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.

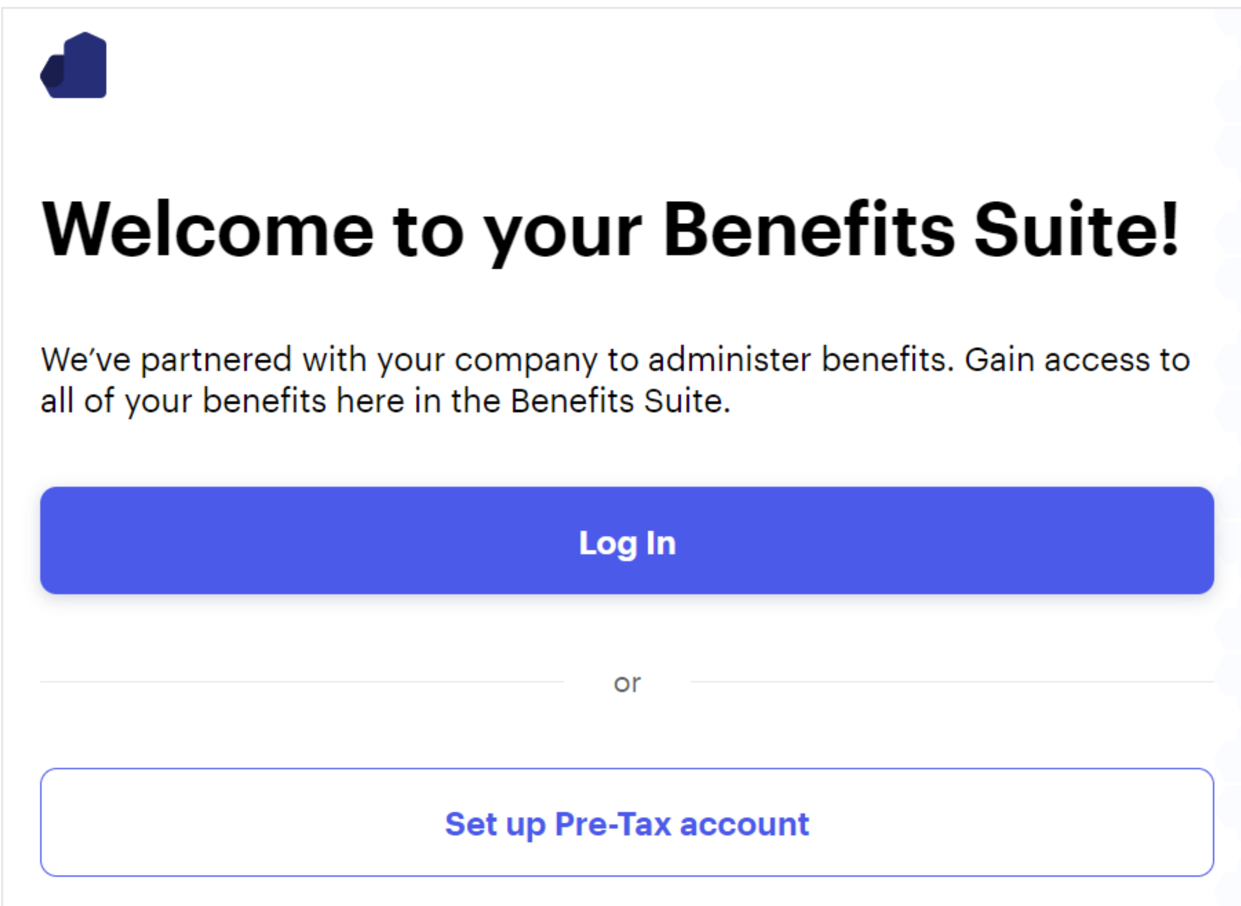
ThrivePass

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.



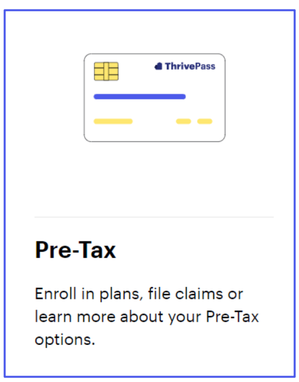
REGISTRATION METHOD 2: MAIL
To register using this method you would have received a Welcome/Activation letter in the mail that contains a unique code.

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

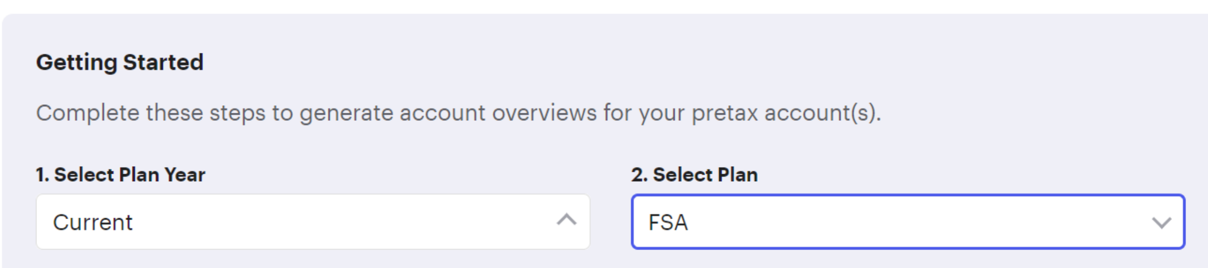
YOUR FIRST LOG IN
Once registered, you will be able to enter your username and password on all subsequent login attempts.

Navigating Pre-Tax Benefits

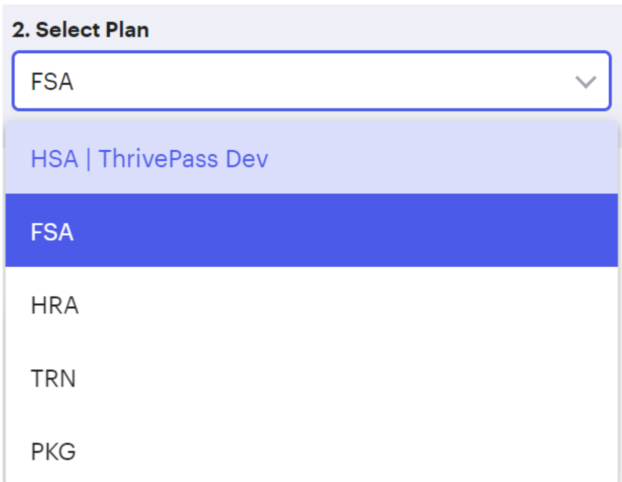
Once you’ve logged in, select the ‘Pre-Tax’ tile. This will bring you to your Pre-Tax dashboard.



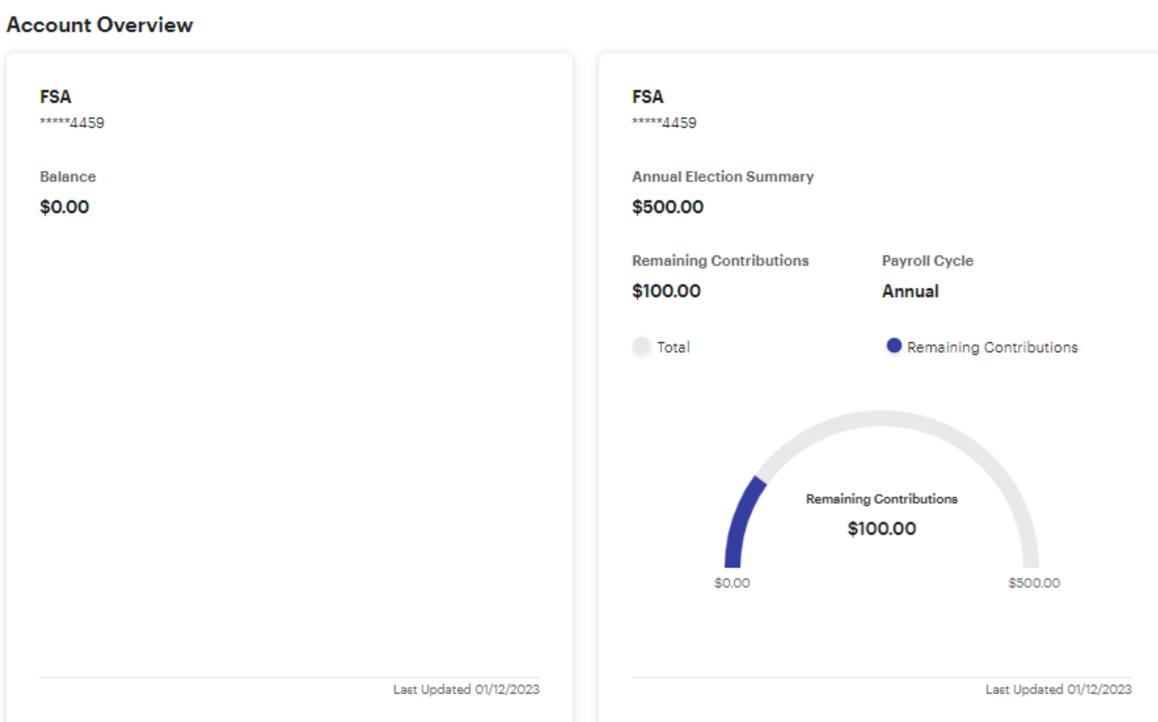
DISPLAY PLAN OVERVIEWS
Use the drop downs under ‘Get Started’ to display your plan information. The page is dynamic, so it will change based on your selections in the ‘Plan Year’ and ‘Plan.’



