

# BerniePortal Benefits Administration

*Better benefits, less administration*

## BerniePortal Benefits Administration allows HR to:



Offer better benefits



Boost employee engagement



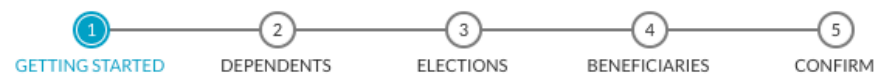
Simplify open enrollment

## BerniePortal's Benefits Administration Key Features Include:

✓ Improved Employee Experience	3
✓ Informed Enrollment Decisions	3
✓ Email Notifications	4
✓ Employee Communication	4
✓ Simplified Analytics and Reporting	5
✓ Made for Mobile	5
✓ ACA Reporting	6
✓ Carrier Connectivity	6

## Improved Employee Experience

Our 5-step guided enrollment process provides the simplicity your employees are looking for, all while increasing engagement and productivity.



**Guided Enrollment: Step 3 of 5**

1 GETTING STARTED 2 DEPENDENTS 3 ELECTIONS 4 BENEFICIARIES 5 CONFIRM

**Health** ✓

Dental

GVAP1 - Accident

HSA

Critical Illness

Vision

401(k)

Custom Vol Life 1

Legal

Identity Theft

Select a plan

Bernie's Music Shop HSA Health Plan Option ▾

**Message from your employer**

Best network for local workers in Nashville, TN.

**Plan documents**

1476801227-Guitar-Gurus-Plan-Summary-1.pdf

**Coverage Tiers:**

Plan cost:	
<input type="radio"/> Employee Only	\$148.97
<input checked="" type="radio"/> Employee + Spouse	\$172.44
<input type="radio"/> Employee + Family	\$244.00

**PER PAY PERIOD COST:**

Health	\$172.44
Dental	\$0.00
Group Accident	\$0.00
HSA	\$0.00
Critical Illness	\$0.00
Vision	\$0.00
401(k)	\$0.00
Custom Vol Life 1	\$0.00
Legal	\$0.00
Identity Theft	\$0.00
<b>Total cost</b>	<b>\$172.44</b>
<b>Employer contribution</b>	<b>\$0.00</b>
<b>Employee cost</b>	<b>\$172.44</b>

**HIDE CART**

**SAVE AND CONTINUE** **BACK TO PREVIOUS STEP**

## Informed Enrollment Decisions

Helpful tools such as shopping cart functionality, video content, helpful links, and detailed plan descriptions help employees make more informed benefit elections.



Hi Courtney,

Jill Green has completed her enrollment. Attached is a PDF summary of what they elected. Remember, you can also log into BerniePortal to download all employee elections to a spreadsheet.

Thanks,

Bernie 

## Email Notifications

Receive email notifications when employees complete their enrollment or make changes to their elections, allowing you to stay in the know and submit information to carriers in a timely manner.

## Employee Communication

Track employee enrollment progress and customize email reminders for employees who haven't yet completed enrollment with increasing urgency.

Outstanding Benefit Enrollment

Who would you like to send a reminder to?

☒ Only Ben Geller

☐ All employees that need to complete enrollment

Message text

Hi Ben,

Please complete your enrollment before the end of the day on Friday.

