

Form 5500 & PCORI Worksheets Coming Soon to Your Mailbox

We recently mailed you information to assist you in filing Form 5500 and paying the PCORI fee. See below for more information.

Form 5500 Deadline

If you have a calendar-year health plan, your Form 5500 must be filed electronically with the IRS by July 31, 2026. Allied National sent you 5500 Filing Worksheets to help you get started and this information also is conveniently located on your Self-Service Site.

PCORI Fees Due

The Patient-Centered Outcomes Research Institute (PCORI) fee also is due July 31, 2026. The fee was established under the Affordable Care Act to support comparative effectiveness research.

For plan years ending between Oct. 1, 2025, and Sept. 30, 2026, the PCORI fee is \$3.84 per covered life, an increase from \$3.47 for prior plan years.

If you need assistance with the form or fee, visit our website for a step-by-step filing guide and PCORI information.

This information is provided as a courtesy. However, we encourage you to obtain independent legal and tax advice for your self-funded plan's compliance obligations specific to your circumstances.

[Form 5500 & PCORI Guidance](#)



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