



# HealthEquity 2023 Reimbursement Account (RA) Renewal Checklist

Health Funding Accounts (HRA/FSA) currently administered by and renewing with HealthEquity

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>Send Reimbursement Account (RA) Renewal Notification emails</b> <ul style="list-style-type: none"> <li>Email will be sent to all individuals with “rarenewalnotification_OptedIn” credentials</li> <li>Email will include renewal process details</li> </ul>	HealthEquity	90, 75, 60, 45 days prior to renewal date
<input type="checkbox"/> <b>Complete RA plan renewal process on HealthEquity client portal by selecting one of the following options:</b> <ul style="list-style-type: none"> <li>Renew plan(s) without changes</li> <li>Renew plan(s) with changes: plan changes should be completed 60 days prior to the renewal date</li> <li>Terminate plan(s)</li> </ul> <p><i>HealthEquity will send <b>Renewal Plan confirmation</b> to the employer group only</i></p>	Group	Once decision is made to renew RA plan(s)
<input type="checkbox"/> <b>Renew RA plan setup</b>	HealthEquity	Once RA Renewal completed in HealthEquity employer portal
<input type="checkbox"/> <b>Notify CDPHP intent to renew RA plans with HealthEquity</b> <ul style="list-style-type: none"> <li>To add a new RA Plan upon renewal, a new Ancillary Services Administration Agreement is needed and the HealthEquity Implementation process will be followed (new NBNF to HealthEquity)</li> </ul>	Broker / Group	Once decision is made to renew RA plan(s)
<input type="checkbox"/> <b>Complete Ancillary Services Administration Agreement</b> <p>Completed Agreements should be returned to CDPHP:</p> <ul style="list-style-type: none"> <li><b>Large Group:</b> Return all renewal paperwork to CDPHP sales team</li> <li><b>Small Group:</b> Complete renewal steps in iConnect and upload Ancillary Services Admin Agreement</li> </ul>	Broker / Group	Once decision is made to renew RA plan(s)

Task	Owner	When Completed
<input type="checkbox"/> <b>Submit completed group paperwork to CDPHP Membership &amp; Billing</b>	Sales Lead	Once Ancillary Services Administration Agreement is received
<input type="checkbox"/> <b>Enrollment submitted to CDPHP</b>	Group / Broker	CDPHP can accept enrollment anytime during the renewal process. Should be received no later than 30 days prior to renewal date.
<input type="checkbox"/> <b>Enrollment sent to HealthEquity</b>	CDPHP	Upon receipt from group and CDPHP group renewal/setup complete
<input type="checkbox"/> <b>Generate reserve funding invoice for new plan year</b>	HealthEquity	Once renewal enrollment received
<input type="checkbox"/> <b>Pay reserve funding invoice for new plan year</b> <ul style="list-style-type: none"> <li>• If Reserve Funding Invoice not paid, 2023 claim payments may be suspended</li> </ul>	Group	Prior to RA plan renewal date
<input type="checkbox"/> <b>RA plan audit</b> <i>(confirms accuracy of plan setup)</i>	HealthEquity	3-5 days after plan setup complete, 5-7 days during peak season
<input type="checkbox"/> <b>Verify enrollment and request debit cards</b> <i>(if needed)</i>	HealthEquity	3-5 days after audit
<input type="checkbox"/> <b>Request plan documents for new plan year</b> The group must contact HealthEquity client services to request new plan documents	Group	Once RA plan setup complete
<input type="checkbox"/> <b>Plan documents sent</b>	HealthEquity	3-5 days after receipt of completed plan document questionnaire
<input type="checkbox"/> <b>Claims payment during runout period</b> <ul style="list-style-type: none"> <li>• Claims paid during the runout period will require the 2022 reserve fund to be replenished</li> <li>• Carryover balances will not be available until after the runout period</li> </ul>	HealthEquity	As claims received
<input type="checkbox"/> <b>Return 2022 reserve funds</b> <ul style="list-style-type: none"> <li>• Notification is not sent to the group that reserve funds have been returned</li> </ul>	HealthEquity	Up to 45-60 days following the runout period