



Helping you get the most from your benefit plan

The Small Group Benefit Experts - for groups of two or more

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Employer Benefit Adviser

July 2024

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What to Know This Month

Here's a sneak peek at the highlights in this issue:

1. Reminder: 5500 and PCORI Due in July
2. Three Easy Ways to Learn About Your Plan
3. Freedom Advantage Plans Come with a Plan Advocate
4. Receive One-On-One Weight Loss Coaching at No Cost

Reminder: 5500 and PCORI Due in July

Form 5500 Deadline - July 31, 2024

As an employer, you must file Form 5500 electronically with the Internal Revenue Service (IRS). Allied National sent you the 5500 Filing Information Worksheet a couple of weeks ago. Form 5500 is used to report information on the qualification of the plan, its financial condition, investments and the operations of the plan.



PCORI Fees Deadline - July 31, 2024

Payment of your PCORI fees is due July 31, 2024. For plan years that ended on or after Oct. 1, 2023, and before Oct. 1, 2024 (including calendar year plans), the fee is \$3.22 per person covered by the plan. For plan years that ended after Oct. 1, 2022, and before Oct. 1, 2023, the fee is \$3 per person.

To assist with both of these filings, we have a page on our website. Please refer to this page for detailed instructions on how to complete a 5500-SF filing or to learn more about PCORI.

[Guidance for Form 5500 & PCORI Web Page](#)

Three Easy Ways to Learn About Your Plan

There are many types of Funding Advantage plans, and the more you and your employees know about your exact plan, the better able you'll be to receive the full benefit of having coverage.

Check out one or all of these options to learn more:

- Visit [Member Resources](#) and click on your plan. If you've forgotten the name of your plan, check your ID card.
- Log into your [Self-Service Site](#) or check out this [flyer](#) to learn how to access your Self-Service Site. After logging into the site, members can see information that includes their benefits, plan documents, claim payments and coverage dates. Employers also can get copies of plan documents, benefit information, claim payments, coverage dates and more.
- Call Client Services at 800-825-7531. Representatives are available from 8 a.m. to 4:30 p.m. Monday through Friday (CST).



Freedom Advantage Plans Come with a Plan Advocate

Check your health plan ID cards and if you and your employees have one of our Funding Advantage Freedom Plans — Freedom Traditional, Freedom Essentials, or Freedom Hybrid — you have access to our Elite Experience Team.



The Elite Experience Team is a dedicated team of trained staff with years of experience to help answer your questions about reference-based pricing (RBP). Our team is dedicated to working with members and their providers and making sure you don't pay for any eligible charges over your copay, deductible and coinsurance.

In addition, Freedom Plan members and our Elite Team have access to a great new tool, CompassConnect. You can use this service to find medical providers who are RBP friendly in a specific area. Register on our website, www.alliednational.com, find a provider, to look up providers or call our Elite Team at 866-332-1987 to have them research an area to see if there are RBP providers available. If there is a specific provider that is needed, you can search for them through CompassConnect or ask our Elite Team members to contact a provider to see if they will accept our

RBP. Our team does a great job of educating providers and getting them to accept RBP patients.

For assistance or more information, you and your employees can contact our Elite Experience Team at 866-332-1987 or email them at elite@alliednational.com.

Receive One-On-One Weight Loss Coaching at No Cost

Struggling with losing weight? Allied's HealthCare Assistant program gives you access to one-on-one health coaching from a registered dietitian at **NO COST TO MEMBERS**.

Allied HealthCare Assistant, an umbrella of health care services available to members and their families, is working with GEMCORE, a health and wellness company. GEMCORE specializes in helping you manage your health and reach your goals through coaching, diet and exercise.



There are two ways to enroll:

- Online at www.gemcorehealth.com/allied
- Or call 1-888-423-5220

Once enrolled, a registered dietician will work with you to establish a personalized weight management plan that fits your lifestyle. You might qualify for a free scale.

Questions? Call Allied HealthCare Assistant at 844-287-6078.

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