

New Member Portal Guide

I've registered my account and have accessed the member portal, now what?


We're here to help you manage all of your pre-tax accounts.

Getting Started

There are two methods in which you can be invited to register for access to the ThrivePass Member Portal. The first method is by email invitation and the second method is by invitation that is mailed to your home.

REGISTRATION METHOD 1: EMAIL

1. Click the link provided in the Welcome/Activation Email. This link will take you directly to the portal (app.thrivepass.com) already logged in and will provide the opportunity to set a new password.
2. Create your password.
 - Note: If you lost your registration email, click the 'Set Up Pre-Tax Account' button. Then select 'No, I did not receive a code.' Lastly, enter the email address that was provided to ThrivePass by your employer.



Welcome to your Benefits Suite!

We've partnered with your company to administer benefits. Gain access to all of your benefits here in the Benefits Suite.

[Log In](#)

or

[Set up Pre-Tax account](#)



REGISTRATION METHOD 2: MAIL

To register using this method you would have received a Welcome/Activation letter in the mail that contains a unique code.

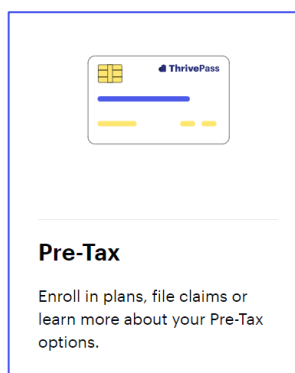
1. Navigate to app.thrivepass.com
2. Click the 'Set Up Pre-Tax Account' button
3. Enter your registration code from the welcome letter
4. Create password

YOUR FIRST LOG IN

Once registered, you will be able to enter your username and password on all subsequent login attempts.

Navigating Pre-Tax Benefits

Once you've logged in, select the 'Pre-Tax' tile. This will bring you to your Pre-Tax dashboard.



DISPLAY PLAN OVERVIEWS

Use the drop downs under 'Get Started' to display your plan information. The page is dynamic, so it will change based on your selections in the 'Plan Year' and 'Plan.'

Getting Started

Complete these steps to generate account overviews for your pretax account(s).

1. Select Plan Year

Current ^

2. Select Plan

FSA v



Under 'PLAN' select the arrow on the right-hand side to see an overview of your different accounts (HSA, FSA, HRA, DCA, and Transit).

2. Select Plan

FSA ▼

HSA | ThrivePass Dev

FSA

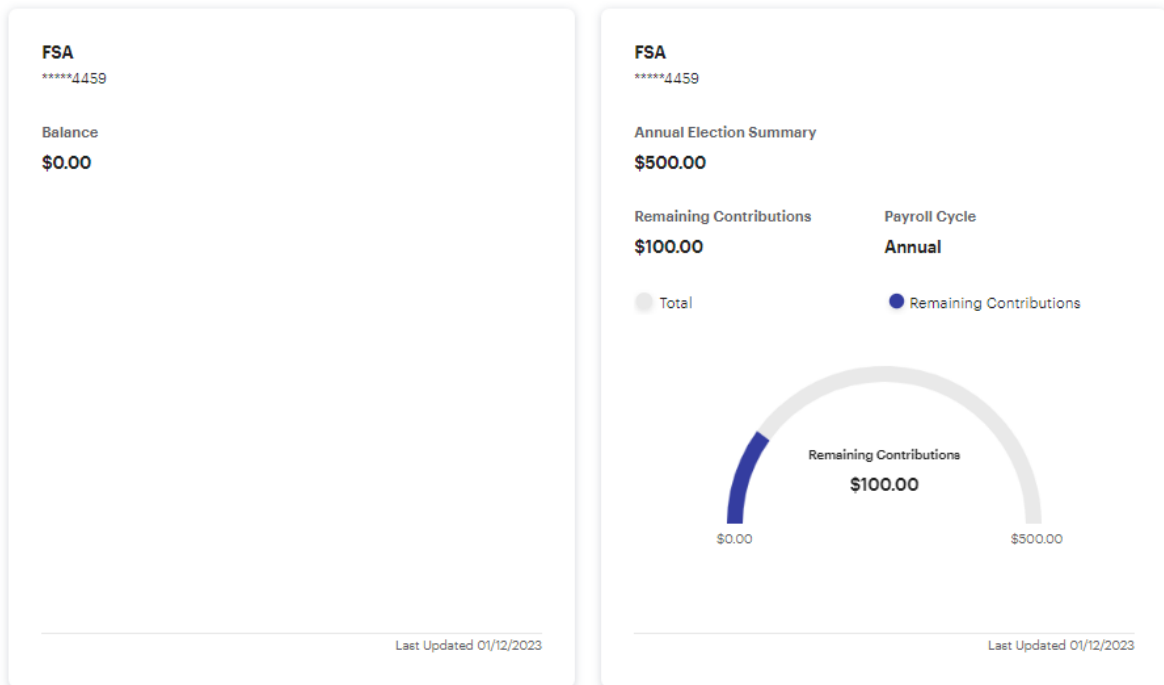
HRA

TRN

PKG

Under each plan you can view your current balance, a list of notifications and recent transactions with the description, amount, and date.

