

# Client Communications Library

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## 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:

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# 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.

Please refer to your transition  
website for exact Transition Dates.

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 January 1, 2020, 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 login instructions to the HealthEquity portal. For eligible members, packages also include new HealthEquity Year Card for the new plan year.	1 month before Transition Date
Members can make post-tax contributions on the HealthEquity portal.	
Final day for Further portal actions: <ul style="list-style-type: none"><li>• clients to process HSA contributions</li><li>• members to make investment changes</li><li>• members to use their Further debit card or request distribution from HSAs</li></ul>	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

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Questions?

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

[View on app](#)

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Final Client\_HSA\_Sent\_1\_31\_Months\_20

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# T-5 Months, Week 1

Sent approximately 5 months prior  
to the Transition Date.


**Description:**  
Reminder: Transition Overview  
Webinar Sign Up

**Subject Line:**  
TRANSITION UPDATE: Your HSA  
transition webinar is now open for  
registration.

HealthEquity

This way to  
a smooth  
transition

Register now for our  
transition webinars.



Hello Client,

To make your transition to HealthEquity a seamless one, we've created webinars to help walk you through the process.

All webinars are available in either a scheduled or on-demand format and feature a Q&A session to address commonly asked questions. Scheduled webinars will include a live chat feature where attendees can ask HealthEquity Implementation Managers questions and get answers in real time.

Transition Overview Webinar - Register Now

We guide you through the upcoming transition steps, highlight the changes you can expect at HealthEquity, and provide valuable account insights.

[Sign up for a scheduled Transition Overview webinar](#)

If attending a scheduled webinar doesn't align with your calendar, don't worry. We've prepared an on-demand version for you to watch at your convenience.

Renewals & Claims Funding Webinar

We will walk you through the steps required to renew your plan and establish the funding options for your accounts.

[Sign up for a scheduled Renewals & Claims Funding Webinar](#)

If attending a scheduled webinar doesn't align with your calendar, don't worry. We've prepared an on-demand version for you to watch at your convenience.

Onboarding Webinar - Coming Soon

Learn how to navigate the HealthEquity portal, transfer files and upload data and submit enrollments for the new plan year.

If you have questions, our Client Services team is ready to help.

Sincerely,  
The HealthEquity Client Services Team

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Final Client\_Email\_T-5\_Months\_W1\_HSA

Please refer to your transition  
website for exact Transition Dates.

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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 HSA member transition  
website.

HealthEquity

This way to connected

We'd like to share some important resources with you.



Hello CHRIS,

As we progress through your transition from the Further to HealthEquity portal, we wanted to provide an update concerning member communications.

Starting three months before your Transition Date we will begin regular communications with Further members about the transition.

No action is needed for the communications to commence.

Our goal is to help make the transition to the HealthEquity portal a smooth one for both you and your members. Below, we've included a link to your member transition website.

**The member transition website for your employees includes:**

- A complete transition timeline
- Progress tracker
- Registration options for webinars
- All guides and resources

[Visit your member transition site](#)

You can find a full summary of upcoming member communications and a complete timeline of our transition including your next steps on your client transition site.

[Visit the client transition site](#)

Sincerely,

The HealthEquity Client Services Team

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Final-Client\_SNA\_and\_HSA\_Email\_4\_T-5\_Months\_V03

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# T-4 Months, Week 3

Sent approximately 4 months prior to the Transition Date.

**Description:**

Bulk Client Onboarding Action Items & Onboarding Webinar Reminder


**Subject Line:**

TRANSITION UPDATE: Important HSA tasks require your attention.

HealthEquity

It's time to make some moves

We have some important tasks for you.



Hello CHRIS,

As your experienced partner in transitioning your HSAs from Further to our HealthEquity portal, we'd like to share some action items for you to accomplish before your transition.

Here is a list of important tasks for <CLIENT NAME>:

- [Attend the Transition Overview webinar.](#)
- [Register for the Onboarding webinar.](#)
- [Review the transition timeline.](#)
- [Preview the upcoming communications we will be sharing with your members.](#)
- Update your bank filters to include HealthEquity.

As always, our Client Services team is ready to help with your questions.

Sincerely,  
The HealthEquity Client Services Team

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Questions?

