New Member Portal Guide

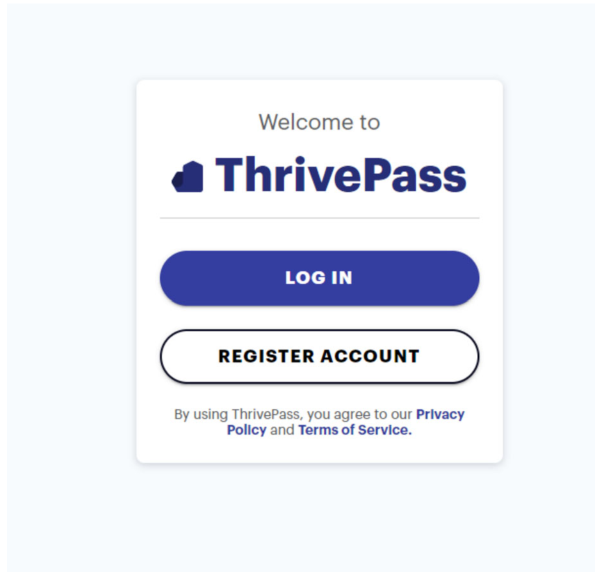
I’ve registered my account and have accessed the Member Portal - now what?
We’re here to help you manage all of your pre-tax accounts.

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

- **Step 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.
- **Step 2:** Create your new password.
  Note: If you lost your registration email, click the "Register Account" button. Then click on email address and enter the email address that was provided to ThrivePass from 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.

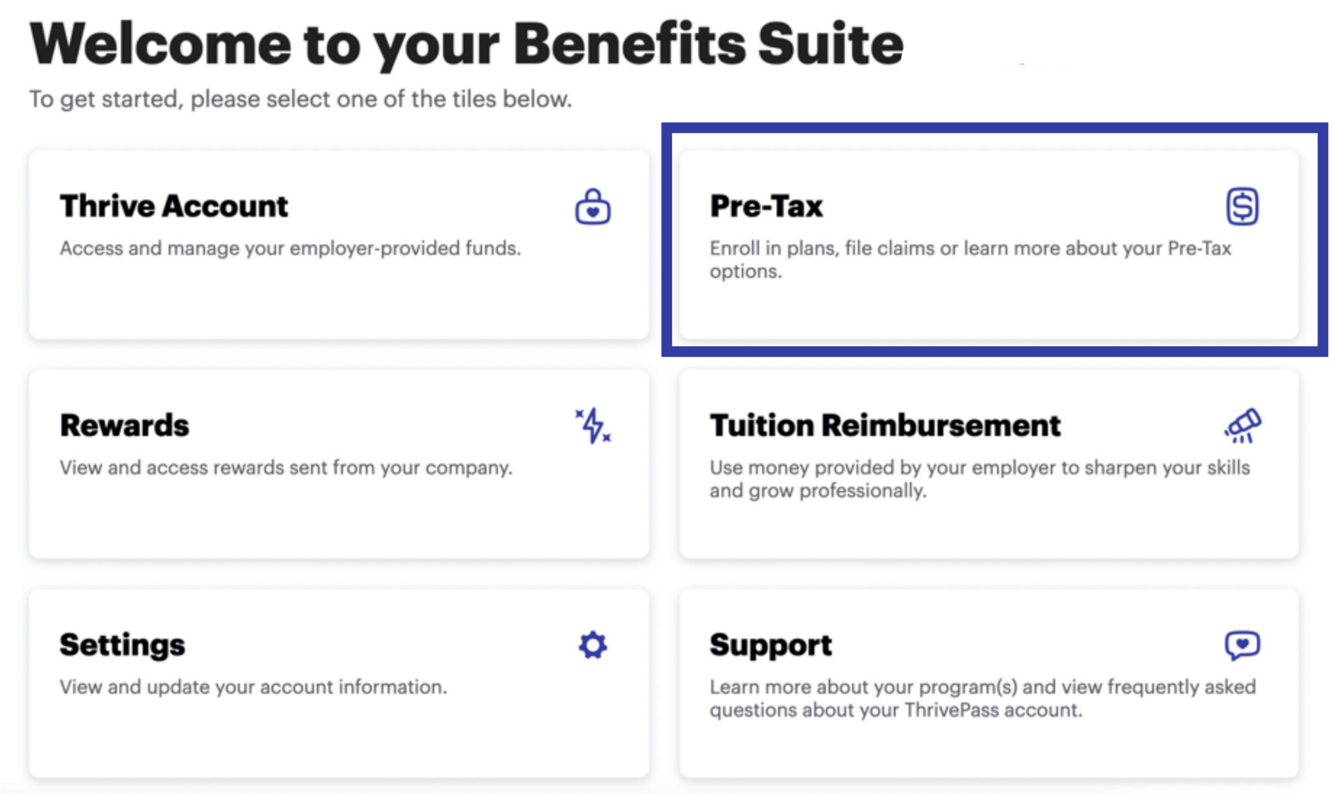
- **Step 1:** Navigate to app.thrivepass.com
- **Step 2:** Click the Register Account Button
- **Step 3**: Enter the Code from the Welcome Letter
- **Step 4:** Create password

