



ALLIED
NATIONAL

BULLETIN



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New Direct Primary Care Quoting Features

Allied is a huge supporter of the trend towards Direct Primary Care (DPC) services. We've designed a new Funding Advantage wrap plan option specifically for employers who are providing DPC benefits.

DPC is a cutting-edge solution to the rising cost of health care. An employer who is in a DPC arrangement makes a fixed monthly payment to a doctor's office in order for employees to have access to primary care health services. Allied's Funding Advantage level-funded major medical plan provides the catastrophic wrap of the Direct Primary Care plan to cover major illnesses and accidents.

The result? Better health care at a lower cost with increased satisfaction from a primary care physician relationship.

We are enhancing our quoting process for Funding Advantage DPC wrap plans to help your sales efforts. This new quoting feature is now available on our WINAllied Proposal software.



Allied is now providing DPC specific quotes that:

1. Add a specialist copay benefit option to help members who have to go outside of a DPC to get required services.
2. Changes the proposal marketing materials to emphasize the DPC relationship so that it is a better sales tool for the concept.
3. Adds an immediate rate discount of 10% to account for the positive plan impact that a DPC provides to members.

The savings with an Allied DPC wrap plan will cover the cost of the DPC plan – all while providing better health care at a lower cost.

Call Sales Support at 888-767-7133 or visit our DPC website page at www.alliednational.com/dpc to learn more about this exciting concept.

Easy-to-Mail Quotes for an Easy-to-Sell Individual Health Benefit Plan

You can now generate a PDF of your PivotCare Elite Fixed Indemnity Benefit Insurance quotes and email them to your clients.

Just go to your personalized page:

- Click on "Find Plans"
- Click on "Online Enrollment"
- Fill in your client's information
- Click on the button for a PDF of the quote; the system will download the form
- Attach the PDF to an email. The PDF contains a link for your client to click that takes them back to your personalized page, ready to see the quote live online.

"This feature has been highly requested by agents," said Gary Ashley, Executive Vice President of Allied National. "We think that the ability to email clients a PDF of the quotes will really make things easier on agents."

PivotCare Elite is a limited benefit health coverage plan that allows individuals to choose the level of coverage they need and can afford.

There are five affordable plans and no insurance deductibles or coinsurance limits to meet. Cash payments are made for both sickness and accidental injuries and no specialist referrals required.



Administered by Allied National and underwritten by the Standard Life and Accident Insurance Company, PivotCare Elite does not qualify as a minimum essential coverage benefit plan.

PivotCare Elite currently is available in these states: AR, AZ, DE, GA, IA, IL, IN, KS, KY, LA, MI, MO, MT, MS, NC, NE, NM, NV, OH, OK, PA, SC, SD, TN, TX, VA, WI, WV, WY.

To learn more, check out our marketing page at www.alliednational.com/formsfixedindemnity for a brochure, flyer, guide and PowerPoint presentation.

If you're ready to add an individual fixed indemnity plan to your portfolio, fill out the form on www.alliednational.com/fixed-indemnity to get your personalized link today.

Two Valuable Announcements on Short Term Medical

Pivot Health Short Term Medical (Pivot STM) is now available in five additional states!

- Idaho
- North Dakota
- Nevada
- North Carolina
- Oregon



If you don't already have your own personalized Pivot STM sales web page you can request one at www.alliednational.com/short-term. The personalized page will allow you to easily get quotes and sign up members.

Pivot STM is administered by Allied National and underwritten by Companion Life. Visit www.alliednational.com/formsshortterm for marketing brochures and guides detailing this product in your state. Learn about our unique "4X3" option which allows your client to buy four 90-day coverage plans at initial enrollment.

Important Update: Health and Human Services is interested in expanding the availability of short-term, limited-duration health insurance by allowing consumers to buy plans providing coverage for any period up to 12 months, rather than the current maximum period of three months. You can read more about this proposed ruling at <https://tinyurl.com/ydzyvndk>.

Need Information for a Client After Hours? Use Your Allied Self Service Site!

Have you ever needed or wished you had 24-hour access to Allied's Client Services or Sales Support to find out specific information for your client? You need to register and use Allied National's Self Service Site. It's not just for employers and members.

With the Self Service Site, you can:

- View all of your cases, including member information and status, plus important documents for your clients, including billing statements, claim-fund monthly reports, stop-loss and administrative agreements and 1095B forms.
- Place service requests on behalf of your clients.

- See your individual license and appointment information, compensation payment history and contracting information.

You can gain access to your Self Service Site from www.alliednational.com on the home page or the Agent Menu. If you're a new user, you'll be asked for your Allied producer number, birth date and last four numbers of your Tax ID# (or Social Security Number) to verify your identity and register for access.

Help your clients by keeping active on your self-service account. Register and log on today.

Are You Using Up-to-Date Forms?

Allied National encourages agents and their staff to use our online applications, enrollment forms and brochures. The following steps will ensure you are always using the most current version.

1. Go to www.alliednational.com/download-forms.
2. From the drop down menu select the product you are looking for and click once on the form you would like to use.
3. When it opens in the browser, highlight the url address at the top of the page and drag it to your desktop.

4. This step will put a web-page short cut on your desktop. By using this method, instead of downloading, the file should automatically update when we make form changes.

If, however, you are using downloaded versions of our forms, we recommend you download new versions of these forms, at least on a quarterly basis to ensure you're using the correct version. We make improvements and updates to these forms throughout the year and the only way to make sure you are using the most current version of a form is to download it on a regular basis or to copy the web-page shortcut to your desktop.



Q. Can I write a Funding Advantage plan for groups comprised of owners only?

A. No. While, Funding Advantage is available for groups as small as two employees, one of the employees must be a non-owner, non-spousal W2 wage earner (meaning the employees can't be husband and wife) for the benefit plan to be considered an eligible ERISA group.