Account Overview



Notifications

[→ View More](#)

▼ Date	Time	Activity Description	Sent Via
01/02/2023	3:45 PM	Your HSA Statement is Ready for Viewing - Download Now!	Email
01/01/2023	3:45 PM	ABCD Testing Data	SMS
12/31/2022	3:45 PM	ABCD Testing Data	Email
12/30/2022	3:45 PM	ABCD Testing Data	SMS
12/29/2022	3:45 PM	Your HSA Statement is Ready for Viewing - Download Now!	Email

Rows per page: Page 1 of 5 >

Recent Transactions

[→ View More](#)

▼ Date	Status	Amount	Type
01/22/2023	Not Applicable	\$25.00	Expense
01/22/2023	Not Applicable	\$25.00	Expense
01/22/2023	Not Applicable	\$25.00	Expense
01/22/2023	Not Applicable	\$25.00	Expense
01/22/2023	Not Applicable	\$25.00	Expense

Rows per page: Page 1 of 3 >




Filing a Claim

Follow the steps below to file a claim:

1. Click on 'File A Claim' in the 'Account Actions' section

Account Actions



→ [File a Claim](#)

Click here to file a claim.

2. Complete steps 1 through 4 of the questionnaire
3. Click the 'Submit Claim' button

File a Claim

▼ Step 1 of 4

1. Claim Information

Claimant

Select the claimant. ^

Service Type

Select the service type. ^

Service Start Date

Enter the service start date. 📅

Service End Date

Enter the service end date. 📅



▼ Step 2 of 4

2. Reimbursement Type

How would you like to receive this payment?

Send me a check

Deposit to account

Payment Type

One-time payment

Recurring payment

▼ Step 3 of 4

3. Documentation

Please upload proof of your purchase.

Upload receipts and any other related documentation pertaining to this claim.



Click here to upload your file

.pdf, .jpeg, .jpg, .gif, .png, .tiff, .tif | 10MB max



4. Review

Claim Information Edit

Chiropractor

12/08/2022

12/08/2022

\$ 5.00


Reimbursement Type Edit

Deposit to account

Checking

One-time payment

Documentation Edit

 .jpg

Checking Account Balance(s)

To view your account balance details, click on 'Personal Dashboard' at top [right-hand](#) corner of the screen.

Welcome to your Pre-Tax Benefits

Manage all of your pre-tax account(s) here.

[Personal Dashboard](#)

This will direct you to the Personal Dashboard Home Page. **Please note** you will be redirected, so the portal will look different.





Your Accounts

Plan years to show: Previous Current Future

Medical FSA (01/01/2023-12/31/2023)

\$2,500.00

● Balance \$2,500.00 ● Spent \$0.00

HSA Account

\$0.00

● Available \$0.00 ● Investment \$0.00

Alerts

Right now you're only receiving email alerts. Click below to maximize the value of your account. **Link your mobile phone and get real-time balance updates!**

✔ Sign Up

Dec 23, 2022 5:09 am CIPLetterAlert

See All

Getting Reimbursed Just

Click on the any of the available accounts to view Account Details.

Medical FSA (01/01/2023-12/31/2023)

Account Balance

\$2,500.00

● Balance \$2,500.00

● Spent \$0.00

Annual Election	\$2,500.00
- Spent	\$0.00
= Balance	\$2,500.00

Annual Election Summary

Annual Election \$2,500.00

Remaining Payroll Deposits	\$2,500.00
Payroll Deposits YTD	\$0.00
Remaining Payroll Deposits	\$2,500.00

Displays how much of your annual election has been spent, and how much is still available.



Important dates, such as the last day to spend funds, and the last day claims can be submitted.



Each of your accounts displays in its own box and provides at-a-glance details regarding your balance, funds spent, and important dates.

Resolving Pending Debit Card Transactions

If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. If a receipt is required, you will see a notification in the 'Alerts' section of the home page.

An alert box titled 'Items that require your attention' with a dollar sign icon. It shows a transaction for (\$387.60) from PEARLE VISION that 'Needs Receipt'. Below this, there is a 'Card' section with fields for Date of Service (May 10, 2022), Date of Transaction (May 11, 2022), and Claimant Name. The Provider is listed as PEARLE VISION. An 'Add Receipt' button is located to the right of the card information.A dialog box titled 'Add Receipt' with a close button (X) in the top right. It contains an 'Upload Receipt' button with a 'BROWSE' button next to it. Below is a dashed box labeled 'DRAG & DROP your receipts here' with a plus sign icon. At the bottom are 'Cancel' and 'Submit' buttons.

