



The Complete Workflow of our **White Label Solution**



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- ▶ Get started with ACAwise's White Label Solution

Expanding your service offerings to include ACA reporting is a simple process with the help of ACAwise.

With the customized White Label option from [ACAwise](#), your company can provide your clients with complete [ACA reporting services](#) under your brand name.

This guide offers an overview of the White Label options so you can better understand the extent of our features and process.

About ACAwise

Launched in 2015, [ACAwise](#) acquired IRS ACA AIR Interface certification when the Affordable Care Act was first passed. Since then, ACAwise has continued to grow and gain experience as a market-leading provider of [ACA reporting services](#).

We oversee the reporting processes for businesses of all sizes and across all industries, including government entities (such as counties, public schools, etc.) and [Third Party Administrators](#) (such as payroll providers, [HCM providers](#), health benefits providers, etc.).

Benefits of our White Label Solution

With the [White Label solution from ACAwise](#), your company can offer end-to-end ACA reporting service to your clients while promoting your own brand. There are numerous features and benefits for your company.

[ACAwise](#) has a varied range of services to meet the needs of your organization. In turn, you can provide any and all of these services to your client base.

Services Offered

ACA Core

ACAwise will prepare and e-file your ACA forms based on the form data you provide. [Learn More](#)

ACA Elite

ACAwise will generate forms with the required ACA codes based on your payroll and employee census data and e-file them. [Learn More](#)

Add-on Services

State Filing

ACAwise supports federal filing, state filing, and state-only filing of ACA forms. [Learn More](#)

Employee Copy Distribution

There are two simple options for distributing recipient copies. [Learn More](#)

Postal Mailing

Our team prints and mails all recipient copies from a SOC 2-Certified facility. [Learn More](#)

Online Access

Enable recipients to access their form copies through a secure online portal. [Learn More](#)

How does our White Label Solution work?

Our team offers the tools needed for you to offer your clients an [ACA reporting](#) solution while our team of experts carries out all of the processes required on the backend.

Here is the streamlined workflow for ACAwise’s White Label Solution:

1 Request a Demo with our team

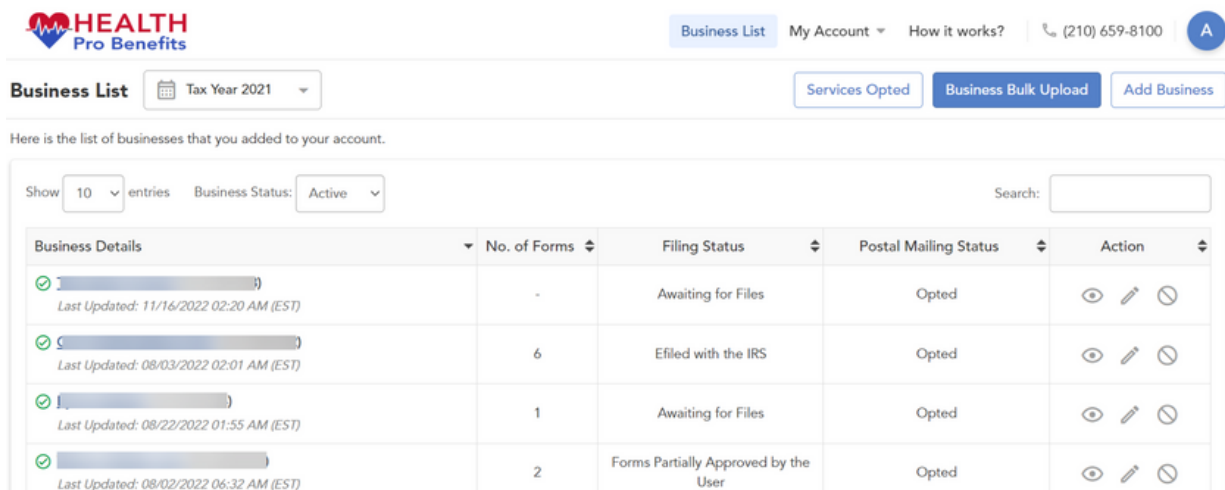
- The first step to getting started with ACAwise is a conversation! Our team will get a better understanding of your organization’s needs and the services that make the most sense for you.
- Once our team has a clear understanding of your needs, we can schedule a demo and share a detailed look at our White Label option.
- Once we have finalized the services your organization requires, we will draft and share a proposal for your signature.

