

# New Member Portal Guide

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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.

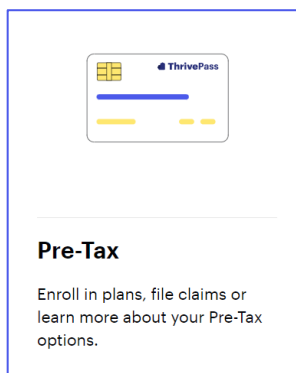
1. Navigate to [app.thrivepass.com](http://app.thrivepass.com)
2. Click the 'Set Up Pre-Tax Account' button
3. Enter your registration code from the welcome letter
4. Create password

## 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

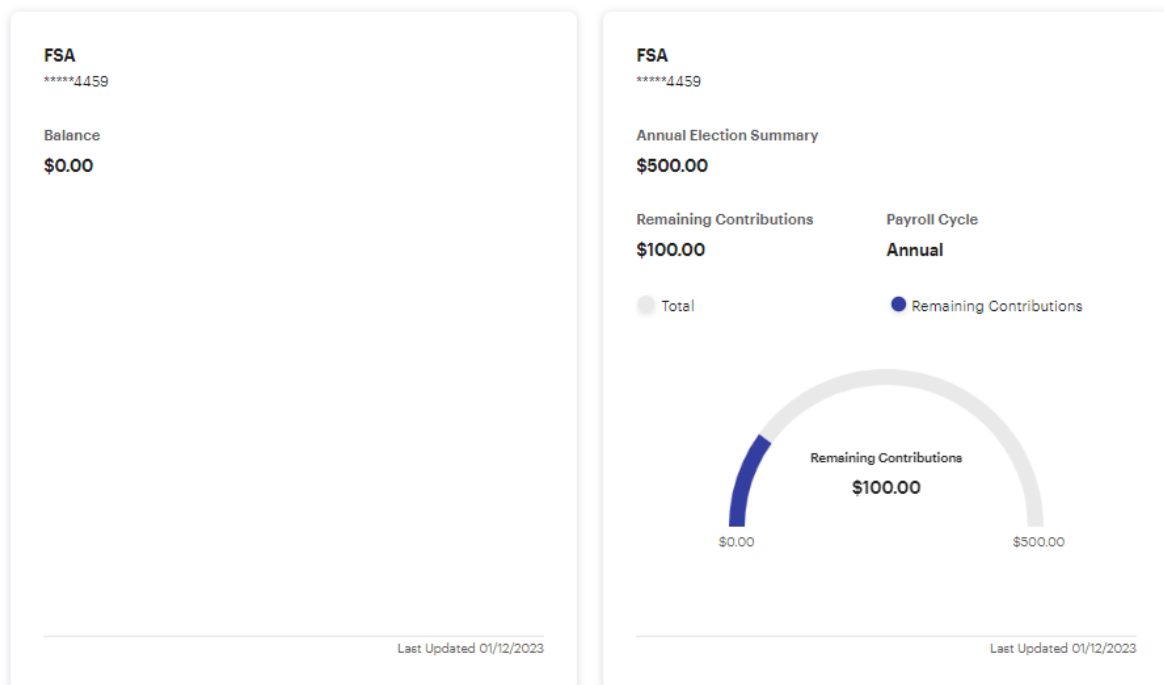
HRA

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: 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

## 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

Chiropractor

12/08/2022

12/08/2022

\$ 5.00

Reimbursement Type

Deposit to account

Checking

\*\*\*\*\*

One-time payment

Documentation

.jpg

Edit

Edit

Edit

## 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

Shop the Marketplace

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**

\$2500.00  
\$1875.00  
\$1250.00  
\$625.00  
\$0.00

Annual Election \$2,500.00

Remaining Payroll Deposits \$2,500.00

Payroll Deposits YTD \$0.00

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.

The 'Items that require your attention' section shows a transaction for (\$387.60) from PEARLE VISION. It includes details like Card, Date of Service (May 10, 2022), Date of Transaction (May 11, 2022), Claimant Name, and Provider (PEARLE VISION). An 'Add Receipt' button is visible.

The 'Add Receipt' modal provides two options: 'Upload Receipt' with a 'BROWSE' button, and a 'DRAG & DROP your receipts here' area. At the bottom are 'Cancel' and 'Submit' buttons.

