

Client Communications Library

This way to —————> remarkable



Important:

All content, including dates, are for demonstration purposes only and subject to change. Please refer to your transition website for dates specific to your transition.

Transition Communications Client HSA

6 months
prior to transition

1 month
after transition



Important:

All content, including dates, are for demonstration purposes only and subject to change. Please refer to your transition website for dates specific to your transition.


T-6 Months, Week 1

Sent approximately 6 months prior to the Transition Date.

Description:
Client Transition Notice & Get Started Guide

Subject Line:
Your HSA transition from Further to HealthEquity starts today.

HealthEquity



Welcome to HealthEquity
We're excited to share our remarkable HSA benefits with you.

Hello Client,

We're reaching out to inform you that effective Transition Date your Health Savings Account (HSA) will transition from the Further portal to our HealthEquity portal.

On November 01, 2021, HealthEquity acquired Further (your existing HSA provider). As a result, the management and care of your company's HSAs will transfer to the HealthEquity portal.

For up-to-date information on the transition, we've created a [transition guide](#) and a [transition website](#) to make the transfer to HealthEquity as seamless as possible.

As the benefits provider for more than 14 million accounts in partnership with health insurers, benefits advisors, and retirement plan providers, we've helped over 120,000 businesses make the switch to HealthEquity.

We're excited to show you the way to the remarkable service, support and outcomes both you and your members can expect from us.

What This Means for Your HSAs

- HealthEquity is the current custodian of your HSA and will remain the custodian of your HSA.
- Your monthly administration fee will remain the same.
- You will receive new login credentials approximately three and a half months before your transition date.
- We'll begin communicating with members three months before the transition.
- HSA assets that are invested in funds on the Further portal will continue to be invested in the same funds, except as noted in the [Fund Lineup Comparison](#).
- Access to historical records on the Further client portal will continue through 2026.

Important Dates:

Milestone	Timing
Clients are notified of the transition.	6 months before Transition Date
Changes and updates in the Further client portal disabled.	4 months before Transition Date
Clients receive HealthEquity portal credentials.	3.5 months before Transition Date
Members are notified of the transition.	3 months before Transition Date
Final day for client to enroll members on the Further portal.	1.5 months before Transition Date
HealthEquity begins mailing Card Packages. Packages include first-time sign instructions to the HealthEquity portal. For eligible members, packages also include new HealthEquity Year* Card* for the new plan year. Members can make post-tax contributions on the HealthEquity portal.	1 month before Transition Date
Final day for Further portal actions: • clients to process HSA contributions • members to make investment changes • members to use their Further debit card or request distribution from HSAs	10 calendar days before Transition Date
HSA member blackout period starts.	9 calendar days before Transition Date
Member account balances and investment holdings (if applicable) are transferred to the HealthEquity portal.	As of Transition Date
Member HSA blackout period ends.	
Member's transaction history loads in HealthEquity portal.	1 week after Transition Date

We recognize any change requires time, effort and patience to get right. We look forward to guiding you through the process and providing you with our remarkable service along the way.

We've also created some helpful resources to get you started.

[Visit transition guide](#)





[Visit transition website](#)

If you have questions about the process, our materials or just want to talk, please reach out.

Sincerely,
The HealthEquity Client Services Team

This way to remarkable

Questions?
Contact Client Services
866.711.4860
Mon.-Fri. 7am-7pm CT

[View on web](#)

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Investments are subject to risk, including the possible loss of the principal invested, and are not FDIC or NCUA insured, or guaranteed by HealthEquity, Inc. Investing through the HealthEquity investment platform is subject to the terms and conditions of the Health Savings Account Custodial Agreement and any applicable investment supplement. Investing may not be suitable for everyone and before making any investments, review the fund's prospectus.

HealthEquity does not provide legal, tax or financial advice. Always consult a professional when making the changing decisions.

To unsubscribe or change your email preferences, [click here](#).

HealthEquity respects your privacy. To learn more, read our [privacy policy](#).

If you receive a suspicious email, please report it by forwarding the email to spider@healthequity.com. Visit [SECURITY](#) to find out more.

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15 Soenic Plains Dr, Ste 400 Draper, UT 84020 US

Final Client_HSA_Email_1_14_Marketing

Please refer to your transition website for exact Transition Dates.

T-5 Months, Week 1

Sent approximately 5 months prior to the Transition Date.

Description:

Reminder: On-Demand Transition Overview Webinar

Subject Line:

Transition Update: On-demand webinars now available

The image shows a preview of an email from HealthEquity. The header features the HealthEquity logo and a purple banner with the text "This way to a smooth transition" and "Access on-demand transition on-demand webinars any time." Below this is a photo of a woman using a tablet. The main body of the email includes a "Hello Client," greeting, a paragraph about on-demand webinars, a section for "Transition Overview on-demand webinar" with a button to "Access the Transition Overview on-demand webinar", and another section for "Onboarding Webinar" with a button to "Access the Onboarding on-demand webinar". It also includes a sign-off from the Client Services Team and a "This way to remarkable" slogan. At the bottom, there is a "Questions?" section with contact information for Client Services (866.711.4860, Mon-Fri 7am-7pm CT) and social media icons for Facebook and LinkedIn.

Please refer to your transition website for exact Transition Dates.

T-5 Months, Week 3

Sent approximately 5 months prior to the Transition Date.

Description:

Member Communications Summary, Transition Timeline & Next Steps

Subject Line:

Review your HSA member transition website.

The image shows a preview of an email from HealthEquity. At the top left is the HealthEquity logo. To the right is a photo of an older man and a woman looking at a tablet together. The main heading is "This way to connected" with a subtext: "We'd like to share some important resources with you." Below this is a personalized greeting: "Hello CHRIS," followed by a message about the transition to the HealthEquity portal. It includes a list of resources available on the member transition website: a complete transition timeline, a progress tracker, registration options for webinars, and all guides and resources. There are two call-to-action buttons: "Visit your member transition site" and "Visit the client transition site". The email concludes with a signature from the HealthEquity Client Services Team and the "This way to remarkable" logo. A "Questions?" section provides a phone number (866.711.4860) and hours (Mon - Fri, 7am-7pm CT). At the bottom, there are social media icons for Facebook, LinkedIn, App Store, and Google Play, along with a "View on web" link. A disclaimer states that HealthEquity does not provide legal, tax, or financial advice. There is also a link to unsubscribe or change email preferences, a privacy policy link, and a security reporting email address (chris@thehealthequity.com). The footer contains copyright information for HealthEquity, Inc. (2024) and a small ID number: "Prod-Client_Mail_2024_Single_A-1-14_20240114_192".

