



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 2025

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What to Know This Month

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

1. Explore Your Health Plan
2. Form 5500 & PCORI Due This Month

Explore Your Health Plan

The more you and your team know, the more you'll gain from your group health benefits! Check out these two quick resources to learn what's available to you.

Member Resources

Our Member Resources page is designed to help Funding Advantage members navigate their health plan.

- Maximize their plan benefits
- Find providers or pharmacies
- Learn about Allied's Discount Program - Membership is FREE!
- Many of the plans have Spanish versions of the plan information

Not sure which plan you have?

Check your **ID card** for the name of your Funding Advantage plan

Self-Service Site

Log into your Self-Service Site to access everything you need to know about your coverage – 24/7.



Here's what you'll find:

- **Plan details:** Benefits, coverage dates, and plan documents
- **Claims info:** View payments and view your Explanation of Benefits (EOB)
- **Covered members:** See who's covered under your plan
- **Submit requests:** Make changes to your coverage or update your address
- **Family access:** Covered family members can grant you permission to view their claims

Need Help?

- Call **Client Services** at **800-825-7531**
- Or email us at clientservices@alliednational.com

Member Resources

Self-Service Login

Form 5500 & PCORI Fees Due This Month

If you sponsor a calendar-year health plan, **your Form 5500 and PCORI fees are due this month – by July 31.**

Form 5500

To make this process easier, Allied National is here to help:

- We sent you your **5500 Filing Worksheet in late May** to help you get started.
- We also created a dedicated page on our website with **step-by-step instructions** to assist you in completing **Form 5500-SF** and understanding your **PCORI fee obligations**.

PCORI Fee Rates

- **\$3.47** per covered person (for plan years ending Oct. 1, 2024 – Sept. 30, 2025)
- **\$3.22** per covered person (for plan years ending Oct. 1, 2023 – Sept. 30, 2024)

Visit our website today for detailed filing guides and support. Don't wait—Allied is ready to assist you every step of the way.

Guidance for Form 5500 & PCORI Web Page

[View as Webpage](#)



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