Contact Client Services  
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Final Client\_HSA\_Email\_3\_T-4\_Months\_W3\_Bulk

Please refer to your transition website for exact Transition Dates.

To be sent to clients with under 500 benefits eligible employees

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# 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.

HealthEquity

Your guide to remarkable

It's time to connect with your Implementation Manager.



Hi 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 January 1, 2020.

If you haven't already done so, we encourage you to:

- [Attend the Transition Overview webinar.](#)
- [Register for the Onboarding 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

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Questions?

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First Client, HSA, Email, 3, 7-4 Months, 103, 35M

Please refer to your transition website for exact Transition Dates.

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 HSA 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 attending our Onboarding webinar where you'll learn about the HealthEquity portal and bookmarking the [Client Help Center](#) for future reference.

Attend Onboarding 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

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Final Client\_HSA\_Final\_3

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website for exact Transition Dates.

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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.

HealthEquity

Share your feedback

Help us improve by sharing your thoughts.



Dear Client,


At HealthEquity, we pride ourselves in our service to our members, clients and partners like you. But in order for us to get better at what we do, we need your help.



Please take a moment to fill out this Customer Satisfaction Survey so that we can better understand how to improve.



Begin Survey

Thank you in advance.

Sincerely,  
The HealthEquity Team

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Final Client\_HSA\_Email\_V3\_-\_CSAT\_Survey

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# Transition Communications

## Client Reimbursement Accounts (FSA/HRA)



### Important:

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# 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 January 1, 2020, your Flexible Spending Account/HealthCare 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
Clients 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.	3 months before Transition Date, must be completed 45 days before Transition Date
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.	Starts 1.5 months before Transition Date, must be completed 30 days before Transition Date
Clients can begin submitting new plan year enrollments. Must complete plan year renewal for enrollments 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 HRA operations, 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.

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Questions?

Contact Client Services  
866.711.4860  
Mon - Fri, 9am-7pm CT

[View on iOS](#)

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

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Final Client\_TN\_2024\_1\_14\_240401\_001

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# T-6 months, Week 3

Sent approximately 6 months prior  
to the Transition Date.


**Description:**  
Claims Funding Form & Webinar  
Sign Up

**Subject Line:**  
Your FSA/HRA Claims Funding Form  
& webinar registration.

HealthEquity

Starting  
your  
funding  
profile

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



**Hello CHRIS,**

As you know, your Flexible Spending Account/HealthCare Reimbursement Arrangement benefits will transition to our HealthEquity portal on Transition Date.

Part of this transition necessitates we have you complete a new funding profile by completing the Claims Funding Form.

**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 at least 45 days before transition date.
- Send completed forms to [Transitions@healthequity.com](mailto:Transitions@healthequity.com)

**Your claims funding form is due no later than 45 days before your transition.**

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

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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Final Client\_RA\_Final\_3\_T-6\_Months\_303

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: Transition Overview,  
Onboarding and Renewals & Claims  
Funding Webinar Sign Up


**Subject Line:**

TRANSITION UPDATE: Your  
FSA/HRA transition webinars are  
now open for registration.

HealthEquity

This way to  
a smooth  
transition

Register now for our  
transition webinars.



**Hello Client,**

To make your transition to HealthEquity a seamless one, we've created webinars to help walk you through the process.

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Learn how to navigate the HealthEquity portal, transfer files and upload data and submit enrollments for the new plan year.

If you have questions, our Client Services team is ready to help.

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Final Client\_Email\_T-5\_Months\_W1\_18\_and\_HRA

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# T-5 months, Week 3

Sent approximately 5 months prior  
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**Description:**  
Member Communications Summary,  
Transition Timeline & Next Steps

**Subject Line:**  
Review your customized member  
transition website.

HealthEquity

This way to connected

We'd like to share some important resources with you.



Hello CHRIS,

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No action is needed for the communications to commence.

Our goal is to help make the transition to the HealthEquity portal a smooth one for both you and your members. Below, we've included a link to your member transition website.

**The member transition website for your employees includes:**

- A complete transition timeline
- Progress tracker
- Registration options for webinars
- All guides and resources

[Visit your member transition site](#)

You can find a full summary of upcoming member communications and a complete timeline of our transition including your next steps on your client transition site.