Thanks,

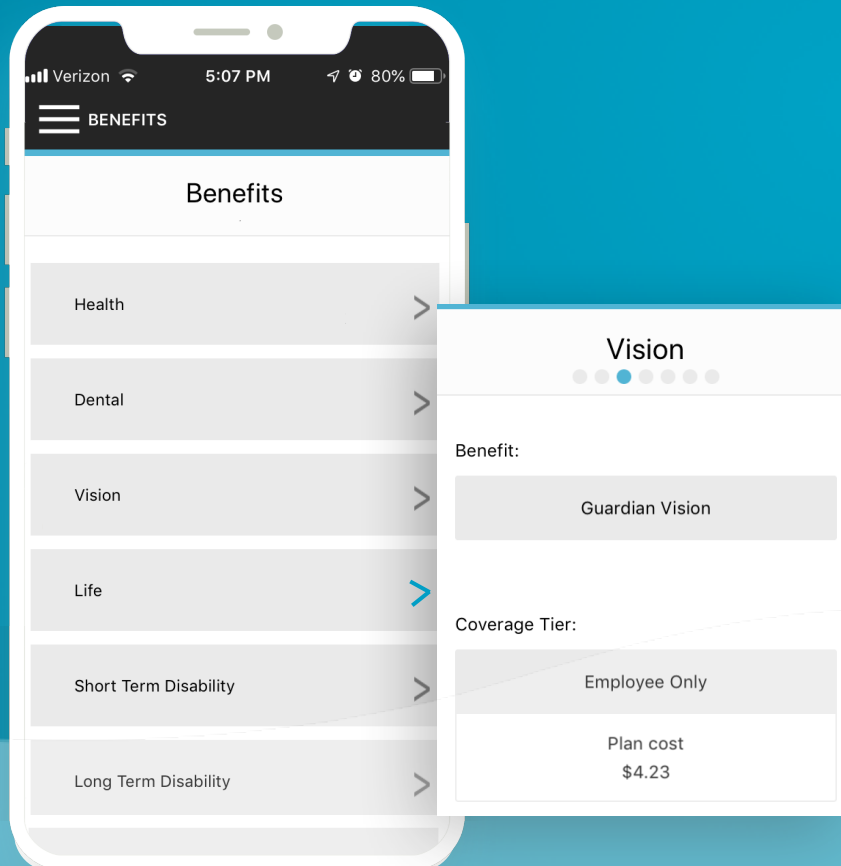
HR

SEND REMINDER

CANCEL

## Simplified Analytics and Reporting

Easily access benchmarking information and improve productivity with customized reports, simplifying the enrollment period for everyone involved.



### STATS

Applicants

Current enrollment

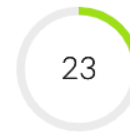
Onboarding

Compliance

Turnover

Time

#### Total enrollment



HEALTH



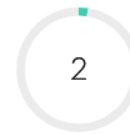
DENTAL



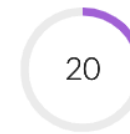
VISION



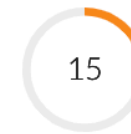
LIFE



CANCER



CUSTOM VOL LIFE 1



CRITICAL ILLNESS



SHORT TERM DISABILITY

## Made for Mobile

Our smartphone app allows employees to view their benefits elections and download important plan documents from anywhere, any time.

## ACA Reporting

By enrolling on BerniePortal you can easily transfer benefit data onto official IRS forms, saving you time.

The screenshot displays the BerniePortal interface for ACA Reporting. The top navigation bar includes links for HOME, EMPLOYEES, REPORTS, BENEFITS, ONBOARDING, and PAYROLL, along with a user profile icon and a search bar. The main content area shows a list of employees under the 'List' tab. A dropdown menu is open, showing options to filter employees by 'Included' or 'Excluded'. The table below lists employees and their benefit data for each month of the year.

STATUS	NAME	ENTRIES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Included	Sampson, Samantha	Line 14	1H	1H	1A	1A	1A	1A	1A	1A	1A	1A	1A	1A
		Line 15	34.22	34.22	55.33	55.33	55.33	55.33	55.33	55.33	55.33	55.33	55.33	55.33
		Line 16	2D	2D	2C	2C	2C	2C	2C	2C	2C	2C	2C	2C
		Cogniscent												
Included	John Johnson	Line 14	1H	1H	1H	1H	1H	1H	1H	1H	1H			1H
		Line 15												
		Line 16	2A	2A	2A	2A	2A	2A	2A	2A				
		Cogniscent												
Included	Franklin, Frank	Line 14	1H	1H	1A	1A	1A	1A						
		Line 15												
		Line 16	2D	2D	2C	2C	2C							
		Cogniscent												

**BONUS Feature: Carrier Connectivity**

Industry-leading benefit providers integrate with BerniePortal.



Enroll, manage and access employee benefits  
year-round with BerniePortal.

**Ready to learn more?  
See a tour of BerniePortal's Benefits  
Administration feature today:**

**SEE TOUR**



# BerniePortal

## Form 1094-C / 1095-C Reporting

*Save time and streamline ACA compliance*

The image shows a tablet displaying the BerniePortal Form 1094-C / 1095-C Reporting interface. The form is divided into two main sections: Part I, Employee Information, and Part II, Employee Offer and Coverage.

