



# PCORI RENEWING CLIENT WORKSHEET

Submit this completed form and all required materials via one of the following methods.	Online	Mail
	Sign into your account at <a href="http://www.tasconline.com">www.tasconline.com</a> and go to <i>Support &gt; Contact Us</i> and attach to a support request.	PO Box 14015 Madison, WI 53708-0015

## CLIENT / EMPLOYER INFORMATION

Client Name		Client TASC ID (12-digit)	
Contact Name		Contact Phone	

## REQUEST FOR INFORMATION

Plan End Date			
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Plan Information (Check all that apply)	<b>A</b>	<input type="checkbox"/> Health Reimbursement Arrangement (HRA) with a vendor other than TASC
	<b>B</b>	<input type="checkbox"/> HRA client
	<b>C</b>	<input type="checkbox"/> Non-Excepted (Health) Flexible Spending Account (NEFSA) client
	<b>D</b>	<input type="checkbox"/> Self-insured health plan
	<b>E</b>	<input type="checkbox"/> HRA Self-Administration client / NEFSA Self-Administration client
	<b>F</b>	<input type="checkbox"/> Individual Coverage HRA (ICHRA) / Qualified Small Employer HRA (QSEHRA) client
	<b>G</b>	<input type="checkbox"/> ICHRA / QSEHRA with a vendor other than TASC

If you checked only boxes **B**, **C**, or **F**: Skip the **PLAN PARTICIPANT COUNTS** section below.

## PLAN PARTICIPANT COUNTS

Please provide the following participant counts as of the date indicated. See instructions below on how to count participants.

1st day of 1st month of plan year (Q1)		1st day of 4th month of plan year (Q2)	
1st day of 7th month of plan year (Q3)		1st day of 10th month of plan year (Q4)	

- Please include all COBRA participants in your counts, but do not include any spouses or dependents that may be covered under the plan in any of your counts.
- If you checked only box A, boxes A and E, or boxes C and E:** Your participant counts should equal the total number of HRA or NEFSA plan participants on the 1st day of each quarter during the plan year.
- If you checked both boxes A and D, or boxes C and D:** Your participant counts should equal the total number of self-insured health plan participants on the 1st day of each quarter during the plan year. Count each health plan participant with self-only coverage and then add to that the number of participants with other than self-only coverage, multiplied by 2.35. (The same plan year is assumed for both your HRA and self-insured health plan.)
- If you checked only box D:** Your participant counts should equal the total number of self-insured health plan participants on the 1st day of each quarter during the plan year. Count each health plan participant with self-only coverage and then add to that the number of participants with other than self-only coverage, multiplied by 2.35.

## AUTHORIZATION

Name

Email

Signature

Date

TASC | 2302 International Lane | Madison, WI 53704 | 800-422-4661 | [www.tasconline.com](http://www.tasconline.com) | ER-5269-100724

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