

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® Card¹ (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 reimbursement, 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

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

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²Investments 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.