



# 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"/> <b>Review Funding Account Comparison Guide with group/broker</b>	CDPHP Sales	90-120 days prior to renewal
<input type="checkbox"/> <b>Notify CDPHP of intent to renew/implement funding accounts (HRA/FSA) with CDPHP</b>	Broker / Group	60 days prior to renewal
<input type="checkbox"/> <b>Complete CDPHP HRA/FSA Administration Agreement</b> <ul style="list-style-type: none"> <li>• <b>Large Group:</b> When complete, return all renewal paperwork to CDPHP sales team</li> <li>• <b>Small Group:</b> Complete renewal steps in CDPHP portal and upload HRA/FSA Admin Agreement</li> </ul>	Broker / Group	Once Funding Account administrator selected
<input type="checkbox"/> <b>Terminate / non-renew HealthEquity funding account(s) for 2023 plan year</b> <ul style="list-style-type: none"> <li>• Log in to HealthEquity client portal and select “Terminate Plan(s)”</li> </ul>	Group	Once Funding Account administrator selected
<input type="checkbox"/> <b>Submit completed group paperwork to CDPHP Enrollment Management Services</b>	CDPHP Sales Lead	Once HRA/FSA Admin Agreement is received
<input type="checkbox"/> <b>Complete group renewal and HRA/FSA plan set up</b>	CDPHP Enrollment Management Services	Once HRA/FSA Admin Agreement is received
<input type="checkbox"/> <b>Create HRA/FSA plan documents (Fund-It)</b> <ul style="list-style-type: none"> <li>• Plan documents will be sent to group upon completion</li> </ul>	CDPHP <ul style="list-style-type: none"> <li>• Large Group completed by Sales</li> <li>• Small Group completed by EMS</li> </ul>	Once HRA/FSA Admin Agreement is received
<input type="checkbox"/> <b>Enrollment submitted to CDPHP</b>	Group / Broker	Should be received no later than 30 days prior to renewal date
<input type="checkbox"/> <b>Request/mail debit cards</b>	CDPHP	Upon receipt of enrollment and completed plan set up
<input type="checkbox"/> <b>Request carryover funds report from HealthEquity client services</b> <ul style="list-style-type: none"> <li>• Carryover report will also be available in the HealthEquity employer portal after the runout period</li> </ul>	Group	Following the end of the runout period
<input type="checkbox"/> <b>Submit carryover funds report to CDPHP</b>	Group	Once received from HealthEquity
<input type="checkbox"/> <b>Add carryover funds to new plan year funding accounts</b>	CDPHP	Once carryover report received from group