2 White Label Account Setup

















After your team provides your basic business information, we will set up your new ACAwise account. This includes the following:

Creating customized portals:

- Our team will set up your portal, customized with your branding for your clients’ use. We provide the option for you to have a separate portal for your staff to manage your clients’ reporting process.
- You can also request a portal for clients to upload data and review and approve forms.

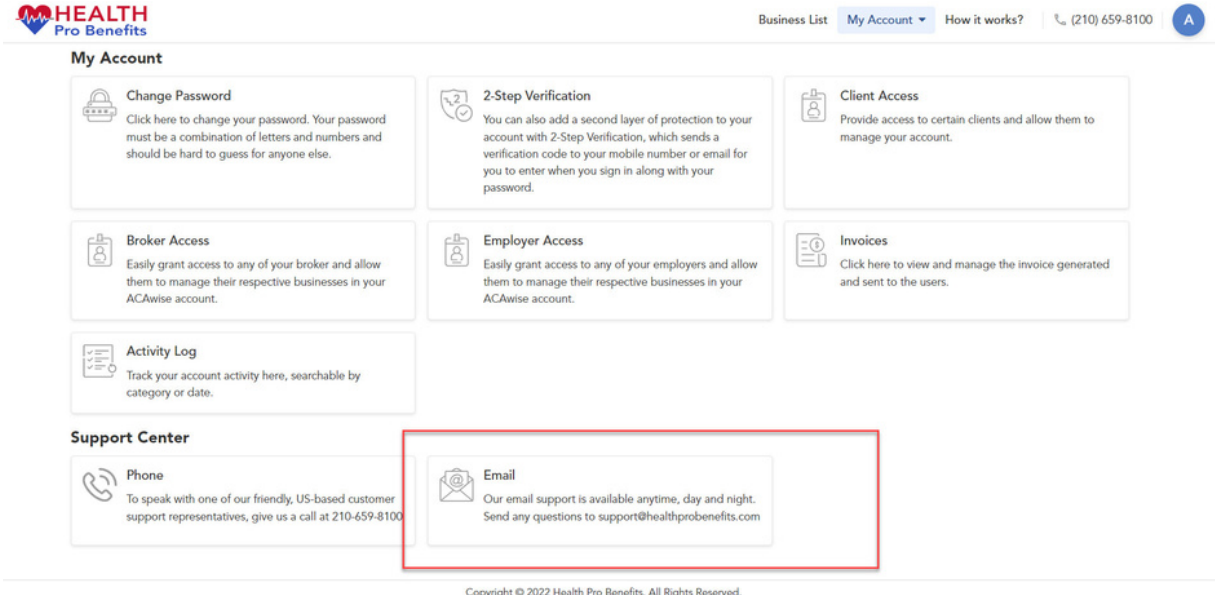


The screenshot shows the 'Business List' interface. At the top, there is a navigation bar with 'Business List', 'My Account', 'How it works?', and a phone number '(210) 659-8100'. Below this, there are buttons for 'Services Opted', 'Business Bulk Upload', and 'Add Business'. The main content area shows a list of businesses with columns for 'Business Details', 'No. of Forms', 'Filing Status', 'Postal Mailing Status', and 'Action'. The list contains four entries, each with a green checkmark icon and a 'Last Updated' timestamp.

Business Details	No. of Forms	Filing Status	Postal Mailing Status	Action
 <small>Last Updated: 11/16/2022 02:20 AM (EST)</small>	-	Awaiting for Files	Opted	  
 <small>Last Updated: 08/03/2022 02:01 AM (EST)</small>	6	Efiled with the IRS	Opted	  
 <small>Last Updated: 08/22/2022 01:55 AM (EST)</small>	1	Awaiting for Files	Opted	  
 <small>Last Updated: 08/02/2022 06:32 AM (EST)</small>	2	Forms Partially Approved by the User	Opted	  

Configuring website and email domains:

- Our team will customize your web domain and perform email configurations so that all emails sent to your clients throughout the process will contain your branding.