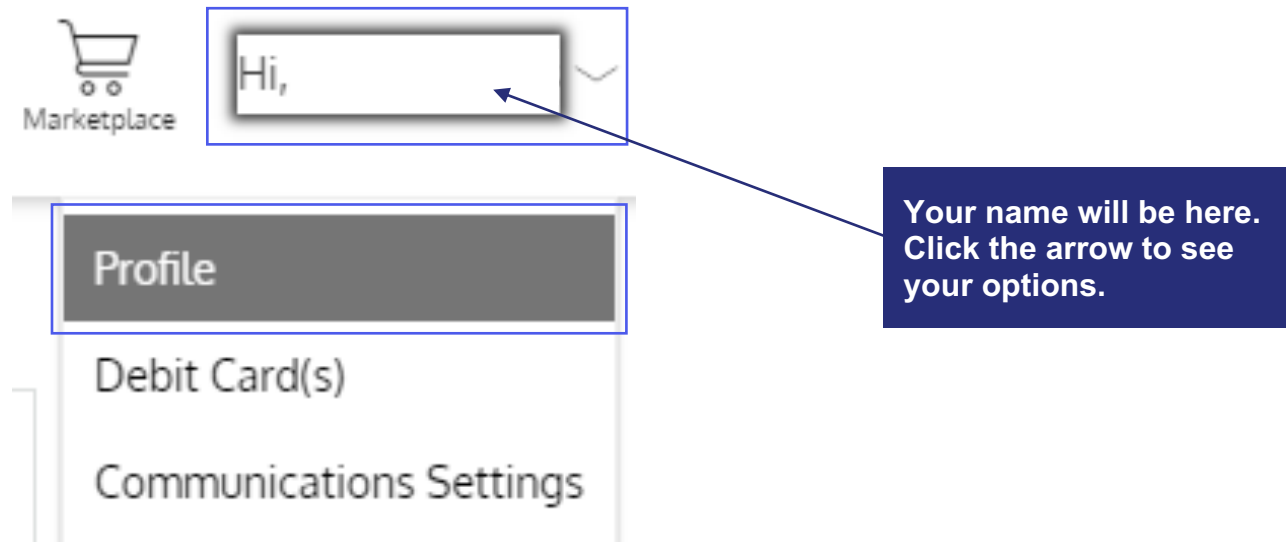
1. Click 'Add Receipt'
2. Browse or Drag & Drop the to attach your supporting documentation to the transaction click 'Submit'.

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.*



 <a href="#">change picture</a>  <b>Charlie Banks</b>  Date of Birth <b>Jan 20, 1976</b>  Marital Status <b>None</b>  Gender <b>None</b>	 Phone  Mobile Phone  Email Address <b>t***@gmail.com</b>	 Home Address <b>123 Anywhere St</b> <b>Anywhere</b> <b>WA, 12345</b> <b>US</b>
	 Employer <b>Test Employer</b>  Employee Status <b>New</b>	 <a href="#">edit</a> Reimbursement Method <b>Check</b>


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	<span style="color: green;">✓</span>

 No card will be issued.

☐ Issue Dependent Card?

✕ Cancel

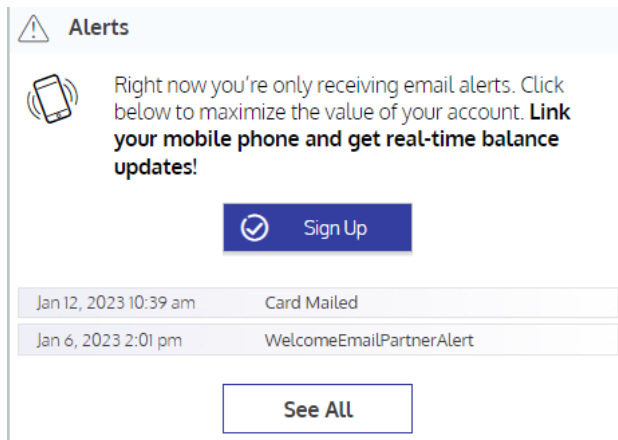
← Edit

✓ 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.