Please refer to your transition website for exact Transition Dates.

T-4 Months, Week 3

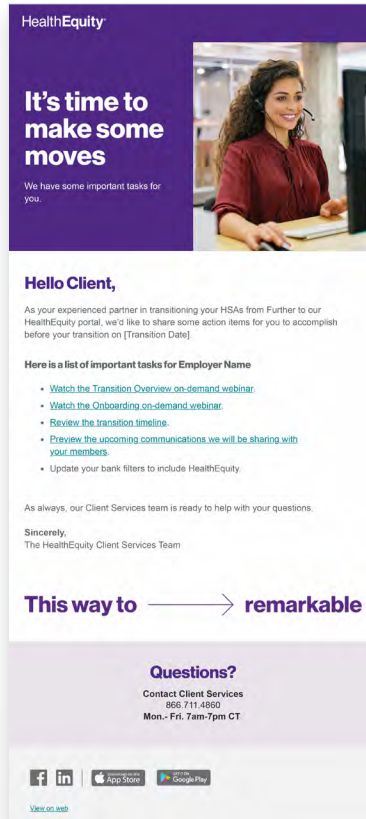
Sent approximately 4 months prior to the Transition Date.

Description:

Bulk Client Onboarding Action Items & On-Demand Onboarding Webinar

Subject Line:

TRANSITION UPDATE: Important HSA tasks require your attention.



Please refer to your transition website for exact Transition Dates.

To be sent to clients with under 500 benefits eligible employees

T-4 Months, Week 3

Sent approximately 4 months prior to the Transition Date.

Description:

Meet your MIM (Managed Only), Onboarding Action Items

Subject Line:

TRANSITION UPDATE: Your HSA Implementation Manager will be reaching out soon.

The image shows a preview of an email from HealthEquity. The header features the HealthEquity logo and a purple background with the text 'Your guide to remarkable' and 'It's time to connect with your Implementation Manager.' Below this is a photo of a smiling woman. The main body of the email is white and contains the following text: 'Hello Client, We're excited to announce you've been assigned an Implementation Manager to aid in your transition from Further to the HealthEquity portal. Soon, your Implementation Manager will reach out to you via email. They will be your point of contact should any questions or issues arise prior to your transition to HealthEquity on [Transition Date]. If you haven't already done so, we encourage you to: Watch the Transition Overview on-demand webinar. Watch the Onboarding on-demand webinar. Review the transition timeline. Preview the upcoming communications we will be sharing with your members. Update your bank filters to include HealthEquity. Thank you in advance for your patience and your help in making this a smooth transition. Sincerely, The HealthEquity Client Services Team'. Below the email body is a purple banner with the text 'This way to remarkable' and an arrow pointing right. At the bottom, there is a 'Questions?' section with contact information: 'Contact Client Services 866.711.4860 Mon.-Fri. 7am-7pm CT'. There are also social media icons for Facebook, LinkedIn, App Store, and Google Play, a 'View on web' link, and a privacy policy link.

Please refer to your transition website for exact Transition Dates.

To be sent to clients with over 500 benefits eligible employees

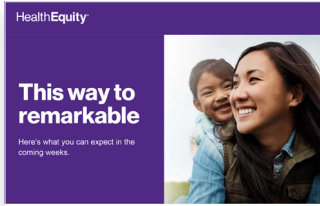
T-2 Months, Week 1

Sent approximately 2 months prior to the Transition Date.

Description:
60-Day Reminder & Action Items

Subject Line:
TRANSITION UPDATE: HSA
60-Day Notice

Please refer to your transition website for exact Transition Dates.



Client Name

It's official. We are two months out from finalizing your transition from Further to HealthEquity HSAs.

If you have not done so, please complete the following steps to ensure your transition is a smooth one.

- Create your credentials on the HealthEquity portal.
- Watch the Transition Overview on-demand webinar.
- Watch the Onboarding on-demand webinar.
- Review these important dates and upcoming communications we will soon be sharing with members.
- Update your bank filters to include HealthEquity.

Your Transition Timeline

Milestone	Date
Clients are notified of the transition	Client Transition Notice Date
Changes/updates via Further Client Portal disabled	Client Portal changes Disabled Date
Clients receive HealthEquity portal credentials and can begin loading enrollments on the HealthEquity portal	Client Portal Credential Date
Members are notified of the transition	Member Transition Notice Date
Final day for Client enrollment on the Further portal	Final Client Enrollment Date
HealthEquity begins mailing Card Packages. Packages include first time login instructions to the HealthEquity portal. For eligible members, packages also include new HealthEquity Visa® Card! for the new plan year.	HSA Card Mailing Date
Members can make post-tax contributions on the HealthEquity portal.	
Final day for clients to process HSA contributions on the Further portal.	Contribution Investment Change Date
Final day for members to make investment changes from Further HSA investment accounts through the Further portal.	
Final day for members to use their Further debit card or request distributions from HSAs through the Further portal.	
Member HSA blackout period starts	Member HSA Blackout Start Date
Member account balances and investment holdings are transferred to the HealthEquity portal.	Member Balance Transfer Date
Member HSA blackout period ends. Funds and investments are now available in the HealthEquity portal.	Transition Complete Date

NEW ENROLLMENT DATA

As of [Final Client Enrollment Date], you will need to provide HealthEquity with your member enrollment data.

- If you provide your enrollment data via Secure File Transfer Protocol (SFTP) today, you will no longer be eligible to submit your enrollment data via Secure File Transfer Protocol (SFTP).
- You must enter enrollment data online through the HealthEquity portal.

ONGOING CONTRIBUTIONS

As of [Contribution Investment Change Date], you will need to provide HealthEquity with your HSA contribution data.

- You must enter your contribution data on the HealthEquity portal.
- For guidance on entering your contribution data online, please visit this [Help Center article](#).

