



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.

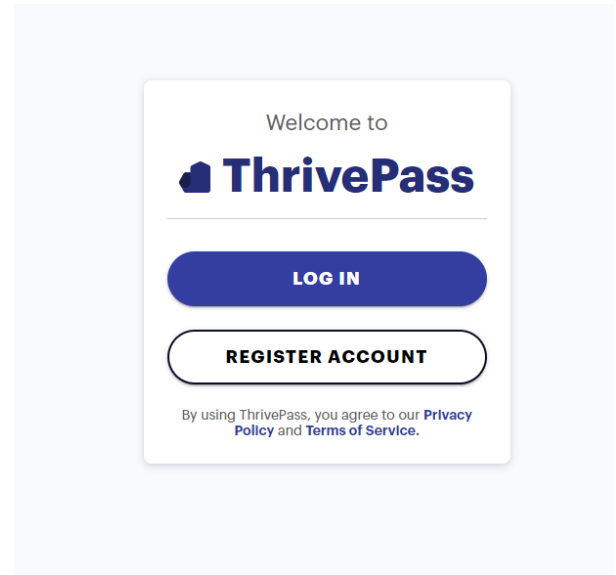


Getting started

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

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

Balance
\$100.00

Balance Due
\$10.00

Manage account

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

Recent Transactions

\$ RTD Monthly Bus Pass (Not Applicable)
Expense

+\$75
January 21, 2021

Pre-Tax Benefits

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

Account overview

PLAN YEAR
All

PLAN
FSA





Balance
\$200.00

Manage account

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

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.

Add Claim

* - Required Field

Claimant: Steve Sample

Reimbursement Method: Card

Service Start Date: select date

Service End Date: select date

Service Type: -- Select One --

Claim Amount: \$ 0.00

Would you like to submit this as a recurring payment? Yes No

Provider Name:

Comments:

Upload Receipt: BROWSE

DRAG & DROP your receipts here

SUBMIT CANCEL

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).

Pay provider? Yes No

Provider Name: Lahey Clinic

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.** Any part of the insurance allowed amount that is not covered by your health insurance plan.
- **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.

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





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

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

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

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

The screenshot shows a 'Flexible Spending Account' dashboard for the period 01/01/2016-12/31/2016. It features a donut chart for 'Account Balance' showing \$1,456.00 available and \$866.51 spent. An 'Account Summary' table lists election amounts, payroll deposits, and current balances. A 'Deadlines' section lists key dates for plan start, end, and claim submission. At the bottom, there are buttons for 'VIEW DETAILS', 'TRANSACTIONS', and 'SUBMIT CLAIM'. Three callout boxes provide additional context: one points to the donut chart, another to the 'Deadlines' section, and a third to the bottom navigation buttons.

Annual Election	\$1,456. ⁰⁰
Payroll Deposits YTD	\$1,568. ⁹⁹
Spent	(\$866. ⁵¹)
Balance	\$589. ⁴⁹

Plan Start	Jan 1, 2016
Plan End	Dec 31, 2016
Last Day to Submit Claims	Mar 31, 2017
Last Day for Spending	Dec 31, 2016

Submitting expenses and filing claims

Wealthcare 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?

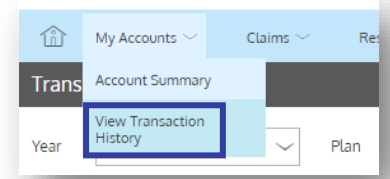
- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or later.

The screenshot shows the 'Claims' dropdown menu in the Member Portal. The menu is open, showing options: 'View Claims List' and 'Submit Claim'. The 'Submit Claim' option is highlighted with a blue box. Below the menu, there is a section for 'Your Account' with a 'Plan years to show:' dropdown set to 'Current'.

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

(\$40.00)	Dependent Care FSA Pending	Card	Feb 27, 2017
Date Of Service	Feb 27, 2017	RECEIPTS	
Description	DR. SMITH	No receipts to display.	
Claimant	NewApp Two		
Account Type	DCA		
Plan Start Date	Jan 1, 2017		
Plan End Date	Dec 31, 2017		
Merchant Name	DR. SMITH		

ADD RECEIPT

PRINT

Updating your user profile

Click on the arrow next to 'Personal Dashboard' to access your profile.