HEALTH Pro Benefits Business List My Account How it works? (210) 659-8100

My Account

- Change Password**
Click here to change your password. Your password must be a combination of letters and numbers and should be hard to guess for anyone else.
- 2-Step Verification**
You can also add a second layer of protection to your account with 2-Step Verification, which sends a verification code to your mobile number or email for you to enter when you sign in along with your password.
- Client Access**
Provide access to certain clients and allow them to manage your account.
- Broker Access**
Easily grant access to any of your broker and allow them to manage their respective businesses in your ACAwise account.
- Employer Access**
Easily grant access to any of your employers and allow them to manage their respective businesses in your ACAwise account.
- Invoices**
Click here to view and manage the invoice generated and sent to the users.
- Activity Log**
Track your account activity here, searchable by category or date.

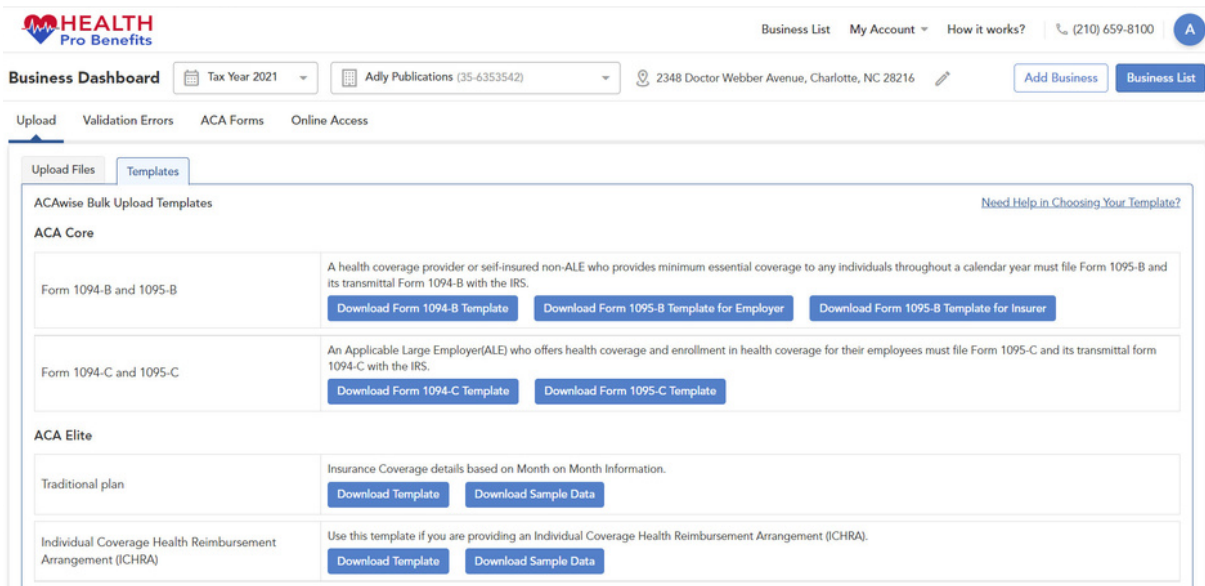
Support Center

- Phone**
To speak with one of our friendly, US-based customer support representatives, give us a call at 210-659-8100
- Email**
Our email support is available anytime, day and night. Send any questions to support@healthprobenefits.com

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3 Data Upload Options for your Clients

- Our software accepts data in Excel and CSV file formats. You can provide access for your clients to upload the data required for [ACA reporting](#) using our custom Excel templates. We can even add your brand logo to the templates as per your preference.
- Your clients can also use their own templates to upload data, and we can convert it to our ACAwise system format.



HEALTH Pro Benefits Business List My Account How it works? (210) 659-8100

Business Dashboard Tax Year 2021 Adly Publications (35-6353542) 2348 Doctor Webber Avenue, Charlotte, NC 28216 Add Business Business List

Upload Validation Errors ACA Forms Online Access

Upload Files Templates

ACAwise Bulk Upload Templates [Need Help in Choosing Your Template?](#)

ACA Core

Form 1094-B and 1095-B	A health coverage provider or self-insured non-ALE who provides minimum essential coverage to any individuals throughout a calendar year must file Form 1095-B and its transmittal Form 1094-B with the IRS. Download Form 1094-B Template Download Form 1095-B Template for Employer Download Form 1095-B Template for Insurer
Form 1094-C and 1095-C	An Applicable Large Employer(ALE) who offers health coverage and enrollment in health coverage for their employees must file Form 1095-C and its transmittal form 1094-C with the IRS. Download Form 1094-C Template Download Form 1095-C Template

