



# Solutions for Every Type of Employer

2021 Proposal of Services for ACA Reporting

# ABY ACA Reporting Has **Everything You Need** To Complete Forms 1094 & 1095.



## **This Is Your Process For Success.**

Seasoned Account Managers (who are great at) guiding you in a full service experience  
(if that's what you want) through simple steps (in our ACA software) to create Forms 1094 & 1095  
(fully coded PDFs, oh yeah!) and submit them (we e-file for you) to the IRS.



## Serving Well

*We have committed through daily training and development to become the very best in our industry. We focus on the details, we study the IRS regulations, we have a work culture that promotes a healthy work-life balance. What has emerged is a customer service team well equipped to answer questions and explain procedures; account managers prepared to consult clients in best practices; and executives leading the way in knowledge sharing and vision.*



### Help From ACA Reporting Experts

Our team is readily available to address questions in preparing for your 1095 reporting. We help employers define their needs and match them to a recommended service level.

# Process

## Gather Company Data

The required information serves to populate Form 1094 and provide benefit plan details used in calculating proper codes for the employee Form 1095. Resources are available outlining minimum data requirements for this section.

## 1094 & 1095 Forms

Hooray! Everyone loves to get perfectly packaged digital forms! Users click REQUEST and our system moves into a PROCESSING stage creating codes and populating the forms. Email alerts then notify users when forms are ready for REVIEW by downloading a set of pdfs.

## Approve For IRS Filing

The final step for success is granting approval for our team to transmit the form data to the IRS. This is the celebration phase where customers do the victory dance signifying the job is nearly done. The system dashboard will display the E-File status and users have an opportunity to make corrections if TIN errors are present.

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## Customer On-boarding

New and returning customers are welcomed with an account activation email. Users navigate the platform from a customized dashboard by following steps and system notifications. Color coded indicators are assigned a PROCESSING, PENDING or COMPLETED status as users complete each phase.

## Supply Employee Data

Quality reporting starts here. Customers are provided a data template outlining the type of information required from two employee reports (Payroll Census & Medical Plan Enrollment Census). Our minimum data requirements combined with system algorithms serve to populate the Form 1095 for each employee.

## Approve For Distribution

Once everything has been reviewed, users are prompted to APPROVE the applicable version of forms by completing a simple digital sign-off. Continuing in the user experience is the option to APPROVE or DECLINE our Print & Mail service that fulfills the requirement for employers to distribute forms to employees. Print & Mail service starts at \$1.75 per form.

# Online Account Dashboard

Designed for easy access to data and support while maintaining the ability to select and display the active company when multiples are present.

The screenshot displays the 'ACA Reporting' admin dashboard for 'ABY BENEFITS LLC'. The browser address bar shows 'https://acareportingsoftware.com/#!/admin/dashboard'. The dashboard is divided into several sections:

- COMPANY DETAILS & SEARCH:** Features details for 'Tesla Superchargers' (ID: ACA-43591-03, EIN: 45-9624812, Package: True Full Service, Client: Tesla, Inc.). Below this is a 'COMPANIES LIST' table with a search bar.
- SUPPORT, DEADLINES & DATA:** Includes links for 'SUPPORT' (View our contact information), 'IRS DEADLINES' (View these important dates), 'UPLOAD DATA FILES' (Upload Payroll/Enrollment Data), and 'DOCUMENT HISTORY' (Download Any Available File).
- AUTHORIZED USERS:** A table listing users with 'Add User' and 'Edit' options.