Your first login

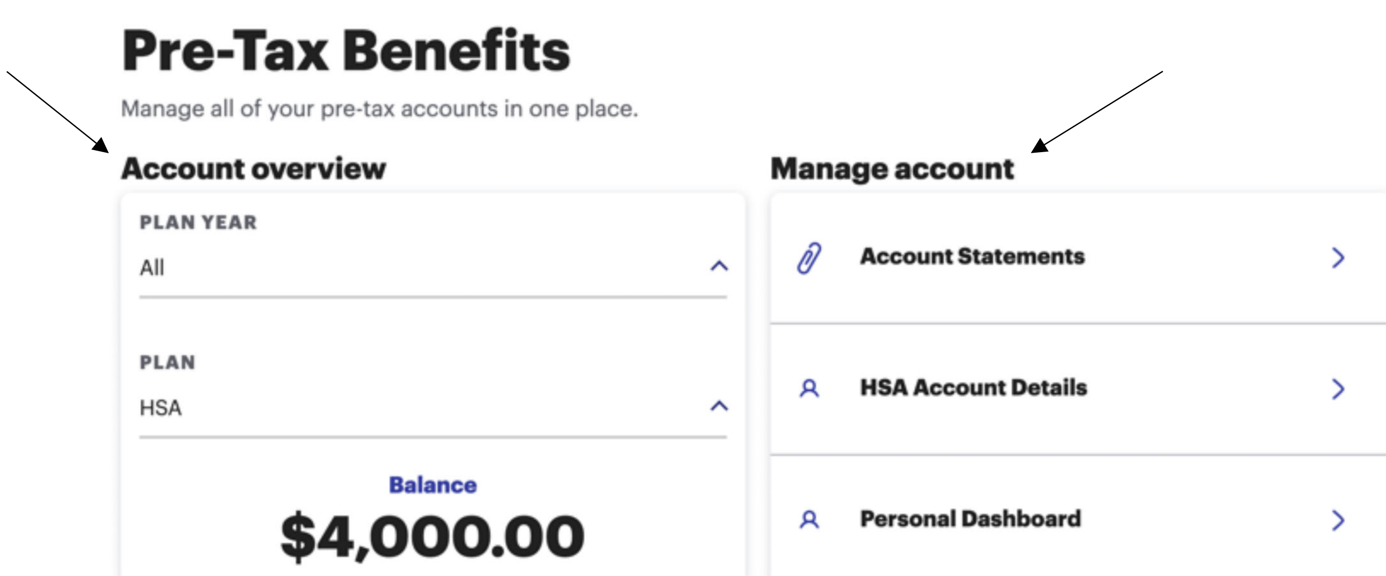
Once registered, you will be able to enter your username and password on all subsequent login attempts.

Navigating Pre-Tax Benefits

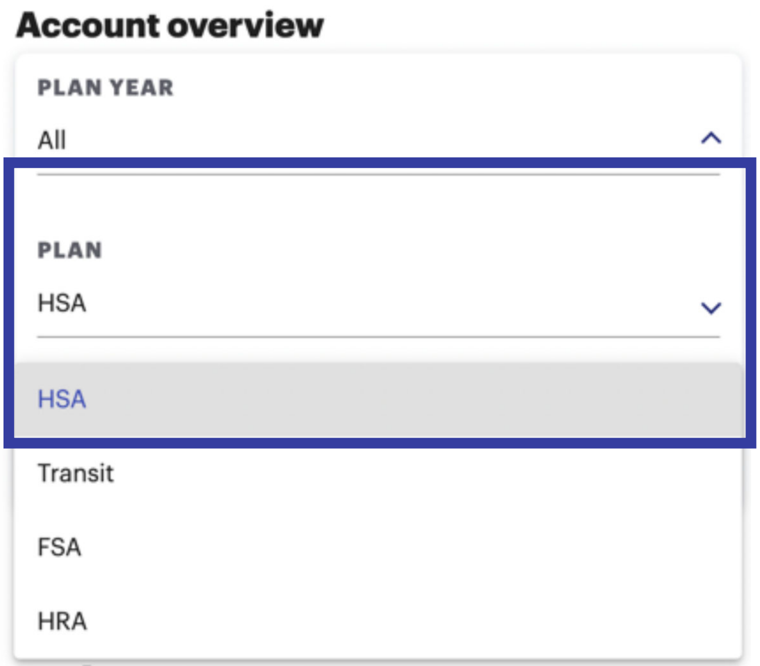
One you're logged in, select the 'Pre-Tax' tile.



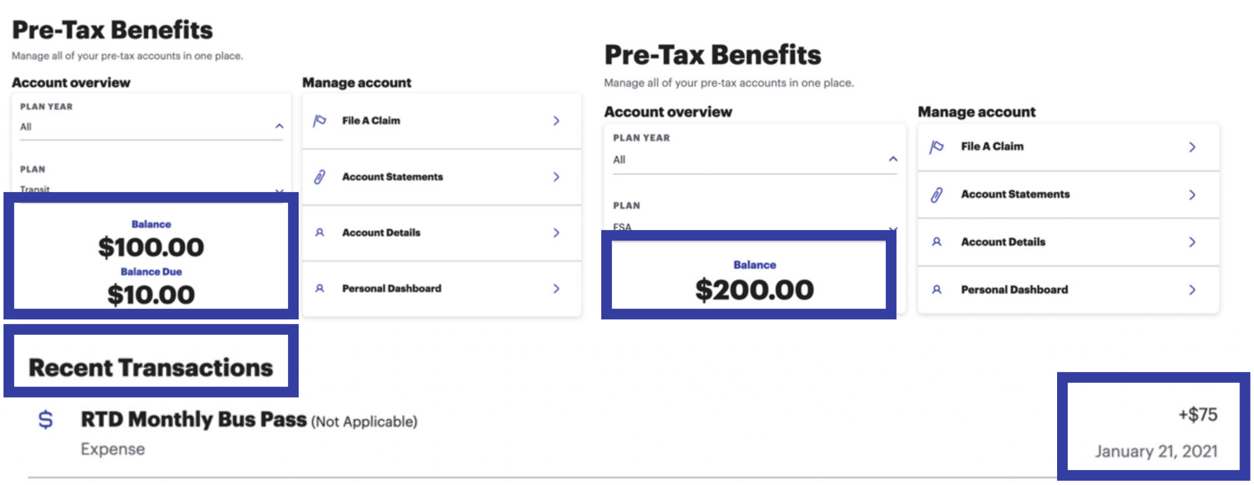
Your pre-tax benefits account is divided between the 'Account overview' and 'Manage account' sections.