[Visit the client transition site](#)

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The HealthEquity Client Services Team

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Final-Client\_SNA\_and\_MSA\_Email\_v\_T-5\_Months\_V03

Please refer to your transition website for exact Transition Dates.

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# 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  
Implementation Manager will be  
reaching out soon.

HealthEquity

Your guide to remarkable

It's time to meet your Implementation Manager.

Hi Client,

As your experienced partner in the transition process, we're introducing your personal Implementation Manager to aid in your transition from Further to our HealthEquity portal.

In the coming days, your Implementation Manager will reach out to you via email. They will be your point of contact should any questions or issues should arise during your transition to HealthEquity on January 1, 2000.

In the meantime, here is a list of important tasks for you to do:

- [Attend Transition Overview webinar](#)
- [Attend Renewals & Claims Funding webinar](#)
- [Register for the Onboarding webinar](#)
- Return Claims Funding Form
- Submit new plan year enrollments

Thank you in advance for your help in a smooth transition.

If you have questions, our Client Services team is ready 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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Final Client, RA, Email, S, T-4 Months, 302\_MIM

Please refer to your transition website for exact Transition Dates.

To be sent to clients with over 500  
benefits eligible employees

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# T-4 months, Week 3

Sent approximately 4 months prior  
to the Transition Date.


**Description:**  
Bulk Client Onboarding Action Items  
& Onboarding Webinar Reminder

**Subject Line:**  
TRANSITION UPDATE: Important  
tasks require your attention.

HealthEquity

This way to  
a smooth  
transition

We have some important tasks for  
you concerning your FSA/HRA  
transition.



Hi Client,

As your experienced partner in the transition process for your Flexible Spending  
Account/HealthCare Reimbursement Arrangement benefits, we'd like to share some  
important action items for you to accomplish before your transition on January 1,  
2020.

Here is a list of tasks for you to do before your transition:

• [Attend Transition Overview webinar.](#)

• [Attend Renewals & Claims Funding webinar.](#)

• [Register for the Onboarding webinar.](#)

• Return Claims Funding Form

• Submit new plan year enrollments

If you have questions, our Client Services team is ready to help.

Sincerely,

The HealthEquity Client Services Team

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Questions?

Contact Client Services

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First Client, RA, Email, 5, T-4, Months, W3, Bulk


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website for exact Transition Dates.

To be sent to clients with under 500  
benefits eligible employees

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**Subject Line:**  
TRANSITION UPDATE: 60-day  
transition notice



# HealthEquity

## This way to remarkable

Please complete these tasks before the transition date.

### Client,

We are approximately two months away from finalizing your Flexible Spending Account/ Healthcare Reimbursement Arrangement transition to HealthEquity.

Your plan year benefits are set up and ready for your upcoming year.

If you have not completed your plan renewal for the upcoming plan year, please do so at least 45 days before your transition date of January 1, 2020.

To ensure a smooth transition, please ensure the following tasks are completed:

- Complete [plan renewal](#).
- Return [claims funding form](#).
- [Attend the transition webinars](#).
- Update your bank filters to include HealthEquity.

#### NEW ENROLLMENT DATA

As you complete your Annual or Open Enrollment period, you will need to provide HealthEquity with your members' new enrollment data.

- You will no longer be eligible to submit your enrollment data via Secure File Transfer Protocol (SFTP).
- For your new plan year on HealthEquity, you must enter your enrollment data on the [HealthEquity portal](#).
- For guidance on entering your enrollment data online, please see the user guides and file templates available on the [Support page](#).
- You may continue to send your SFTP file for any enrollment updates for your current plan year on Further through the end of runout.

#### NEW MEMBER DEBIT CARDS

Once your member elections are loaded in our system, we'll be able to generate their new HealthEquity debit cards.

- To ensure members have their new HealthEquity Visa® cards by the new plan year, we require the enrollments to be processed in our system **one month before** the start of your new plan year.\*
- Cards may not arrive by the start of the new plan year if your enrollments are entered after this date. Cards will take approximately 10-15 business days after the enrollments are entered for your members to receive them.

