ThrivePass Pre-Tax Accounts

Mobile Application Guide

ThrivePass empowers employees to thrive through exceptional service and innovative benefits technology.

ThrivePass

ThrivePass Pre-Tax Accounts App

Managing your benefit account(s) on-the-go is made easy with the ThrivePass Pre-Tax Accounts mobile application. This powerful, intuitive mobile app gives you access to view your account balances, update your profile, submit a claim, and much more, right from your Android or Apple mobile device. ThrivePass provides a personalized experience and delivers meaningful insights to better guide your healthcare spending. The app also offers recommendations for savings on healthcare items such as prescription medications. This guide is intended to provide an overview of the ThrivePass Pre-Tax Accounts mobile features so you can be sure you are getting the most from your benefit account(s).

GETTING STARTED
Your login credentials for the ThrivePass Pre-tax Accounts mobile application are different than your direct login to app.thrivepass.com. After downloading the application, you will see a landing page with options for 'log in' and 'sign up' as shown in the image to the right.

If this is your first time logging in to the mobile application, you must register before you can access the application.
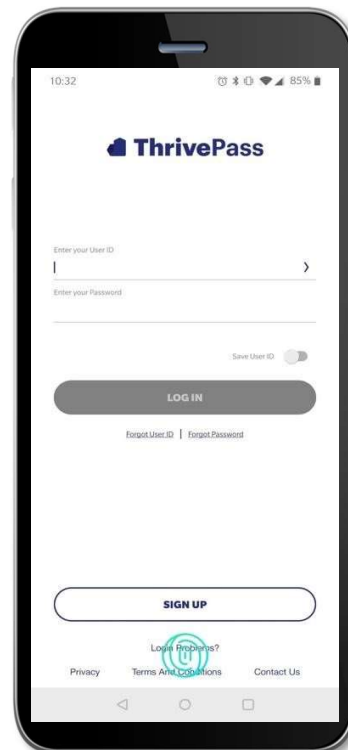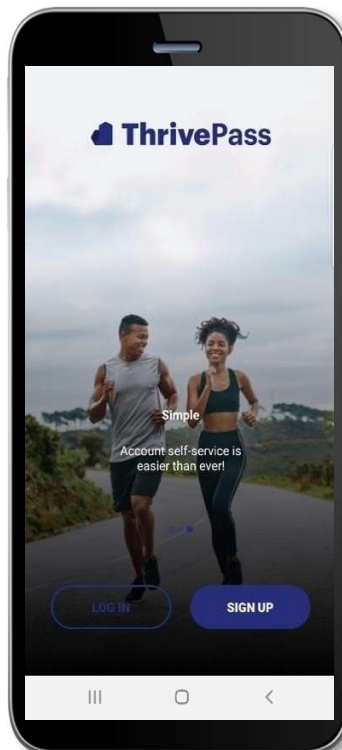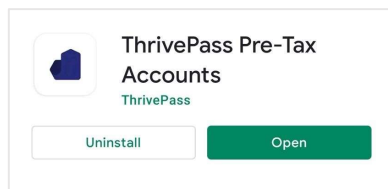
Registration

After tapping the 'sign up' button on the home screen, you will be guided through the registration steps.
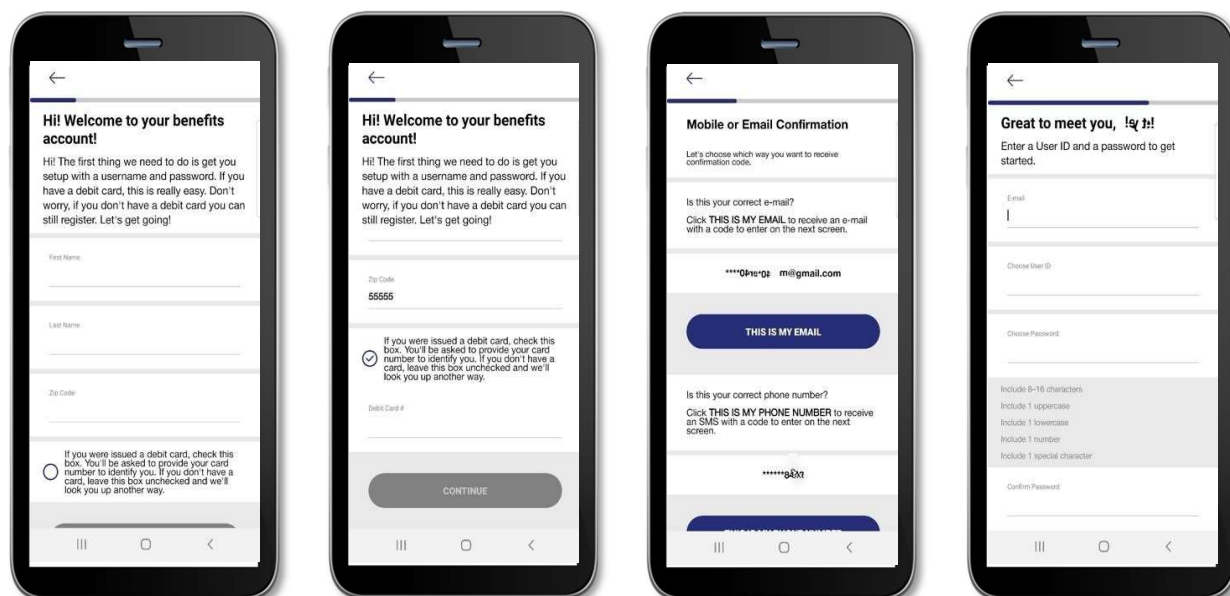
Begin the registration process by entering the required information. If you have your benefit card number handy, you only need to enter your name, zip code, and card number. You are then guided by the ThrivePass Pre-Tax Accounts mobile app to confirm your identity, create a user ID, and choose and confirm a password that meets the provided specifications.