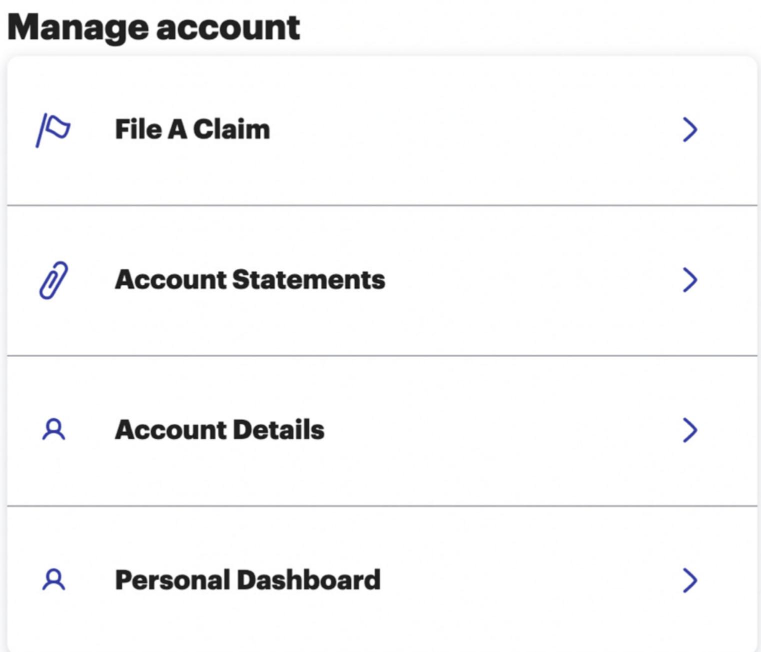
Under ‘PLAN’ select the arrow on the right-hand side to see an overview of your different accounts (HSA, FSA, HRA, DCA, and Transit).



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

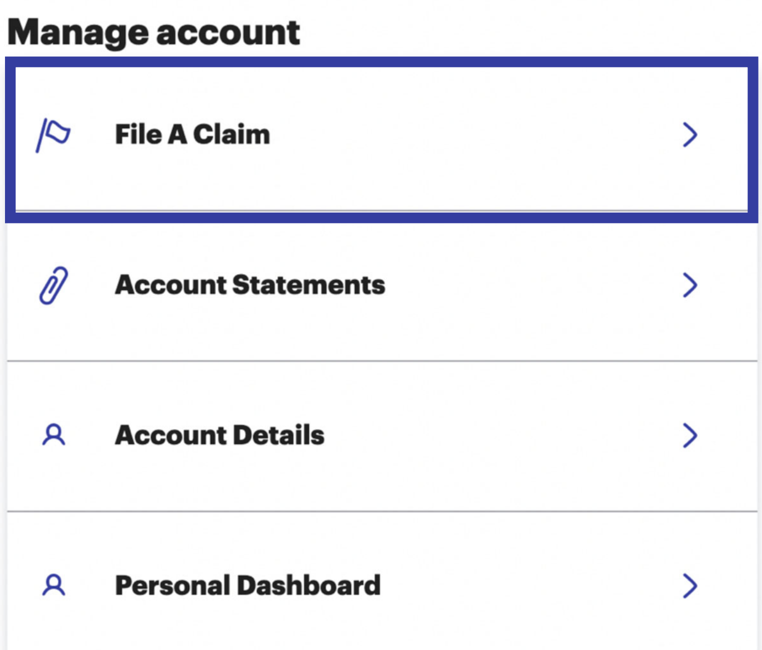


Use the ‘Manage account’ tab to be redirected to file a claim, view account statements and details, and edit your personal dashboard.



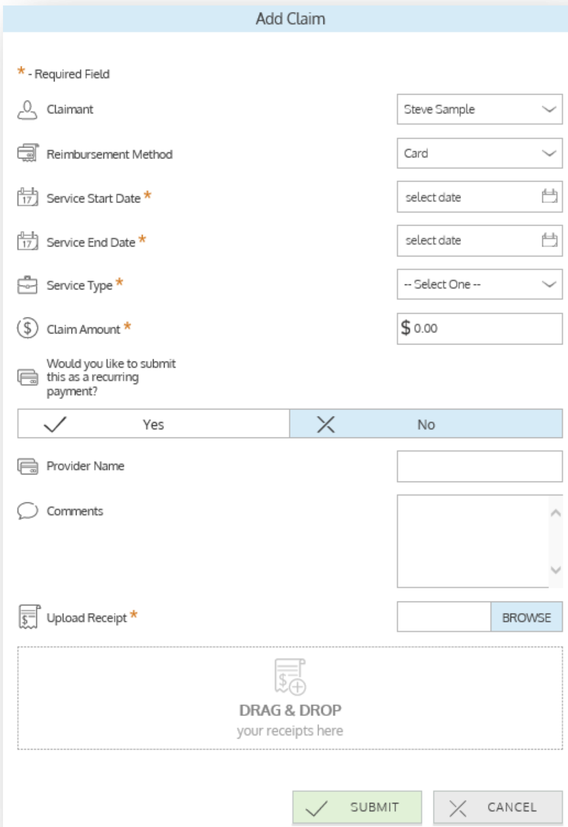
Filing a Claim

Click on the arrow next to ‘File A Claim’ to open the Member Portal.

