



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

June 2025

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What to Know This Month

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

1. Allied Makes Group Participation Easy
2. Reminder: 5500 & PCORI Due July 31
3. Gain Access to Substantial Discounts
4. Holiday Hours

Allied Makes Group Participation Easy

Keeping your group's medical plan participation on track isn't just a one-time task – it's a year-round priority. The good news? Allied National makes it easy! During renewal, we take care of reporting participation numbers for you – something not all carriers do, which often leaves employers handling it themselves.



To simplify the process, your renewal kit includes an Employer Participation Statement. Just fill it out, and we'll ensure your updated participation numbers are reported accurately. While we're here to help, maintaining participation requirements is ultimately up to the group.

Here's what you need to know:

- Major Medical & Cost Saver Plans: Your group must meet one of these criteria:
 - 75% of eligible employees after valid waivers
 - OR 50% of eligible employees, waivers aside – whichever is easiest for your team

With employees coming and going, keeping an eye on participation is key to staying compliant. If your numbers fall below the minimum, don't worry – you'll have time to

get back on track and avoid any disruptions.

Check your Summary Plan Description for details, and reach out to your agent or Allied National Client Services at 800-825-7531 with any questions. We're here to support you!

Reminder: 5500 & PCORI Due July 31

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 more about PCORI.

Form 5500 deadline

If you sponsor a calendar-year health plan, your Form 5500 must be filed electronically with the IRS by **July 31, 2025**. Allied National sent your 5500 Filing Worksheet in late May to help you get started.

PCORI fees also due

PCORI fees also are due **July 31, 2025**. Rates are:

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

Need help? Visit our website for step-by-step filing guides and PCORI info.

[Guidance for Form 5500 & PCORI Web Page](#)

Gain Access to Substantial Discounts

Allied National's Member Perks Program from BenefitHub is a great way for you and your employees to get discounts on favorite brands and services ranging from theme park tickets to transportation discounts and membership is FREE.

Members who have been using this great perk may have noticed the name has changed. Abenity and BenefitHub, two industry leaders, have combined as BenefitHub to bring our members access to even more savings and perks! Here is just a sample of the benefits you have access to for FREE!

- **Huge savings** on 150+ attractions like Disney World®, Universal Studios®, SeaWorld®, and Six Flags®
- **Travel deals** – local, national, and international
- **Cash Back** on tons of offers, with easy PayPal payouts



- **Discounted gift cards** that stack with other deals
- **Personalized recommendations** based on your interests

Top Brands Include: Costco, Sprint, Firestone, DirecTV, T-Mobile, Dell, Target.com, PODS, LifeLock, Verizon Wireless, Overstock.com, Brooks Brothers, Bally Total Fitness, Olive Garden, Red Lobster and Outback Steakhouse.

Be sure to share this information with your employees! For more information or to register for this FREE membership click the below.

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