

FSA Key Milestone – November 2021

Key Milestones	Dates
Current eligible employee demographics loaded into new platform <small>Please note: Only applicable if you currently send us eligibility via file feed or you have a Commuter product. Otherwise, you will need to load employee demographics directly to the new platform.</small>	September 12, 2021
Recommended communication begins with current members and eligible employees	September 13, 2021
First date to begin entering new plan year enrollments in the client portal or sending in new enrollment files	September 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 October 1, 2021
Order Form & Funding Profile Due Date <i>(if applicable)</i>	October 1, 2021
Mailing of new HealthEquity® Visa® Healthcare cards ¹ and QuickStart Guides	Mid-October 2021 <small>(Approximately 10-15 days after your enrollments are processed)</small>
Go Live Date!	November 1, 2021
First funding invoice	November 5, 2021
First monthly administration service fee invoice	November 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.

¹Your HealthEquity® Visa® Healthcare Card can be used at participating merchants who sell eligible healthcare products or services everywhere Visa debit cards are accepted. Your HealthEquity Visa Healthcare Card is issued by The Bancorp Bank pursuant to a license from Visa U.S.A. Inc. The Bancorp Bank; Member FDIC.