

FSA Key Milestone

Key Milestones	Owner	Dates
Current eligible employee demographics loaded into new platform	HealthEquity	March 11, 2021
Recommended communication begins with current members & eligible employees	Client	March 12, 2021
First date to begin entering new plan year enrollments in the client portal or sending in new enrollment files	Client	March 15, 2021
Deadline for enrollments to be loaded to ensure debit card delivery for the first day of the new plan year	Client	Week of April 1, 2021
Funding Profile due date	Client	April 1, 2021
Mailing of new Healthcare debit cards and QuickStart Guides	HealthEquity	Mid April (approximately 10-15 days after your enrollments are processed)
Spending Account Card by WageWorks disabled	HealthEquity	May 1, 2021
Go Live Date!		May 1, 2021
First funding invoice	HealthEquity	May 3, 2021
First monthly administration service fee invoice	HealthEquity	May 23, 2021
Carryover of remaining funds <i>(only applies if you offer the carryover option)</i>	HealthEquity	Approximately 45 days following your run-out period. <i>Example: If you have 3-month run-out ending July 31, 2021, carryover funds would be loaded around September 15, 2021.</i>