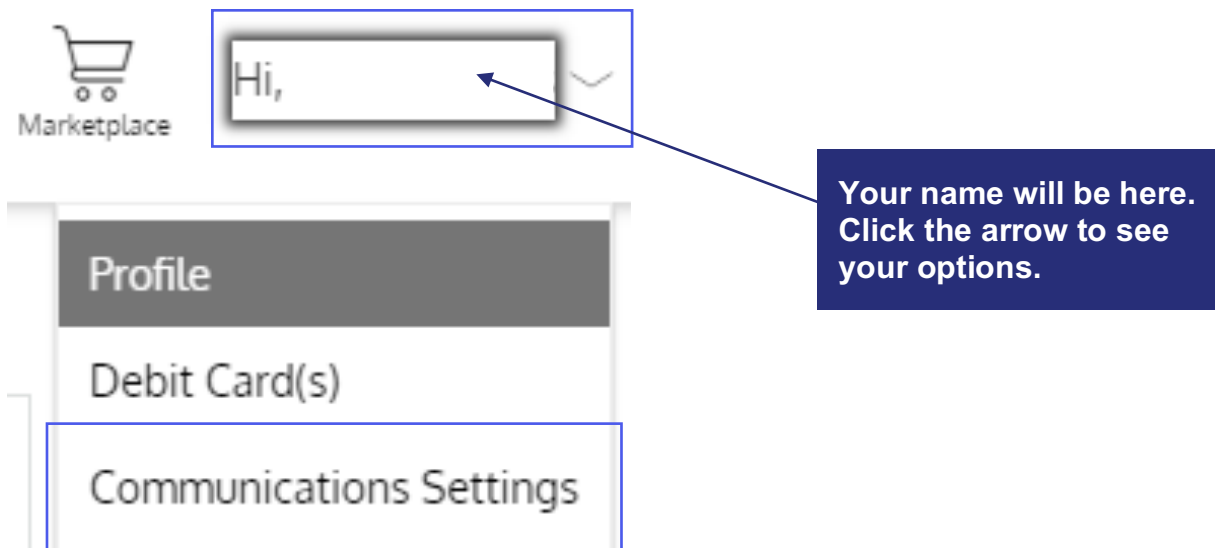




Click on an individual message to see the full text.

## 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.*



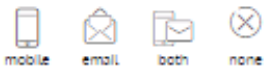
### Assigned Notifications



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.

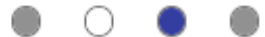


#### Completed HSA Payment Notice



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



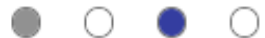
This PCM alert should be triggered when the HSA Online Payment Processing Agent denies a pending payment.