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



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



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: 5

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

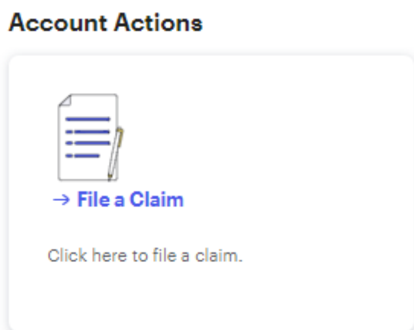
Rows per page: 5

Page 1 of 3

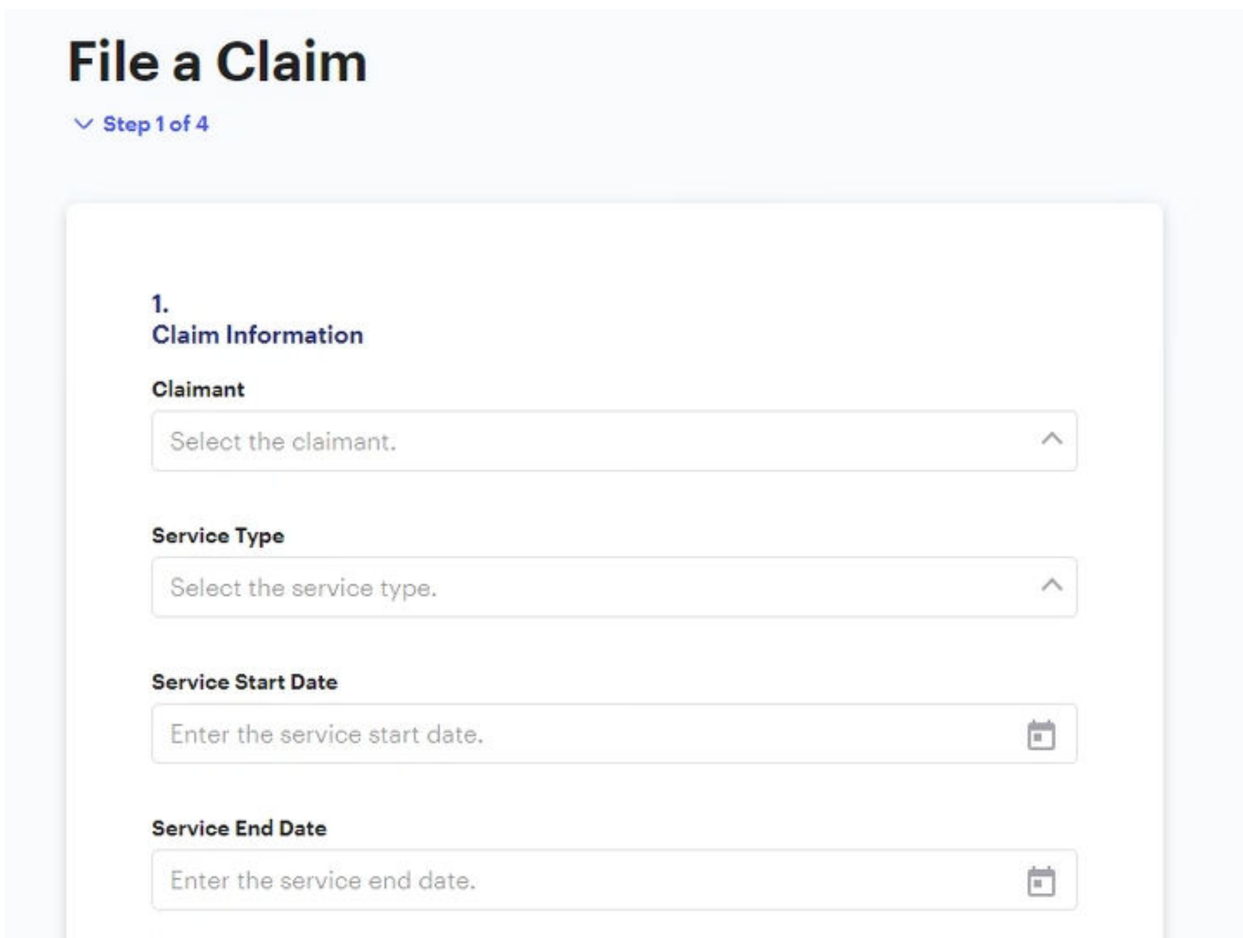
Filing a Claim

Follow the steps below to file a claim:

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



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



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

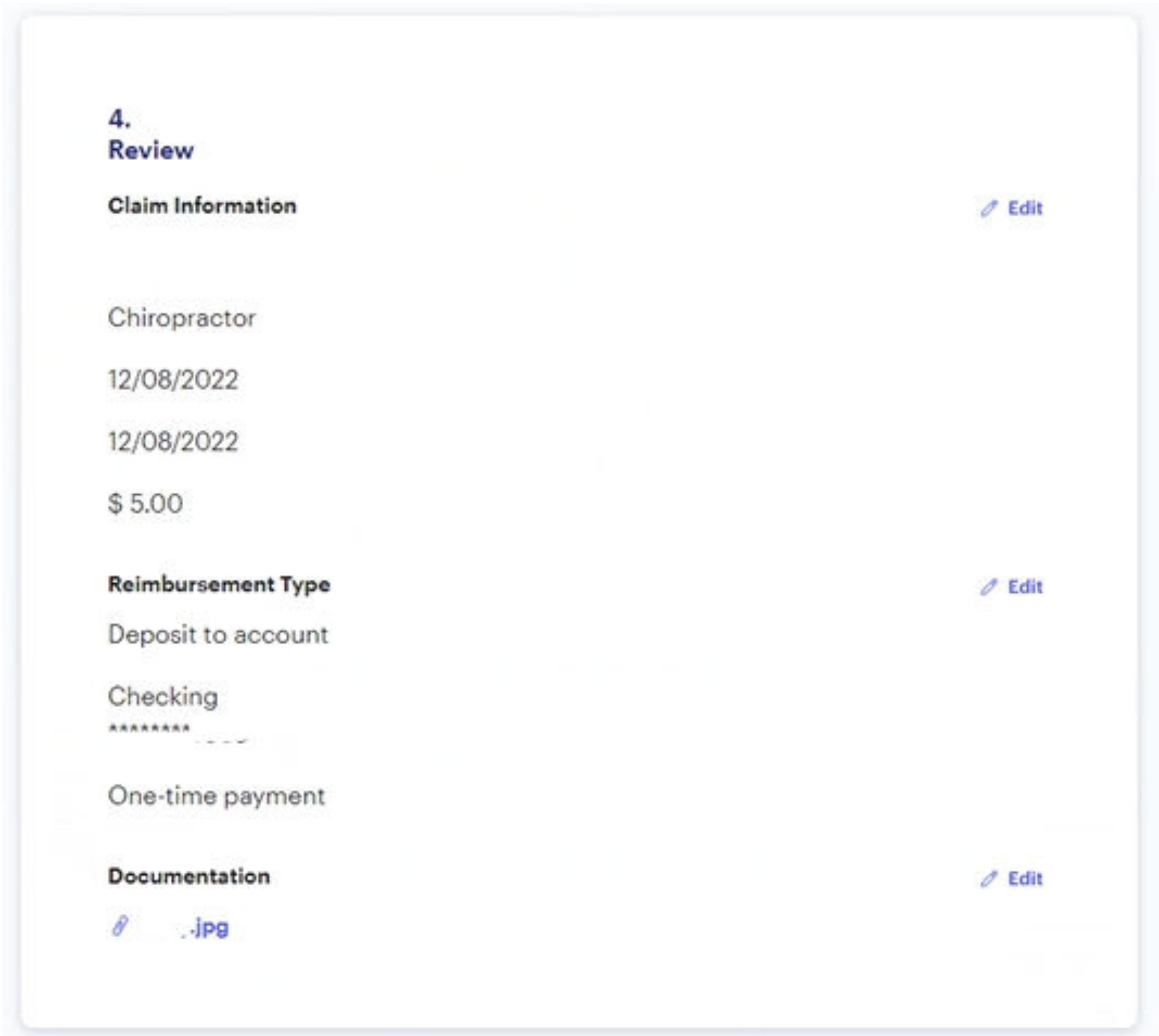
3.
Documentation

Please upload proof of your purchase.