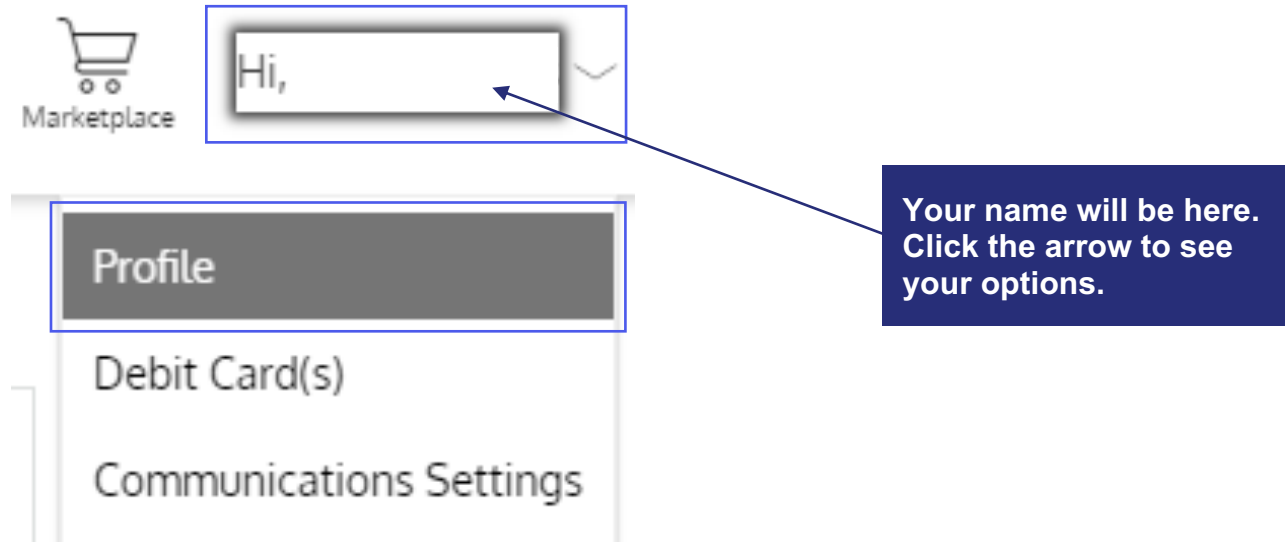
1. Click 'Add Receipt'
2. Browse or Drag & Drop the to attach your supporting documentation to the transaction click 'Submit'.

We will review the documentation you've submitted and update the transaction accordingly.



Updating User Profile

In the upper right-hand corner click on the arrow next to your name and select 'Profile'.




PROFILE OPTIONS

From this page you can:

1. Update your email address. **Please note** this cannot be changed if your employer provides this information to us via an eligibility file.
2. Update your reimbursement method.
3. Add a new dependent.
 - a. Under 'Family Members' click 'Add Family Member'
 - b. Complete required fields and click 'Next'
 - c. Click the 'Issue Dependent Card' box if you would like a debit card for this dependent.

Please refer to the images on the next page.




 change picture Charlie Banks Date of Birth Jan 20, 1976 Marital Status None Gender None	Phone Mobile Phone Email Address t***@gmail.com	Home Address 123 Anywhere St Anywhere WA, 12345 US	
	Employer Test Employer Employee Status New	Reimbursement Method Check	

Family Members

[+ Add Family Member](#)

Account Linking

Please un-check the benefit account(s) that will not have access to.

	Account	Plan Start Date	Plan End Date	Plan Id	Card Eligible
<input checked="" type="checkbox"/>	HSA Account	Jan 1, 2020	Dec 31, 2099	HSA	✓
<input type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> No card will be issued. </div>				

Issue Dependent Card?

[✕ Cancel](#)

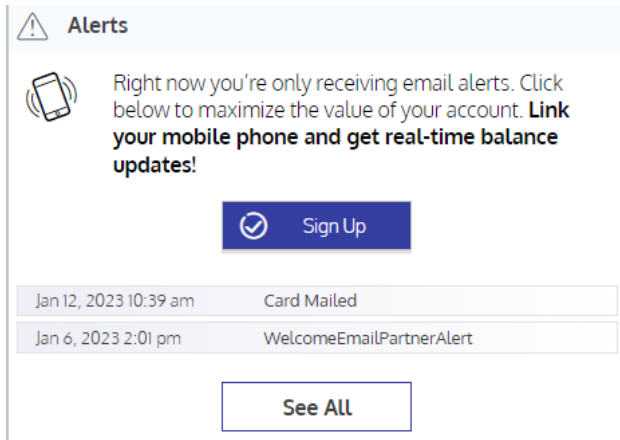
[← Edit](#)

[✓ Submit](#)

Managing Alerts & Messages

The Alerts section in the Personal Dashboard will indicate when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts could be anything from confirmation of an email address or password change, to notification that a claim you submitted has been received, to an alert that a card transaction was denied, to a wide variety of other communication types.

