HealthEquity®

Member
Transition Checklist

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Member 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 Further account** Confirm contact info, address, and banking. If updates are needed, log in to your Further portal or contact Further Member Services at 800-859-2144 or email CustomerSolutions@HelloFurther.com. We are available Monday–Friday 7:00 a.m. to 8:00 p.m. CT	**All**	1 month before transition
☐ **Log in to the HealthEquity portal** First-time log-in: Click here to create a new username and password. Your Further credentials will not automatically transfer to HealthEquity. **HealthEquity portal:** Click here to log in Need help? Visit the Log-in Help page. If you have an existing HealthEquity account, please log in using your existing credentials. If needed, click on "Forgot username or password?" to reset your log-in information.	**All**	14 days before transition
☐ **Activate your HealthEquity® Visa® Card[1] (if applicable)** Follow the instructions in your Card Package or visit this link. **Pro tip:** You can add your card to your favorite online retailer to pay for HSA-qualified medical expenses with online retailers, your local pharmacy, and more.	**All (if applicable)**	14 days before transition

Required Actions (Must Be Completed)

Key Transition Activities	Product(s)	Due Date
Link a bank account for quick reimbursement Linking an external checking account means faster reimbursement. You won't have to wait for a check in the mail. Also, you can use the same checking account to set up one-time or recurring HSA contributions.	**All**	14 days before transition
Add a beneficiary and/or dependents • Adding an HSA Beneficiary • Adding dependents and authorized users	**All**	14 days before transition
Plan for the Blackout Period To securely transfer your funds, your benefits will enter a Blackout Period. During this time, you will be unable to use your Further debit card, request reimbursment, make contributions, distributions, or investment changes. Please plan accordingly to minimize any disruption. If you 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**	10 calendar days before transition
Accept HSA investment terms and conditions Once your transition date has passed, please log in to yourHealthEquity member portal and review your HSA investment options.[2] • Accept the monthly investment terms and conditions to begin managing your HSA investments. **Pro Tip:** HealthEquity offers three ways to invest your HSA Review the HSA Investment Guide and familiarize yourself with the investment options & features that are available.	**HSA**	Upon transition date

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

Recommended Resources (Optional, But Encouraged)

Action	Product(s)	Due Date
☐ **Explore the transition website** Review transition timelines, guides, FAQs, and other resources. Check out the **member transition guide**	**All**	Anytime
☐ **View the member portal tour** • **Member portal navigation tutorial**	**All**	Anytime
☐ **Allow HealthEquity emails** Add @e.HealthEquity.com to your safe sender list to avoid missing updates.	**All**	Anytime
☐ **Download the HealthEquity mobile app** Find the **HealthEquity mobile app** in the app store on your mobile device. It's a fast, convenient way to view balances, manage your HealthEquity® Visa® Card[1], submit and review reimbursements, manage HSA investments[2] and much more.	**All**	Anytime

HealthEquity Advisors, LLC is a subsidiary HSA investment advisory service. A subscription is required and associated fees may apply. You may cancel at any time by accessing Advisor through the HealthEquity dashboard.

[1]The HealthEquity Visa® Card is issued by The Bancorp Bank, N.A., Member FDIC, pursuant to a license from Visa U.S.A. Inc. Your card can be used everywhere Visa debit cards are accepted for qualified expenses. This card cannot be used at ATMs and you cannot get cash back, and cannot be used at gas stations, restaurants, or other establishments not health related. See Cardholder Agreement for complete usage restrictions.

[2]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. HealthEquity, Inc. does not provide investment advice. HealthEquity Advisors, LLC, a wholly owned subsidiary of HealthEquity, Inc. and an SEC-registered investment adviser, provides web-based investment advice to HSA holders that subscribe for its services (minimum thresholds and additional fees apply). Registration does not imply endorsement by any state or agency and does not imply a level of skill, education, or training. Investing may not be suitable for everyone and before making any investments, review the fund's prospectus.