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
5. Update or remove an existing dependent

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

The screenshot shows a user profile page for 'NewApp Two'. The profile information is organized into three columns. Callout 1 points to the 'EDIT PROFILE' button in the top right corner. Callout 2 points to the 'change password' link below the profile edit button. Callout 3 points to the 'edit' button next to the 'Reimbursement Method' field. Callout 4 points to the '+ ADD FAMILY MEMBER' button in the 'Family Members' section. Callout 5 points to the 'EDIT DEPENDENT' button next to the dependent's information.

Profile Information:

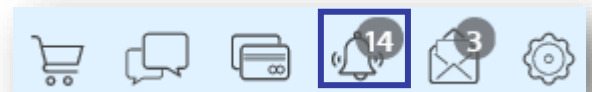
- Name:** NewApp Two
- Date of Birth:** Jan 1, 1950
- Employee ID:** *****P002
- Marital Status:** None
- Gender:** None
- Phone:** 555-444-1234
- Email Address:** [edit](#) [delete](#) (hjones@alegeus.com)
- Address:** 1 Main Street, Beverly, MA, 00000, US
- Alternate Address:** 40 Elm St, Orlando, FL, 32801, US
- Employer:** New Mobile App One
- SSN:** XXX-XX-5678
- Employee Status:** New
- Reimbursement Method:** Direct Deposit
- Bank:** Eastern Bank
- Account Number:** ****2356
- Routing Number:** ****1798
- Account Type:** Checking

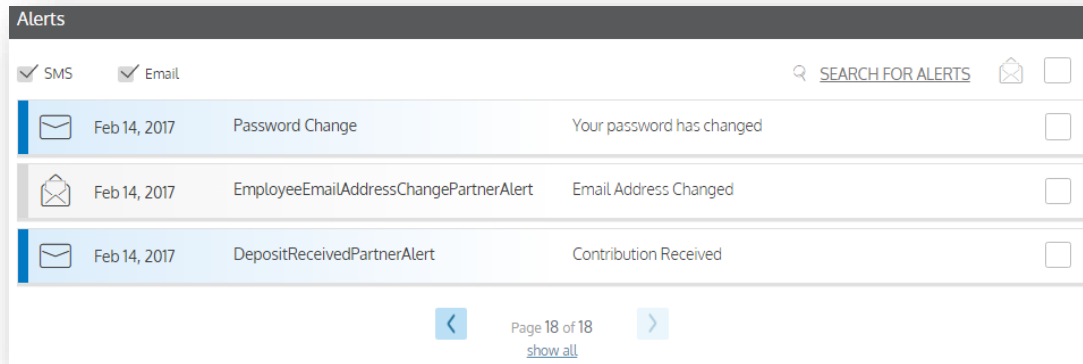
Family Members:

- Spouse:** NewApp Two (Spouse Or Common Law Spouse)
- Date of Birth:** Mar 3, 1975
- SSN:** *****1555
- Address:** 1 Main Street, Beverly, 00000, US

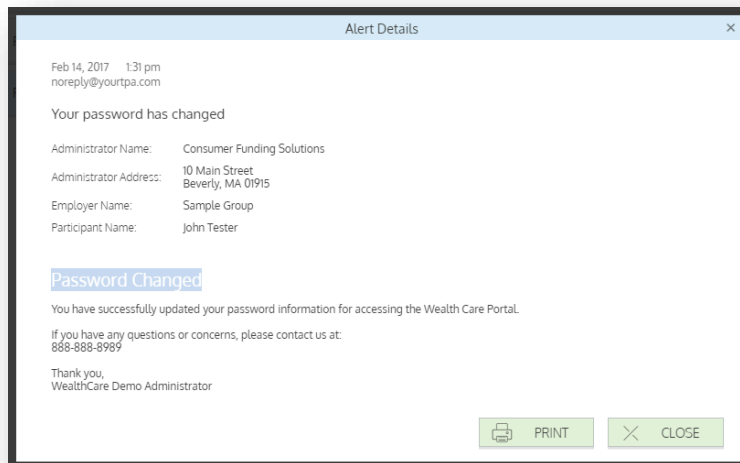
Managing alerts & messages

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"/>

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

	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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