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

Click here to upload your file

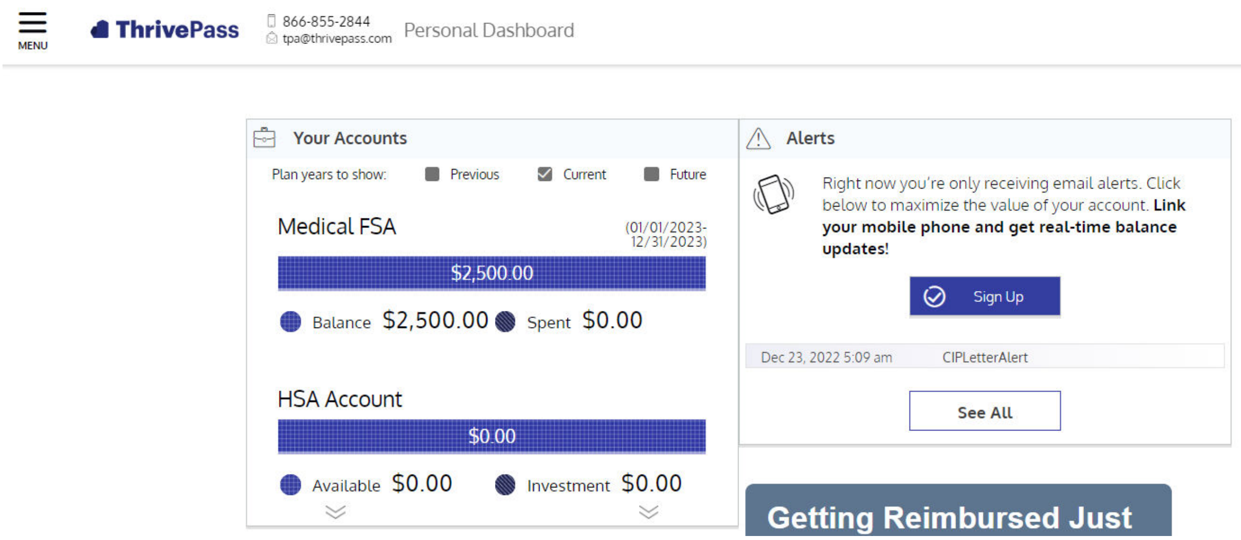
.pdf, .jpeg , .jpg, .gif, .png, .tiff, .tif | 10MB max



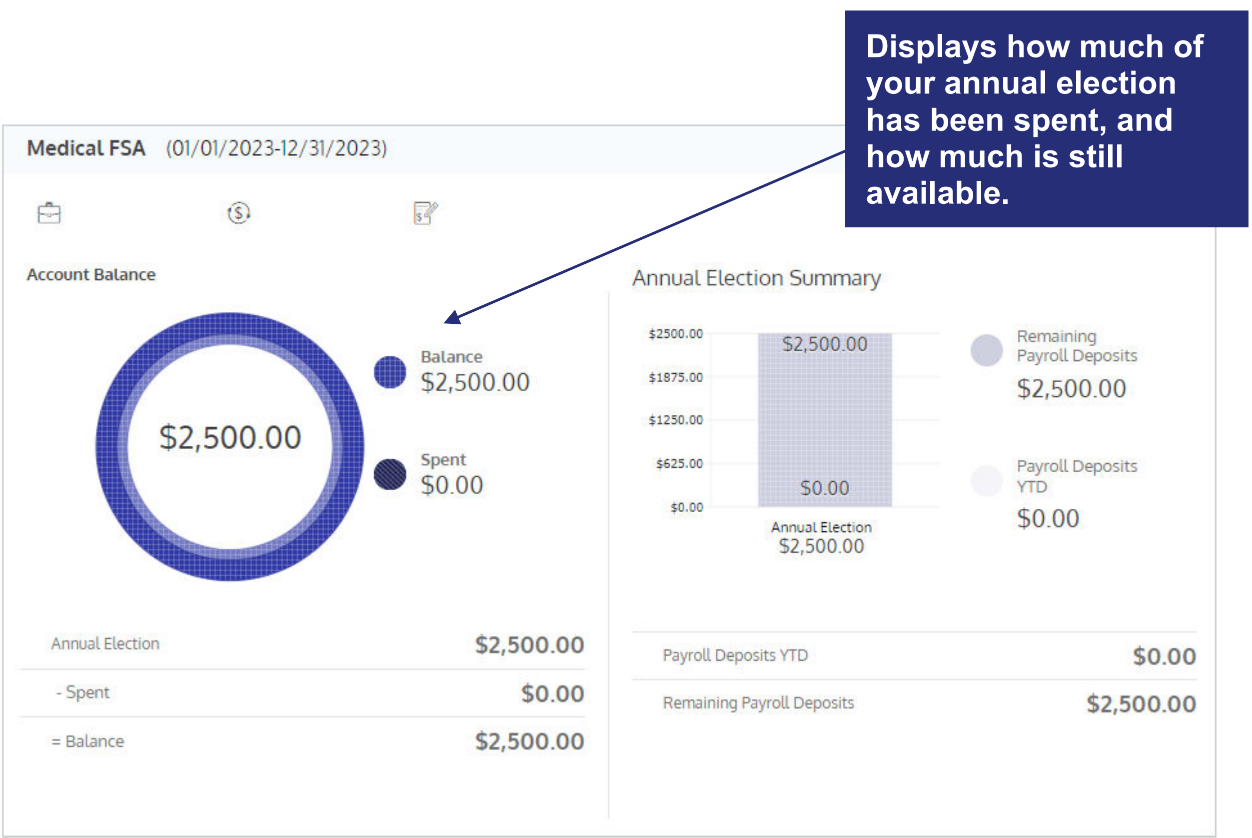
Checking Account Balance(s)

To view your account balance details, click on ‘Personal Dashboard’ at top right-hand corner of the screen.

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



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

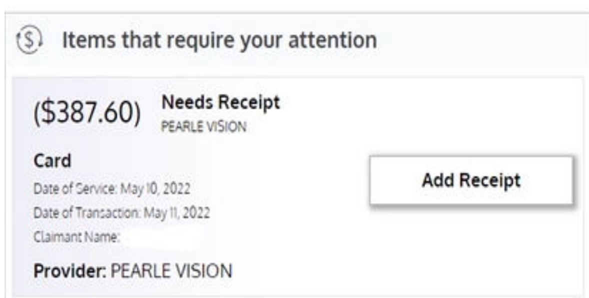


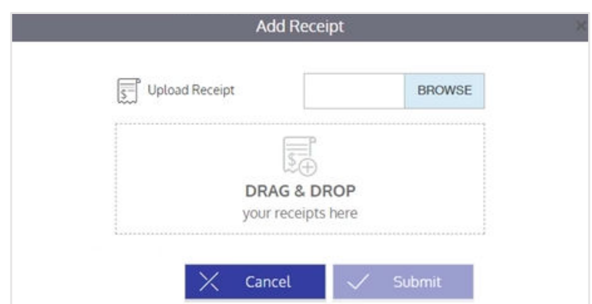
Important dates, such as the last day to spend funds, and the last day claims can be submitted.

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.