#### NEW PLAN YEAR CONTRIBUTIONS/DEDUCTIONS

As you transition into the new plan year, you will need to provide HealthEquity with your member contribution/deduction amounts.


- You will no longer be eligible to submit your contribution/deduction data via SFTP.
- For your new plan year on HealthEquity, you must enter your contribution/deduction data online on the [HealthEquity portal](#).
- For guidance on entering your contribution/deduction data online, please see the user guides and file templates available on the [Support page](#).
- You may continue to send your SFTP file for any contribution/deduction amounts for your current plan year on Further through the end of the plan year.

We'll continue to provide updates as we move through the transition process.

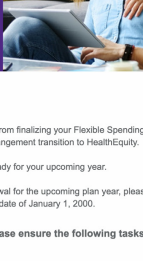
If you have any questions regarding your transition to HealthEquity, contact our Client Services team.

**Sincerely,**  
The HealthEquity Client Services Team

## This way to



## remarkable



# HealthEquity

## This way to remarkable

Please complete these tasks before the transition date.

### Client,

We are approximately two months away from finalizing your Flexible Spending Account/Healthcare Reimbursement Arrangement transition to HealthEquity.

Your plan year benefits are set up and ready for your upcoming year.

If you have not completed your plan renewal for the upcoming plan year, please do so at least 45 days before your transition date of January 1, 2020.

To ensure a smooth transition, please ensure the following tasks are completed:

- Complete plan renewal.
- Return claims funding form.
- Attend the transition webinars.
- Update your bank filters to include HealthEquity.

### NEW ENROLLMENT DATA

As you complete your Annual or Open Enrollment period, you will need to provide HealthEquity with your members' new 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.

### NEW MEMBER DEBIT CARDS

Once your member elections are loaded in our system, we'll be able to generate their new HealthEquity debit cards.

- To ensure members have their new HealthEquity Visa® cards by the new plan year, we require the enrollments to be processed in our system one month before the start of your new plan year.<sup>1</sup>
- Cards may not arrive by the start of the new plan year if your enrollments are entered after this date. Cards will take approximately 10-15 business days after the enrollments are entered for your members to receive them.

### NEW PLAN YEAR CONTRIBUTIONS/DEDUCTIONS

As you transition into the new plan year, you will need to provide HealthEquity with your member contribution/deduction amounts.


- 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.

We'll continue to provide updates as we move through the transition process of your Flexible Spending/Healthcare Reimbursement Accounts.

If you have any questions regarding your transition to HealthEquity, contact our Client Services team.

Sincerely,  
The HealthEquity Client Services Team





## This way to



## remarkable

### Questions?

**Contact Your Service**  
**866.711.4860**  
**Mon.-Fri. 7am-7pm CT**

[View on web](#)

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Final Client\_BN\_Smml\_2\_1000\_1\_2\_Marketing\_001

To be sent to clients with under 500  
benefits eligible employees

**Please refer to your transition website for exact Transition Dates.**



# This way to remarkable

Please complete these tasks before the transition date.

## Client,

We are approximately 30 days away from finalizing your transition to HealthEquity.

Your Flexible Spending Account/Healthcare Reimbursement Arrangement plan year benefits are set up and ready for your upcoming year.

If you have not completed your plan renewal for the upcoming plan year, please do so at least 45 days before your transition date of January 1, 2000.

To ensure a smooth transition, please ensure the following tasks are completed:

- [Complete plan renewal.](#)
- [Return claims funding form.](#)
- [Attend the transition webinars.](#)
- Update your bank filters to include HealthEquity.

### NEW ENROLLMENT DATA

As you complete your Annual or Open Enrollment period, you will need to provide HealthEquity with your members' new enrollment data.

- You will no longer be eligible to submit your enrollment data via Secure File Transfer Protocol (SFTP).
- For your new plan year on HealthEquity, you must enter your enrollment data on [the HealthEquity portal](#).
- For guidance on entering your enrollment data online, please see the user guides and file templates available on the [Support page](#).
- You may continue to send your SFTP file for any enrollment updates for your current plan year on [Further](#) through the end of runoff.

### NEW MEMBER DEBIT CARDS

Once your member elections are loaded in our system, we'll be able to generate their new HealthEquity debit cards.

