

FSA Key Milestone – September 2021

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

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