ACA Elite

Traditional plan	Insurance Coverage details based on Month on Month Information. Download Template Download Sample Data
Individual Coverage Health Reimbursement Arrangement (ICHRA)	Use this template if you are providing an Individual Coverage Health Reimbursement Arrangement (ICHRA). Download Template Download Sample Data

4 Data Validation

To ensure the accuracy of the ACA Forms, ACAwise performs multiple [data validation](#) processes, including:

IRS Business Rules Validation

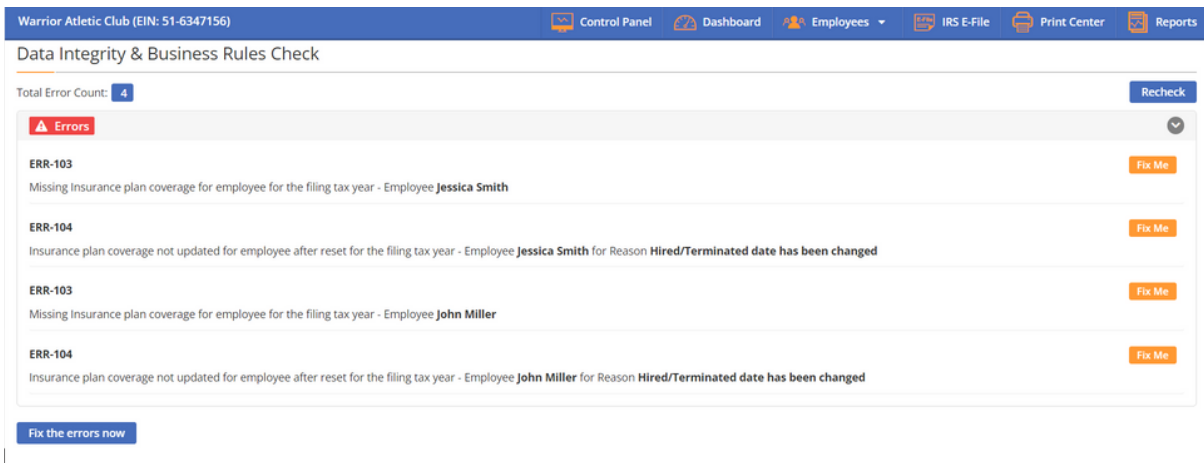
- The IRS has a defined set of Business Rules that must be met when filing ACA forms. ACAwise uses these rules to validate your clients' form data and identifies any errors.

IRS Schema Validation

- As per the IRS, ACA Forms must be e-filed only in XML format. ACAwise converts your client's ACA forms into XML format and performs [IRS Schema Validations](#) on the XML files to identify and resolve any errors.

Data Integrity Checks

- [Data integrity checks](#) are performed specifically for clients that have chosen the [ACA Elite Services](#). This validation process is used to identify and resolve any errors in regard to hire dates, insurance plans, addresses, and dependents.



Warrior Athletic Club (EIN: 51-6347156) Control Panel Dashboard Employees IRS E-File Print Center Reports

Data Integrity & Business Rules Check

Total Error Count: 4 Recheck

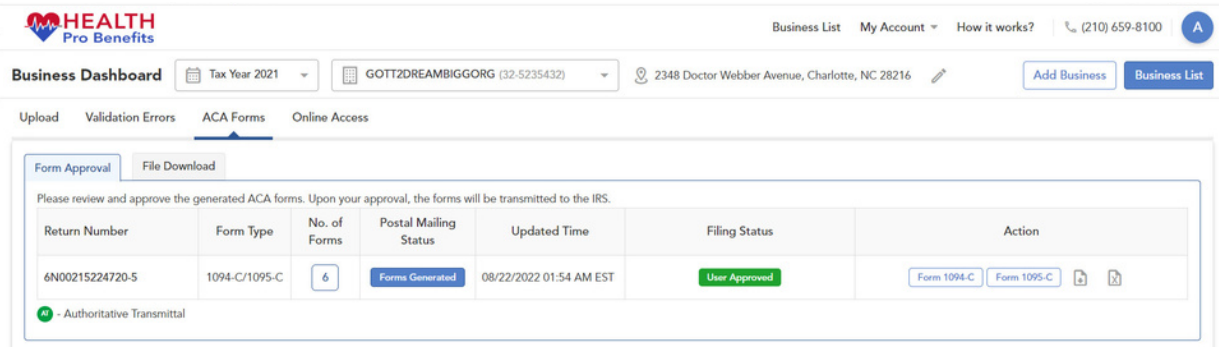
Errors	Fix Me
ERR-103 Missing Insurance plan coverage for employee for the filing tax year - Employee Jessica Smith	Fix Me
ERR-104 Insurance plan coverage not updated for employee after reset for the filing tax year - Employee Jessica Smith for Reason Hired/Terminated date has been changed	Fix Me
ERR-103 Missing Insurance plan coverage for employee for the filing tax year - Employee John Miller	Fix Me
ERR-104 Insurance plan coverage not updated for employee after reset for the filing tax year - Employee John Miller for Reason Hired/Terminated date has been changed	Fix Me

