



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.

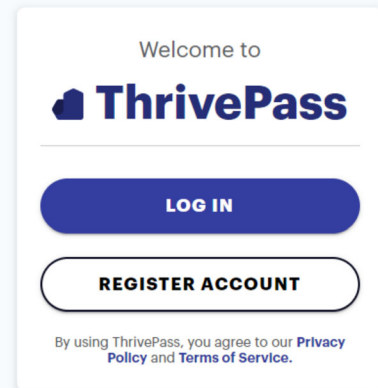


Getting started

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

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

Welcome to your Benefits Suite

To get started, please select one of the tiles below.

Thrive Account

Access and manage your employer-provided funds.



Pre-Tax

Enroll in plans, file claims or learn more about your Pre-Tax options.



Rewards

View and access rewards sent from your company.



Tuition Reimbursement

Use money provided by your employer to sharpen your skills and grow professionally.



Settings

View and update your account information.



Support

Learn more about your program(s) and view frequently asked questions about your ThrivePass account.



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

Pre-Tax Benefits

Manage all of your pre-tax accounts in one place.

Account overview

PLAN YEAR

All



PLAN

HSA



Balance

\$4,000.00

Manage account



Account Statements



HSA Account Details



Personal Dashboard



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

Account overview

PLAN YEAR
All ^

PLAN
HSA v

HSA

Transit

FSA

HRA

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

Pre-Tax Benefits

Manage all of your pre-tax accounts in one place.

Account overview

PLAN YEAR
All ^

PLAN
Transit v

Balance
\$100.00
Balance Due
\$10.00

Recent Transactions

\$ **RTD Monthly Bus Pass** (Not Applicable)
Expense

Pre-Tax Benefits

Manage all of your pre-tax accounts in one place.

Account overview

PLAN YEAR
All ^

PLAN
FSA v

Balance
\$200.00

Manage account

File A Claim >

Account Statements >





Account Details >

Personal Dashboard >

+\$75
January 21, 2021

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





Manage account

	File A Claim	>
	Account Statements	>
	Account Details	>
	Personal Dashboard	>

Filing a Claim

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

Manage account

	File A Claim	>
	Account Statements	>
	Account Details	>
	Personal Dashboard	>

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.

The 'Add Claim' form contains the following fields and options:

- Claimant:** Steve Sample (dropdown menu)
- Reimbursement Method:** Card (dropdown menu)
- Service Start Date:** select date (calendar icon)
- Service End Date:** select date (calendar icon)
- Service Type:** -- Select One -- (dropdown menu)
- Claim Amount:** \$ 0.00 (text input)
- Would you like to submit this as a recurring payment?:** Yes (checked) / No
- Provider Name:** (text input)
- Comments:** (text area)
- Upload Receipt:** (text input) with a **BROWSE** button
- Drag & Drop:** A dashed box with a receipt icon and the text 'DRAG & DROP your receipts here'
- Buttons:** SUBMIT (green) and CANCEL (grey)

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).

The 'Pay provider?' dialog box contains the following fields and options:

- Pay provider?:** Yes (checked) / No
- Provider Name:** Lahey Clinic (dropdown menu)

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.

Add Expense

* - Required Field

Service Start Date: Apr 1, 2018

Service End Date: Apr 1, 2018

Claimant: Steve Sample

Provider: Dr. Smith

Description: flu shot

Amount Your Provider Charged: \$200.00

Insurance Allowed Amount: \$175.00

Amount Covered by Insurance: \$100.00

Amount You Paid Out-Of-Pocket: \$15.00

My Responsibility: \$75.00

Reimbursed from My Accounts: \$0.00

My Remaining Responsibility: \$60.00

Comments:

