

FSA Key Milestones – November

Key Milestones	Owner	Dates
Funding Profile due date	Client	September 1, 2021
Recommend distribution of FSA Welcome Letter to current members	Client	Early September 2021
Current eligible employee demographics loaded into new platform	HealthEquity	Week of September 6, 2021
First date to begin entering new plan year enrollments in the client portal or sending in new enrollment files	Client	Week of September 6, 2021
Recommend distribution of Reminder Notice to current members	Client	Early October 2021
Deadline for enrollments to be loaded to ensure debit card delivery for the first day of the new plan year	Client	October 15, 2021
Distribution of FSA Quick Start Guides and mailing of Healthcare debit cards	HealthEquity	Mid-October 2021 <small>(received approximately 10-15 days after your enrollments are processed)</small>
Spending Account Card by WageWorks disabled	HealthEquity	November 1, 2021
Go Live Date! Members can access accounts and file claims at Healthequity.com/wageworks		November 1, 2021
First funding invoice	HealthEquity	Beginning November 1 st (or upon claim spend and in accordance with the signed Funding Profile)
First monthly administration service fee invoice from new platform	HealthEquity	November 23, 2021
Client and Member access to CSAM disabled	Client/Member	180 Days post run-out period
Carryover of remaining funds (if carryover offered)	HealthEquity	Approximately 45 days following your run-out period Example: if you have 3-month run-out ending September 30, carryover funds would be loaded around November 15.