



Helping you get the most from your benefit plan

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

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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. The Importance of Maintaining Group Participation
3. Save With Abenity on Travel Plans
4. Holiday Hours

Reminder: 5500 and PCORI Due in July

Form 5500 Due July 31

As an employer, you must file Form 5500 electronically with the Internal Revenue Service (IRS) and Allied National will mail you the 5500 Filing Information Worksheet. The deadline for calendar-year plans is July 31, 2024. The form is used to report information on the qualification of the plan, its financial condition, investments and the operations of the plan.



PCORI Fees Due July 31

Payment of 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. The PCORI fee will be in effect through 2029 and is used to fund comparative effectiveness research.

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

The Importance of Maintaining Group Participation



It's important to keep a close watch on your group's medical plan participation throughout the year, not just in the beginning. At the time of renewal, Allied National will report plan participation on your behalf. Not all carriers do this and the burden typically falls on the employer.

To make this process easier, Allied provides an Employer Participation Statement inside of your renewal kit. After you fill out the report, Allied will report the new, accurate participation numbers for you based on the information provided. Otherwise, the group is responsible for maintaining participation requirements.

Participation requirements for all major medical and Cost Saver plans:

- At least 75% of eligible employees AFTER valid waivers for other coverage
- OR 50% of the eligible employees in the group without regard to waivers, whichever is easier for the group to meet.

So as employees come and go, it is important to remember this and do what you can to maintain participation. If, for any reason, you fall below this minimum, you will have a fixed period of time in which to reestablish minimum participation requirements and avoid termination.

See your Summary Plan Description for details. Contact your agent if you have questions.

Save With Abenity on Travel Plans

Vacations are great fun – especially if you know you're getting a deal.

Allied National's Member Perks Program from Abenity is a great way to get discounts on services ranging from theme park tickets to transportation discounts

For instance, Disneyland Resort California is offering a \$27 discount on Disneyland Resort eTickets so you and your family members can celebrate Pixar Fest now through Aug. 4.



Driving to your destination and need a reliable car? Avis Car Rental and Budget Rent a Car are offering up to 35% off car rentals or budget base rates respectively.

For cruises, Celebrating Cruises offers members a 75% discount on a second guest fare and Carnival has 50% reduced deposits and up to \$25 onboard credit per room.

Search for more discounts by pressing the button below.

[Abenity Discounts](#)



TIME TO TAKE A BREAK

Closed For The Holidays

JUNE TEENTH
June 19, 2024

HAPPY 4th of July
July 4, 2024

A graphic of colorful fireworks exploding in the sky, with streaks of red, purple, and white.

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