendar Year:	2022	▼
State residency:	Any	▼
Mark Form As:	<input type="checkbox"/> Add only employees that need correction	

Update the Report Parameters based on information confirmed by the client and should be maintained in an internal Setup Guide.

Authoritative Transmittal:	<input type="checkbox"/> Is this the authoritative transmittal for this ALE Member?
Certifications of Eligibility:	<input type="checkbox"/> Qualifying Offer Method <input type="checkbox"/> 98% Offer Method
Aggregated ALE:	<input type="checkbox"/> Is ALE Member a member of an Aggregated ALE Group?
Affordability Method:	<input type="checkbox"/> Poverty Line <input type="checkbox"/> Rate of Pay Based on Pay History <input type="checkbox"/> Rate of Pay Based on Annual Salary <input type="checkbox"/> Rate of Pay Based on Hourly Wage <input type="checkbox"/> W2 Earnings
Special Situations:	<input type="checkbox"/> Include offers made to part time employees <input type="checkbox"/> Include 1094B and 1095B data <input type="checkbox"/> Include Statistical Summary Tab
Use MultiEmployer Interim Rule:	<input type="checkbox"/> Apply code 2E where applicable

No longer set with default. YOU must SELECT the applicable

New Option: Statistical Summary Tab is suppressed

4.

Delivery Option(s)

Schedule Initial (Q1) and Ongoing (Q2 & Q3) ACA Summary report using *Schedule Recurring Report*

Delivery Options

Task Description: [CASE] ACA Summary

Deliverable: <Not a Deliverable>

Delivery: Run Now Deliver Report Schedule Recurring Report

From: Kelli Smith, (kelli.smith@selerix.com, Selerix) → From: CA assigned to the case

To: Choose Recipients → Select your recipient(s)
Aaron Russell

Report Enhancement: Task Description will now automatically include the EIN selected under *General Parameters* when distributed.

Associate w/ applicable Dashboard Deliverable

Date Range and Frequency

Report Starts: 01/01/2022

End By: 12/31/2022

Frequency: Daily Weekly Monthly Calendar

Report Date(s): 01/01/2022, 04/15/2022, 07/07/2022, 10/06/2022

To ensure the report triggers the initial report for Q1 you must use the following:
Report Starts: 01/01/2022 and Report Date(s): 01/01/2022, Current Date, 07/07/2022, 10/06/2022

Example:

Report Date(s): 01/01/20xx, Current Date, 07/07/20xx, 10/06/20xx

This will trigger the initial quarterly report to generate immediately and located under “Sent Reports”

The remaining scheduled reports (Q2 & Q3) are now in queue for distribution based on the dates provided. Verify the next scheduled quarterly report is found under “Scheduled Reports”

(see example):

Scheduled Reports

	Report	From	Recipients	Report Date	Delivery End	Case	Homepage Deliverable
Suspend Cancel	GOLDEN STAR Qtrly ACA Summary EIN: 440262280	Rolanda West	Ray Julio	7/7/2022	10/8/2022	GOLDEN STAR	Quarterly ACA Summary EIN_44-0262280

It is important that this process is perform for **each unique EIN** on file for the client.