**COMPANIES LIST Table:**

Company Name	EIN	Company ID
Tesla, Inc.	01-1234567	ACA-43591-01
Tesla Service Centers	21-2651479	ACA-43591-02
Tesla Superchargers	45-9562547	ACA-43591-03
Tesla Destination Charging	65-8521789	ACA-43591-04
Tesla Stores & Galleries	75-5629841	ACA-43591-05
Tesla Delivery	14-6214856	ACA-43591-06
Tesla Development	55-2796538	ACA-43591-07
Tesla Auto Technology	36-1154896	ACA-43591-08

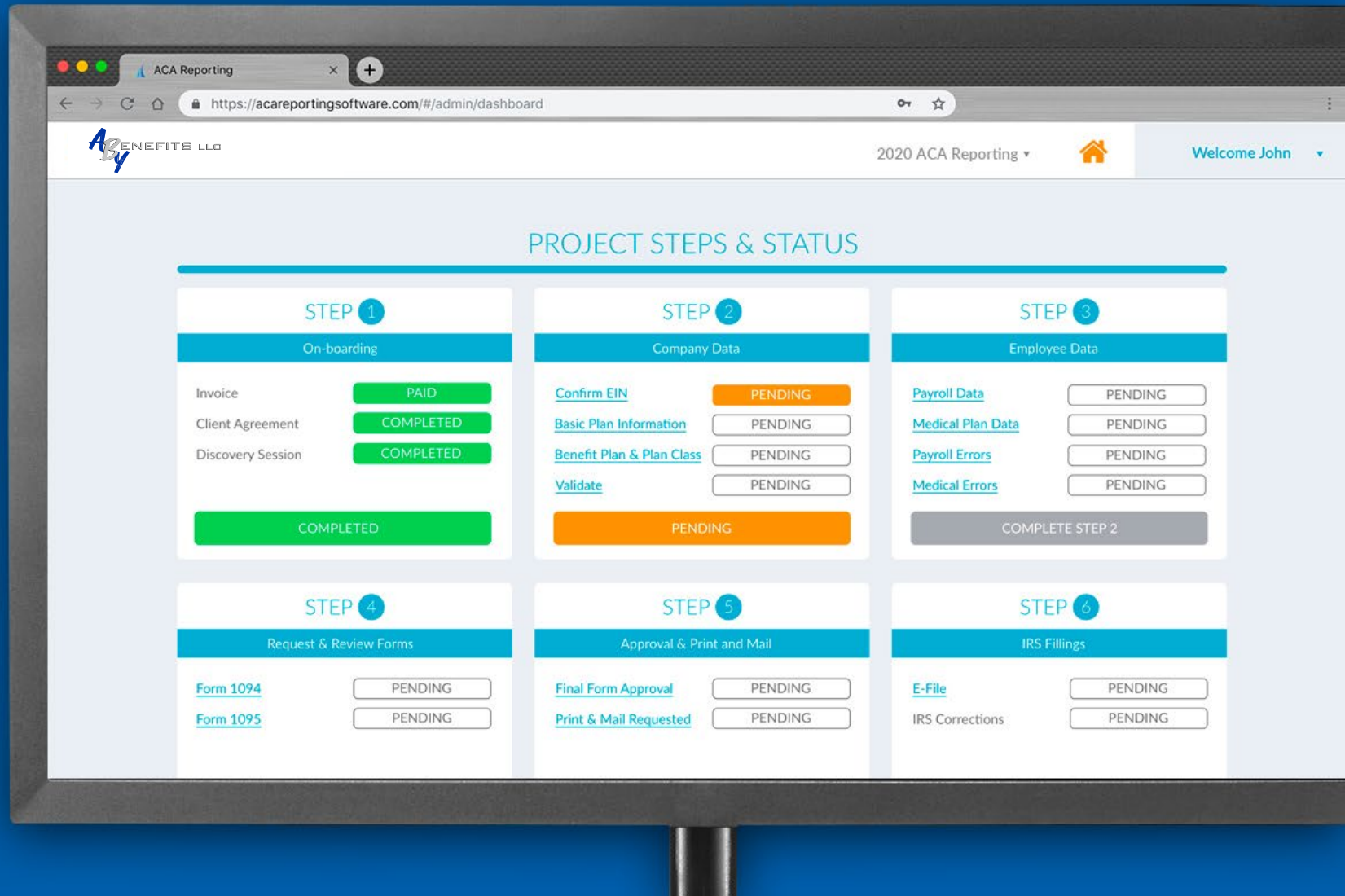
**AUTHORIZED USERS Table:**

First Name	Last Name	Email	Actions
John	Jones	john.jones@tesla.com	<a href="#">Edit</a>
Jennifer	Rodriguez	jennifer.rodriguez@tesla.com	<a href="#">Edit</a>



