

FSA Key Milestone – July 2021

Key Milestones	Dates
Current eligible employee demographics loaded into new platform	May 12 th , 2021
Recommended communication begin with current members & eligible employees	May 13 th , 2021
First date to begin entering new plan year enrollments in the client portal or sending in new enrollment files	May 15 th , 2021
Deadline for enrollments to be loaded in order for debit card delivery for the first day of the new plan year	Week of June 1, 2021
Order Form & Funding Profile Due Date <i>(if applicable)</i>	June 1 st , 2021
Mailing of new healthcare debit cards and QuickStart Guides	Mid-June 2021 (approximately 10-15 days after your enrollments are processed)
Go Live Date!	July 1 st , 2021
First funding invoice	July 5 th , 2021
First monthly administration service fee invoice	July 23 rd , 2021
Carryover of remaining funds <i>(only applies if you offer the carryover option)</i>	Approximately 45 days following your run-out period. <i>Example: if you have 3-month runout ending September 30, 2021; carryover funds would be loaded around November 15, 2021.</i>