



Agent Bulletin

Allied National - The Small Group Benefit Experts

February 2021

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What to Know This Month

Here's a list of what you can expect to read about in the Agent Bulletin this month. Take a look!

1. Tribute to a General Agent legend
2. New 1099-NEC form coming your way
3. Why you should follow Allied on social media
4. How to submit a successful RFP
5. How to keep DocuSign emails out of junk mail
6. Registering your clients on the Self-Service Site
7. New blog articles to share

Harry Garman: A Tribute to an Industry Leader and Friend



It was with much sadness that we received the news in January that our longtime General Agent and friend Harry Garman **passed away** due to COVID-19 complications. He was 72.

Harry, who was President of Midwest Insurance Marketers of America, was associated with Allied National for decades and was one of our top Funding Advantage General Agents.

“He was truly one of the great, old school gentlemen in our business,” said Gary Ashley, Allied’s Executive Vice President. “In a business as crazy and sometimes contentious as ours can be, Harry never had

a cross word with me or anyone here. Always a class act, everyone had always been ready to bend over backwards for Harry because of our respect for him.

“He was as much a friend to Allied as he was someone we did business with,” Gary

continued. "I'll miss the evening phone calls he made to me that always started with 'just a quick question' and would end an hour later after we'd discussed pretty much all aspects of business and life."

We send our sincere condolences to his family, coworkers and friends.

Memorials may be directed to the Sunshine Social Club, P.O. Box 199, Whitestown, Indiana 46075, or to the American Diabetes Association, 8604 Allisonville Road, Suite 140, Indianapolis, Indiana 46250.

Online condolences may be posted on the Meyers Mortuary website.

Share
Condolences

A New 1099 has Been Mailed to You

The 1099-MISC form Allied National mailed at the end of January to you for your 2020 commissions was a mistake. As it turns out, the Internal Revenue Service (IRS) created a new form for 'Non-Employee Compensation' called the 1099-NEC. This new form was to be used for the 2020 compensation reporting. We apologize for any inconvenience or confusion this may have caused you. We mailed you the correct 1099-NEC form the first week of February.



The good news is we never sent the 1099-MISC to the IRS, so the copy you received can be safely ignored. However, if you want a corrected 1099-MISC form that zeroes out the incorrect version, you can download it from your Allied agent self-service portal. If you are not registered, you can easily sign-up by clicking the self-service button below.

Login to Self-Service
Site

Get Social With Allied National

Here at Allied National we love getting social, which is why you'll find us on LinkedIn, Facebook and Twitter. We think it's a great way to post expert content that you can share to your own personal and business page for your clients to see. It's also a great way to build an online community where we can hear from our agents, employers and members.

Here are a few of the places you can find and support us online:

LinkedIn: Follow us to keep up with all things business. On Allied's LinkedIn page, you will find expert content from *The Allied Blog*; who's new at Allied; health care trends and important updates regarding federal aid for small businesses and COVID-19 information and resources. [Click here to follow us.](#)

Facebook: You can "like" our Facebook page for weekly blog updates and share tips with



your clients or how they and their employees can get the most out of Allied's member health benefits. We also post educational videos for you to share and you can see some of the fun we have at Allied – like our [Chiefs Spirit Day](#) and [National Wear Red Day](#) photos. [Click here to “like” our page.](#)

Twitter: Follow us to stay in the know regarding what's happening in the health care world and how it impacts group health plans. [Click here to follow us.](#)

What Makes a RFP Successful?

To get the best rates when you submit a request for proposal using our transmittal form, please include current rate information from other carriers. Even on street rates, providing Allied National with current rate information is beneficial so we can make sure we have enough information to underwrite.

Plus, when the transmittal form is filled out correctly, it provides us information on the type of coverage they have, such as GAP/HRA and COBRA.



The process of using a non-Allied employee enrollment application also is smoother when the ERISA disclosure statement form is included. We've linked it below for you or it can be found on our [Funding Advantage Resource](#) web page.

The bottom line is that we want to be competitive and make the process simpler for you. Our Online Enrollment system has been updated to give notifications to our team for any/all employee enrollments. The more information we all have, the better we can assist you and your clients.