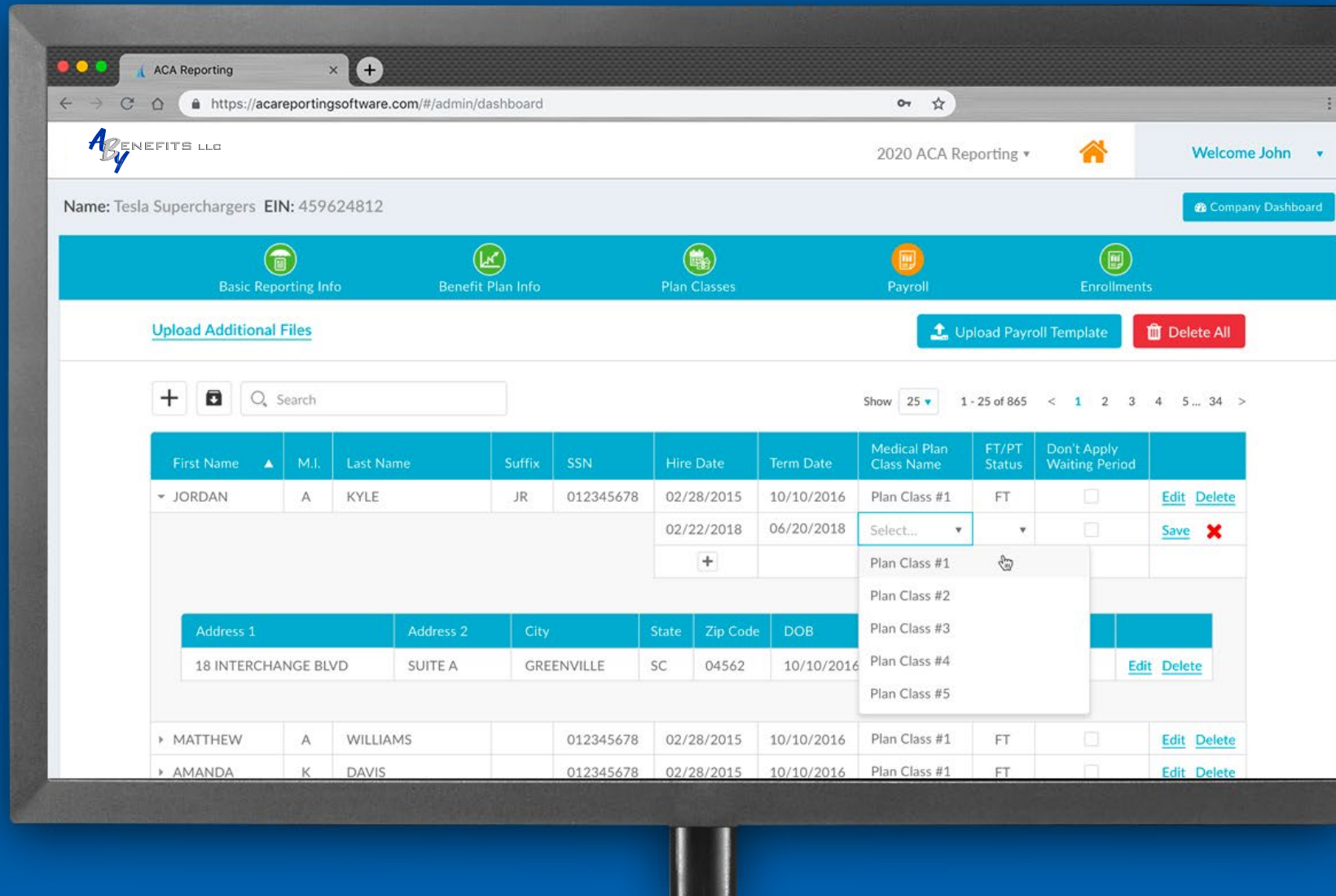
# Online Account Dashboard

Follow the project steps from on-boarding to the IRS filing. System notifications and status alerts prompt users when to take action.



