

## Success Story



### ACA Compliance Solution Helps Top-Ranking CPA Firm Offer Affordable New ACA Services to Clients

**WIPFLI**<sup>LLP</sup>  
CPAs and Consultants

“Integrity Data and their ACA Compliance Solution helped us provide a valuable service to our clients we couldn’t have otherwise offered, or kept affordable. It has everything we need included in one annual licensing fee without add-ons or upfront costs.

The built-in intelligence, easy imports, automatic coding and streamlined electronic filing enabled us to do our work in a fourth of the time without hiring additional staff.”

Pam Branshaw, Partner

*Founded in 1930, Wipfli LLP is a multi-discipline CPA and professional services firm ranking among the top 20 accounting and business consulting firms in the nation. The organization serves more than 44,000 clients worldwide and, with the new Affordable Care Act regulations looming, wanted an efficient and accurate solution to help clients prepare and file IRS Forms 1094-B/C and 1095-B/C.*

Partners at Wipfli knew it would be a valuable service to help clients manage ACA compliance, but also understood with the volume and size of some of their clients, doing it manually wouldn’t be efficient or cost-effective for either party.

“It was really difficult to plan how to offer this service. We knew payroll providers were developing their own solutions, but they were extremely expensive and there were very few solutions available for us to purchase that were fully built. We needed to find someone to work with that would be willing to modify their system and processes to work with us,” says Pam Branshaw, Wipfli Partner.

Wipfli provided ACA services to an initial group of approximately 150 clients using a variety of systems. “None of the systems we initially used were built to prepare these forms automatically. They did not have the intelligence to take payroll and insurance data and determine proper coding for the IRS forms. All were strictly fillable forms. Some systems did not do electronic filing and other products had many issues with the electronic filing. We needed a solution that could work with any payroll system and save us significant time over Excel spreadsheets and manually coding each employee for each month,” Pam explains.



## Multiple Clients One Comprehensive ACA Solution

Wanting a more accurate and automated way to prepare the IRS forms for clients, Wipfli's internal IT consulting group recommended talking with Integrity Data and other ACA solution providers. Pam chose to go with Integrity Data's cloud-based ACA Compliance Solution for a few reasons. "They were willing to work with me and had technical expertise that I trusted. They developed specific service center functionality to work with us that allows us to help clients very effectively. The system is easy to use."

Integrity Data provided Wipfli with easy-to-understand import formats they could distribute to their clients and insurance vendors or use to modify existing Excel reports. Clients send Wipfli their data for each payroll (or Wipfli exports the files from their payroll processing software), which is then imported into the ACA Compliance Solution. Each import only takes a few minutes and the system automatically calculates the proper codes. Employer compliance is proactively tracked and reported on a monthly basis for those clients that desire help figuring out who they need to offer insurance to each month. Upon entering the final payroll at the end of the year, the appropriate IRS forms are complete and can then be sent to employees and electronically filed with the IRS.

"Through this process, we found a lot of clients were getting inaccurate data from their own systems. When we imported everything into the ACA Compliance Solution, we ended up correcting a lot of forms that would have been seriously wrong," says Pam.

Wipfli successfully helped their initial group of clients comply with ACA reporting requirements in 2016 and plans to expand and market ACA services moving forward. Not only does the solution allow Wipfli to provide clients with accurate year-end IRS forms, it also allows them to provide year-round services around eligibility determination for health coverage and affordability testing of the coverage offered.

With Integrity Data's ACA Compliance Solution, the firm can further enhance its value to clients, while adding ongoing revenue opportunities.

To learn more about this ACA Compliance Solution for private employers, or as a value-added offering for payroll and benefits service providers, call Integrity Data at 888.786.6162 or visit [www.integrity-data.com/aca-services/](http://www.integrity-data.com/aca-services/).