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** • 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. • Set a reminder to submit the prior year HRA carryover report to HealthEquity and FSA carryover report to CDPHP at the end of the runout period.	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

CDPHP   **HealthEquity**