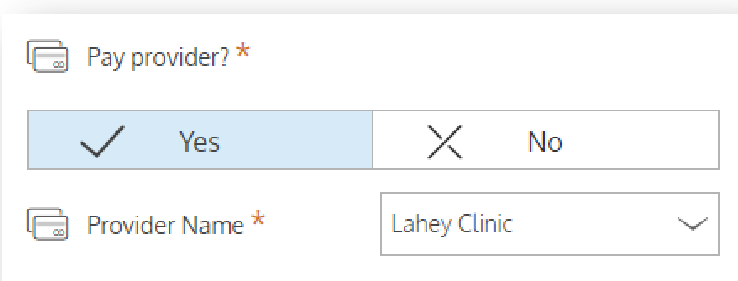


The Member Portal allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

Be sure to complete the form and upload a receipt image if you have one. You can click 'BROWSE' to navigate to the file, or you can drag and drop from your computer. Click 'SUBMIT' to send the request for processing.



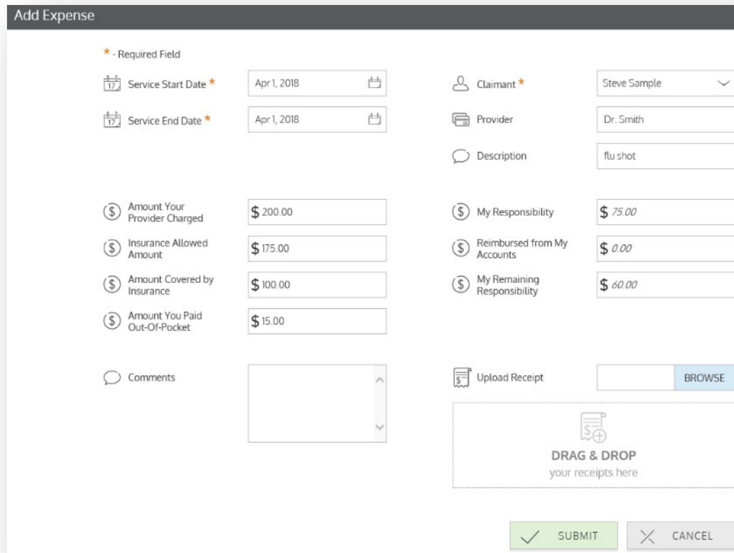
Send payment directly to your service provider. When entering a claim, you can choose to have the reimbursement funds sent directly to you, or you can have payment sent directly to your provider (on your behalf).



If you pay a provider, choose your provider name from the dropdown menu. If you don't see your provider listed, select *add new provider record* to add your provider.

Adding an expense for future payment

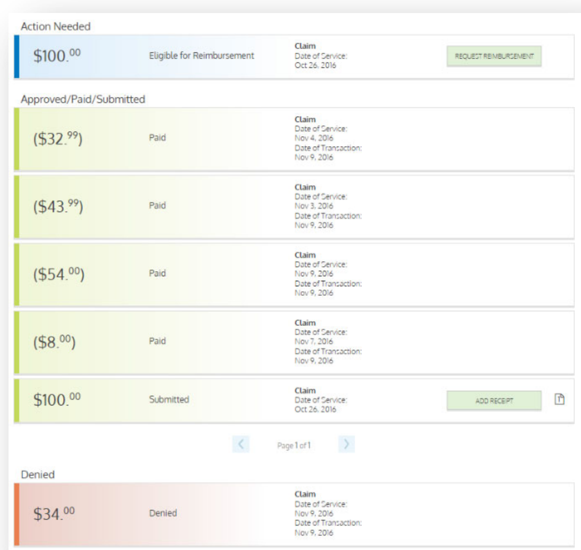
Similar to claim submission, to enter an expense, open the *add expense for future payment* page and complete the form. Be sure to include a receipt, if you have one.



- **Amount your provider charged.** Full amount billed for services provider.
- **Insurance allowed amount.** The maximum amount your health insurance plan will pay for services provided.
- **Amount covered by insurance.** The amount covered by your health insurance plan.
- **Amount you paid out-of-pocket.** The cost included in the insurance allowed amount that are for ineligible items or services.
- **My responsibility.** The part of the insurance allowed amount that is not paid by insurance (e.g. deductible, co-insurance), which is eligible for reimbursement under the FSA.
- **Reimbursed from my accounts.** The amount paid from other accounts not administered by ThrivePass or the amounts already reimbursed from your ThrivePass accounts.
- **My remaining responsibility.** The remaining amount you can submit for reimbursement.