If you do not have your card number available, you will be prompted to enter your *employee ID*. If you do not know your ID number, you may obtain it from your employer.
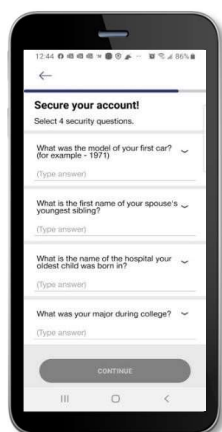
To secure your account, select and answer four security questions. You can confirm that all your information has been entered accurately before moving on to the email or text confirmation steps.

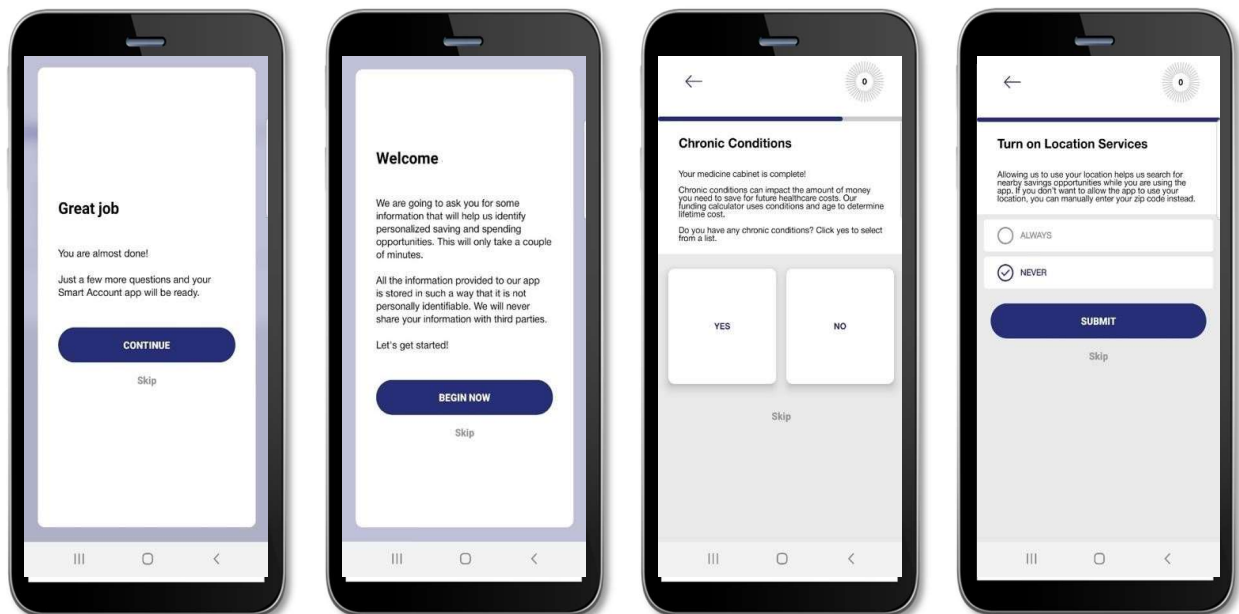Biometric Verification
If your device uses biometric verification you can opt to enable this functionality to access ThrivePass. Simply choose to save your user ID on the *log in* screen, and after signing in, you will be presented with the option to enable touch/face recognition access. You can view your touch/face recognition access status and disable it at any time via the 'settings' screen.

Optional Registration Flow

Set-up "Smart Account." Smart Account allows you to provide information to the application that will give you proactive recommendations that guide you through your healthcare journey. Real-time insights give you accurate, and up-to-the minute data the moment you need it.

Great job

You are almost done!

Just a few more questions and your Smart Account app will be ready.