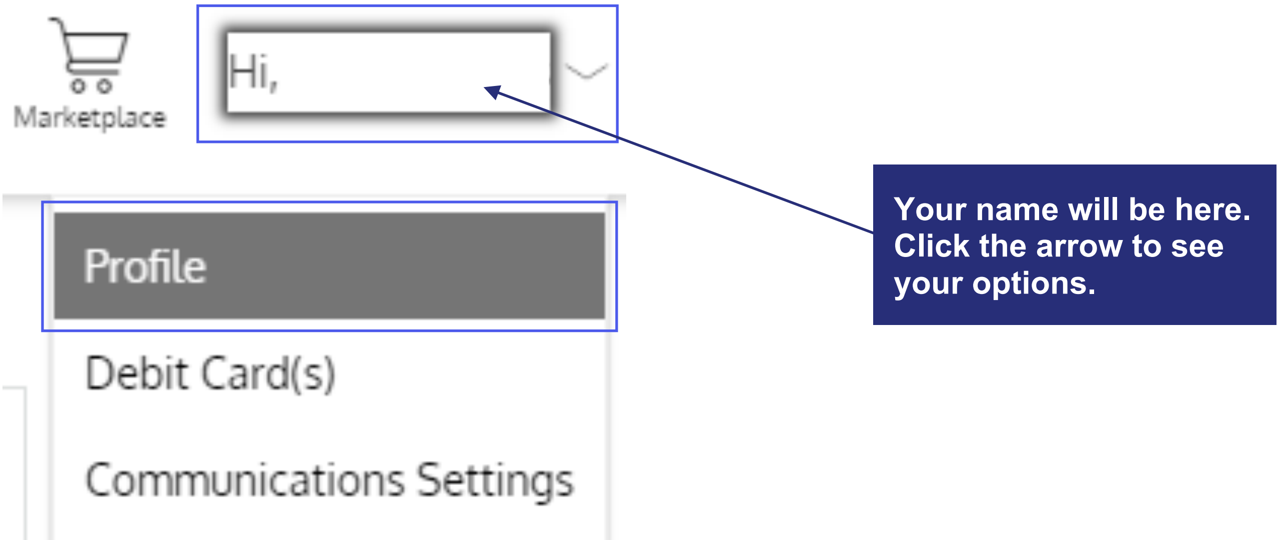


1. Click ‘Add Receipt’
2. Browse or Drag & Drop the to attach your supporting documentation to the transaction click ‘Submit’.

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'.

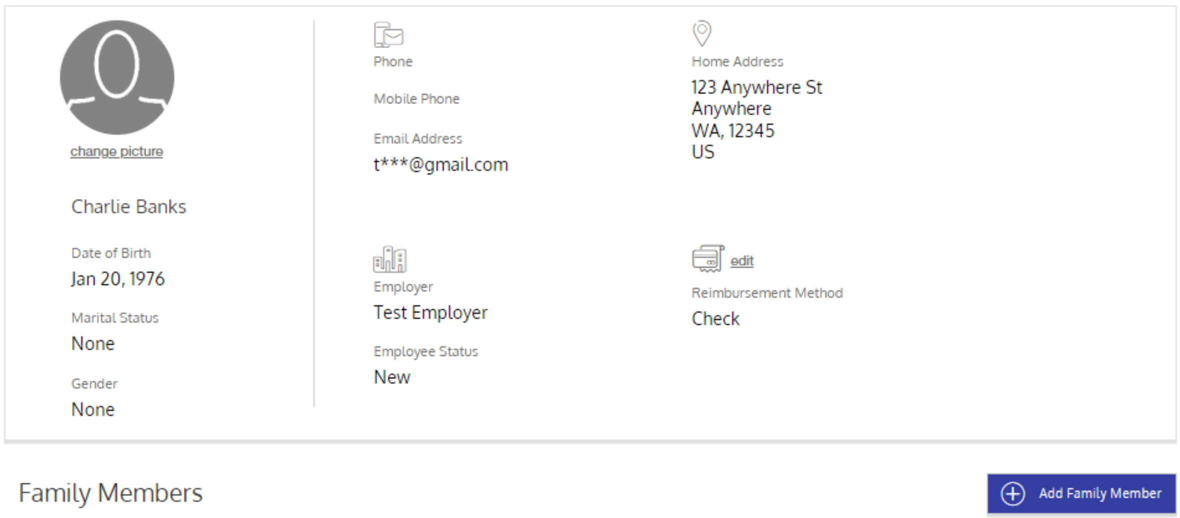


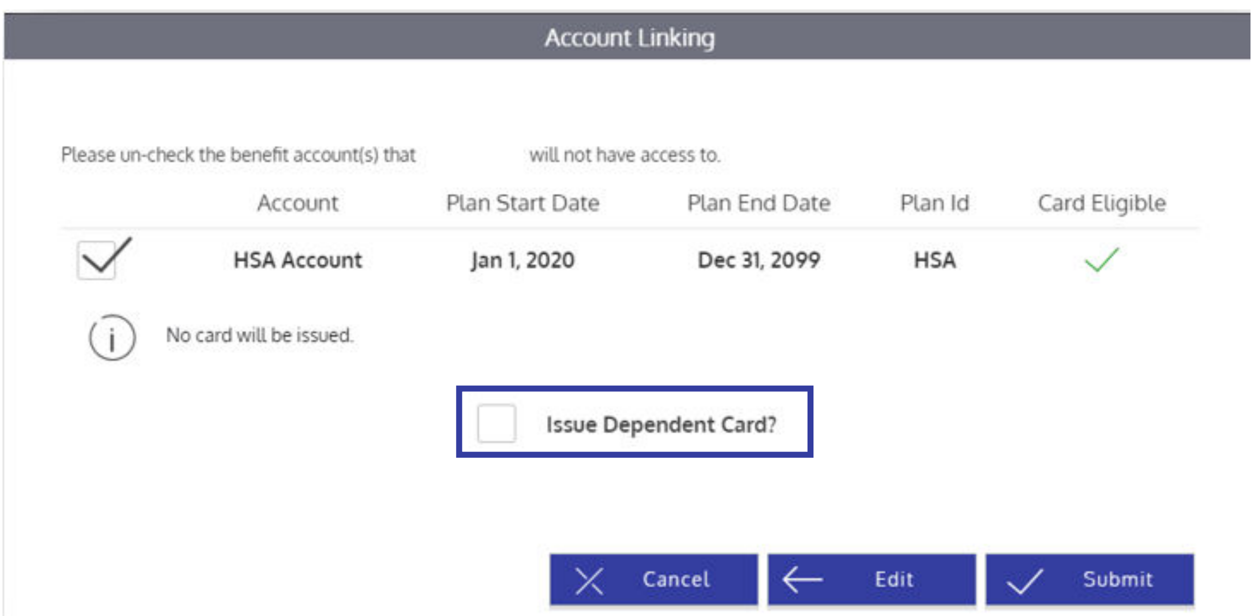
PROFILE OPTIONS

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.

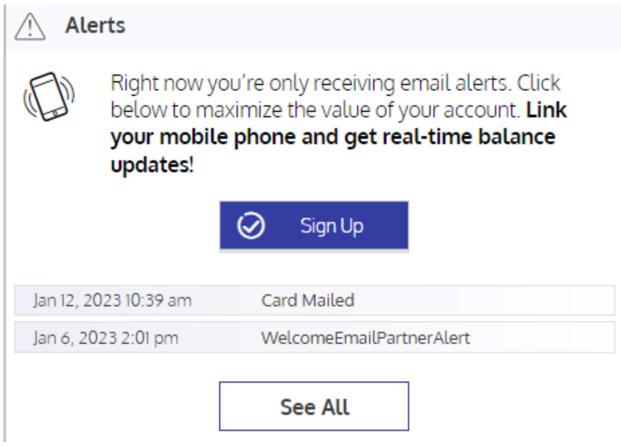
Please refer to the images on the next page.





Managing Alerts & Messages

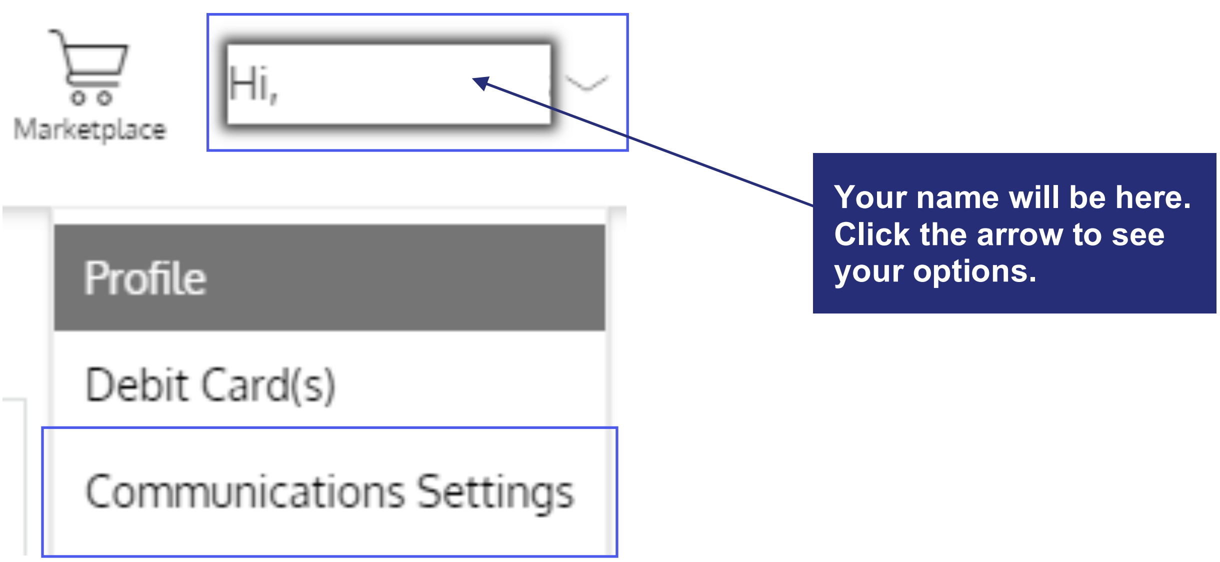
The Alerts section in the Personal Dashboard will indicate when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts could be anything from confirmation of an email address or password change, to notification that a claim you submitted 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.

