

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
<input type="checkbox"/> Review and update your Further account 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	6-5 months before transition Account changes disabled 4 months before transition.
<input type="checkbox"/> 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	3 months before transition
<input type="checkbox"/> Log in to the HealthEquity portal View the client portal navigation tutorial to familiarize yourself with the platform. Then, click here to login . Your client login instructions will be sent from healthequity@e.healthequity.com around 3 months before your transition date. Once logged in, we recommend reviewing your banking information, managed user permissions, assign Broker/ Agency, and more.	All	3 months before transition
<input type="checkbox"/> Complete Plan Renewal FSA/HRA plans will not be activated until this step is completed. Rollover dollars from prior plan year cannot be transferred if plan has not been renewed.	FSA, DCFSA, HRA	Start 3 months before; must complete 45 days before

Required Actions (Must Be Completed)

Key Transition Activities	Product(s)	Due Date
<input type="checkbox"/> 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	2 months before transition
<input type="checkbox"/> Begin loading any newly enrolled HSA members Keep an eye out for communications from HealthEquity about your go-forward enrollment file upload method.	HSA	1.5 months before transition
<input type="checkbox"/> Submit new plan year FSA/HRA enrollments 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, DCFSA, HRA	1 month before transition
<input type="checkbox"/> Final day to process HSA contributions on Further. Then, begin using HealthEquity portal.	HSA	10 calendar days before transition
<input type="checkbox"/> Plan for the HSA Blackout Period To securely transfer your member's funds, their HSA will enter a Blackout Period. During this time, members will be unable to use their Further debit card, 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: <ul style="list-style-type: none"> • 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. Follow these steps for more information. 	HSA	9 calendar days before transition
<input type="checkbox"/> Load FSA/HRA deductions files Begin entering deductions for your new plan year on the HealthEquity portal.	FSA, DCFSA, HRA	As of transition date

Recommended Resources (Optional, But Encouraged)

Action	Product(s)	Due Date
<input type="checkbox"/> Explore the transition website Review transition timelines, guides, FAQs, and other resources.	All	Anytime
<input type="checkbox"/> Submit Claims Funding Form <ul style="list-style-type: none"> • Client Transition Overview • Client FSA/HRA Plan Renewal & Claims Funding • Client Onboarding Webinar 	All	Anytime
<input type="checkbox"/> Whitelist HealthEquity emails Add @e.HealthEquity.com to your safe sender list to avoid missing updates.	All	Anytime
<input type="checkbox"/> Send Internal Member Notice Use this template to help inform members about the upcoming change.	All	3 months before transition
<input type="checkbox"/> Review the Reporting Guide Get familiar with reports available to manage and track your plans. <ul style="list-style-type: none"> • Health Savings Account Reports • Reimbursement Account Reports 	All	3 months before transition
<input type="checkbox"/> Remind HSA members of blackout period To securely transfer your member's funds, their HSA will enter a Blackout Period. During this time, members will be unable to use their Further debit card, 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: <ul style="list-style-type: none"> • 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. Follow these steps for more information. 	HSA	9-10 calendar days before transition