

FSA Key Milestones – January

Key Milestones	Owner	Dates
Funding Profile due date	Client	November 1, 2021
Recommend distribution of FSA Welcome Letter to current members	Client	Early November 2021
Current eligible employee demographics loaded into new platform	HealthEquity	Week of November 8, 2021
First date to begin entering new plan year enrollments in the client portal or sending in new enrollment files	Client	Week of November 8, 2021
Recommend distribution of Reminder Notice to current members	Client	Early December 2021
Deadline for enrollments to be loaded to ensure debit card delivery for the first day of the new plan year	Client	December 3, 2021
Distribution of FSA Quick Start Guides and mailing of Healthcare debit cards	HealthEquity	Mid-December 2021 <small>(received approximately 10-15 days after your enrollments are processed)</small>
Spending Account Card by WageWorks disabled	HealthEquity	January 1, 2022
Go Live Date! Members can access accounts and file claims at Healthequity.com/wageworks		January 1, 2022
First funding invoice	HealthEquity	Beginning January 1 st (or upon claim spend and in accordance with the signed Funding Profile)
First monthly administration service fee invoice from new platform	HealthEquity	January 23, 2022
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.