

CDPHP® Funding Account Renewal Checklist



Health funding accounts (HRA/FSA) currently administered by HealthEquity and renewing with CDPHP

Task	Owner	When Completed
<input type="checkbox"/> Review Funding Account Comparison Guide with group/broker	CDPHP Sales	90-120 days prior to renewal
<input type="checkbox"/> Notify CDPHP of intent to renew/implement funding accounts (HRA/FSA) with CDPHP	Broker / Group	60 days prior to renewal
<input type="checkbox"/> Complete CDPHP HRA/FSA Administration Agreement <ul style="list-style-type: none"> • Large Group: When complete, return all renewal paperwork to CDPHP sales team. • Small Group: Complete renewal steps in CDPHP portal and upload HRA/FSA Admin Agreement. 	Broker / Group	Once Funding Account administrator selected
<input type="checkbox"/> Terminate / non-renew HealthEquity funding account(s) for current plan year <ul style="list-style-type: none"> • Log in to HealthEquity client portal and select "Terminate Plan(s)". 	Group	Once Funding Account administrator selected
<input type="checkbox"/> Submit completed group paperwork to CDPHP Enrollment and Billing (E&B)	CDPHP Sales Lead	Once HRA/FSA Admin Agreement is received
<input type="checkbox"/> Complete group renewal and HRA/FSA plan set up	CDPHP E&B	Once HRA/FSA Admin Agreement is received
<input type="checkbox"/> Create HRA/FSA plan documents (Fund-It) <ul style="list-style-type: none"> • Plan documents will be sent to group upon completion. 	CDPHP <ul style="list-style-type: none"> • Large and Small Group completed by E&B 	Once HRA/FSA Admin Agreement is received
<input type="checkbox"/> Enrollment submitted to CDPHP <ul style="list-style-type: none"> • Members with FSA carryover and not electing for new plan year, enrollment will need to be submitted with zero dollar election amount for access to prior year FSA funds. 	Group / Broker	Should be received no later than 30 days prior to renewal date
<input type="checkbox"/> Request/mail debit cards	CDPHP	Upon receipt of enrollment and completed plan set up
<input type="checkbox"/> Request HRA and/or FSA carryover funds report from HealthEquity client services <ul style="list-style-type: none"> • Carryover report will also be available in the HealthEquity employer portal after the runout period. 	Group	Following the end of the runout period
<input type="checkbox"/> Submit carryover funds report to CDPHP	Group	Once received from HealthEquity
<input type="checkbox"/> Add carryover funds to new plan year funding accounts	CDPHP	Once carryover report received from group