Fix the errors now

After these validation processes, the validated data can be shared with your clients to update the correct data as needed.

5 Form Generation and Review Process

- Once all data validations are complete, ACAwise generates Forms 1094 and 1095.
- We also handle special cases such as COBRA coverage, ICHRA, rehires, termination, and age bands.



Business Dashboard | Tax Year 2021 | GOTT2DREAMBIGGORG (32-5235432) | 2348 Doctor Webber Avenue, Charlotte, NC 28216 | Add Business | Business List

Upload | Validation Errors | **ACA Forms** | Online Access

Form Approval | File Download

Please review and approve the generated ACA forms. Upon your approval, the forms will be transmitted to the IRS.

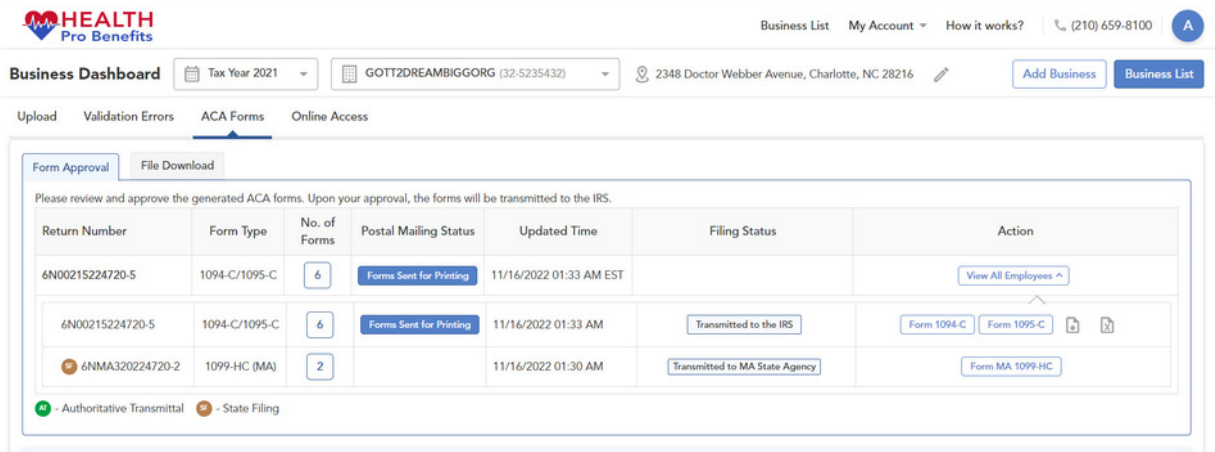
Return Number	Form Type	No. of Forms	Postal Mailing Status	Updated Time	Filing Status	Action
6N00215224720-5	1094-C/1095-C	6	Forms Generated	08/22/2022 01:54 AM EST	User Approved	Form 1094-C Form 1095-C [Download] [Print]

• Authoritative Transmittal

- Once your clients' forms are generated, we will notify, and the generated forms can be shared with your clients to review and correct any errors.
- We can re-generate forms as needed for your clients to review and provide final approval.

6 IRS / State Filing and Employee Copy Distribution

- Upon your client's approval, we will transmit the ACA forms electronically to the IRS and state (or only with the state) based on your client's requirements.
- If you have offered your clients postal mailing and/or online access services, we will distribute and enable secure portal access accordingly.



