



Allied National - The Small Group Benefit Experts

Employer Benefit Adviser

June 2020

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Federal Form Filings – 5500 & PCORI

This month Allied National mailed you the 5500 Filing Information Worksheet to help you with your annual federal 5500 filings and payment of the PCORI fee established under the Affordable Care Act.

Form 5500 must be filed electronically with the Internal Revenue Service by the last day of the seventh month following the end of the plan year, unless an extension has been granted. The deadline is July 31, 2020, for calendar-year plans.

Under the rules and requirements of the Employee Retirement Income Security Act, a self-funded employee benefit plan is required to make an “Annual Report” to the Department of Labor using the 5500 Report. Small employers under 100 lives have a general exemption from making this filing if their plan is fully insured or unfunded.

However, small employers lose this exemption if they are considered self-funded because they are withholding employee funds and these contributions are held by a third party (other than an insurance company), such as a Third-Party Administrator in an account to pay claims benefits. Funding Advantage plans generally

fall into this category of a “funded” plan.

Although Allied sends out the data and the information necessary to file the 5500 report, you are required to do this filing yourself. Small employers generally are able to file the 5500-SF (short form) version. This filing information also is available on the Allied Self-Service Site.



PCORI fees have been extended through 2029. For plan years that end on or after October 1, 2019, and before October 1, 2020, the applicable fee amount is \$2.54 per person.

In an effort to help employers with these filings, we have an informational page on our website at alliednational.com/5500 with detailed instructions on how to complete a 5500-SF filing and more information on PCORI. We hope you will refer to this page for assistance.

Last Chance to Register Your Email to Continue EBA

This edition of the **Employer Benefit Adviser** will be the **last paper copy** we mail out to our small business members. Starting in July, we will **only** be emailing our monthly newsletter to employers who have registered their email address to be an authorized user on the employer Self-Service Site.

To stay up to date with industry news and Allied health plan details, please register your email address by visiting alliednational.biz/573.pdf and fill out and send in your Website Authorization Form.



For questions regarding how to register or to confirm you are registered, contact one of our friendly Client Services Representatives at 800-825-7531 or by email at clientservices@alliednational.com.

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Write a Review About Your Experience with Allied

Do you have a few minutes to spare? We'd love for you to write us a review. Your experience can be a big help to other employers looking for a unique small group health plan solution like yours.

Share your Allied National experience on Birdseye or Google by June 30 and you'll be entered to win an Amazon gift card!

Leave your review by going here:

<https://tinyurl.com/y7aocz3m>



"It helps to have somewhere [like Allied's partner AiRCare] to help me navigate my insurance and also support me emotionally when I needed it." Funding Advantage Plan Member

"It's nice to join a new health plan and see that they're looking out for you (about the DNA testing program for Rx usage)." Funding Advantage Plan Member

Recent member testimonials

"It's great to have real people I can contact to resolve any issues that may arise, quickly and efficiently! Great company to work with." Funding Advantage Plan Member

"I love all cards (on the Member Connection/Benovate portal). It's been helping me manage my daily stress. Thank you." Funding Advantage Plan Member

Connect to Your Inner Strength Using Member Connection

We are all going through unprecedented changes and emotions. Member Connection is the perfect resource to help you and your employees find ways to become stronger both physically and emotionally – not to mention the added bonus of earning gift cards to places like Amazon.com and Target!

Member Connection is an online, interactive member engagement portal powered by Benovate. Member Connection focuses on ways to help members improve their health, finances, growth and relationships. Once registered, members can access telehealth 24/7 or earn gift cards for taking wellness surveys, entering contests or answering simple questions like, how do you feel today. You also will find helpful tips on important topics like:

- Riding out the storm with your investments
- Alerts on COVID-19 scams to watch for
- Things everyone can do to help others during these difficult times
- The benefits of going outside

If your Allied National health plan includes access to Member Connection, you'll see it on the back of your member ID card. Your employees can enroll in this free program by:

- Downloading the app from the Google Play Store or Apple Store (search for the Benovate app); OR
- Go to member.alliednational.com to register on their PC or laptop

Members only need the "Allied Member Connection Registration Code" from the back of their health plan ID card to register.