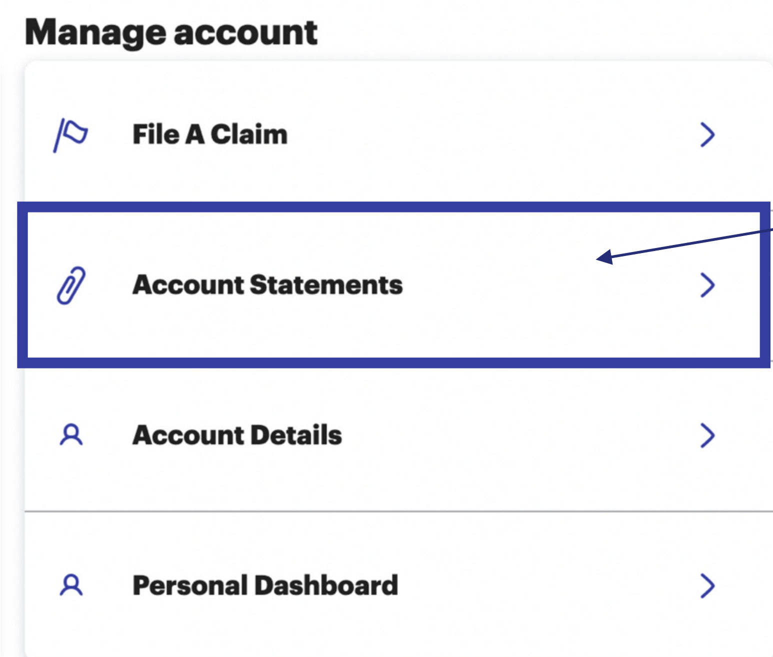
Viewing claims and expenses

Once entered, claims and expenses can be viewed on the *claims list* page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.



View your Account Statements

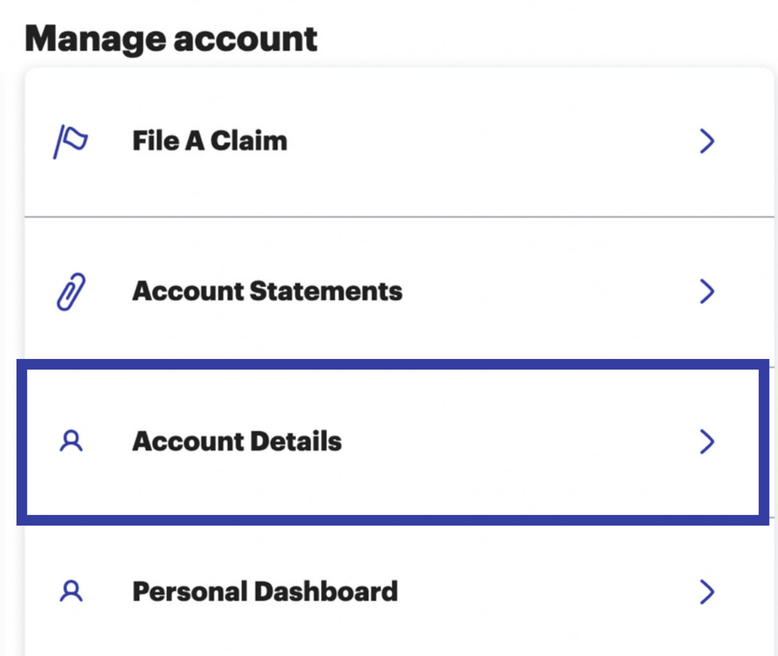
Click on the arrow next to ‘Account Statements’ to access historical account statements.



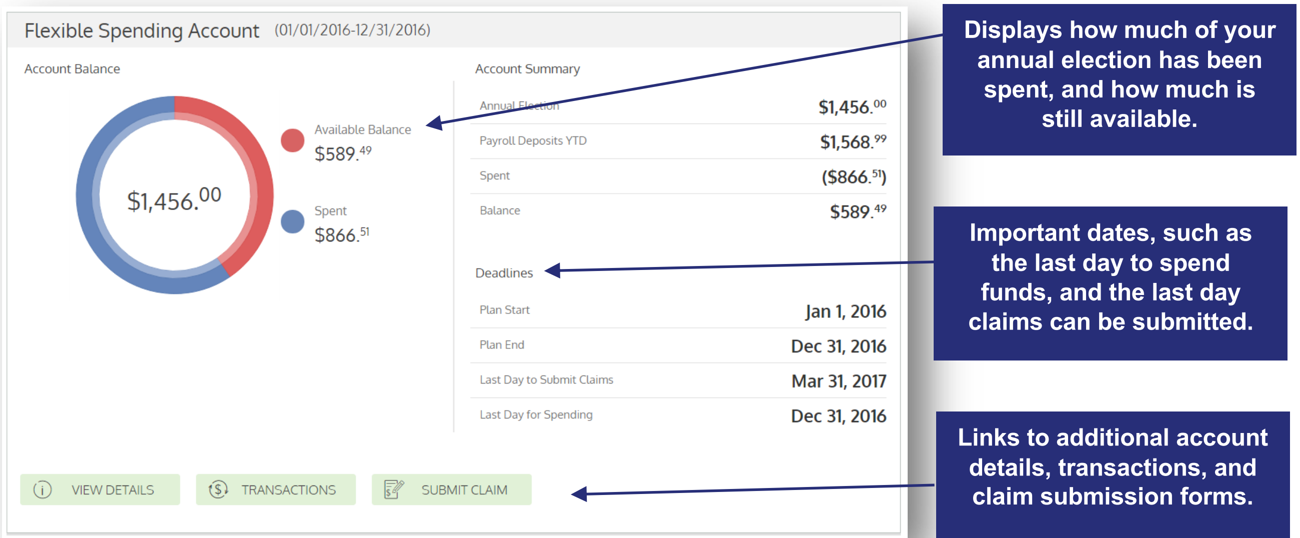
We’ve attached a sample for you. To view the sample Account Statement, please scroll to the end of this document.