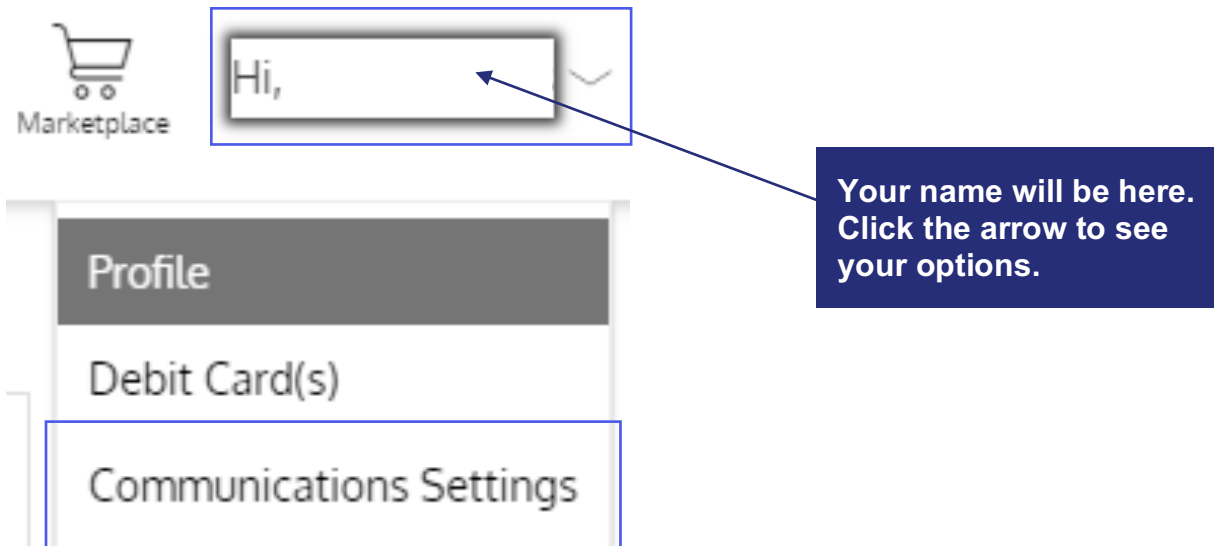




Click on an individual message to see the full text.

CHANGING YOUR COMMUNICATION SETTINGS

You can change whether you receive certain alert types, as well as how you receive them from the *communication settings* page. This page can be accessed by going to the upper right-hand corner click on the arrow next to your name and select 'Communication Settings'.



You may choose, for each alert type, whether you receive it via mobile, email, both, or neither. Click save when you are done editing your [preferences](#). You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.

Please refer to the images on the next page.



Assigned Notifications



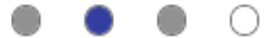
You are opted-in to one or more mobile communications, but do not have a mobile number registered. You will not receive these communications unless you register a mobile number.



The notifications below are available to you. Please define the delivery method for each notification you wish to receive. Please ensure you have an email address and/or registered mobile in order to receive these notifications.



Completed HSA Payment Notice



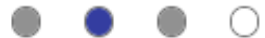
This PCM alert should be triggered when a Pending HSA Online Payment is successfully processed and a check/trace number is generated.

Email Address Change



This communication is sent when your email address has been updated.

Employer Plan Reconciliation



Failed HSA Payment Notice



This PCM alert should be triggered when the HSA Online Payment Processing Agent denies a pending payment.

Online Balance Repayment Confirmation



This communication is sent to an employee when an employee initiates a payment for a balance due.

Online Balance Repayment Failure



This communication is sent to an employee when a payment for paying back the balance due fails.

Payroll Contribution Reminder



Payroll deposits for [payroll date] are due today. If you have not entered deposits for this payroll date, please complete today to ensure your employee accounts are funded on time.