Upload Receipt: BROWSE

DRAG & DROP your receipts here

SUBMIT CANCEL

Viewing claims and expenses

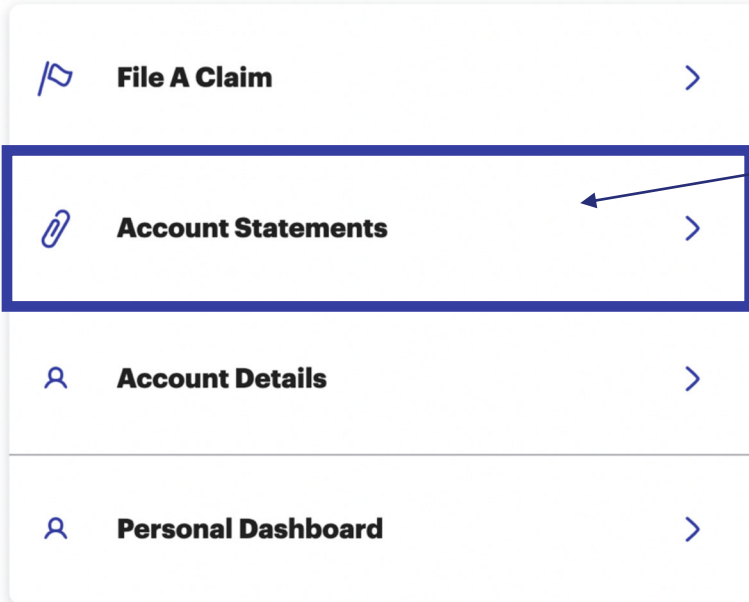
Once entered, claims and expenses can be viewed on the *claims list* page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.

Action Needed			
\$100.00	Eligible for Reimbursement	Claim Date of Service: Oct 26, 2016	REQUEST REIMBURSEMENT
Approved/Paid/Submitted			
(\$32.99)	Paid	Claim Date of Service: Nov 4, 2016 Date of Transaction: Nov 9, 2016	
(\$43.99)	Paid	Claim Date of Service: Nov 3, 2016 Date of Transaction: Nov 9, 2016	
(\$54.00)	Paid	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	
(\$8.00)	Paid	Claim Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016	
\$100.00	Submitted	Claim Date of Service: Oct 26, 2016	ADD RECEIPT
Page 1 of 1			
Denied			
\$34.00	Denied	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	

View your Account Statements

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

Manage account

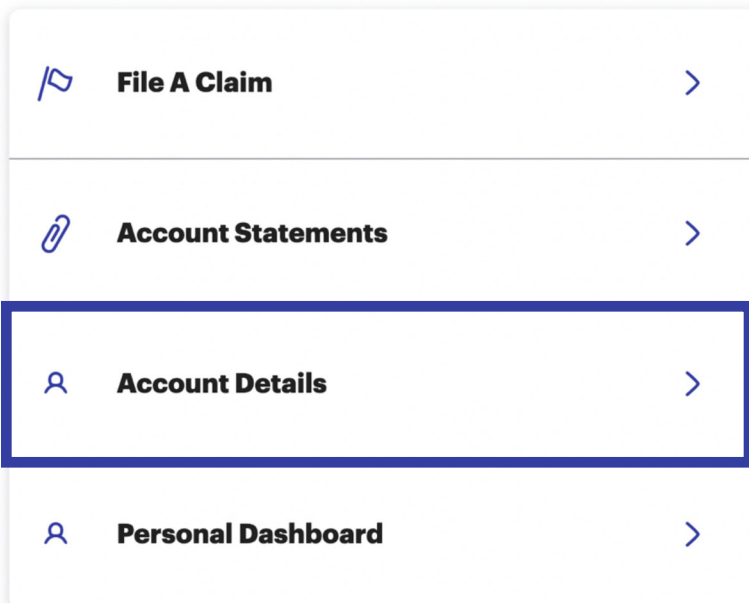


We've attached a sample for you. To view the sample Account Statement, please scroll to the end of this document.