Please note that any file uploads attempted via the SFTP after the designated cutoff dates may result in the following:

1. An error when attempting to login to our SFTP site (secure@healthequity.com) as your access has been removed, or
2. The files will upload but may result in records that receive an "exception off error" message when the file is processed. These will be noted in your error report Records with the "exception off error" message with that referencing the "blackout" or "Start Date after Migration" will need to be loaded manually via the HealthEquity portal.

For guidance on entering your enrollments or contributions online, please see the user guides and file templates available on the Support page of our client microsite.

[Visit Support page](#)

If you have questions, Client Services is here to help.

Sincerely,
The HealthEquity Client Services Team

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Questions?

Contact Client Services
866.711.4860
Mon.-Fri. 7am-7pm CT

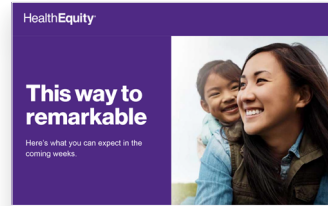


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To be sent to clients with under 500 benefits eligible employees



Hello Client,

It's official. We are two months out from finalizing your transition from Further to HealthEquity HSAs.

If you have not done so, please complete the following steps to ensure your transition is a smooth one.

- Create your credentials on the HealthEquity portal.
- Watch the Transition Overview on-demand webinar.
- Watch the Onboarding on-demand webinar.
- Review these important dates and upcoming communications we will soon be sharing with members.
- Update your bank filters to include HealthEquity.

Your Transition Timeline

Milestone	Date
Clients are notified of the transition	Client Transition Notice Date
Changes/updates via Further Client Portal disabled	Client Portal changes Disabled Date
Clients receive HealthEquity portal credentials and can begin loading enrollments on the HealthEquity portal	Client Portal Credential Date
Members are notified of the transition	Member Transition Notice Date
Final day for Client enrollment on the Further portal	Final Client Enrollment Date
HealthEquity begins mailing Card Packages. Packages include first time login instructions to the HealthEquity portal. For eligible members, packages also include new HealthEquity Visa® Card! for the new plan year.	HSA Card Mailing Date
Members can make post-tax contributions on the HealthEquity portal.	
Final day for clients to process HSA contributions on the Further portal.	Contribution Investment Change HSA Card Date
Final day for members to make investment changes from Further HSA investment accounts through the Further portal.	
Final day for members to use their Further debit card or request distributions from HSAs through the Further portal.	
Member HSA blackout period starts	Member HSA Blackout Start Date
Member account balances and investment holdings are transferred to the HealthEquity portal.	Member Balance Transfer Date
Member HSA blackout period ends. Funds and investments are now available in the HealthEquity portal.	Transition Complete Date

NEW ENROLLMENT DATA

As of [Final Client Enrollment Date], you will need to provide HealthEquity with your member enrollment data.

- You can continue to send in your files via Secure File Transfer Protocol (SFTP) as you do today.
- If you are currently sending your file in an excel format (.xls, .xlsx) you will need to save your file in a Comma Delimited format (.csv) before submitting it via SFTP.

ONGOING CONTRIBUTIONS

As of [Contribution Investment Change Date], you will need to provide HealthEquity with your HSA contribution data.

- You can continue to send in your contribution/deduction files via SFTP as you do today.
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Sincerely,
The HealthEquity Client Services Team

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To be sent to clients with over 500 benefits eligible employees

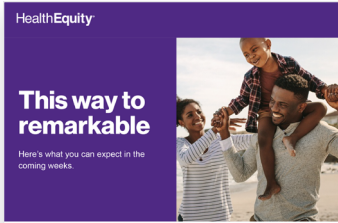
T-1 Month, Week 1

Sent approximately 1 month prior to the Transition Date.

Description:
30-Day Reminder & Action Items

Subject Line:
TRANSITION UPDATE: HSA
30-Day Notice.

Please refer to your transition website for exact Transition Dates.



HealthEquity

This way to remarkable

Here's what you can expect in the coming weeks.

Client Name,

As of today, we are one month out from finalizing your transition from Further to HealthEquity HSAs.

Please make sure you have completed the following steps to ensure a smooth transition.

- Create your credentials on the [HealthEquity portal](#).
- [Watch the Transition Overview on-demand webinar](#).
- [Watch the Onboarding on-demand webinar](#).
- [Review these important dates and upcoming communications](#) we will soon be sharing with members.
- Update your bank filters to include HealthEquity.

Your Transition Timeline

Milestone	Date
Clients are notified of the transition	[Client Transition Notice Date]
Changes and updates in the Further Client Portal disabled	[Client Portal Changes Disabled Date]
Members are notified of the transition	[Member Transition Notice Date]
Clients receive HealthEquity portal credentials and can begin loading enrollments on the HealthEquity portal	[Client Portal Credential Date]
Final day for Client enrollment on the Further portal	[Final Client Enrollment Date]
HealthEquity begins mailing Card Packages. Packages include first time login instructions to the HealthEquity portal. For eligible members, packages also include new HealthEquity Visa® Card* for the new plan year.	[HSA Card Mailing Date]
Members can make post-tax contributions on the HealthEquity portal.	[Contribution Investment Change Date]
Final day for clients to process HSA contributions on the Further portal	[Contribution Investment Change Date]
Final day for members to make investment changes from Further HSA investment accounts through the Further portal.	[Contribution Investment Change Date]
Final day for members to use their Further debit card or request distributions from HSAs through the Further portal.	[Contribution Investment Change Date]
Member HSA blackout period starts.	[Member HSA Blackout Start Date]
Member account balances and investment holdings* are transferred to the HealthEquity portal.	[Member Balance Transfer Date]
Member HSA blackout period ends. Funds and investments are now available in the HealthEquity portal.	[Transition Complete Date]

NEW ENROLLMENT DATA

As of [Final Client Enrollment Date], you will need to provide HealthEquity with your member enrollment data.

- If you provide your enrollment data via Secure File Transfer Protocol (SFTP) today, you will no longer be eligible to submit your enrollment data via SFTP.
- You must enter them online [through the HealthEquity portal](#).

ONGOING CONTRIBUTIONS

As of [Contribution Investment Change Date], you will need to provide HealthEquity with your HSA contribution data.