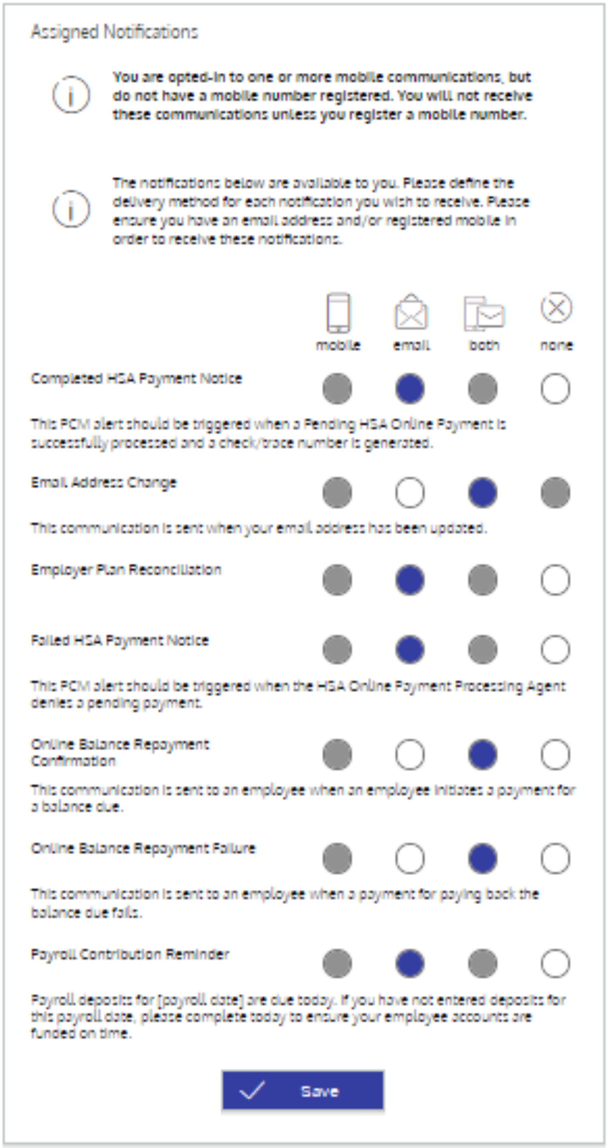
CHANGING YOUR COMMUNICATION SETTINGS

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.

mobile email both none

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.

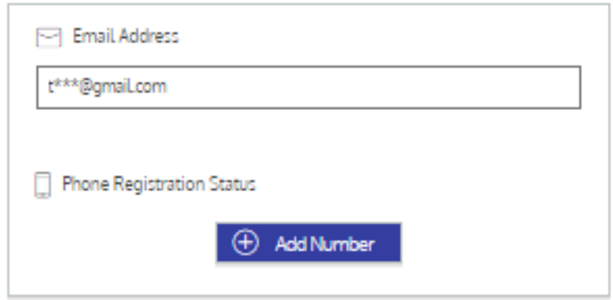
Online Balance Repayment Failure

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

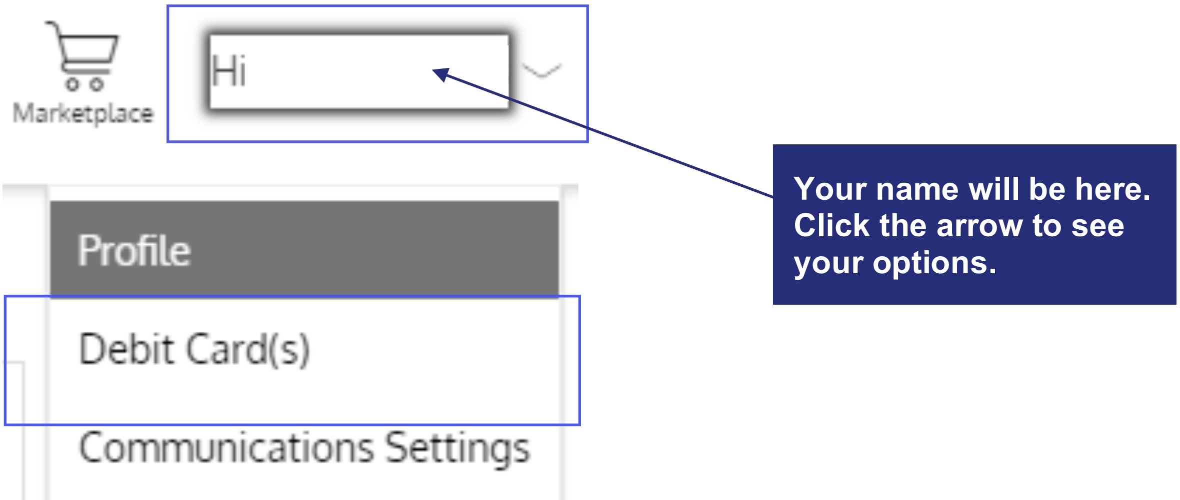
t***@gmail.com

Phone Registration Status

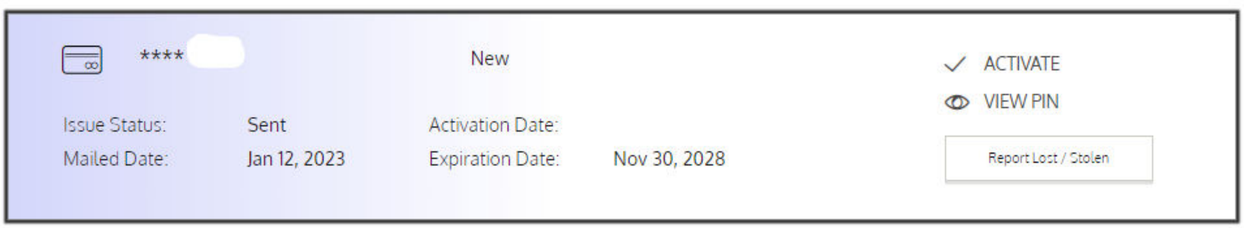
Add Number

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.

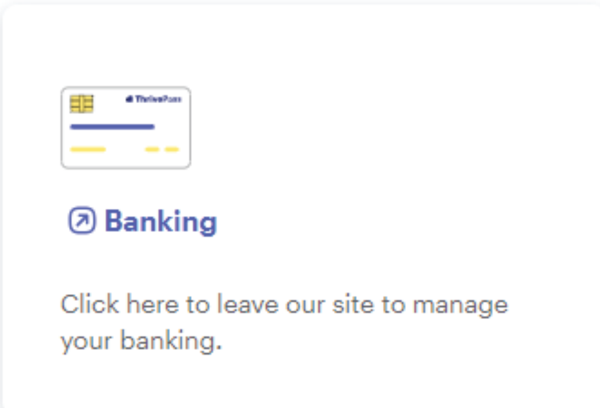


Your new card will arrive in about 10 business days. Please note that a $5 fee will be assessed to your account when replacing a debit card.

