

# HRA Key Milestone – September 2022

| Key Milestones                                                                                                                | Dates                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| Current eligible employee demographics loaded into new platform                                                               | July 12, 2022                                                                      |
| Recommended communication begins with current members and eligible employees                                                  | July 13, 2022                                                                      |
| First date to begin entering new plan year enrollments in the client portal or sending in new enrollment files                | July 15, 2022                                                                      |
| 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, 2022                                                             |
| Order Form & Funding Profile Due Date ( <i>if applicable</i> )                                                                | August 1, 2022                                                                     |
| Mailing of new healthcare debit cards <sup>1</sup> ( <i>if applicable</i> ) and QuickStart Guides                             | Mid-August 2022<br>(Approximately 10-15 days after your enrollments are processed) |
| <b>Go Live Date!</b>                                                                                                          | September 1, 2022                                                                  |
| First funding invoice                                                                                                         | September 5, 2022                                                                  |
| First monthly administration service fee invoice                                                                              | September 23, 2022                                                                 |
| Remaining member funds rollover to new accounts ( <i>only applies if you offer this plan design</i> )                         | Timing will vary based off your plan design / setup                                |

<sup>1</sup>Your 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.