- You must enter your contribution data on the HealthEquity portal.
- For guidance on entering your contribution data online, please visit [this Help Center article](#).

For guidance on entering your enrollments or contributions online, please see the user guides and file templates available on the Support page of our client microsite.

[Visit Support page](#)

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Sincerely,
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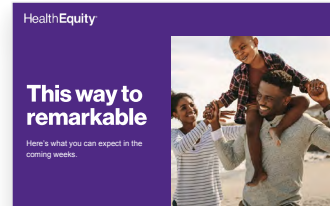


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To be sent to clients with under 500 benefits eligible employees



HealthEquity

This way to remarkable

Here's what you can expect in the coming weeks.

Client Name,

As of today, we are one month out from finalizing your transition from Further to HealthEquity HSAs.

Please make sure you have completed the following steps to ensure a smooth transition.

- Create your credentials on the [HealthEquity portal](#).
- [Watch the Transition Overview on-demand webinar](#).
- [Watch the Onboarding on-demand webinar](#).
- [Review these important dates and upcoming communications](#) we will soon be sharing with members.
- Update your bank filters to include HealthEquity.

Your Transition Timeline

Milestone	Date
Clients are notified of the transition	[Client Transition Notice Date]
Changes and updates in the Further Client Portal disabled	[Client Portal Changes Disabled Date]
Members are notified of the transition	[Member Transition Notice Date]
Clients receive HealthEquity portal credentials and can begin loading enrollments on the HealthEquity portal	[Client Portal Credential Date]
Final day for Client enrollment on the Further portal	[Final Client Enrollment Date]
HealthEquity begins mailing Card Packages. Packages include first time login instructions to the HealthEquity portal. For eligible members, packages also include new HealthEquity Visa® Card* for the new plan year.	[HSA Card Mailing Date]
Members can make post-tax contributions on the HealthEquity portal.	[Contribution Investment Change Date]
Final day for clients to process HSA contributions on the Further portal	[Contribution Investment Change Date]
Final day for members to make investment changes from Further HSA investment accounts through the Further portal.	[Contribution Investment Change Date]
Final day for members to use their Further debit card or request distributions from HSAs through the Further portal.	[Contribution Investment Change Date]
Member HSA blackout period starts.	[Member HSA Blackout Start Date]
Member account balances and investment holdings* are transferred to the HealthEquity portal.	[Member Balance Transfer Date]
Member HSA blackout period ends. Funds and investments are now available in the HealthEquity portal.	[Transition Complete Date]

NEW ENROLLMENT DATA

As of [Final Client Enrollment Date], you will need to provide HealthEquity with your member enrollment data.

- You can continue to send in your files via Secure File Transfer Protocol (SFTP) as you do today.
- If you are currently sending your file in an excel format (.xls, .xlsx), you will need to save your file in a Comma Delimited format (.csv) before submitting it via SFTP.

ONGOING CONTRIBUTIONS

As of [Contribution Investment Change Date], you will need to provide HealthEquity with your HSA contribution data.

- You can continue to send in your contribution/deduction files via SFTP as you do today.
- If you are currently sending your file in an excel format (.xls, .xlsx), you will need to save your file in a Comma Delimited format (.csv) before submitting it via SFTP.

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[Visit Support page](#)

If you have questions, Client Services is here to help.

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To be sent to clients with over 500 benefits eligible employees

T+1 Month, Week 1

**Sent approximately 1 month after
the Transition Date.**

Description:

Transition Complete & Welcome To
HealthEquity

Subject Line:

Your HSA transition from Further to
HealthEquity is now complete.

HealthEquity

Welcome to HealthEquity

Welcome to a remarkable way to plan for the future.

Welcome to the HealthEquity portal.

We are thrilled to inform you that your transition to HealthEquity is now complete.

Your Health Savings Accounts (HSAs) are now seamlessly integrated into our portal and you can begin to enjoy the benefits of our comprehensive services and resources.

As a reminder, we recommend watching our [Onboarding on-demand webinar](#) where you'll learn about the HealthEquity portal and bookmarking the [Client Help Center](#) for future reference.

[Watch Onboarding on-demand webinar](#)

Here are some important details now that your transition is complete:

Member Account Access:

- Your members can now access their HSAs through the [HealthEquity member portal](#) and our user-friendly mobile app.
- Log in to review accounts, check balances, and manage contributions effortlessly.

Once again, welcome to HealthEquity! We are honored to have you as a client and we look forward to working towards better outcomes for all.

Warm regards,
Your HealthEquity Team

This way to **remarkable**

[View on web](#)

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To unsubscribe or change your email preferences, [click here](#).

HealthEquity respects your privacy. To learn more, read our [privacy policy](#).

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15 Spring Pointe Dr, Ste 400 Englewood, UT 84002 US

Please refer to your transition website for exact Transition Dates.

T+1 Month, Week 3

Sent approximately 1 month after
the Transition Date.

Description:
CSAT Survey

Subject Line:
Please help us improve our process.

The email content is displayed within a vertical rectangular frame. At the top left, the HealthEquity logo is visible. Below it, the heading 'Share your feedback' is prominently displayed in white text against a dark purple background. A sub-headline reads 'Help us Improve by sharing your thoughts.' To the right of this text is a photograph of a woman smiling and holding a golden retriever puppy. Below the purple header, the text 'Dear Client,' is followed by a paragraph of introductory text. A green button labeled 'Begin Survey' is centered. Further down, there is a 'Thank you in advance.' message, a signature block for 'The HealthEquity Team', and the slogan 'This way to → remarkable'. At the bottom, there are social media icons for Facebook, LinkedIn, the App Store, and Google Play. A small 'View on web' link is also present. The footer contains a disclaimer, an unsubscribe link, a privacy policy link, a reporting email address, and copyright information for HealthEquity, Inc. in 2024.

