

To Our Valued Partner,

As a complimentary service to our groups, we have calculated the HRA portion of their Patient-Centered Outcomes Research Institute (PCORI) fee, also known as the Comparative Effectiveness Research (CER) fee. For more information about PCORI fees and a sample of the calculation statement, please see our [broker resource](#).

All groups with HRAs will be receiving an email notice of this calculation along with detailed instructions for filing the fee on IRS Form 720. All groups will be notified by end of day on Wednesday, June 18.

To view their calculation, plan administrators are being advised to log into their Admin Guides. The calculation will be posted in the Plan Documents section as "CHOGROUPNAME-PcoriForm720July2014."

How do Groups Access the Admin Guide?

Access to the Admin Guide is provided on our website at: <http://www.choice-strategies.com/where-would-you-like-to-go->

Admin Guide passwords are emailed to plan administrators during their plan's initial setup. If groups need help accessing the Admin Guide, please advise them to contact Client Services. For an overview of the Admin Guide, they can watch a [quick video tutorial](#).

Understanding Choice's PCORI Fee Calculation

- If the calculation reads \$0.00, the group may not owe a PCORI fee this year for their Choice Strategies HRA. They may still owe a fee if they had an HRA with

another TPA.

- If the calculation reads greater than \$0.00, the group likely is required to submit this fee on [IRS Form 720](#) by July 31, 2014. Instructions for completing and submitting Form 720 are included with the calculation.
- As with all tax forms, we recommend having a qualified CPA or tax adviser review the calculation and Form 720 prior to filing.
- If employers have more than one qualifying self-insured plan, they may be considered as one plan so long as all the plans have the same plan year. If employers have a self-funded health insurance plan, they should see their self-funded plan administrator for additional information on merging employee counts.
- Have questions? We are offering a reoccurring, live PCORI webinar for Brokers and Employers on Tuesdays in June and July. [Register here.](#)

It is our pleasure to provide this calculation to our groups as part of our commitment to delivering the highest level of customer service.

Sincerely,

Choice Strategies, a division of WageWorks

www.choice-strategies.com



No information contained herein is intended to be legal, accounting or other professional advice. We assume no liability whatsoever in connection with your use or reliance upon this information. This information does not address specific situations. If you have questions about your specific situation, we recommend that you obtain independent professional advice.