**Part I, Employee Information**

First Name:  Middle Name:

Last Name:  Address:

City or town:  State or province:

ZIP Code:  Social security number:

ALL Subgroups:

**Part II, Employee Offer and Coverage**

Plan Start Month (2-digit number):

	ALL 12 MONTHS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Line 14	1A	<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"/>
Line 15		<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"/>
Line 16	2A	<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"/>

☒ Include with submission

☐ Corrected Form



## BerniePortal 1094-C /1095-C Reporting allows HR to:



**Automate processes**



**Increase productivity**



**Remain audit-ready**

## BerniePortal 1094/1095-C Reporting Key Features Include:

✓ Automate Manual Work	10
✓ Edit Capability	11
✓ Data Import	11
✓ Data Export	11
✓ E-File Directly with the IRS	12
✓ Distribute Forms	12

## Automate Manual Work

Since BerniePortal already houses all necessary benefit data, Form 1095-C documents are automatically populated with correct codes, meaning HR can simply print to distribute to employees.

The screenshot displays the BerniePortal interface for managing Form 1095-C documents. The navigation bar at the top includes tabs for HOME, EMPLOYEES, REPORTS, BENEFITS, ONBOARDING, and PAYROLL. The current view is 'List', which shows a table of employee data. A dropdown menu is open for filtering employees, showing options for 'Included' and 'Excluded'. The table lists four employees: Samantha Sampson, John Johnson, Frank Franklin, and Will Williams, each with their respective benefit data for the past 12 months.

STATUS	NAME	ENTRIES	ALL 12 MONTHS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	ACTIONS
Included	Sampson, Samantha	Line 14		1H	1H	1A	1A	1A	1A	1A	1A	1A	1A	1A	1A	⚙️
		Line 15		34.22	34.22	55.33	55.33	55.33	55.33	55.33	55.33	55.33	55.33	55.33		
		Line 16		2D	2D	2C	2C	2C	2C	2C	2C	2C	2C	2C		
		Cogniscent														
Included	John Johnson	Line 14		1H	1H	1H	1H	1H	1H	1H	1H	1H	1H	1H	1H	⚙️
		Line 15														
		Line 16		2A	2A	2A	2A	2A	2A	2A	2A	2A	2A	2D	2D	
		Cogniscent														
Included	Franklin, Frank	Line 14		1H	1H	1A	1A	1A	1A	1A	1A	1A	1A	1A	1A	⚙️
		Line 15														
		Line 16		2D	2D	2C	2C	2C	2C	2C	2C	2C	2C	2C	2C	
		Cogniscent														
Included	Williams, Will	Line 14		1H	1H	1H	1H	1H	1H	1H	1A	1A	1A	1A	1A	⚙️
		Line 15														
		Line 16		2A	2A	2A	2A	2A	2A	2A	2D	2C	2C	2C	2C	

## Edit Capability

Need to make changes or add codes to your Form 1095-C database? Individual forms are editable with BerniePortal.

SUBGROUP NAME	(14) EMPLOYER OFFER OF COVERAGE CODE	(15) EMPLOYEE SHARE OF LOWEST COST MONTHLY PREMIUM FOR SELF-ONLY MINIMUM VALUE COVERAGE	(16) APPLICABLE SECTION 4980H SAFE HARBOR CODE
All Employees	1A	78.28	2G
Managers	1A	0.00	2G
COBRA	1D	470.00	2E

 Edit  
 Don't include

## BONUS Features:

### Data Import

New to BerniePortal? No worries! Upload a spreadsheet of data to generate and download complete and compliant IRS Form 1095-C documents.

### Data Export

Simply download and print IRS compliant Form 1095-C documents for on-time distribution to employees.

## E-File Directly with the IRS

BerniePortal can e-file forms for groups over 250 lives directly with the IRS, saving you time and reducing errors.

### ACA AIR FILES FOR 2018 year:

FILE NAME	FILE GENERATION DATE	FILE SIZE
<a href="#">2018-12-22_15-41-11_ACA_Forms.zip</a>	2018-12-22 15:41:11	114.59k

### ACA AIR FILES FOR 2019 year:

FILE NAME	FILE GENERATION DATE	FILE SIZE
<a href="#">2019-4-30_18-05-20_ACA_Forms.zip</a>	2019-30-04 18:05:20	516.46k
<a href="#">2019-4-09_14-21-15_ACA_Forms.zip</a>	2019-09-04 14:21:58	556.83k
<a href="#">2019-4-03_00-08-38_ACA_Forms.zip</a>	2019-3-04 00:08:39	556.31k

### BONUS Feature: Distribute Forms

BerniePortal mailing services keep you compliant by ensuring employees receive the proper documents on time.



BerniePortal's 1094-C /1095-C Reporting features allow you to stay compliant by reporting and filing directly with the IRS.

**Ready to learn more?**

**See a tour of BerniePortal 1094-C / 1095-C Reporting today:**

**SEE TOUR**