CONTINUE

Skip

Welcome

We are going to ask you for some information that will help us identify personalized saving and spending opportunities. This will only take a couple of minutes.

All the information provided to our app is stored in such a way that it is not personally identifiable. We will never share your information with third parties.

Let's get started!

BEGIN NOW

Skip

Chronic Conditions

Your medicine cabinet is complete!

Chronic conditions can impact the amount of money you need to save for future healthcare costs. Our funding calculator uses conditions and age to determine lifetime cost.

Do you have any chronic conditions? Click yes to select from a list.

YES   NO

Skip

Turn on Location Services

Allowing us to use your location helps us search for nearby savings opportunities while you are using the app. If you don't want to allow the app to use your location, you can manually enter your zip code instead.
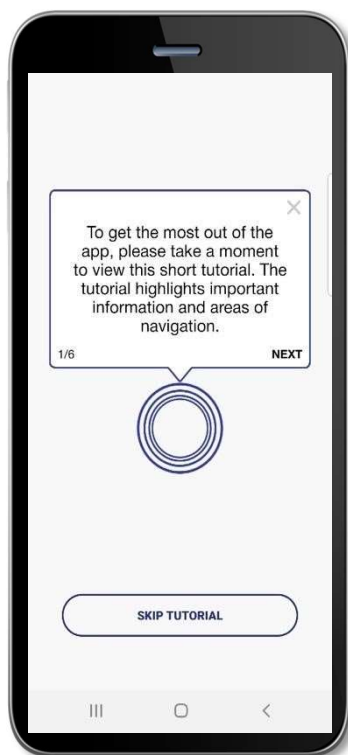
○ ALWAYS

⊘ NEVER

SUBMIT

Skip

Onboarding

After registering, or successfully logging into the app for returning users, you will be guided through an onboarding process. Onboarding will help improve the usefulness of the app while starting to build your *smart score* (explained in detail later in this guide). You may opt out of the onboarding process if you prefer, and you can still take advantage of increasing your *smart score* through *opportunities*.
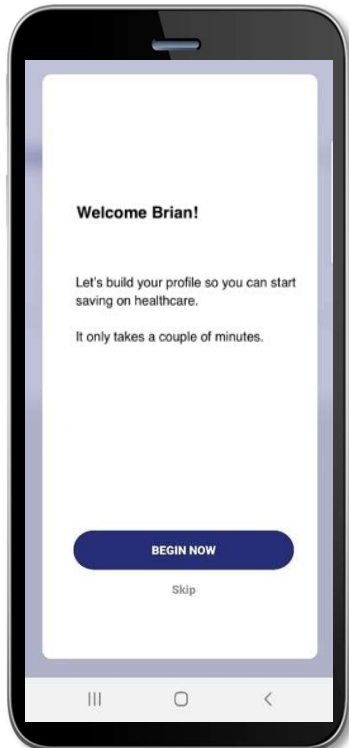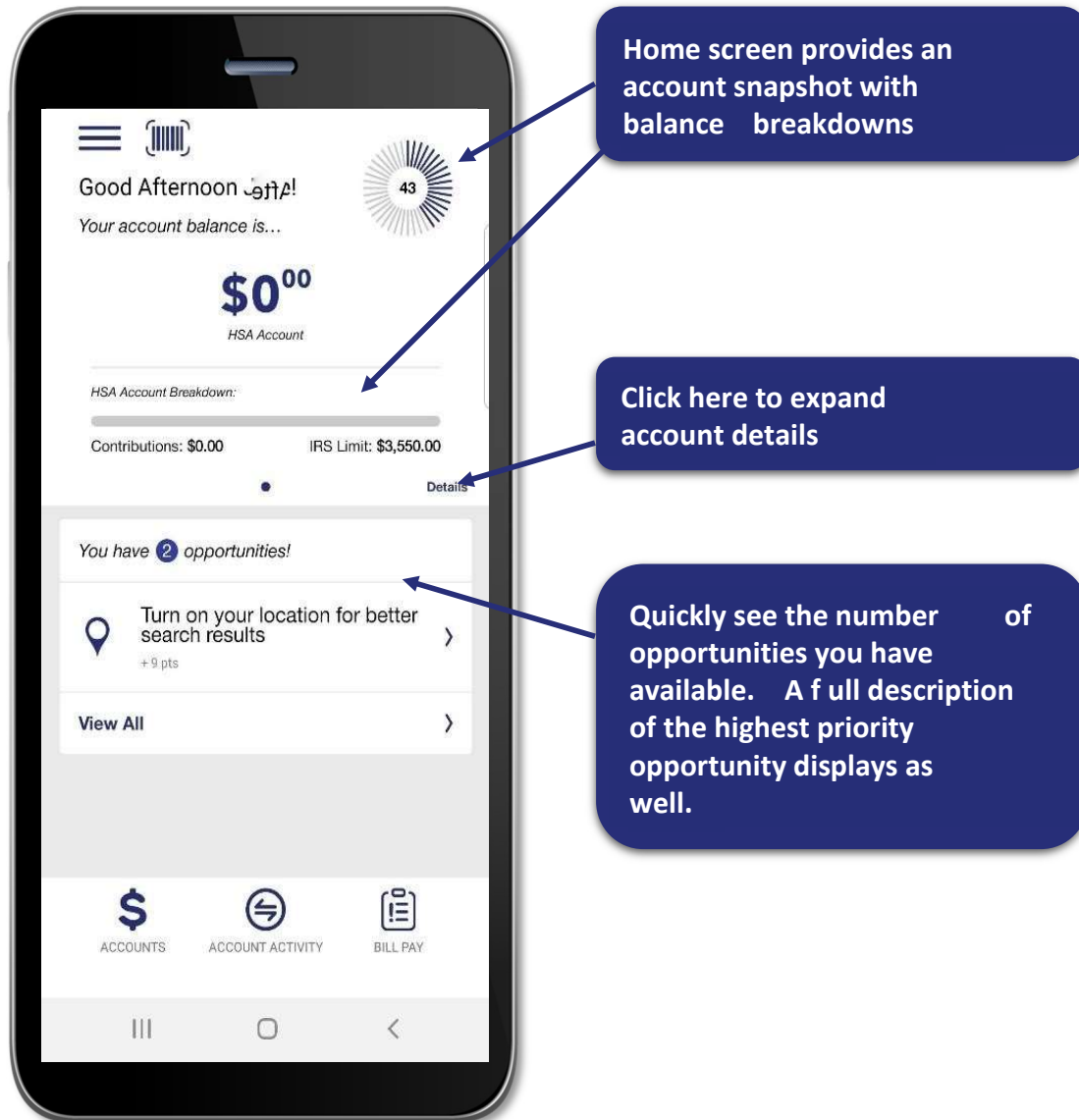
Tutorial