Checking your account balance(s)

Click on the arrow next to ‘Account Details’ to access a quick view of your account balance(s).



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

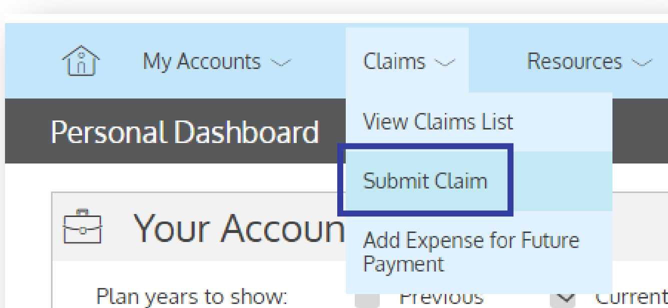


Submitting expenses and filing claims

The Member Portal allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

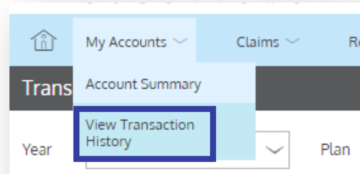
What is the difference between a claim and expense?

- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Expenses can be manually entered by you, or can also be automatically fed into your profile via electronic data feeds from your insurance carrier. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or later.



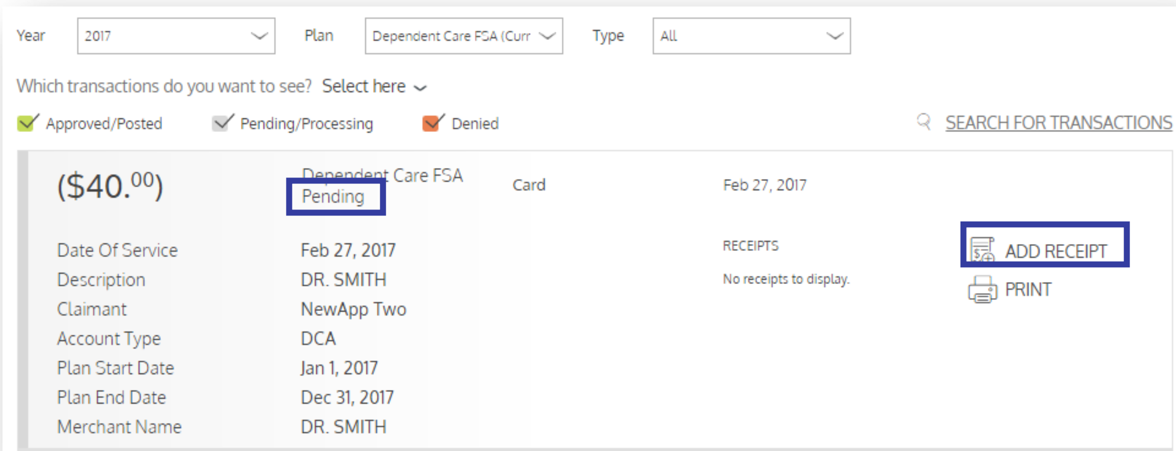
Resolving pending debit card transactions

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. To aid in resolving pending debit card transactions, you can take the following action:



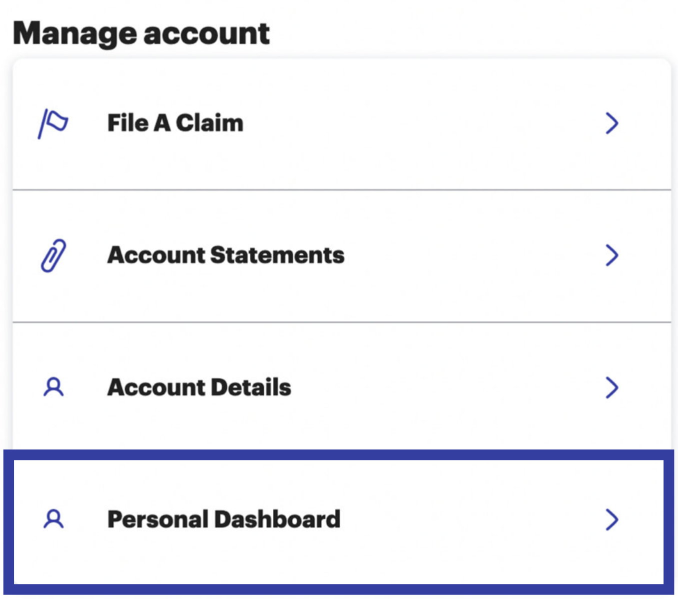
- **Step 1.** Navigate to the *transactions* page.
- **Step 2.** Located the pending transaction (using the search filters)
- **Step 3.** Click to expand the transaction, and click *add receipt* to attach your supporting documentation to the transaction.