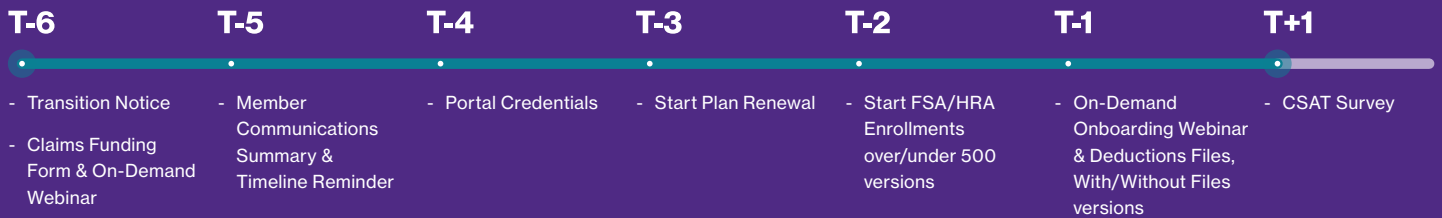
Please refer to your transition
website for exact Transition Dates.

Transition Communications

Client Reimbursement Accounts (FSA/HRA)

6 months
prior to transition

1 month
after transition



Important:

All content, including dates, are for demonstration purposes only and subject to change. Please refer to your transition website for dates specific to your transition.

T-6 Months, Week 1


Sent approximately 6 months prior to the Transition Date.

Description:
Client Transition Notice & Get Started Guide

Subject Line:
Your FSA/HRA plan starts transitioning from Further to HealthEquity today.

Please refer to your transition website for exact Transition Dates.

HealthEquity



This way to remarkable

We're excited to share our remarkable FSA & HRA Benefits with you.

Hello Client,

We're excited to share that, effective Transition Date, your Flexible Spending Account/Health-Care Reimbursement Arrangement (FSA/HRA) benefits will transition to our HealthEquity portal.





On November 1, 2021, HealthEquity acquired Further. As a result, your company's FSA/HRA benefits will be transferred to the HealthEquity portal.

[Read more about HealthEquity's acquisition of Further.](#)

About HealthEquity

As the benefits provider for more than 14 million accounts in partnership with employers, benefits advisors, and health and retirement plan providers, we've helped over 120,000 businesses make the switch to HealthEquity.

Whether you offer your employees one or more of these consumer-directed accounts, the HealthEquity portal provides a variety of enhanced features to elevate your employee experience and simplify your plan management, including:

-  Enhanced on-demand reporting
-  Expanded member claim and payment features
-  Cutting-edge mobile capabilities*
-  Industry-leading customer service and client services support

We're excited to show you the way to the remarkable service, support, and outcomes both you and your members can expect from us.

What This Means for You

In the coming weeks, we'll be sharing resources designed to make the transition easy for all, including webinars for your organization and your members.

We know any change requires time, effort, and patience to get right. We look forward to providing you with the remarkable service and transformative experience that HealthEquity offers.

As we begin kicking off the process of transitioning to HealthEquity, we will keep you informed of upcoming key dates and next steps. Please be on the lookout for additional communications in the coming weeks.

Important dates to know regarding your transition

Milestone	Timing
Clients are notified of the transition.	6 months before Transition Date
Claims Funding Form sent to clients.	5.5 months before Transition Date
Changes and updates in the Further client portal disabled.	4 months before Transition Date
Onboarding Notice sent to clients.	3.5 months before Transition Date
Clients receive HealthEquity portal credentials.	
Clients can submit their plan renewals on HealthEquity portal and return Claims Funding Form.	3 months before Transition Date, must be completed 45 days before Transition Date
Members notified of the transition.	
Clients can begin submitting new plan year renewals. Must complete plan year renewal for renewals to be processed.	Starts 1.5 months before Transition Date, must be completed 30 days before Transition Date
HealthEquity begins mailing Card Packages. Packages include first time login instructions to the HealthEquity portal. For eligible members, packages also include new HealthEquity Visa® Card† for the new plan year.	7 to 10 business days after enrollments are processed in the HealthEquity system
Last day to use Further debit card.	Last day of current plan year or through Grace Period if applicable
Transition complete. Clients and members are live on the HealthEquity portal.	As of Transition Date
Members submit prior plan year claims on Further portal.	Through end of Runout
† If client plan has Rollover and/or HSA, supplemental applicable balances will be available on the HealthEquity portal.	Approximately 45 days post Runout

In the meantime, we've created your transition guide and a transition website to help you get started.

[View Transition guide](#)
[Visit Transition website](#)





If you have questions about the process, our materials or just want to talk, please reach out to our Client Services team.

Sincerely,
The HealthEquity Client Services Team.

This way to → remarkable

Questions?

Contact Client Services
866.711.4960
Mon.-Fri. 7am-7pm CT

[View Us Here](#)

*Accounts must be activated via the HealthEquity website in order to use the mobile app.

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150 Spring Pointe Dr, Ste 400 Deepwater, UT 84202 US
File: Client_TN_5M_1_24_364761_211

T-6 Months, Week 3

Sent approximately 6 months prior to the Transition Date.

Description:

Claims Funding Form & On-Demand Webinar

Subject Line:


Your FSA/HRA Claims Funding Form & On-Demand Webinar

Please refer to your transition website for exact Transition Dates.

HealthEquity

Starting your funding profile

We need some important information from you regarding FSA/HRA funding.



Hello Client Name,

We recently informed you about the upcoming change in the administration of your Flexible Spending Account (FSA), including Dependent Care Flexible Spending Account (DCFSA) if applicable, and Health Reimbursement Arrangement (HRA) benefits from Further to HealthEquity. To facilitate the transition, clients must complete the Claims Funding Form and plan renewal.

Claims Funding Form:

Clients will need to create a new funding profile to pay FSA/HRA claims by completing the Claims Funding Form. The Claims Funding Form is [linked here](#) and can be found on the [transition website](#). Please complete the Claims funding form 45 days before your transition date of [Transition Date]. Completed forms can be sent to Transitions@healthequity.com.

If the Claims Funding Form is not received 45 days before your transition date, the plan will be defaulted to the funding option with the timing closest to the client's current funding with Further.