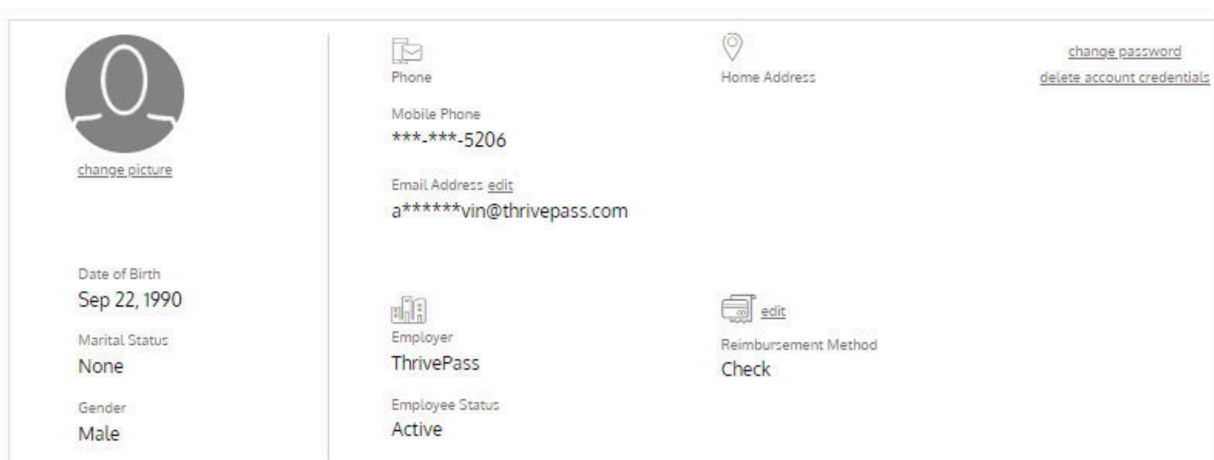
Banking

A. Updating your Reimbursement Method to Direct Deposit.

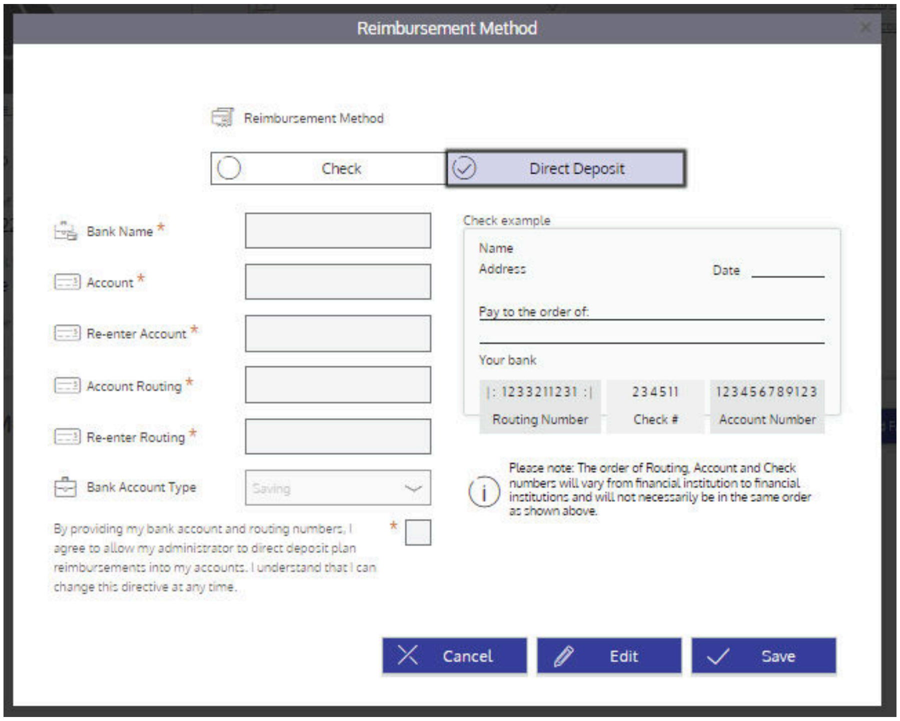
Step 1. Click on the Banking Tile.



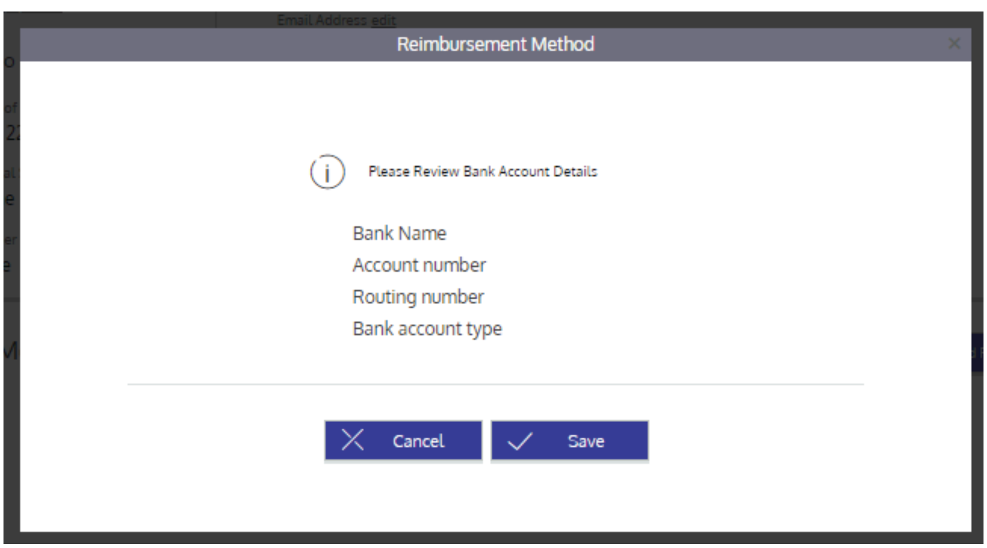
Step 2. Click on “Edit” button right above Reimbursement Method.



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.



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



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:

From: tpa@thrivepass.com
To:
Subject: Direct Deposit Bank Account Validation Required

You recently updated the bank account to receive direct deposits reimbursements from ThrivePass. In order to validate your account, three micro-transactions have been initiated to the new account - two small deposits and one offsetting credit. These deposits usually take 1-2 business days to post to your bank account.

When they do, please log into the ThrivePass participant portal and validate your new bank account by entering those deposit amounts. To do so, click on "Personal Dashboard," then click your name in the upper right-hand corner and select "Profile." Then select "Edit" on the Reimbursement Method. From there, you can enter the micro-transaction amounts.

If you have any questions or concerns, please contact us at tpa@thrivepass.com or by phone at 1-866-855-2844

Thank you,

ThrivePass

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.

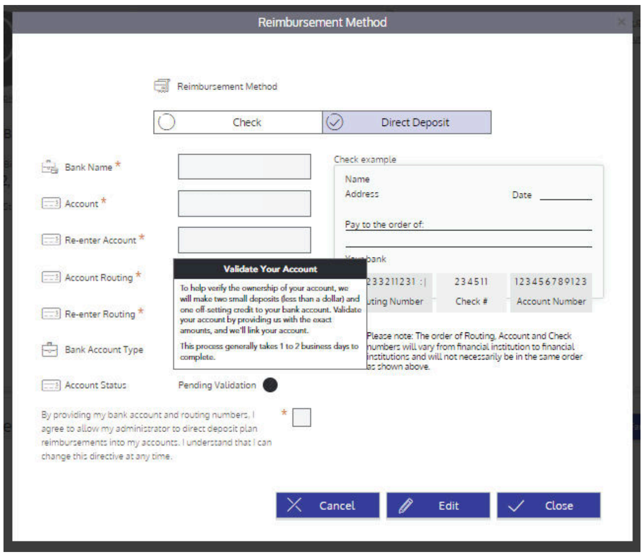
2. The participant must check their bank account to obtain the credit and debit amounts.

3. Log in to the member portal and enter the transaction amounts on the reimbursement settings page.

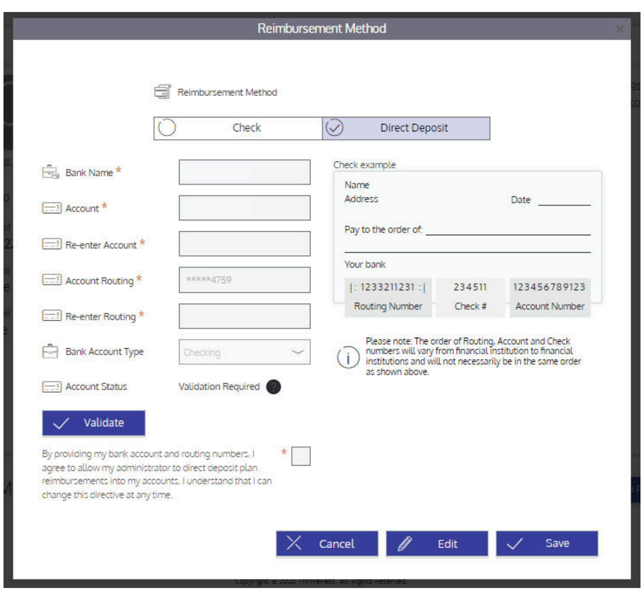
4. If the amounts are correct, your bank account is successfully confirmed and ready for future direct deposit reimbursements.