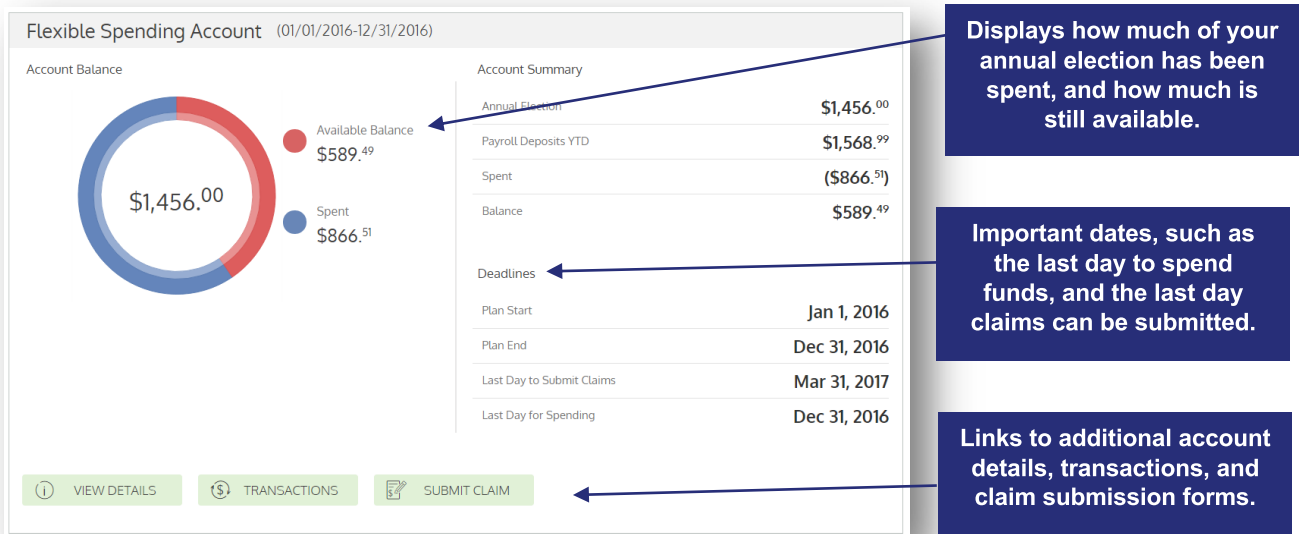
Checking your account balance(s)

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

Manage account



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

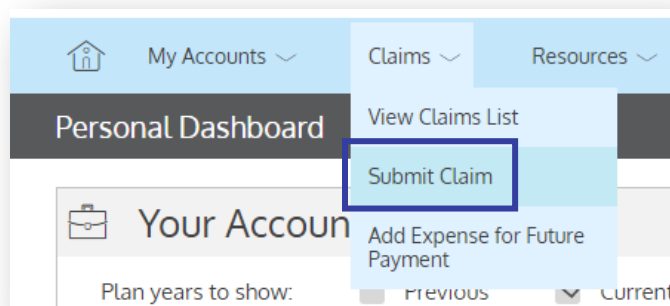


Submitting expenses and filing claims

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?

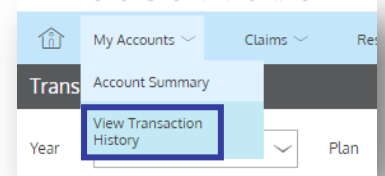
- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Expenses can be manually 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.

Year: 2017 Plan: Dependent Care FSA (Curr) Type: All

Which transactions do you want to see? Select here

☒ Approved/Posted ☒ Pending/Processing ☒ Denied

SEARCH FOR TRANSACTIONS

Amount	Transaction Type	Card	Date
(\$40.00)	Dependent Care FSA	Card	Feb 27, 2017
	Pending		

Date Of Service: Feb 27, 2017
 Description: DR. SMITH
 Claimant: NewApp Two
 Account Type: DCA
 Plan Start Date: Jan 1, 2017
 Plan End Date: Dec 31, 2017
 Merchant Name: DR. SMITH

RECEIPTS: No receipts to display.

ADD RECEIPT PRINT

Updating your user profile

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

Manage account

File A Claim >

Account Statements >

Account Details >

Personal Dashboard >

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.

Profile Information

Personal Info: NewApp Two, Date of Birth: Jan 1, 1950, Employee ID: *****P002, Marital Status: None, Gender: None.

Contact: Phone: 555-444-1234, Email Address: [edit](#) [delete](#) hjones@alegeus.com

Address: 1 Main Street, Beverly, MA, 00000, US. Alternate Address: 40 Elm St, Orlz, FL, US.