HEALTH Pro Benefits Business List My Account How it works? (210) 659-8100

Business Dashboard Tax Year 2021 GOTT2DREAMBIGGORG (32-5235432) 2348 Doctor Webber Avenue, Charlotte, NC 28216 Add Business Business List

Upload Validation Errors **ACA Forms** Online Access

Form Approval File Download

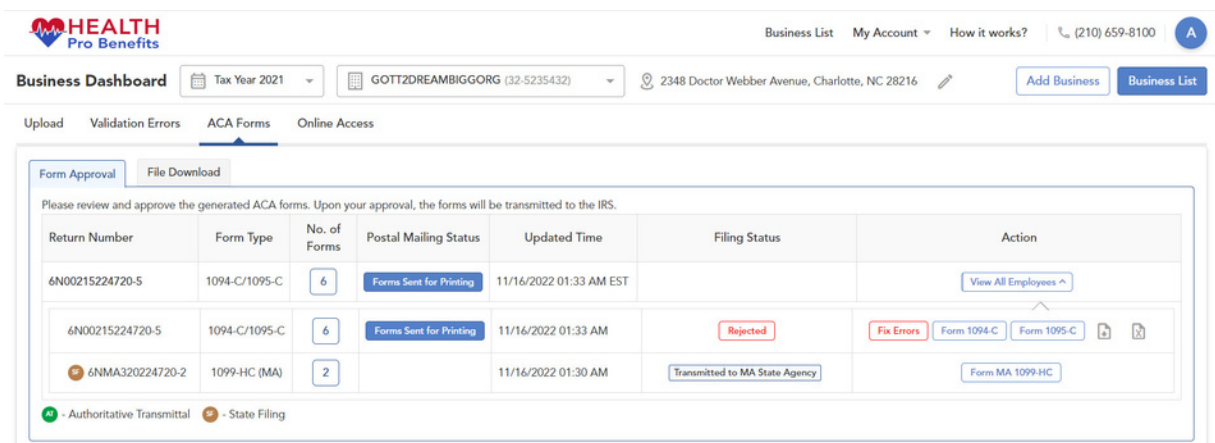
Please review and approve the generated ACA forms. Upon your approval, the forms will be transmitted to the IRS.

Return Number	Form Type	No. of Forms	Postal Mailing Status	Updated Time	Filing Status	Action
6N00215224720-5	1094-C/1095-C	6	Forms Sent for Printing	11/16/2022 01:33 AM EST		View All Employees ^
6N00215224720-5	1094-C/1095-C	6	Forms Sent for Printing	11/16/2022 01:33 AM	Transmitted to the IRS	Form 1094-C Form 1095-C
6NMA320224720-2	1099-HC (MA)	2		11/16/2022 01:30 AM	Transmitted to MA State Agency	Form MA 1099-HC

● - Authoritative Transmittal
 ● - State Filing

7 ACA Corrections

- If there are any errors in the data provided in your client’s ACA forms, the IRS will send a notification regarding that. In those cases, you can assist the clients with the corrections and re-transmit the rejected returns through ACAwise.
- ACAwise also allows you to file corrected returns of ACA forms that were filed with errors previously.
- We can also distribute the corrected employee copies if required.



HEALTH Pro Benefits Business List My Account How it works? (210) 659-8100

Business Dashboard Tax Year 2021 GOTT2DREAMBIGGORG (32-5235432) 2348 Doctor Webber Avenue, Charlotte, NC 28216 Add Business Business List

Upload Validation Errors **ACA Forms** Online Access

Form Approval File Download

Please review and approve the generated ACA forms. Upon your approval, the forms will be transmitted to the IRS.

Return Number	Form Type	No. of Forms	Postal Mailing Status	Updated Time	Filing Status	Action
6N00215224720-5	1094-C/1095-C	6	Forms Sent for Printing	11/16/2022 01:33 AM EST		View All Employees ^
6N00215224720-5	1094-C/1095-C	6	Forms Sent for Printing	11/16/2022 01:33 AM	Rejected	Fix Errors Form 1094-C Form 1095-C
6NMA320224720-2	1099-HC (MA)	2		11/16/2022 01:30 AM	Transmitted to MA State Agency	Form MA 1099-HC

● - Authoritative Transmittal
 ● - State Filing

Get started with ACAwise's White Label Solution

Now, you are just a step away from expanding your business in ACA reporting services!

[Get Started Now](#)

If you have any additional questions about our services, reach out to our support team via phone, email, and chat.



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