# Employee Records

Make edits to employee records within a easy to use interface. Template uploads are performed by our Data Technicians.



# Digital Form Review

Accessible from the user dashboard the digital form & files section displays, archives and downloads Forms 1094 & 1095 for review.

The screenshot displays the ACA Reporting software dashboard. The browser address bar shows the URL <https://acareportingsoftware.com/#!/admin/dashboard>. The dashboard header includes the company logo "ABY BENEFITS LLC", the year "2020 ACA Reporting", a home icon, and a user greeting "Welcome John". Below the header, the company name "Name: Tesla Superchargers" and EIN "EIN: 459624812" are displayed. A "Company Dashboard" button is located in the top right corner.

The main content area is divided into two sections: "START HERE" and "DIGITAL FORMS & FILES".

**START HERE**

- 1.) Identify the correct version of the forms (if multiples exist).
- 2.) Download PDF Files to your computer (keep for your records).
- 3.) Review forms for accuracy and then return here to proceed.
- 4.) Click **Approve** or **Reject** button for the applicable version.

A "SUPPORT" button with a headset icon and the text "View our contact information" is located below the instructions.

**DIGITAL FORMS & FILES**

Version	Creation Date	User	CSV Files	PDF Files	Actions
1.0	01/28/2019 04:41:10 pm	John Jones	Click to Download <a href="#">1095</a>	Click to Download <a href="#">1094</a> <a href="#">1095</a> <a href="#">Summary</a>	<a href="#">Approve</a> <a href="#">Reject</a>



## Reporting Packages & Pricing

### Self Service Reporting Package

This package is a non-managed account and the expectation is the user is familiar with ACA regulations and comfortable manipulating the employee data templates. Customers have access to our support team via phone or email for technical assistance. The goal is to provide a budget friendly option that includes the essentials to complete the reporting.

### Print & Mail Service

*Form 1095-C Printed & Mailed Direct To Your Employee's Home.*

As simple as clicking print within our software, we handle everything else to up to the moment the forms enter the USPS mail stream.

- ✓ First Class Mail
- ✓ 48-Hour Turnaround Time

### Individual Mandate State Reporting

*Employee 1095C data is extracted from the ACA account and electronically filed with the applicable state(s).*

Applicable states: California, District of Columbia, Massachusetts, New Jersey, Rhode Island, Vermont

- ✓ Flat Fee pricing model

### Enhanced Reporting Package

A managed account features full support from a member of our service team. You will have a complete on-boarding experience including an initial discovery call with your assigned account manager. We will intake company information, populate the account and address each step in the process complete with timelines and customer action items.

### IRS Audit & Inquiry Assistance

*Inquiry Assistance Secures An Expert To Help Form An IRS Response Strategy.*

Acting like a warranty of sorts, buying this add-on will give you access to our in-house consultant for instruction on responding to the IRS.

- ✓ IRS Penalty Letter Evaluation
- ✓ Records Kept for Eight Years

### True Full Service Reporting Package

Building upon the Enhanced package this complete package includes access to a data technician. The goal is to minimize a customer's data responsibility in terms of employee supplied records. Customers supply an unformatted payroll or medical report that meets our minimum standards and our data techs will extract the data.

### TIN Reconciliation Service

*When the IRS Error Report Highlights a Mismatch in Employee Name or SSN.*

Our process of helping you make corrections when an "Accepted with Errors" status is indicated by the IRS following an Information Return submission.

- ✓ Correct Employee Name Mismatches
- ✓ Support From ACA Experts