Save

Email Address

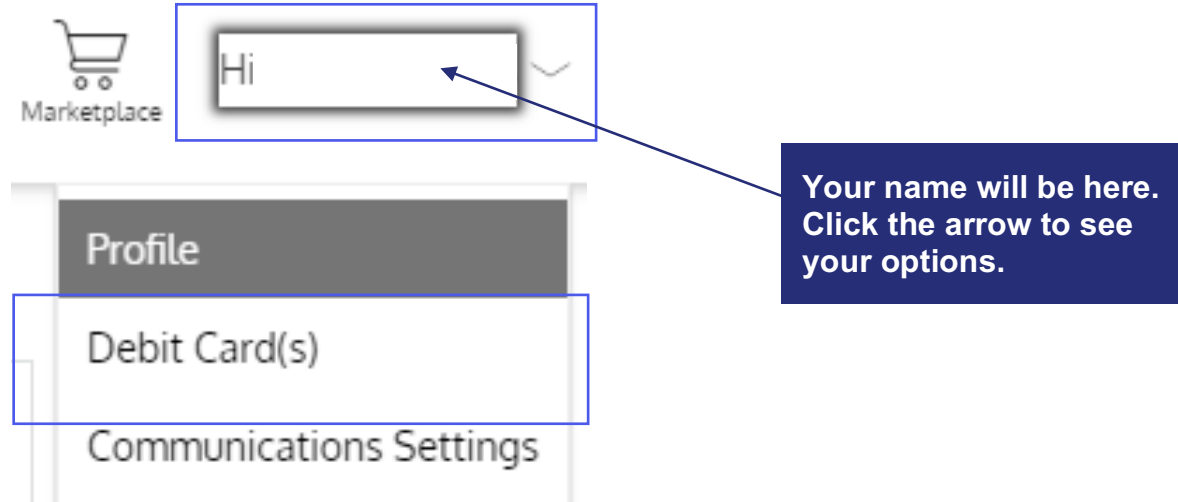
Phone Registration Status

Add Number

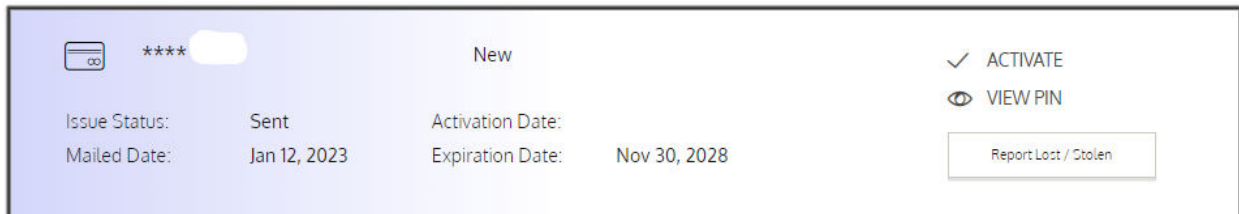


Lost/Stolen Cards & Replacement

In the upper right-hand corner click on the arrow next to your name and select 'Debit Card(s)'.



Click the 'Report Lost/Stolen' button.



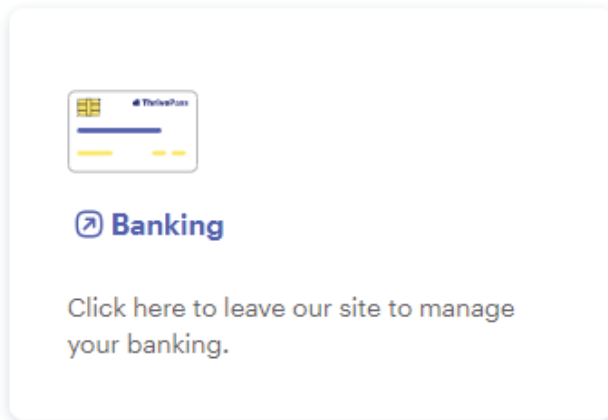
Your new card will arrive in about 10 business days. Please note that a \$5 fee will be assessed to your account when replacing a debit card.








Banking

A. Updating your Reimbursement Method to Direct Deposit.

Step 1. Click on the Banking Tile.



Step 2. Click on “Edit” button right above Reimbursement Method.

 change picture	 Phone Mobile Phone ***_***_5206 Email Address edit a*****vin@thrivepass.com	 Home Address change password delete account credentials
Date of Birth Sep 22, 1990 Marital Status None Gender Male	 Employer ThrivePass Employee Status Active	 edit Reimbursement Method Check



Step 3. Click on radio button to the left of Direct Deposit button fill in your banking details and check the box to agree to allow direct deposit reimbursement and then click the save button.

Reimbursement Method

Reimbursement Method

Check Direct Deposit

Bank Name *

Account *

Re-enter Account *

Account Routing *

Re-enter Routing *

Bank Account Type

Check example

Name _____
Address _____ Date _____

Pay to the order of: _____

Your bank

: 1233211231 :	234511	123456789123
Routing Number	Check #	Account Number

Please note: The order of Routing, Account and Check numbers will vary from financial institution to financial institution and will not necessarily be in the same order as shown above.

By providing my bank account and routing numbers, I agree to allow my administrator to direct deposit plan reimbursements into my accounts. I understand that I can change this directive at any time.

Cancel Edit Save

Step 4. Confirm your bank details are correct and click the “Save” button.

Reimbursement Method

Please Review Bank Account Details

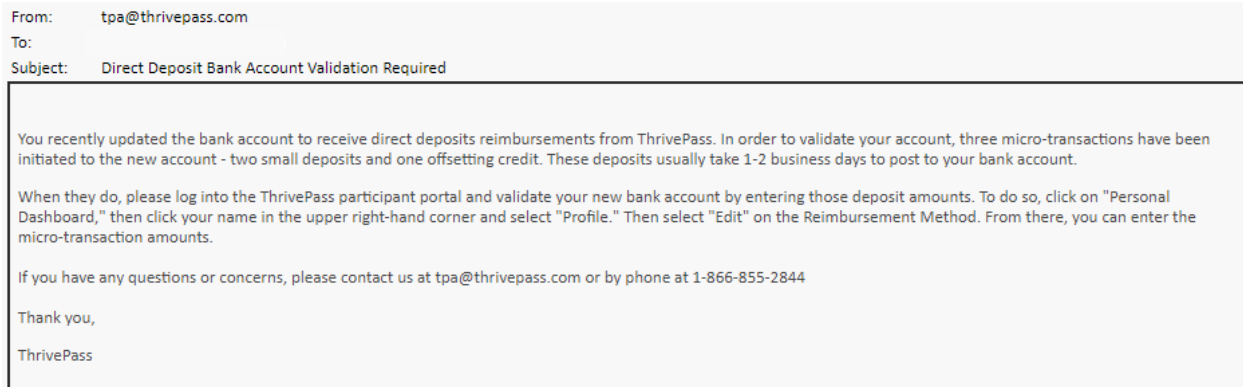
Bank Name
Account number
Routing number
Bank account type