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

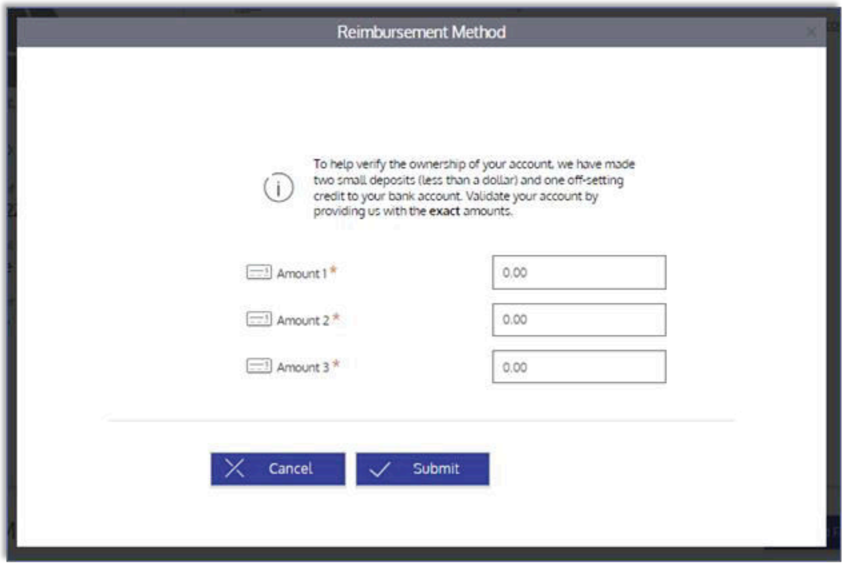
Step 1. If you go back to the Edit Reimbursement screen, you can see this message next to your account status that tells you you'll need to validate the account once you receive your micro deposits in 1-2 business days.



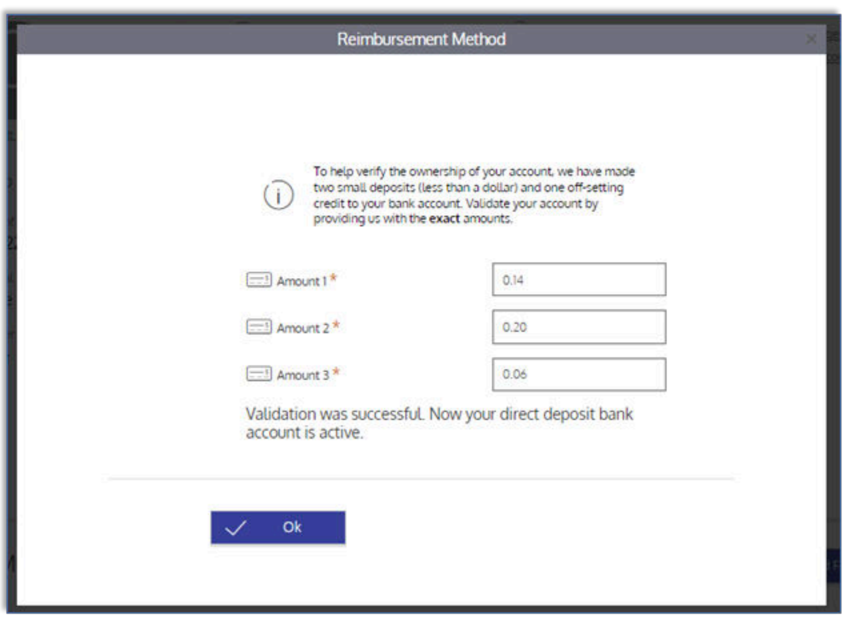
Step 2. Once the deposits have been initiated, you will receive a notice that your account requires validation.The reimbursement method screen is now updated to include a "Validate" button. Once the deposits appear in your bank account, click on the "Validate" button.



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.

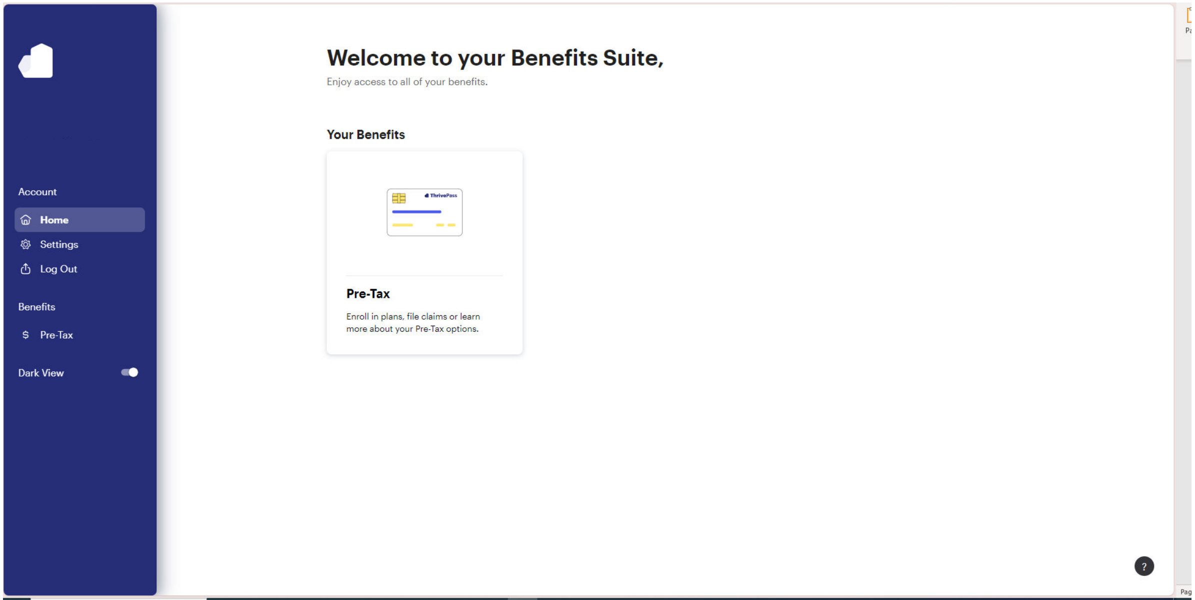


Step 4. Correctly enter the micro deposit amounts you see on the screen, and select the Ok button if the validation was successful.