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



Updating your user profile

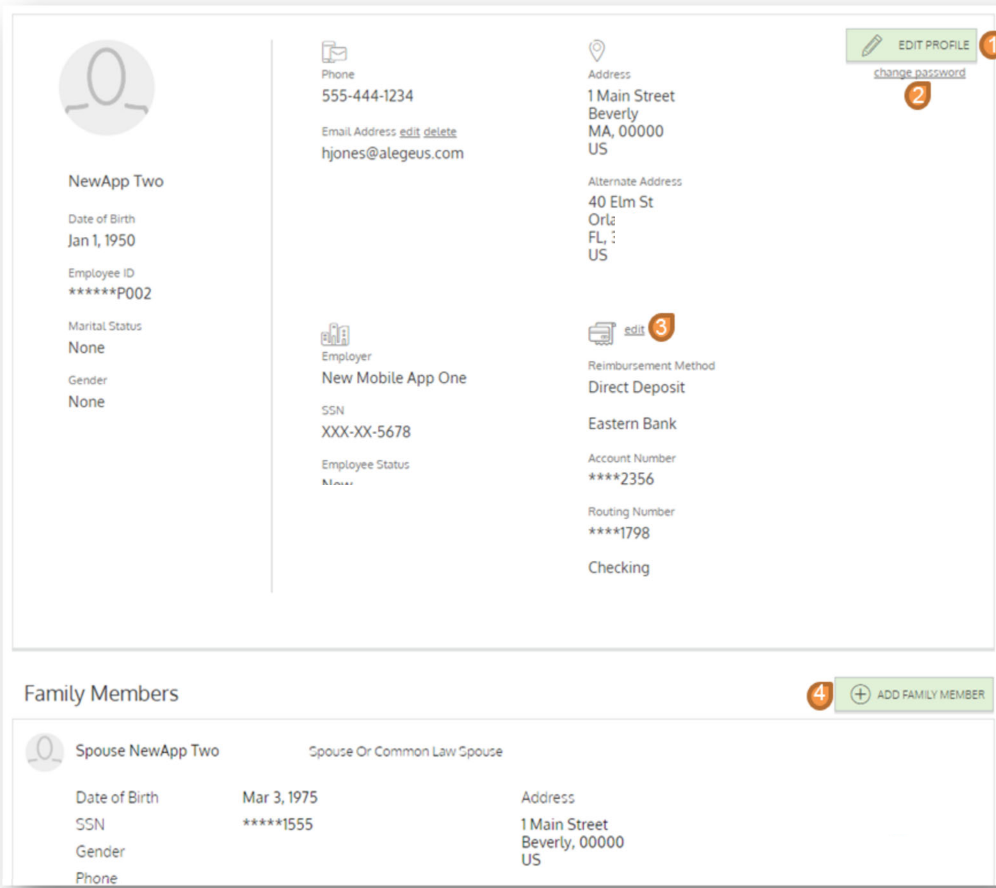
Click on the arrow next to 'Personal Dashboard,' then select your name and profile to access your profile page.

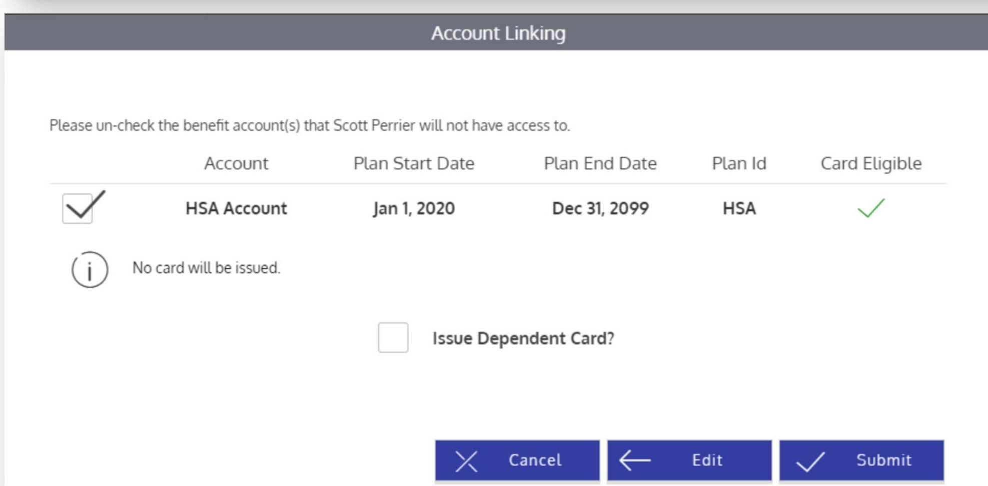


From this page, you can:

1. Update your phone number and address (unless your employer provides this information to us on an eligibility file)
2. Change your password
3. Update your reimbursement method
4. Add a new dependent

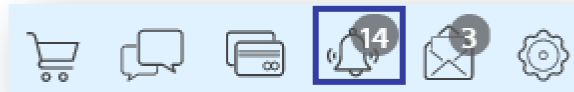
The image below shows where each item in the list above is located.