Things you should know:

- HealthEquity requires that clients select from four claims funding options.
 - **Option 1: Reserve account invoicing**
 - Based on total annual plan liability and the frequency of invoicing, HealthEquity requests a percentage to be held on the client's behalf as a reserve. Pre-funds are collected before the start of each plan year.
 - If auto-debit is set up, funds are debited two business days after invoice is generated.
 - **Option 2: Pay-as-you-go**
 - If claim(s) are payable, an invoice is generated each day, and your account is auto-debited two business days later (not available with a debit card).
 - **Option 3: Fully funded**
 - HealthEquity will invoice you for the total annual plan liability at the beginning of the plan year.
 - Funds are due upon receipt of an invoice.
 - If auto-debit is set up, funds are debited two business days after invoice is generated.
 - **Option 4: Funding based on allocation files (deposit-based Health Reimbursement Arrangements / Dependent Care Reimbursement Accounts)**
 - HealthEquity will invoice you as deposits are added to the member's account.
 - Funds are due upon receipt of an invoice.
 - If auto-debit is set up, funds are debited two business days after an invoice is generated.
- A selection must be made on the [Claims Funding Form](#) and completed by at least 45 days before transition date.
- Send completed forms to Transitions@healthequity.com

Plan Renewal:

Lastly, please remember to complete your FSA/HRA plan renewal in the HealthEquity client portal as soon as you receive your HealthEquity credentials via email. Plan renewal [Plan Renewal Start Date] ensures your members can continue to enjoy benefits without any interruption. Failure to do so could delay enrollment, disrupt member claims reimbursement and postpone the HealthEquity Visa® Card delivery.

Clients can complete plan renewal by logging into the HealthEquity client portal and selecting the "HRA/FSA Renewal" option under the "Employee Info" tab. On the following screen, clients will be prompted to select the plans they would like to renew. Clients can begin the renewal process as soon as they gain access to the client portal 3.5 months prior to the transition.

For more information about the Claims Funding Form and plan renewal, we highly recommend you watch the FSA/HRA Renewals & Claims Funding on-demand webinar. To access the on-demand webinar, please [click this link](#).





If you have questions, our Client Services team is ready to help. Thank you in advance for your help in making this a smooth transition.

If you have already returned your signed Claims Funding Form, this notice may be disregarded.

Sincerely,
The HealthEquity Client Services Team

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Questions?
Contact Client Services
855.711.4900
Mon - Fri, 7am-7pm CT

[View as web](#)

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T-5 Months, Week 3

Sent approximately 5 months prior to the Transition Date.

Description:

Member Communications Summary, Transition Timeline & Next Steps

Subject Line:

Review your customized member transition website.

The image shows a preview of an email from HealthEquity. The header features the HealthEquity logo and a photo of an elderly couple looking at a tablet. The main heading is "This way to connected" with a sub-headline "We'd like to share some important resources with you." The body of the email is addressed to "CHRIS" and discusses the transition to the HealthEquity portal. It includes a list of resources available on the member transition website, such as a transition timeline, progress tracker, and webinar registration options. There are two prominent buttons: "Visit your member transition site" and "Visit the client transition site". The email concludes with a signature from "The HealthEquity Client Services Team" and a logo for "This way to remarkable". A "Questions?" section provides a phone number (866.711.4860) and hours (Mon - Fri, 7am-7pm CT). At the bottom, there are social media icons for Facebook, LinkedIn, and mobile app download links for the App Store and Google Play. A small "View on web" link is also present. The footer contains a disclaimer, unsubscribe link, privacy policy link, and copyright information for HealthEquity, Inc. (2024).

Please refer to your transition website for exact Transition Dates.

T-4 Months, Week 4

Sent approximately 4 months prior to the Transition Date.

Description:


Your HealthEquity Client Portal Login / HealthEquity Client Portal Temporary Password

Subject Line:

HealthEquity Client Portal Login Credentials (Username) / HealthEquity Client Portal Temporary Password.

Please refer to your transition website for exact Transition Dates.

HealthEquity



Hello [Client first name only],

The transition of your organization's consumer-directed benefits accounts from the Further portal to the HealthEquity portal is underway.

You now have access to the HealthEquity client portal where you can manage company information, see your plan details, access a variety of useful reports, and more. Please read this email carefully for next steps.

If you have Flexible Spending Account (FSA) plans or Health Reimbursement Arrangement (HRA) plans, please log in and begin your plan renewal. Please note, only users with 'Manage Employee' access can complete plan renewal.

Client Portal Credential Information

Username: [Username]
Password: Your first-time login link will be sent in a separate email.

During your first login experience, you will be prompted to create your password. Your password must be between 8-20 characters and include at least one number or symbol.

If you would like to modify your assigned username after your initial login, please contact your account admin. Admins with 'Manage Users' access, please go to: Login > Company Details > Manage Users > Username.

After your first successful login, you can access the HealthEquity client portal by going to <https://my.healthequity.com/ClientLogin.aspx>

Lastly, please watch HealthEquity's Onboarding on-demand webinar to learn how to get set up on the HealthEquity portal and make your transition to HealthEquity as smooth as possible. Access the on-demand webinar [here](#).

[Watch now](#)

Thank you for your help making this a smooth transition. If you have questions, our Client Services team is ready to help.

Sincerely,

HealthEquity Client Services
 Mon - Fri.: 7am-7pm CT
 866.711.4860

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[View on web](#)

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 15 Somic Points Dr, Ste 400 Draper, UT 84020 US

%Name%_%, %%

HealthEquity

Hello [Client first name only],

Welcome to the HealthEquity client portal. Please see your temporary password below. Your HealthEquity username will be sent to you in a separate email.

Your temporary password is: [Password]

To access the client portal, go to <https://my.healthequity.com/ClientLogin>

After your first successful login, you will be prompted to change your password. Your new password must be between 8-20 characters and include at least one number or symbol.

Please note, your temporary password will expire within 90 days. If you need to reset your password, please contact Client Services or your account admin.

Thank you for your help making this a smooth transition.

Sincerely,
 HealthEquity Client Services
 Mon - Fri.: 7am-7pm CT
 866.711.4860

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%Name%_%, %%


T-3 Months, Week 2

Sent approximately 3 months prior to the Transition Date.

Description:
Start Plan Renewal

Subject Line:
Urgent: Complete Your FSA/HRA Plan Renewal Today

HealthEquity



Urgent: Complete Your FSA/HRA Plan Renewal Today

Ensure your benefits continue without interruption—act now.

Hello Client,

As you transition to HealthEquity, it's crucial to ensure that your Flexible Spending Account (FSA) and/or Health Reimbursement Arrangement (HRA) plan benefits continue without interruption. To do this, please complete the following two critical steps.