- To ensure members have their new debit cards by the new plan year, we require the enrollments to be processed in our system **one month before** the start of your new plan year.\*
- Cards may not arrive by the start of the new plan year if your enrollments are entered after this date. Cards will take approximately 10-15 business days after the enrollments are entered for your members to receive them.

### NEW PLAN YEAR CONTRIBUTIONS/DEDUCTIONS

As you transition into the new plan year, you will need to provide HealthEquity with your member contribution/deduction amounts.

- You will no longer be eligible to submit your contribution/deduction data via SFTP.
- For your new plan year on HealthEquity, you must enter your contribution/deduction data online on [the HealthEquity portal](#).
- For guidance on entering your contribution/deduction data online, please see the user guides and file templates available on the [Support page](#).
- You may continue to send your SFTP file for any contribution/deduction amounts for your current plan year on [Further](#) through the end of the plan year.

We'll continue to provide updates as we move through the transition process.



If you have any questions regarding your transition to HealthEquity, contact our Client Services team.



**Sincerely,**  
The HealthEquity Client Services Team

## This way to remarkable

### Questions?

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

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FinalClient\_RA\_Email\_3\_000\_1\_1\_Months\_201



# HealthEquity

## This way to remarkable

Please complete these before the transition date.

### Client,

We are approximately 30 days away from finalizing your transition to HealthEquity.

Your Flexible Spending Account/Healthcare Reimbursement Arrangement plan year benefits are set up and ready for your upcoming year.

If you have not completed your plan renewal for the upcoming plan year, please do so at least 45 days before your transition date of January 1, 2000.

To ensure a smooth transition, please ensure the following tasks are completed:

- [Complete plan renewal.](#)
- [Return claims funding form.](#)
- [Attend the transition webinars.](#)
- Update your bank filters to include HealthEquity.

### NEW ENROLLMENT DATA

As you complete your Annual or Open Enrollment period, you will need to provide HealthEquity with your members' new enrollment data.

- You can continue to submit your enrollment data via Secure File Transfer Protocol (SFTP).
- For your new plan year on HealthEquity, you must enter your enrollment data on the [HealthEquity debit card](#).
- For guidance on entering your enrollment data online, please see the user guides and file templates available on the [Support page](#).
- You may continue to send your SFTP file for any enrollment updates for your current plan year on Further through the end of runoff.

### NEW MEMBER DEBIT CARDS

Once your member elections are loaded in our system, we'll be able to generate their new HealthEquity debit cards.

- To ensure members have their new debit cards by the new plan year, we require the enrollments to be processed in our system one month before the start of your new plan year.
- Cards may not arrive by the start of the new plan year if your enrollments are entered **after** this date. Cards will take approximately 10-15 business days after the enrollments are entered for your members to receive them.

### NEW PLAN YEAR CONTRIBUTIONS/DEDUCTIONS

As you transition to the new plan year, you will need to provide HealthEquity with your member contribution/deduction amounts.

- 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.

We'll continue to provide updates as we move through the transition process.





If you have any questions regarding your transition to HealthEquity, contact our Client Services team.

**Sincerely,**  
The HealthEquity Client Services Team

## This way to remarkable

### Questions?

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

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FinalClient\_RA\_Final\_01\_1000\_Coverletters\_0197\_711\_March19\_1

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 FSA/HRA transition from  
Further to Health Equity 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 HSA 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 attending our Onboarding webinar where you'll learn about the HealthEquity portal and bookmarking the [Client Help Center](#) for future reference.

Attend Onboarding 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

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Final Client\_HSA\_Final\_3

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website for exact Transition Dates.

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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.

HealthEquity

Share your feedback

Help us improve by sharing your thoughts.




Dear Client,



At HealthEquity, we pride ourselves in our service to our members, clients and partners like you. But in order for us to get better at what we do, we need your help. Please take a moment to fill out this Customer Satisfaction Survey so that we can better understand how to improve.



Begin Survey

Thank you in advance.

Sincerely,  
The HealthEquity Team

This way to  remarkable

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Final Client\_HSA\_Email\_V3\_-\_CSAT\_Survey

Please refer to your transition website for exact Transition Dates.