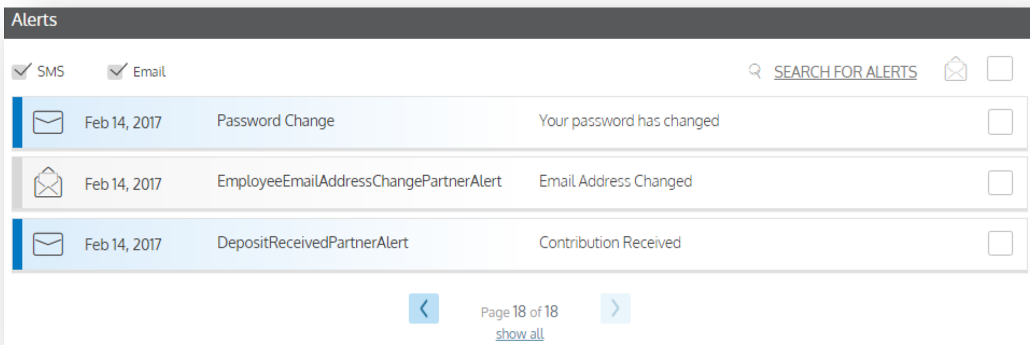




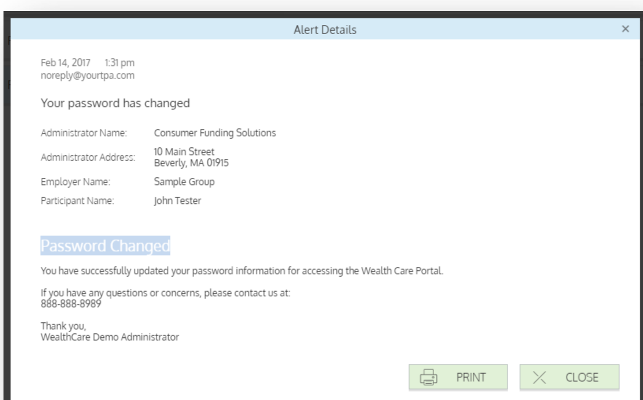
Managing alerts & messages

The bell icon in the navigation bar indicates 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.



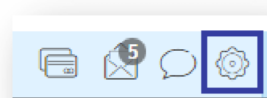


Click on an individual message to see the full text:

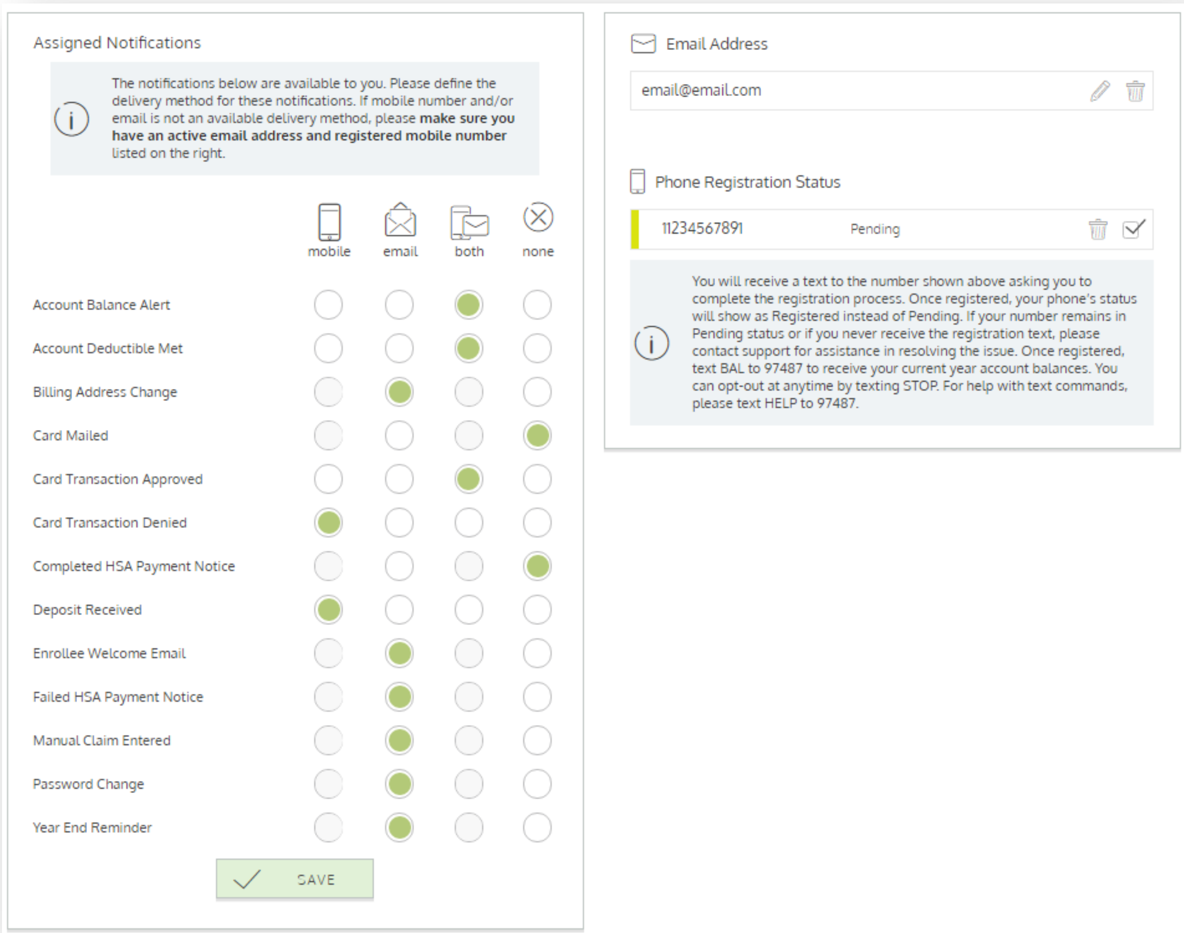


Changing your alert preferences

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 clicking the sprocket symbol in the navigation bar.



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 preferances. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.



The envelope icon in the navigation bar indicates when you have unread messages awaiting review. These messages include copies of manual claim letters, receipt notification letters, and reimbursement letters. Similar to alerts, you can simply click any message item to see the letter text in full.