#### 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

\*\*\*\*@gmail.com

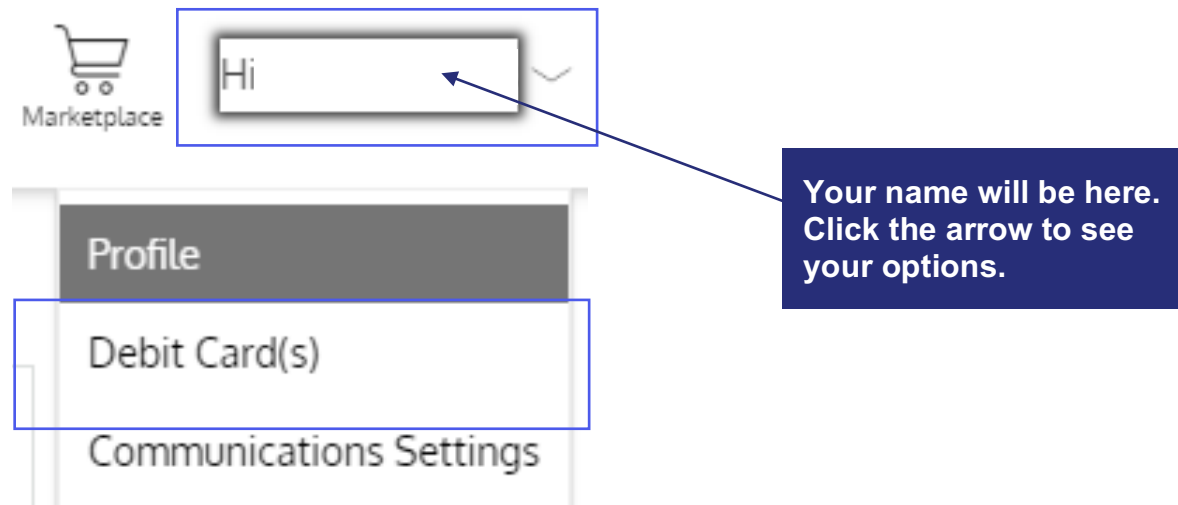
### Phone Registration Status

+ Add Number

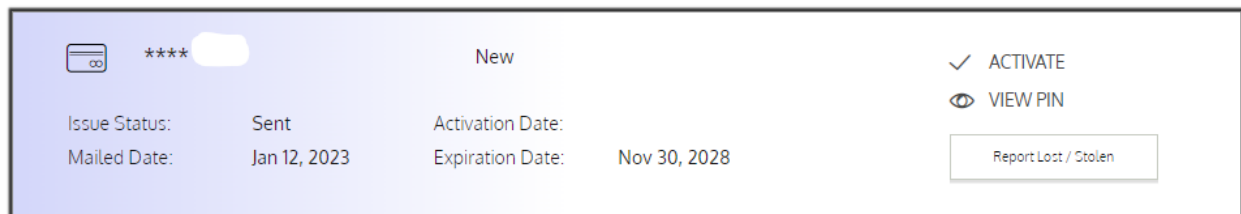


# Lost/Stolen Cards & Replacement

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.



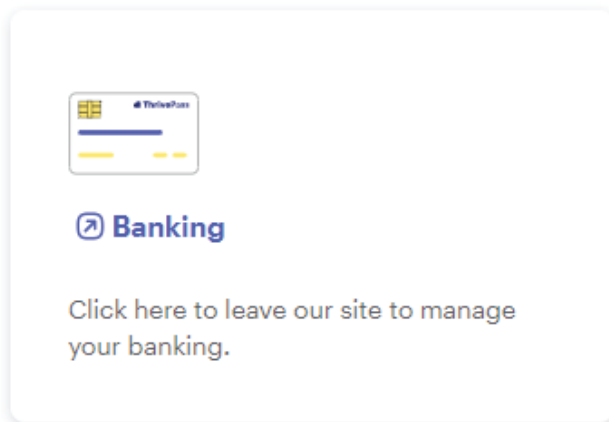
Your new card will arrive in about 10 business days. Please note that a \$5 fee will be assessed to your account when replacing a debit card.








# 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.

 <a href="#">change picture</a>	 Phone Mobile Phone ***-***-5206 Email Address <a href="#">edit</a> a*****vin@thrivepass.com	 Home Address <a href="#">change password</a> <a href="#">delete account credentials</a>
Date of Birth Sep 22, 1990 Marital Status None Gender Male	 Employer ThrivePass Employee Status Active	 <a href="#">edit</a> 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.

The screenshot shows a web form titled "Reimbursement Method". At the top, there are two radio buttons: "Check" (unselected) and "Direct Deposit" (selected). Below these are several input fields for bank information, each with a red asterisk indicating it is required: "Bank Name", "Account", "Re-enter Account", "Account Routing", "Re-enter Routing", and "Bank Account Type" (which is a dropdown menu currently showing "Saving"). To the right of these fields is a "Check example" box containing a form for a check with fields for Name, Address, Date, Pay to the order of, and Your bank. Below the check example, there is a table showing the order of numbers: Routing Number (1233211231), Check # (234511), and Account Number (123456789123). A note below the table states: "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." At the bottom left, there is a checkbox for agreeing to allow direct deposit plan reimbursements. At the bottom right, there are three buttons: "Cancel", "Edit", and "Save".

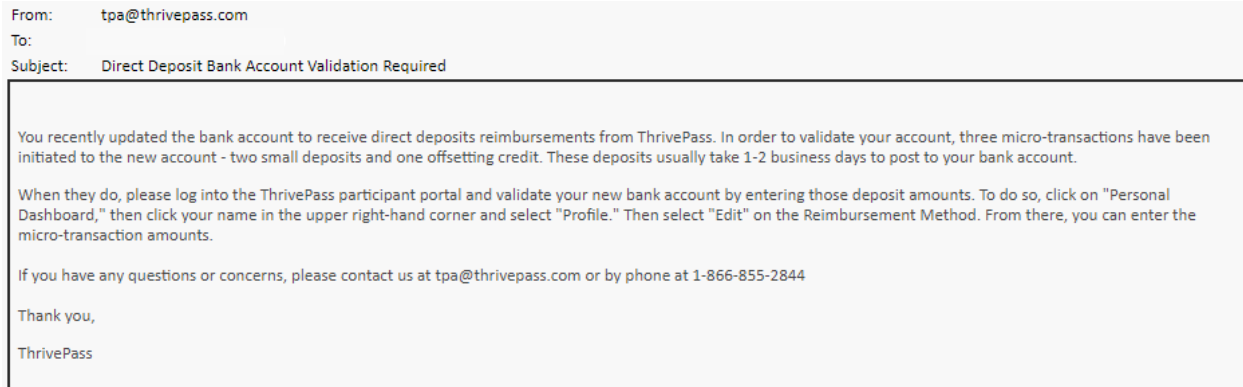
Step 4. Confirm your bank details are correct and click the "Save" button.

