HealthEquity®

Member
Transition Checklist

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Member Transition Checklist

Use this checklist to complete essential tasks for a smooth transition from Further to HealthEquity. The **Required Actions** section outlines what must be completed to avoid service delays. The **Recommended Resources** section includes helpful, optional items to familiarize yourself with the new platform and available tools.

For key dates specific to your transition, please visit the transition website.

Required Actions (Must Be Completed)

Key Transition Activities	Product(s)	Due Date
☐ **Review and update your Further account** Confirm contact info, address, and banking. If updates are needed, log in to your CareFirst WellBeing℠ portal or contact Further Member Services at 800-859-2144 or email CustomerSolutions@HelloFurther.com. We are available Monday–Friday 7:00 a.m. to 8:00 p.m. CT	**All**	June 1, 2026 (1 month before transition)
☐ **Log in to the HealthEquity portal** First-time log-in: Click here to create a new username and password. Your CareFirst WellBeing℠ portal credentials will not automatically transfer to HealthEquity. **HealthEquity portal:** Click here to log in Need help? Visit the Log-in Help page. If you have an existing HealthEquity account, please log in using your existing credentials. If needed, click on "Forgot username or password?" to reset your log-in information. If you are not using Single Sign-On (SSO) to access your HealthEquity member portal, you will need to set up a passkey.* For more information about passkeys, please visit your Member Transition Guide. *Passkey set up is also available online using a desktop, laptop or tablet computer. A valid phone number is required to register a passkey. HealthEquity offers multiple authentication options to ensure accessibility.	**All**	June 15, 2026 (14 days before transition)
☐ **Activate your HealthEquity® Visa® Card[1] (if applicable)** Follow the instructions in your Card Package or visit this link.	**All (if applicable)**	June 15, 2026 (14 days before transition)

Required Actions (Must Be Completed)

Key Transition Activities	Product(s)	Due Date
☐ **Link a bank account for quick reimbursement** Link an external bank account for easy claims reimbursement, avoiding the $2.00 check fee for reimbursement payments.	**All**	June 15, 2026 (14 days before transition)
☐ **Plan for the Blackout Period** To securely transfer your funds, your benefits will enter a Blackout Period. During this time, you will be unable to use your current Blue Rewards incentives (either CareFirst Blue Rewards-branded debit card or Autopay) or submit new claims. Please plan accordingly to minimize any disruption. Eligible expenses incurred during the blackout can be submitted after July 1, 2026 on the HealthEquity portal. If you earn an incentive during the blackout, the funds will automatically post to your account on the HealthEquity portal after the transition.	**All**	Blackout period begins June 21, 2026

Recommended Resources (Optional, But Encouraged)

Action	Product(s)	Due Date
☐ **Explore the transition website** Review transition timelines, guides, FAQs, and other resources. Check out the **member transition website**	**All**	Anytime
☐ **Allow HealthEquity emails** Add @e.HealthEquity.com to your safe sender list to avoid missing updates.	**All**	Anytime
☐ **Download the HealthEquity mobile app** Find the **HealthEquity mobile app** in the app store on your mobile device. It's a fast, convenient way to view balances, manage your HealthEquity® Visa® Card[1], submit and review reimbursements, manage HSA investments[2] and much more.	**All**	Anytime

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[1]The HealthEquity Visa® Card is issued by The Bancorp Bank, N.A., Member FDIC, pursuant to a license from Visa U.S.A. Inc. Your card can be used everywhere Visa debit cards are accepted for qualified expenses. This card cannot be used at ATMs and you cannot get cash back, and cannot be used at gas stations, restaurants, or other establishments not health related. See Cardholder Agreement for complete usage restrictions.

[2]Investments are subject to risk, including the possible loss of the principal invested and are not FDIC or NCUA insured, or guaranteed by HealthEquity, Inc. HealthEquity, Inc. does not provide investment advice. HealthEquity Advisors, LLC, a wholly owned subsidiary of HealthEquity, Inc. and an SEC-registered investment adviser, provides web-based investment advice to HSA holders that subscribe for its services (minimum thresholds and additional fees apply). Registration does not imply endorsement by any state or agency and does not imply a level of skill, education, or training. Investing may not be suitable for everyone and before making any investments, review the fund's prospectus.