Employer: New Mobile App One, SSN: XXX-XX-5678, Employee Status: [View](#)

Reimbursement Method: Direct Deposit, Eastern Bank, Account Number: ****2356, Routing Number: ****1798, Checking. [edit](#) 3

Actions: [EDIT PROFILE](#) 1, [change password](#) 2

Family Members 4 [+ ADD FAMILY MEMBER](#)

Family Member: Spouse NewApp Two, Spouse Or Common Law Spouse. Date of Birth: Mar 3, 1975, SSN: *****1555, Address: 1 Main Street, Beverly, 00000, US. Gender: , Phone: .

Account Linking

Please un-check the benefit account(s) that Scott Perrier 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	✓

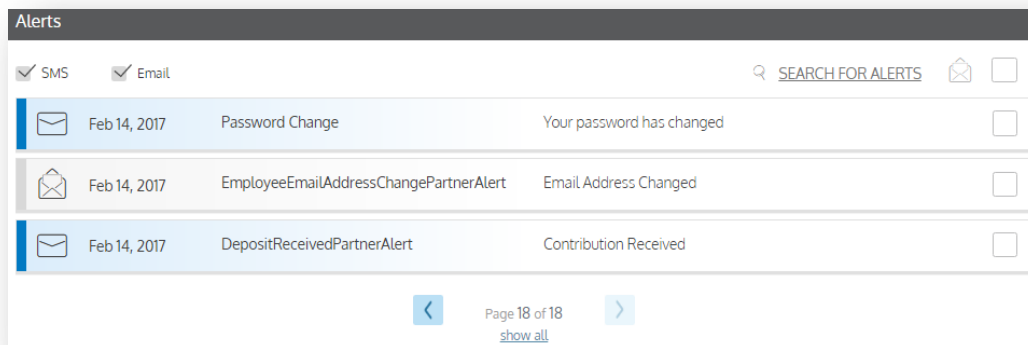
[i](#) No card will be issued.

☐ Issue Dependent Card?

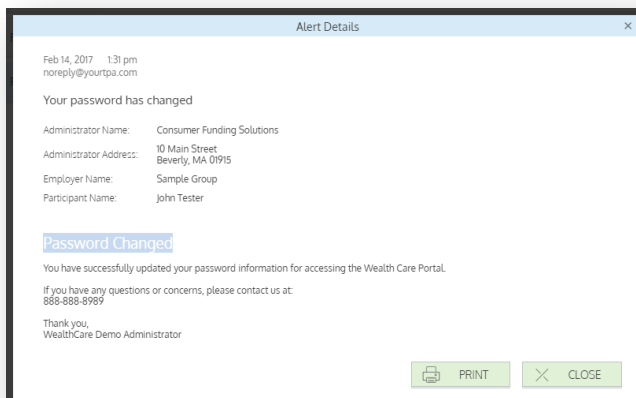
[Cancel](#) [Edit](#) [Submit](#)

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

Assigned Notifications

The notifications below are available to you. Please define the delivery method for these notifications. If mobile number and/or email is not an available delivery method, please **make sure you have an active email address and registered mobile number** listed on the right.

	mobile	email	both	none
Account Balance Alert	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Account Deductible Met	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Billing Address Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Card Mailed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Card Transaction Approved	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Card Transaction Denied	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completed HSA Payment Notice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Deposit Received	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enrollee Welcome Email	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Failed HSA Payment Notice	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manual Claim Entered	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Password Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Year End Reminder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

✓ SAVE

Email Address

email@email.com

Phone Registration Status

11234567891 Pending

You will receive a text to the number shown above asking you to complete the registration process. Once registered, your phone's status will show as Registered instead of Pending. If your number remains in Pending status or if you never receive the registration text, please contact support for assistance in resolving the issue. Once registered, text BAL to 97487 to receive your current year account balances. You can opt-out at anytime by texting STOP. For help with text commands, please text HELP to 97487.

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.

Messages

Unread Read

SEARCH FOR MESSAGES

May 1, 2018	Pending Letter	<input type="checkbox"/>
Apr 17, 2018	Pending Letter	<input type="checkbox"/>
Apr 17, 2018	Denial Letter	<input type="checkbox"/>

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