Cancel Save



B. Validating your bank account once it has been added

After adding your bank information you will receive an email informing you that validation is required. It must be validated by entering micro deposit amounts you get from your bank:



1. Two small credits and one offsetting debit will be processed against the bank account entered. These credits are random amounts between \$0.05 and \$0.25.
2. The participant must check their bank account to obtain the credit and debit amounts.
3. Log in to the member portal and enter the transaction amounts on the reimbursement settings page.
4. If the amounts are correct, your bank account is successfully confirmed and ready for future direct deposit reimbursements.



The following is a step-by-step process of the validation.

Step 1. If you go back to the Edit Reimbursement screen, you can see this message next to your account status that tells you you'll need to validate the account once you receive your micro deposits in 1-2 business days.

The screenshot shows the 'Reimbursement Method' screen with the 'Direct Deposit' option selected. A modal dialog titled 'Validate Your Account' is displayed in the center. The dialog contains the following text:

Validate Your Account

To help verify the ownership of your account, we will make two small deposits (less than a dollar) and one off-acting credit to your bank account. Validate your account by providing us with the exact amounts, and we'll link your account. This process generally takes 1 to 2 business days to complete.

Please note: The order of Routing, Account and Check numbers will vary from financial institution to financial institutions and will not necessarily be in the same order as shown above.

The dialog also shows a table with the following data:

Routing Number	Check #	Account Number
1233211231	234511	123456789123

At the bottom of the dialog, there is a checkbox for 'Pending Validation' which is currently checked. Below the dialog, there are 'Cancel', 'Edit', and 'Close' buttons.

Step 2. Once the deposits have been initiated, you will receive a notice that your account requires validation. The reimbursement method screen is now updated to include a "Validate" button. Once the deposits appear in your bank account, click on the "Validate" button.

The screenshot shows the 'Reimbursement Method' screen with the 'Direct Deposit' option selected. The 'Account Status' is now 'Validation Required'. A blue 'Validate' button is visible at the bottom left of the form. The 'Bank Account Type' is set to 'Checking'. The 'Routing Number' field contains '****4759'. The 'Validate Your Account' dialog is no longer present. At the bottom of the screen, there are 'Cancel', 'Edit', and 'Save' buttons.



Step 3. Enter the amounts that were deposited into your bank account in any order, with or without a negative sign and click the “Submit” button.

Reimbursement Method

i To help verify the ownership of your account, we have made two small deposits (less than a dollar) and one off-setting credit to your bank account. Validate your account by providing us with the **exact** amounts.

Amount 1 * 0.00

Amount 2 * 0.00

Amount 3 * 0.00

Cancel Submit

Step 4. Correctly enter the micro deposit amounts you see on the screen, and select the Ok button if the validation was successful.

Reimbursement Method

i To help verify the ownership of your account, we have made two small deposits (less than a dollar) and one off-setting credit to your bank account. Validate your account by providing us with the **exact** amounts.

Amount 1 * 0.14

Amount 2 * 0.20

Amount 3 * 0.06

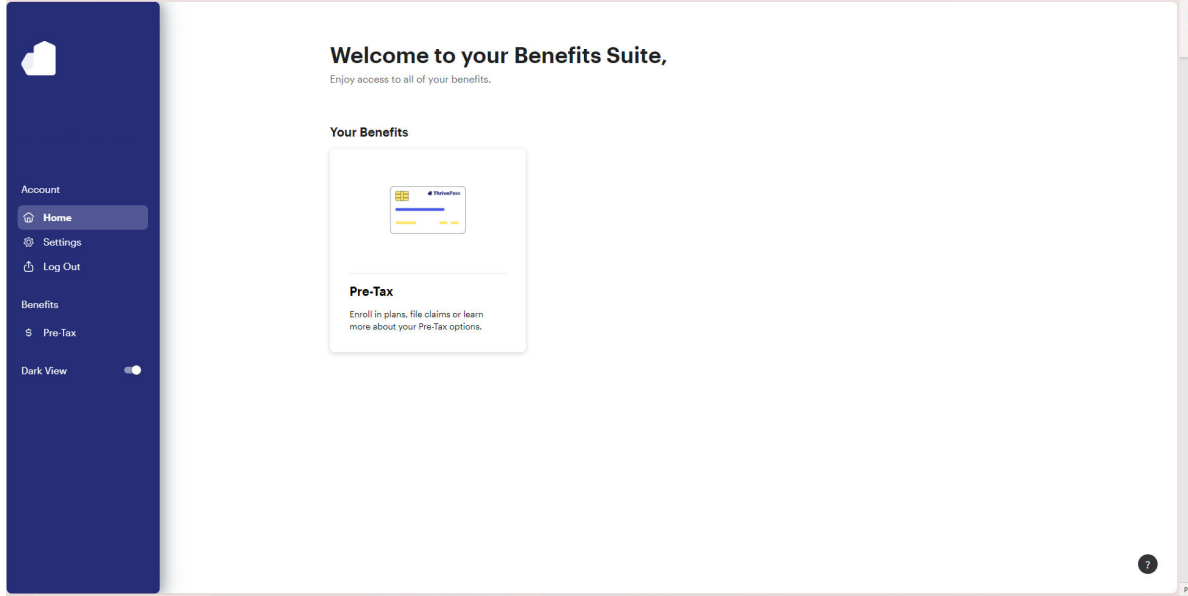
Validation was successful. Now your direct deposit bank account is active.