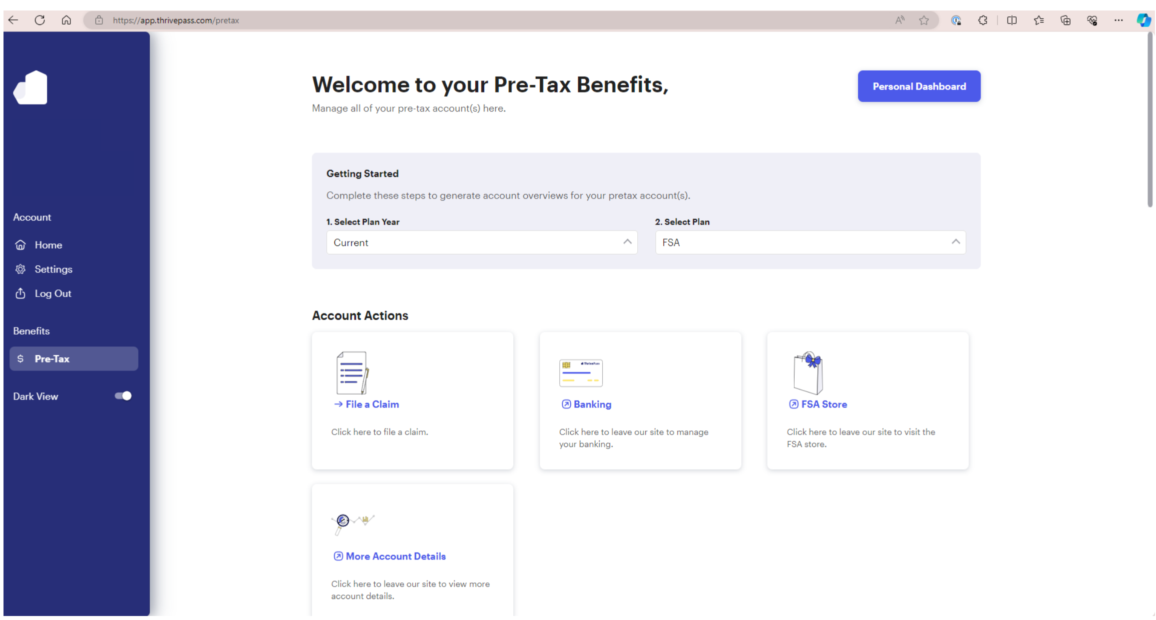


C. How to Repay a Balance Due Online

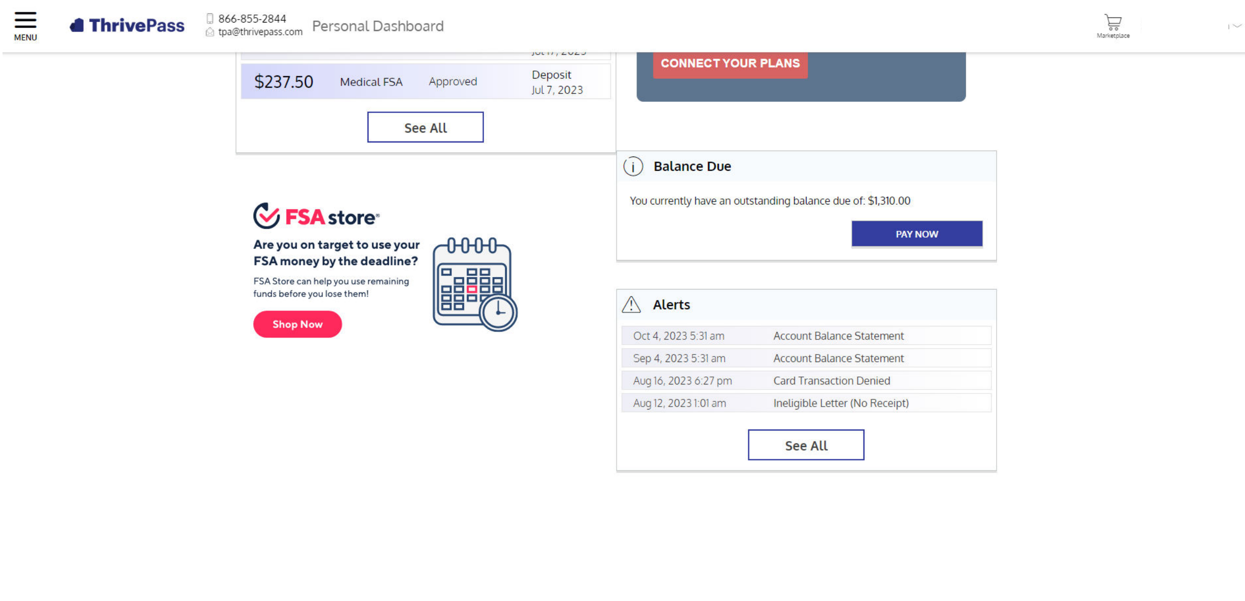
Step 1. Log into your account by going to app.thrivepass.com.



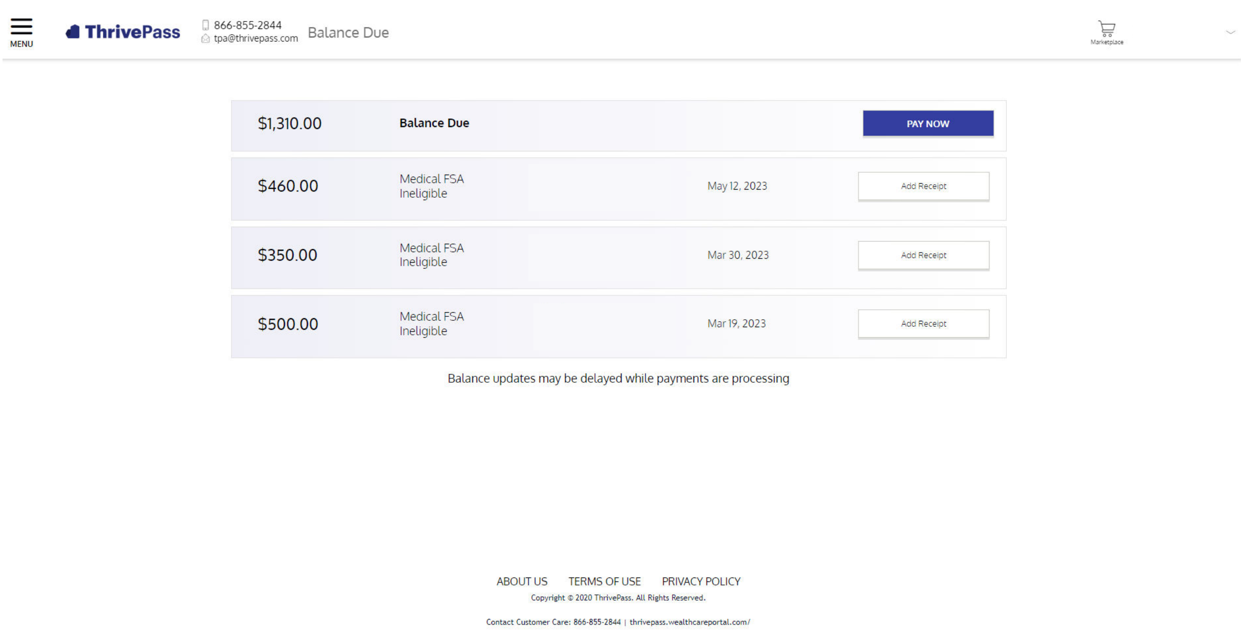
Step 2. Click on the Pre-Tax tile.



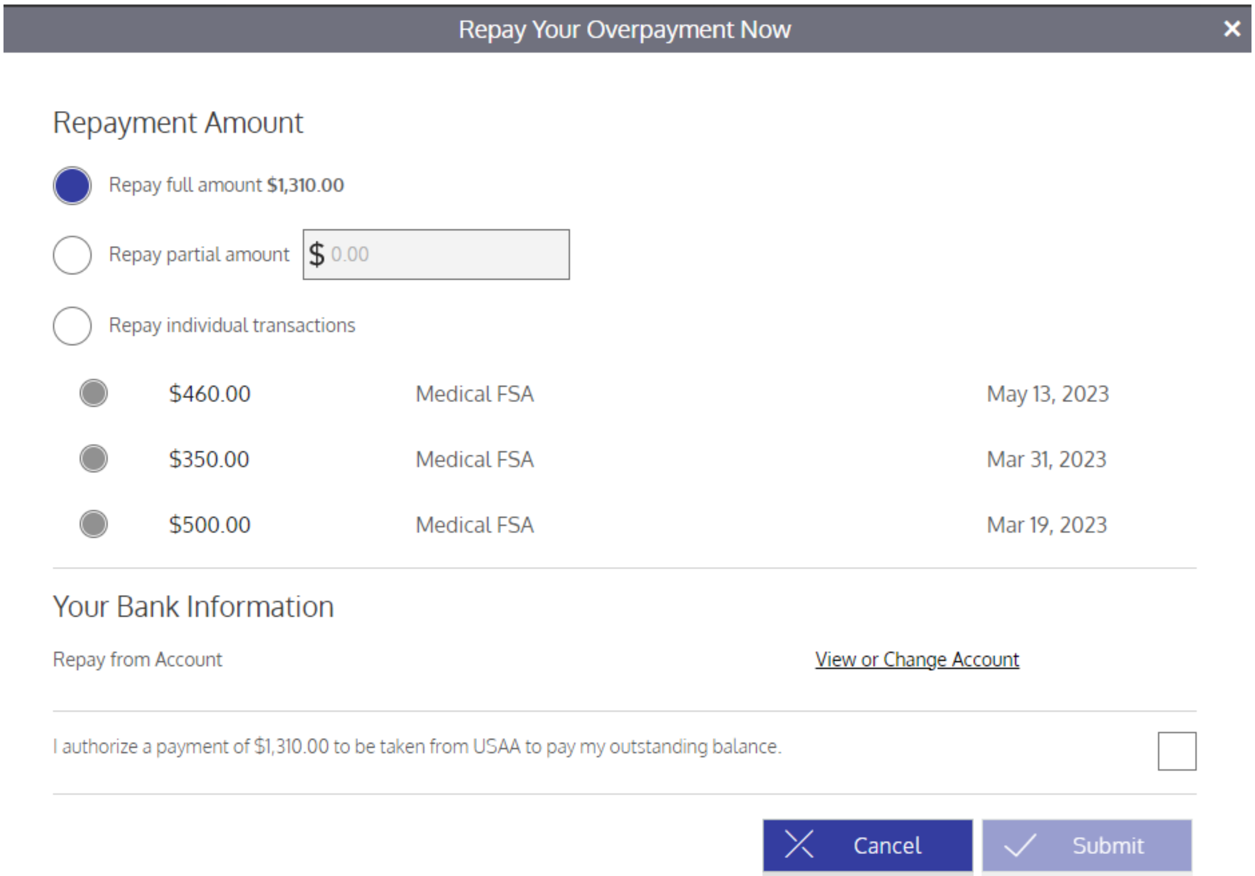
Step 3. Click on the blue Personal Dashboard button. Scroll down once the page loads, and you will see any Balance Due messages. Click the “PAY NOW” button to initiate on-line repayment.



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.



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.