

VANTAGEPOINT

BENEFIT ADMINISTRATORS

PROPOSAL FOR: **ACA REPORTING SERVICES**

All applicable large employers (ALE) must begin reporting benefit information annually to the IRS. There are several steps required to collect data and determine the applicable codes; then information must be mapped to and printed on the applicable IRS forms, a report transmitted to the IRS, and a statement mailed to employees. This is also referred to as ACA reporting. Few organizations have the internal structure, support, resources, and compliance expertise to address the complexity of ACA reporting. Outsourcing is sometimes the best solution. The question is...

Are You Ready And Able...Or Do You Need Help?

Our solution eliminates the burden of researching the regulations, becoming an expert in ACA reporting requirements, interpreting complicated form instructions, and spending hours programming data to comply with the IRS formatting requirements. We provide a fully compliant ALE reporting solution that ensures proper coding and reporting. We will manage all reporting tasks and compliance requirements, enabling you to focus on your core business.

VantagePoint is a national benefit administration firm located in New York who has assisted employers with benefit design, pre-tax expertise and compliance administrative support for over 15 years. The knowledge, experience and diversity within our organization gives us an edge in providing focused solutions, including this one, that are flexible enough to fit your organization's needs.

The entire team will be at your service. As your partner, we understand that our relationship requires consistent attention, commitment, focus and awareness. On the following pages you will discover a complete description of the reporting services we provide.

ALE REPORTING SERVICE

We provide a solution that captures your employee information into our custom configured system and manages your activity using a web-based solution. Our service begins with a discovery and implementation process: system set-up; an initial data load; and ends with IRS transmittal and employee statement distribution. Throughout the process your assigned management team will oversee all aspects of your reporting service.

Discovery and Implementation

During discovery we will learn about your current employee demographics, benefit programs, and gain an understanding of where and how the required reporting information is currently maintained so we can develop recommendations for data acquisition, aggregation, management, and applicable coding.

We will create a detailed project plan with timelines and milestones critical for a successful implementation. Implementation will include:

- Providing an exportable file for the initial data load
- Mapping demographic and benefit information to our proprietary system
- Completing data audits to ensure the accuracy of the received data

System Set-Up and Data Collection

Unlike some systems, we complete all of the system configuration and set-up. You don't need to allocate staff time to learn and configure a new software program. Your responsibilities will include gathering the required data for reporting and providing it in our standard layout for the initial file load. Following

implementation, you will be responsible for entering any required ongoing activity that will impact the derivation of the applicable codes.

Vantage Point's software solution stores information in a secure database. Based on the information gathered during discovery and the information you update, we will:

- Configure our system with your benefit groups
- Derive the applicable codes for Form 1095-C from the initial data load and ongoing activity entered
- Calculate and maintain the employee counts for Form 1094-C reporting
- Aggregate any employer groups for control group consolidation
- Maintain transition relief data, if applicable

YOUR LOGO HERE
FICTIONAL SHIPPING

Welcome, John Smith! | [Log Out](#)

Home EIN Benefit Group Resources **IRS Forms** Support

Form 1095-C Instructions for Recipient

Form 1095-C <small>Department of the Treasury Internal Revenue Service</small>	Employer-Provided Health Insurance Offer and Coverage <input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED <small>Information about Form 1095-C and its separate instructions is at www.irs.gov/1095c.</small>	600116 <small>OMB No. 1545-2051</small> 2015
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Part I Employee		Applicable Large Employer Member (Employer)										
1 Name of Employee (First Minit Last) Multiple <input type="checkbox"/> L <input type="checkbox"/> Changes <input type="checkbox"/>	2 Social security number (SSN) 000-06-7418	7 Name of Employer Fictional Shipping, L.T.D										8 Employer identification number (EIN) 38-001234
3 Street address (including aptment no.) 36772 Lodge Drive		9 Street address (including room or suite no.) 30800 Telegraph Rd. Suite 3800			10 Contact telephone number 2481234567							
4 City or town Southfield	5 State or province MI	6 Country and ZIP or foreign postal code USA - 48075-0000		11 City or town Bingham Farms	12 State or province MI	13 Country and ZIP or foreign postal code US - 48025						

Part II Employee Offer and Coverage	Plan Start Month (Enter 2-digit number):												
	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
14 Offer of Coverage (enter required code)	<input type="checkbox"/>	1H	1H	1H	1H	1H	1C	1C	1C	1C	1C	1C	1C
15 Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
16 Applicable Section 4980H Safe Harbor (enter code, if applicable)	<input type="checkbox"/>	2A	2A	2A	2D	2D	2C	2C	2C	2C	2C	2C	2C

Part III Covered Individual															
<small>If Employer provided self-insured coverage, check the box and enter the information for each covered individual. <input type="checkbox"/></small>															
(a) Name of covered individual(s) (First Minit Last)	(b) SSN	(c) DOB (if SSN is not available)	(d) Covered all 12 months	(e) Months of Coverage											
				Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
17 Multiple <input type="checkbox"/> Changes <input type="checkbox"/>	000-00-7418		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
18 Rachel <input type="checkbox"/> Hensley <input type="checkbox"/>	000-00-4642		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Here is a sample of a completed employee 1095-C.

Transmittal and Distribution

The final steps include Form 1094-C and 1095-C document generation, IRS transmittal, and employee statement distribution. Not only will we electronically submit Form 1094-C to the IRS on your behalf, but we will print and distribute Form 1095-C statements to all full-time employees. This also includes forms required for distribution to any part-time or non-employees enrolled in a self-insured plan.

The added value of our service is that we store all historical data used for access and substantiation in case of audit. In addition, we utilize document storage and bar-coded mail as proof of distribution.

ACA REPORTING SERVICES

ALE DETERMINATION VARIABLE HOUR TRACKING 1094 AND 1095 REPORTING

VantagePoint's system will help employers:

- Determine ALE status
- Automatically track variable hour employees and applicable measurement periods
- Generate and transmit via E-File and mail all IRS Forms 1094-C, 1095-C and 1095-B

INCLUDED SERVICES
Discovery and Implementation
System Configuration and Initial Data Import <ul style="list-style-type: none">- Initial eligibility group configuration- Required data file layout provided
Ongoing Maintenance <ul style="list-style-type: none">- Code modifications as changes occur- Data storage for audit inquiry- Compliance consulting support (up to four hours)
Annual Administration <ul style="list-style-type: none">- Form 1094-C Transmittal. E-File- Form 1094/1095-C Print and Mail to Employee Address- Form 1095-B Print and Mail for Self-Funded Employers
Dependent SSN Solicitation <ul style="list-style-type: none">- Employer Responsibility to Obtain

This proposal is not intended as, and does not constitute, a binding agreement. It is merely intended to specify the proposed terms and conditions of the services described herein. The following service agreement provides the terms and conditions of the proposed services. The undersigned individual fully understands that there is no binding legal obligation unless and until all of the terms and conditions of the proposed services have been negotiated and agreed to by all parties. If the decision is made by you to terminate the intention of acquiring service from VantagePoint, notification of the decision should be made immediately in writing. The duly authorized individual identified below, accepts this proposal and agrees to proceed with discovery and implementation.

By: _____ (Print Name) Company Name: _____

Signature: _____ Date: _____

For more information on VantagePoint Benefit Administrators' services, visit us on the web at:

www.vantagepointbenefit.com