frequently asked questions

schedule A reports

Q. What information is on a Schedule A?

A. Total premiums received and applied during the plan year requested (paid premium)

- Total participants represented by the certificates in force on the plan year end date
- Total commissions paid and total fees paid during the plan year

Q. How can I request a Schedule A report?

A. Send the request with all of the following information ONLY to **ABScheduleARequests@Allstate.com**:

- Full account name
- Account number(s)
- Plan year or time period the Schedule A should cover (month/day/year - Example: 1/1/2020 to 12/31/2020)
- If you are not the broker of record, attach a letter of authorization from the account

Q. Can I request a Schedule A through EasyBill Online?

A. Yes, the request can be submitted through the employer portal in EasyBill Online. The request must include the following information:

- Full account name
- Account number(s)
- Plan year or time period the Schedule A should cover (month/day/year - Example: 1/1/2020 to 12/31/2020)

Q. How long will it take for me to get a Schedule A?

A. All requests will be completed within 5 business days of receipt. Please note that requests with 5 accounts or more may take longer.

Q. Once my Schedule A is ready, where will it be sent?

A. Schedule A reports will be sent to the requestor.

Q. What is the definition of a "plan year"?

A. The plan year is determined by the account in accordance with their reporting needs. The plan year can be either calendar year or fiscal year, and it does not necessarily have to coincide with the enrollment period.

Q. Will the premium amounts on the Schedule A match invoices or payments remitted?

A. The participant count and recorded premiums on the Schedule A include policies that are on payroll deduction at the end of the plan year requested. It includes all standalone coverages (spouse or dependent coverage is not included if attached as a rider). If a policy was moved from payroll deduction to Direct Bill before the plan year end date, that policy would not be included in the participant count. If a policy has moved to a different account, that policy would be included on the new account for that plan year's date range.

Q. How soon can I request a Schedule A after the plan year end date?

A. You can request a Schedule A 15 days after the plan year end date.

Q. What happens if Allstate Benefits receives multiple requests for the same Schedule A (for example, requests for a broker, account, sales support rep, etc.)?

A. It may slow down the turnaround time.

Q. What should I do if I think the information on the Schedule A report is incorrect (large variances in the premium amounts or commissions amounts are not what I think they should be)?

A. Report it to one of your Account Managers (Sales Support, Regional Account Billing or National Account Billing) and provide them with the specific items that you believe are incorrect and why.

Allstate BENEFITS