Ok

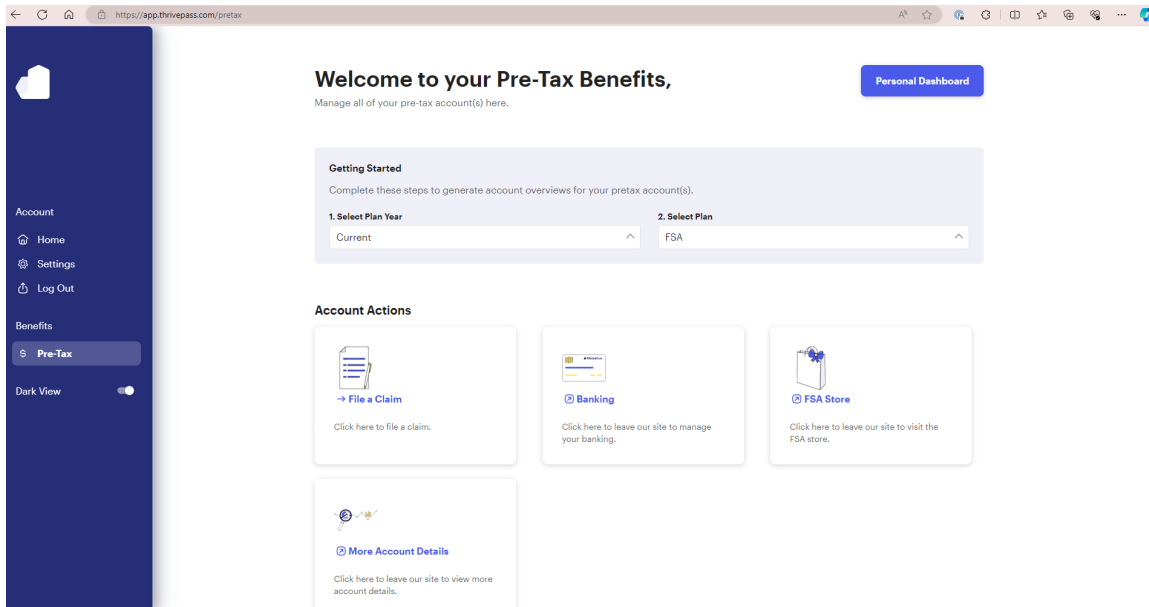


C. How to Repay a Balance Due Online

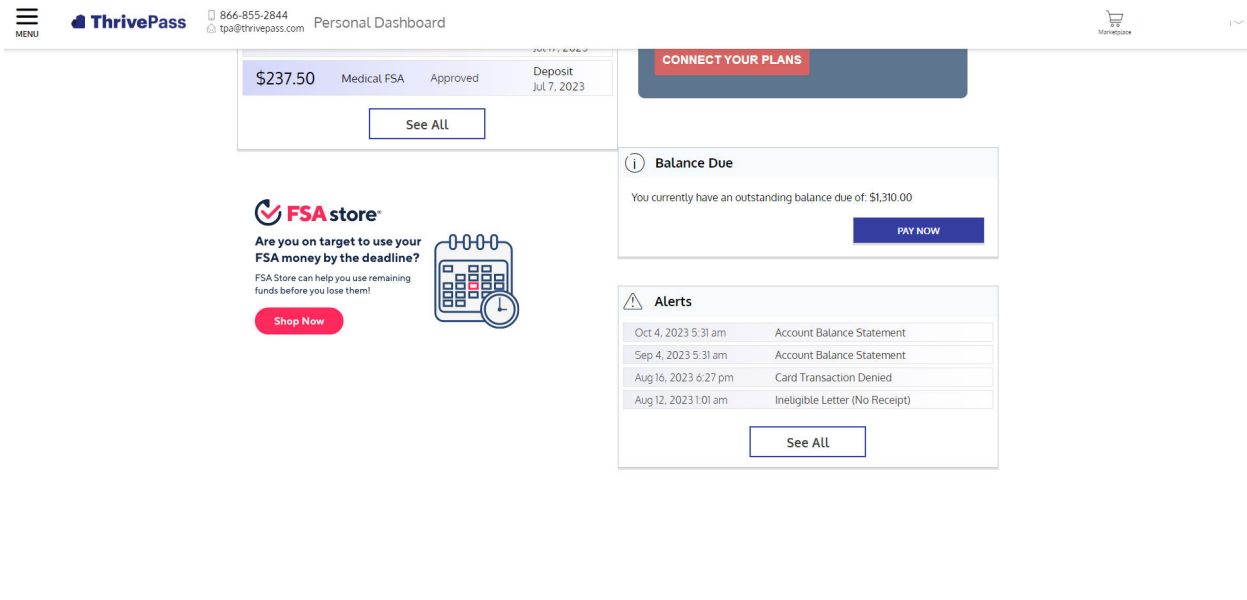
Step 1. Log into your account by going to app.thrivepass.com.