The screenshot shows a review screen for the "Reimbursement Method" form. It features a large information icon and the text "Please Review Bank Account Details". Below this, there is a list of the bank details entered: "Bank Name", "Account number", "Routing number", and "Bank account type". At the bottom, there are two buttons: "Cancel" and "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.

**Reimbursement Method**

Reimbursement Method

☐ Check ☒ Direct Deposit

Bank Name \*

Account \*

Re-enter Account \*

Account Routing \*

Re-enter Routing \*

Bank Account Type

Account Status

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

**Validate Your Account**

To help verify the ownership of your account, we will make two small deposits (less than a dollar) and one off-ending 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.

Check example

Name \_\_\_\_\_ Address \_\_\_\_\_ Date \_\_\_\_\_

Pay to the order of: \_\_\_\_\_

Your bank

Routing Number: 1233211231 | Check #: 234511 | Account Number: 123456789123

Pending Validation ●

Cancel Edit Close

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.

**Reimbursement Method**

Reimbursement Method

☐ Check ☒ Direct Deposit

Bank Name \*

Account \*

Re-enter Account \*

Account Routing \*

Re-enter Routing \*

Bank Account Type

Account Status

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

**Validate**

Cancel Edit Save



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

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

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

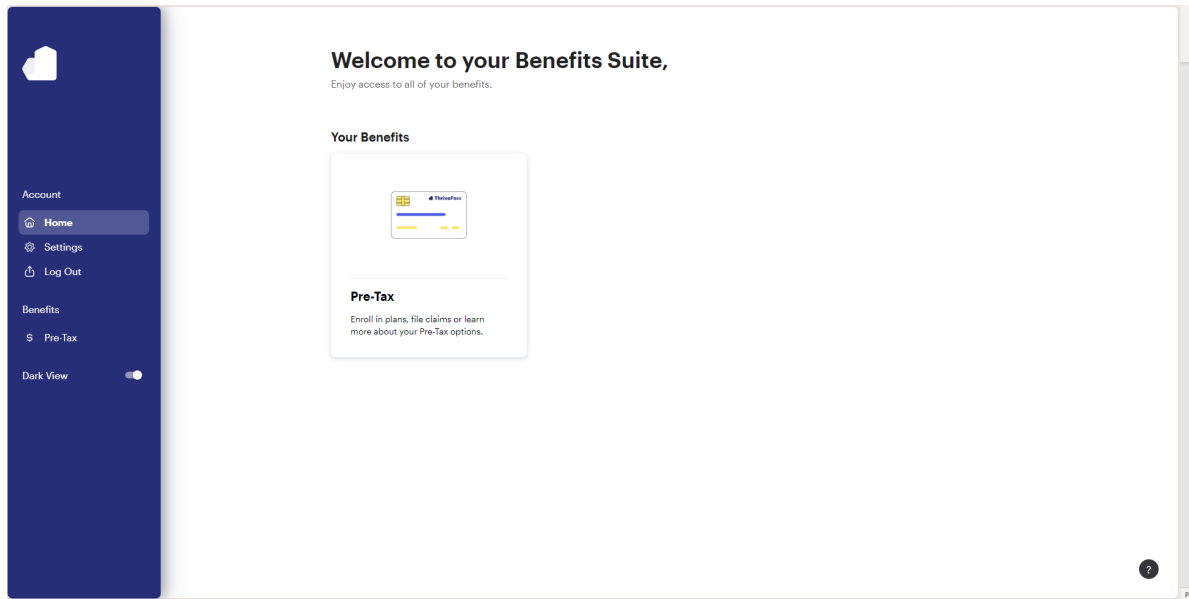
Validation was successful. Now your direct deposit bank account is active.