1. FSA/HRA Plan Renewal

If you have not done so already, please login to the HealthEquity client portal to complete your FSA/HRA plan renewal at least 45 days before your Transition Date. See plan renewal instructions below:

- Navigate to:** Employee Info > HRA/FSA Renewal.
- Action Required:** Select "Renew" or "Term" for each plan.
- Need Help?** Use this step-by-step guide: [Show Me How](#).

2. Submit the Claims Funding Form

Complete the Claims Funding Form and email it to transitions@healthequity.com. You can download the form here: [Claims Funding Form](#).

Why This Matters:

- Plan Renewal:** If you do not complete the FSA/HRA plan renewal, your FSA/HRA plan benefits will not be active for the following plan year, impacting your employees' benefits.
- Claims Funding Form:** If we do not receive the completed Claims Funding Form 45 days before the start date of the plan year, the plan will default to the funding option with the timing closest to your current funding option with Further.


Key Dates

- FSA/HRA Plan Renewal & Claims Funding Form Deadline:** [Enrollment Submission Due Date]
- Transition Date:** [Client Transition Date]





Take action now to avoid any interruptions in service. If you have any questions or need assistance, please do not hesitate to reach out to the HealthEquity Client Services team or your Service Delivery Manager. For more information about the transition, please visit your [transition website](#).

Thank you for your immediate attention to these important matters.

Sincerely,
The HealthEquity Client Services Team

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Questions?
Client Services Team
866.711.4860
Mon. - Fri. 7am-7pm CT

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Please refer to your transition website for exact Transition Dates.

T-2 Months, Week 4

Sent approximately 2 months prior to the Transition Date.

Description:

Start FSA/HRA Enrollments


Subject Line:

Action Required: Complete Your FSA/HRA Enrollments (Under 500 Version)

Action Required: Submit Your FSA/HRA Enrollments (Over 500 Version)

Please refer to your transition website for exact Transition Dates.

HealthEquity



Action Required: Complete Your FSA/HRA Enrollments

Submit your data on time to ensure benefit readiness.

Dear [First Name],

It is now time to submit your Flexible Spending Account (FSA) and/or Health Reimbursement Arrangement (HRA) new employee enrollments for the upcoming plan year. Please follow the steps below to complete your enrollment submission.

New Enrollment Data

As you complete your Annual or Open Enrollment period, you will need to provide HealthEquity with your member enrollment data:

- If you provide your enrollment data via Secure File Transfer Protocol (SFTP) today, you will no longer be eligible for this option for the upcoming plan year. You may continue to send your SFTP file for any enrollment updates for your current plan year on Further through the end of runout.
- For your new plan year on HealthEquity, you must enter your enrollment data on the [HealthEquity portal](#).
- For detailed guidance and file templates, please visit the [Client Help Center](#).

What You Need to Do:

- Log in to the HealthEquity Portal:** Access your account at [my.HealthEquity.com](#)
- Navigate to the Enrollment Section:** Click on "Employee Info" > "Eligibility Upload" > "Employee Upload."
- Enter Your Enrollment Data:** Fill in the required member enrollment information in the downloaded template and submit the completed file.
- Submit Before the Deadline:** The enrollment submission window is approximately 15 days long, beginning on **Claims Funding Form Due Date**. Please ensure all data is submitted within this timeframe.

- If your enrollment data is not ready at least 30 days before the transition date of [Enrollment Submission Due Date], please submit it as soon as possible thereafter. HealthEquity will begin mailing card packages 7 to 10 business days after processing your enrollments in the system.

Why This Is Important:

- Timely Debit Card Delivery:** Submitting your enrollments on time ensures your employees receive their debit cards (if applicable) before the new plan year begins, allowing them to access their benefits without delay.
- Compliance and Accuracy:** Entering your enrollment data via the HealthEquity portal helps ensure compliance with HealthEquity requirements and minimizes disruptions that could impact your employees' benefits.

Key Dates

- FSA/HRA Enrollment Submission Window:** [Claims Funding Form Due Date]
- Transition Date:** [Enrollment Submission Due Date]

Please take action now to prepare your enrollment data and submit it as soon as the window opens. If you need guidance or have any questions, visit the [Client Help Center](#) or contact our support team. For more information about the transition, please visit your [transition website](#).

Thank you for your prompt attention to this critical step.


Sincerely,
The HealthEquity Client Services Team

This way to → **remarkable**

Questions?

Client Services Team

866.711.4560
Mon - Fri, 7am-7pm CT



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%{emailName}, %%

To be sent to clients with under 500 benefits eligible employees

HealthEquity



Action Required: Submit Your FSA/HRA Enrollments

Prepare now to ensure timely benefit access.

Dear [First Name],

To ensure your employees' benefits are ready on time for the new plan year, please follow the steps below to complete your Flexible Spending Account (FSA) and/or Health Reimbursement Arrangement (HRA) enrollment submission.

What You Need to Do:

As you complete your annual or open enrollment period, you will need to provide HealthEquity with your members' new enrollment data.

- Submit Your Enrollment Data via SFTP:** You can continue to send in your files via Secure File Transfer Protocol (SFTP) as you do today.
- Save Your File in the Correct Format:** If you are currently sending your file in an Excel format (e.g., .xls, .xlsx), please save your file in a Comma Delimited format (e.g., .csv) before submitting it via SFTP.
- Submit Before the Deadline:** The enrollment submission window is approximately 15 days long, beginning on [Claims Funding Form Due Date]. Please ensure all data is submitted within this timeframe.

- If your enrollment data is not ready at least 30 days before the transition date of [Enrollment Submission Due Date], please submit it as soon as possible thereafter. HealthEquity will begin mailing card packages 7 to 10 business days after processing your enrollments in the system.

Why This Is Important:

- Timely Debit Card Delivery:** Submitting your enrollments on time ensures your employees receive their debit cards (if applicable) before the new plan year begins, allowing them to access their benefits without delay.
- Compliance and Accuracy:** Submitting your enrollment data in the correct format helps ensure compliance with HealthEquity requirements and minimizes disruptions that could impact your employees' benefits.

Key Dates

- FSA/HRA Enrollment Submission Window:** [Claims Funding Form Due Date]
- Transition Date:** [Enrollment Submission Due Date]

Please take action now to prepare your enrollment data and submit it as soon as the window opens. If you need guidance or have any questions, visit the [Client Help Center](#) or contact our support team.