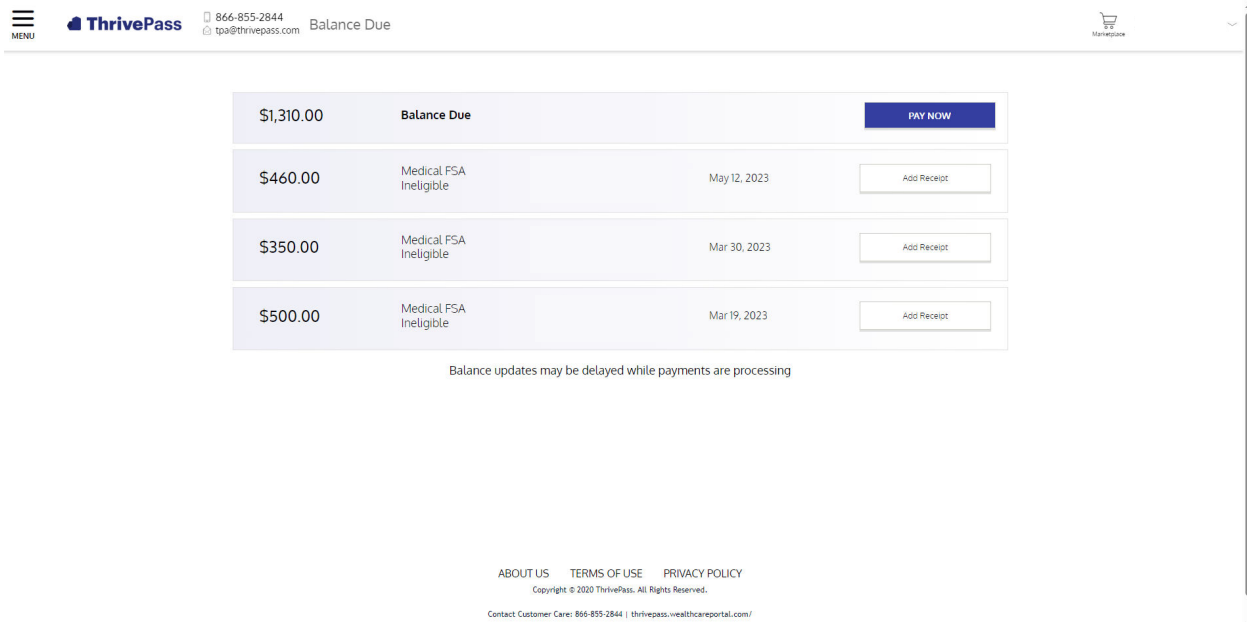
Step 2. Click on the Pre-Tax tile.



Step 3. Click on the blue Personal Dashboard button. Scroll down once the page loads, and you will see any Balance Due messages. Click the “PAY NOW” button to initiate on-line repayment.



Step 4. A list of ineligible charges to be repaid will appear. To repay, click the “PAY NOW” button.



Step 5. Enter whether you're making a full repayment or partial repayment amount, and then click the "Submit" button.

Repay Your Overpayment Now ×

Repayment Amount

Repay full amount \$1,310.00

Repay partial amount

Repay individual transactions

<input checked="" type="radio"/>	\$460.00	Medical FSA	May 13, 2023
<input checked="" type="radio"/>	\$350.00	Medical FSA	Mar 31, 2023
<input checked="" type="radio"/>	\$500.00	Medical FSA	Mar 19, 2023

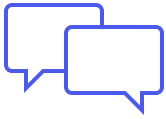
Your Bank Information

Repay from Account [View or Change Account](#)

I authorize a payment of \$1,310.00 to be taken from USAA to pay my outstanding balance.

✕ Cancel ✓ Submit





Get In Touch

Phone: (866) 855-2844

Email: tpa@thrivepass.com

SUPPORT HOURS

Monday - Thursday: 7:30am to 5:30pm CT

Friday: 7:30am to 5:00pm CT

General support inquiries will be responded to within 2 business days.

ThrivePass is committed to ensuring our customers have access to information and issue resolution quickly and easily through direct team support.