Ok

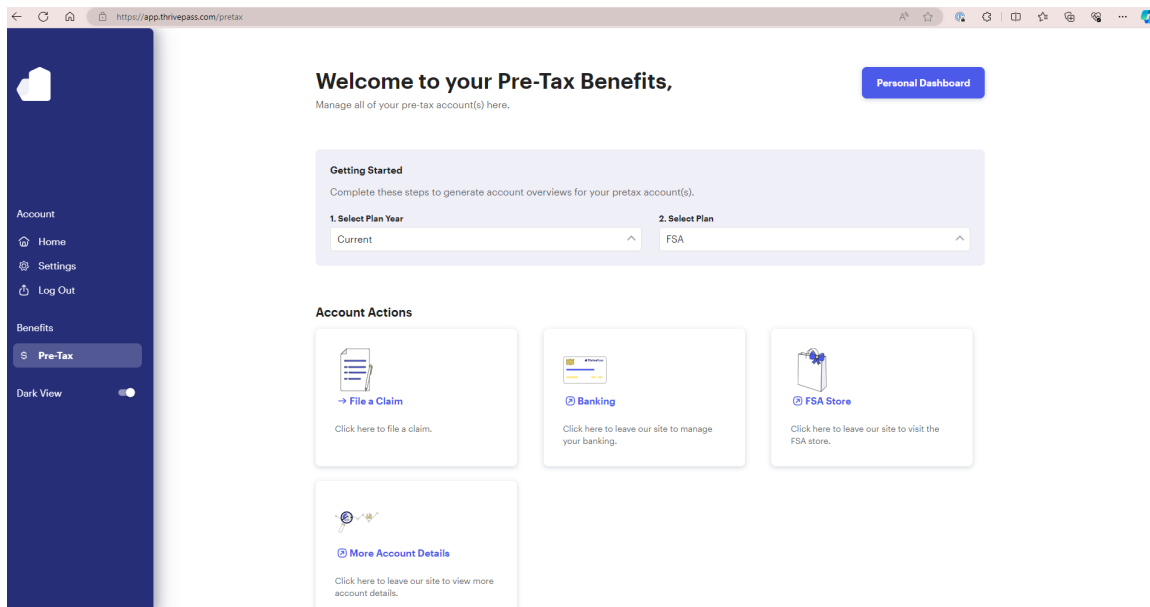


## C. How to Repay a Balance Due Online

Step 1. Log into your account by going to [app.thrivepass.com](https://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.

**ThrivePass** 866-855-2844 tpa@thrivepass.com Personal Dashboard

**CONNECT YOUR PLANS**

\$237.50	Medical FSA	Approved	Deposit Jul 7, 2023
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[See All](#)

**FSA store**  
Are you on target to use your FSA money by the deadline?  
FSA Store can help you use remaining funds before you lose them!  
[Shop Now](#)

**Balance Due**  
You currently have an outstanding balance due of: \$1,310.00  
[PAY NOW](#)

**Alerts**

Oct 4, 2023 5:31 am	Account Balance Statement
Sep 4, 2023 5:31 am	Account Balance Statement
Aug 16, 2023 6:27 pm	Card Transaction Denied
Aug 12, 2023 1:01 am	Ineligible Letter (No Receipt)

[See All](#)

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

**ThrivePass** 866-855-2844 tpa@thrivepass.com Balance Due

\$1,310.00	<b>Balance Due</b>		<a href="#">PAY NOW</a>
\$460.00	Medical FSA Ineligible	May 12, 2023	<a href="#">Add Receipt</a>
\$350.00	Medical FSA Ineligible	Mar 30, 2023	<a href="#">Add Receipt</a>
\$500.00	Medical FSA Ineligible	Mar 19, 2023	<a href="#">Add Receipt</a>

Balance updates may be delayed while payments are processing

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Contact Customer Care: 866-855-2844 | thrivepass.healthcareportal.com/



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 

\$ 0.00

☐ Repay individual transactions

☒

\$460.00

Medical FSA

May 13, 2023

☒

☒

\$350.00

Medical FSA

Mar 31, 2023

☒

☒

\$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.

☐

✕

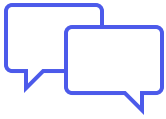
Cancel

✓

Submit

23

The USAA logo, consisting of three overlapping blue hexagons.



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## Get In Touch

Phone: (866) 855-2844

Email: [tpa@thrivepass.com](mailto: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.

