Reimbursement Account (RA) Implementation Checklist

	TASK	OWNER	WHEN COMPLETED
☐	**Notify CDPHP of intent to implement a Health Funding Account (HRA, FSA, LPFSA, DCFSA, HSA)** » Return completed and signed CDPHP Ancillary Services Agreement	Broker / Group	60 days prior to effective date
☐	**Complete HealthEquity New Business Notification Form**	CDPHP / Broker / Group	Once notification received from group
☐	**Send Welcome Email to contacts listed on New Business Notification Form** *(includes Calendly link)* » An implementation manager will be assigned, and reach out directly to the group contact for employer groups with >500 eligible employees (mid-market)	HealthEquity	3-5 days after NBNF submitted
☐	**Schedule Welcome Call** » Mid-market (>500 eligible employees) groups will receive a project plan and implementation schedule from the implementation manager	CDPHP / Broker / Group	Based on implementation manager / group availability
☐	**Facilitate Welcome Call and Complete RA Application**	HealthEquity	Based on implementation manager / group availability
☐	**Send RA Application Draft to group via AdobeSign**	HealthEquity	Following welcome call
☐	**Voided Check or Banking letter provided to HealthEquity**	Group	Following welcome call
☐	**Group signs RA Application through AdobeSign*** *(automatically returned to HealthEquity once signed electronically)*	Group	Once RA application sent to group
☐	**Enrollment submitted to CDPHP****	Group / Broker	CDPHP can accept enrollment anytime during the implementation process, and should be received no later than 30 days prior to effective date
☐	**Enrollment Sent to HealthEquity**	CDPHP	Upon receipt from group and CDPHP group renewal/ setup complete

	TASK	OWNER	WHEN COMPLETED
☐	**RA Plan Setup***	HealthEquity	3-5 days after signed RA application, 5-7 days during peak season
☐	**RA Plan Audit** *(confirms accuracy of plan setup)*	HealthEquity	3-5 days after plan setup complete, 5-7 days during peak season
☐	**Verify Enrollment and Request Debit Cards** *(if needed)*	HealthEquity	3-5 days after audit
☐	**Client Training / Portal Orientation / Verify Bank Account** » Email sent to group contacts with login credentials and links to employer portal webinar » Group Contact verifies ACH micro-deposit in bank account	HealthEquity	3-5 days after debit cards requested
☐	**Plan Document Questionnaire*** » Implementation manager emails questionnaire to group contact and requests return within 10 days	HealthEquity	Once RA plan setup complete
☐	**Plan Documents Sent**	HealthEquity	3-5 days after receipt of completed plan document questionnaire
☐	**Final Walkthrough** » Implementation manager audits project to ensure all phases complete » Transition email sent to group with employer services contact information » Mid-market groups (>500 eligible employees) will be transitioned to a dedicated service delivery manager	HealthEquity	3-5 days after plan documents
☐	**Confirm Funding / Banking information**	Group	

* *The full implementation/onboarding process typically takes 30-45 days, delays in returning required documentation to HealthEquity can delay the overall timeline.*

** *Enrollment for all product types and plans must be received 30 days prior to effective date to guarantee debit cards will be delivered on time.*

*** *Enrollment for all product types and plans must be processed for Plan Setup to begin*