[Download ERISA Form](#)

[Download Transmittal Form](#)

Keep Your DocuSign Emails Out of The Junk Folder

Allied uses DocuSign to help our agents and employers quickly sign required contracts for our Funding Advantage level funded plan. DocuSign is a quick and efficient way of using email to get documents signed by multiple parties in a timely manner and without requiring handling of paper forms. Unless, of course, the documents are, sitting in an email junk or spam folder in cyber space.

The goal, is keeping these emails out of your and your clients' junk or spam folders. Every email service has their own way of getting this done, but the two main ways are to trust the sender or save the contact. For instructions on how you and your clients can trust an email using email services like Gmail, Yahoo, Outlook and AOL, to name a few, [click here.](#)



Allied National uses DocuSign to expedite the return of our documents requiring multiple signatures. This can – and does – save days to weeks off of processing time.

To help speed up the processing of your cases, here are two additional steps to ensure DocuSign emails are landing in your inbox and your client's inbox:

1. Add the following email addresses as Safe Senders (aka Trusted Senders) in your and your client's address book. These are the DocuSign system sending email addresses:

- dse@docusign.net
- dse_demo@docusign.net
- dse_na2@docusign.net
- dse_na3@docusign.net
- dse_na4@docusign.net
- dse@eumail.docusign.net
- dse@camail.docusign.net
- dse@aumail.docusign.net

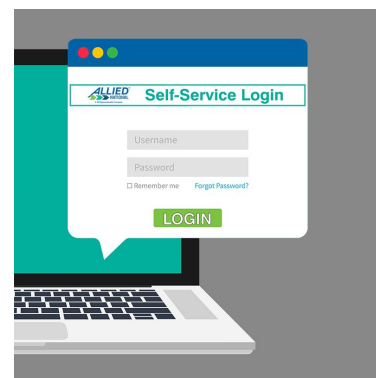
2. Request that your and your client's IT department allows emails from the domains @docusign.net & @docusign.com.

#1 Resource for Agents & Employers - Allied's Self-Service Site

The Allied National Self-Service Site is not just a super tool for you – our agents, it also will provide your Funding Advantage clients with all the information they need to manage and update their health plans.

By encouraging your clients to register and use the Allied Self-Service Site you are ensuring their easy access to:

- View monthly bills
- Manage employee information
- Submit requests to change names, addresses and terminations
- Get a copy of the Administrative Guide
- See reports about their health plan
- Read the monthly *Employer Benefit Adviser* Newsletter



Employers may assign one or more company representatives as an administrator to manage the account. Direct them to alliednational.com/employers where they can download, complete and return the Employer Authorization Form to underwriting@alliednational.com.

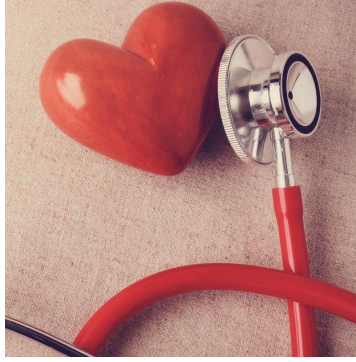
After Allied receives the completed authorization form, we will send the employer an email saying that the administrator can now access the site, register and create his or her login and password. Only individuals who have been authorized as an administrator by the employer and who are listed on the authorization form may have access to the administration side of the Self-Service Site.

[Download Employer Authorization Form](#)

Check Out Our Latest Blogs

Each week, we post new expert content on *The Allied Blog* for you to share on your social media pages or share directly with your clients. Many of these topics address issues faced by small employers.

Visit alliednational.com/blog to see all the latest content!



5 Simple Ways to Promote Heart Health in February
(infographic included)

[Read More](#)



The Value of Adding Dental and Vision to Your Health Plan

[Read More](#)



The Attraction of Level-Funded Health Plans

[Read More](#)

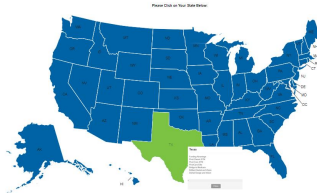
Quick Links



Sales Support

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888-767-7133



State Product Availability Map

[View](#) and link to Allied products available in each state.



WINAllied Proposal Software

[Get](#) current proposal software and information. Keep updated!

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