

Client Transition Checklist



Use this checklist to complete essential tasks for a smooth transition from Further to HealthEquity. The **Required Actions** section outlines what must be completed to avoid service delays. The **Recommended Resources** section includes helpful, optional items to familiarize yourself with the new platform and available tools.

For key dates specific to your transition, please visit the [transition website](#).

Required Actions (Must Be Completed)

Key Transition Activities	Product(s)	Due Date
☐ Review and update your account on the CareFirst portal by Further Confirm contact info, managed users, plan design, banking, and location details (if applicable). If updates are needed, contact Further Group Services at 888-460-4013. We are available 8:00 a.m. to 5:00 p.m. CT	All	3 months before transition Account changes disabled 3 months before transition.
☐ Complete Plan Renewal on Further For clients with a plan renewal date through November 1, 2026, you must complete plan renewal on the CareFirst portal by Further by May 31, 2026. Failure to complete plan renewal will result in an auto-renewal of your plan for the following plan year. If you need to make plan design changes after the renewal window has closed, please contact HealthEquity Client Services or your Service Delivery Manager.	FSA, DCFSA, HRA	Due by May 31, 2026 (3 months before transition)
☐ Submit Claims Funding Form Your account will default to the closest match if not completed by the deadline. Click here to access the Claims Funding Form Click here for a brief tutorial on the Claims Funding Form	FSA, DCFSA, HRA	Due by July 15, 2026 (45 days before transition)

Required Actions (Must Be Completed)

Key Transition Activities	Product(s)	Due Date
 Log in to the HealthEquity portal View the Client portal navigation tutorial to familiarize yourself with the platform. Then, click here to log in. Your client log-in instructions will be sent from healthequity@e.healthequity.com around 1 month before your transition date. Once logged in, we recommend reviewing your banking information, managed user permissions, assign Broker/ Agency, and more. If your members are not using Single Sign-On (SSO) to access their HealthEquity member portal, they will need to set up a passkey*. For more information about passkeys, please visit your Client Transition Guide. *Passkey set up is also available online using a desktop, laptop or tablet computer. A valid phone number is required to register a passkey. HealthEquity offers multiple authentication options to ensure accessibility	All	30 days before transition
 Add your Broker of Record Collect your broker's new HealthEquity Broker ID. Click here and direct them to: Add or Update Broker Access & Notifications HealthEquity Help Center.	All	30 days before transition
 Begin loading any newly enrolled HSA members Keep an eye out for communications from HealthEquity about your go-forward enrollment file upload method.	HSA	Begins August 10, 2026 (3 weeks before transition)
 Final day to process HSA contributions and FSA/HRA enrollments and deductions the CareFirst portal by Further. Then, begin using HealthEquity portal.	HSA	Due August 21, 2026 (11 calendar days before transition)
 Plan for the Blackout Period To securely transfer your member's funds, their plans will enter a Blackout Period. During this time, members will be unable to use their CareFirst-branded debit card, request reimbursement, make contributions, distributions, or investment changes. Please plan accordingly to minimize any disruption. If your members have an eligible medical expense during the Blackout Period, here are two payment options: • Option 1: Pay out of pocket and submit a reimbursement request following the Blackout Period. Click here for more information. • Option 2: Make a post-tax contribution to your HealthEquity HSA (HSA only). Follow these steps for more information.	All	Starts August 22, 2026 (10 calendar days before transition)

Recommended Resources (Optional, But Encouraged)

Action	Product(s)	Due Date
☐ Submit FSA/HRA enrollments and deductions Keep an eye out for communications from HealthEquity about your go-forward enrollment file upload method Reminder: Plan renewal must be completed before enrollments can be loaded.	FSA, DCFS, HRA	2–3 days before transition
☐ Explore the transition website Review transition timelines, guides, FAQs, and other resources.	All	Anytime
☐ Watch On-demand Webinars • Client Transition Overview • Client FSA/HRA Plan Renewal & Claims Funding • Client Portal Tutorial	All	Anytime
☐ Whitelist HealthEquity emails Add @e.HealthEquity.com to your safe sender list to avoid missing updates.	All	Anytime
☐ Send Internal Member Notice Use this template to help inform members about the upcoming change.	All	3 months before transition
☐ Review the Reporting Guide Get familiar with reports available to manage and track your plans. • Health Savings Account Reports • Reimbursement Account Reports	All	30 days before transition

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