Thank you for your prompt attention to this critical step.


Sincerely,
The HealthEquity Client Services Team

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Questions?

Client Services Team

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%{emailName}, %%

To be sent to clients with over 500 benefits eligible employees

T-1 Months, Week 2

Sent approximately 1 month prior to the Transition Date.

Description:


On-Demand Onboarding Webinar & Deductions Files — No Files Version / With Files Version

Subject Line:

Important Steps for Your Upcoming Transition to HealthEquity

Please refer to your transition website for exact Transition Dates.

HealthEquity



Final Reminder: Submit Your FSA/HRA Enrollments Now!

Don't miss the deadline – ensure your employees are ready for the new plan year.

Dear Client,

As your transition to HealthEquity is just a few weeks away, we want to ensure a smooth process for you and your employees. Please review the important steps below to prepare for the new plan year.

Key Actions for a Successful Transition:

1. Submit Deduction Files for the New Plan Year.

As you transition into the new plan year, you will need to provide HealthEquity with your Flexible Spending Account (FSA) and/or Health Reimbursement Arrangement (HRA) members' contribution/deduction amounts.

- **Enter Data Online:** For your new plan year on HealthEquity, you must enter your contribution/deduction data directly on the [HealthEquity portal](#).
- Go to **Manage Money > Make HRA/FSA deductions**.
- Select a plan then follow the prompts.
- **Guidance Available:** For instructions on entering your contribution/deduction data online, please refer to the [Support Page](#).

2. Watch the Onboarding on-demand webinar

We highly encourage you to watch our onboarding on-demand webinar to better understand the HealthEquity portal. The on-demand webinar is available anytime for your convenience.

[Click here to watch the Client Onboarding on-demand webinar](#)

3. Inform Your Bank of HealthEquity's Originator ID

Some banks may require an originator ID in order to complete the Electronic Funds Transfers (EFT) setup. If you've had an ACH rejection you may need to give your bank the HealthEquity originator ID: 1522383166.

Key Dates:

- **[Claims Funding Form Due Date]** Clients can begin submitting new plan year enrollments. Plan year renewal must be completed for enrollments to be processed.
- **7 to 10 Business Days After Enrollment Processing:** HealthEquity begins mailing card packages, which include first-time login instructions to the HealthEquity portal. For eligible members, packages also include a new HealthEquity Visa® Card1 for the new plan year.
- **[Final Debit Card Use Date]:** Last day to use Further debit card.
- **[Transition Due Date]:** Transition Complete. Clients and members are now live on the HealthEquity portal.
- **Through the End of Runout:** Members can submit prior plan year claims on Further.
- **Approximately 45 Days Post-Runout:** If your plan includes Rollover and/or HRA spenddown, applicable balances will be moved to the HealthEquity portal.

By completing these steps, you will help ensure a seamless transition to HealthEquity, allowing your employees to access their benefits without interruption.

If you have any questions or need further assistance, please don't hesitate to reach out to HealthEquity Client Services or your Service Delivery Manager (SDM). For more information about the transition, please visit your [transition website](#). Thank you for your attention to these important details.



Sincerely,
The HealthEquity Client Services Team

This way to → remarkable

Questions?

Client Services Team

866.711.4860
Mon - Fri, 7am-7pm CT


 

[View on web](#)

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To be sent to clients without files

HealthEquity



Final Reminder: Submit Your FSA/HRA Enrollments Now!

Don't miss the deadline – ensure your employees are ready for the new plan year.

Dear Client,

After your transition, you will need to provide HealthEquity with your Flexible Spending Account (FSA) and/or Health Reimbursement Arrangement (HRA) members' contribution/deduction amounts for the new plan year.

Key Actions for a Successful Transition:

1. Submit Deduction Files for the New Plan Year.

After your transition, you will need to provide HealthEquity with your members' contribution/deduction amounts for the new plan year.

- **Continue Using SFTP:** You can continue to send in your contribution/deduction files via Secure File Transfer Protocol (SFTP) as you do today.
- **File Format Reminder:** If you currently send your file in an Excel format (e.g., .xls, .xlsx), please save it in a Comma Delimited format (e.g., .csv) before submitting it via SFTP.

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Key Dates:

- **[Claims Funding Form Due Date]** Clients can begin submitting new plan year enrollments. Plan year renewal must be completed for enrollments to be processed.
- **7 to 10 Business Days After Enrollment Processing:** HealthEquity begins mailing card packages, which include first-time login instructions to the HealthEquity portal. For eligible members, packages also include a new HealthEquity Visa® Card¹ for the new plan year.
- **[Final Debit Card Use Date]:** Last day to use Further debit card.
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Thank you for your attention to these important details.

Sincerely,
The HealthEquity Client Services Team



This way to → remarkable

To be sent to clients with files

Questions?

Client Services Team

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T+1 Month, Week 3

Sent approximately 1 month after
the Transition Date.

Description:
CSAT Survey

Subject Line:
Please help us improve our process.

The email content is displayed within a vertical rectangular frame. At the top left, the HealthEquity logo is visible. Below it, the heading 'Share your feedback' is prominently displayed in white text against a dark purple background. A sub-headline reads 'Help us Improve by sharing your thoughts.' To the right of this text is a photograph of a woman smiling and holding a golden retriever puppy. Below the purple header, the text 'Dear Client,' is followed by a paragraph of introductory text. A green button labeled 'Begin Survey' is centered. Below this, there is a 'Thank you in advance.' message and a sign-off: 'Sincerely, The HealthEquity Team'. A large graphic reads 'This way to → remarkable'. At the bottom, there are social media icons for Facebook, LinkedIn, the App Store, and Google Play. A small link 'View on web' is present. The footer contains a disclaimer: 'HealthEquity does not provide legal, tax or financial advice. Always consult a professional when making life-changing decisions.' It also includes a link to update email preferences, a privacy policy link, and a reporting email address. The copyright notice for 2024 HealthEquity, Inc. and the address '15 Sorensen Pointe Dr, Ste 400 Draper, UT 84020 US' are at the very bottom.

Please refer to your transition
website for exact Transition Dates.