ThrivePass Pre-Tax Accounts mobile app includes a helpful tutorial that will enable you to get started with this already highly intuitive and personalized app. There is an option to skip the tutorial if you'd like; you can also navigate back to re-trigger the tutorial through the menu at any time. The tutorial provides an overview of the specialized features (*opportunities*, *smart score*, *medicine cabinet, find care,* and *funding calculator* described below) as well as traditional app and benefit account functionality.

Though the tutorial will take you through some traditional app and benefit account functionality, additional features and screens are highlighted below for your convenience:

Home Screen & Menu

Once you are logged in, you will see the home screen:

Home screen provides an account snapshot with balance   breakdowns

Click here to expand account details

Quickly see the number   of opportunities you have available.   A f ull description of the highest priority opportunity displays as well.

Menu buttons at the bottom of the screen allow you to reach the most commonly used pages with a single tap. All the menu items found at the bottom of the home screen, plus many other helpful links, can be accessed at any time by tapping the menu symbol found in the upper left corner of every screen in the application. Below is a screenshot of the menu options:
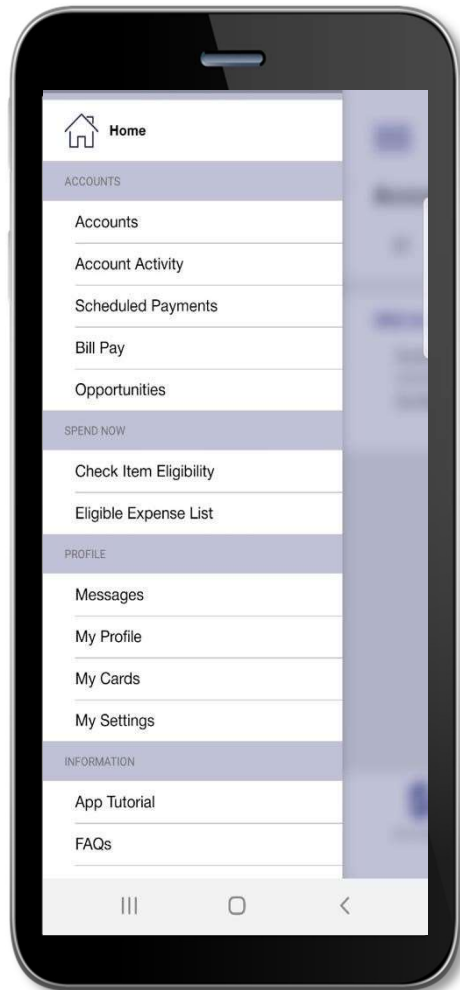
Accounts

The Accounts screen displays a listing of all your benefit account(s) and their balances. This list can be filtered by plan year (current, future, previous, or all) by clicking the related link.

Plan Year Filters

**Click on the down arrow for additional account options**
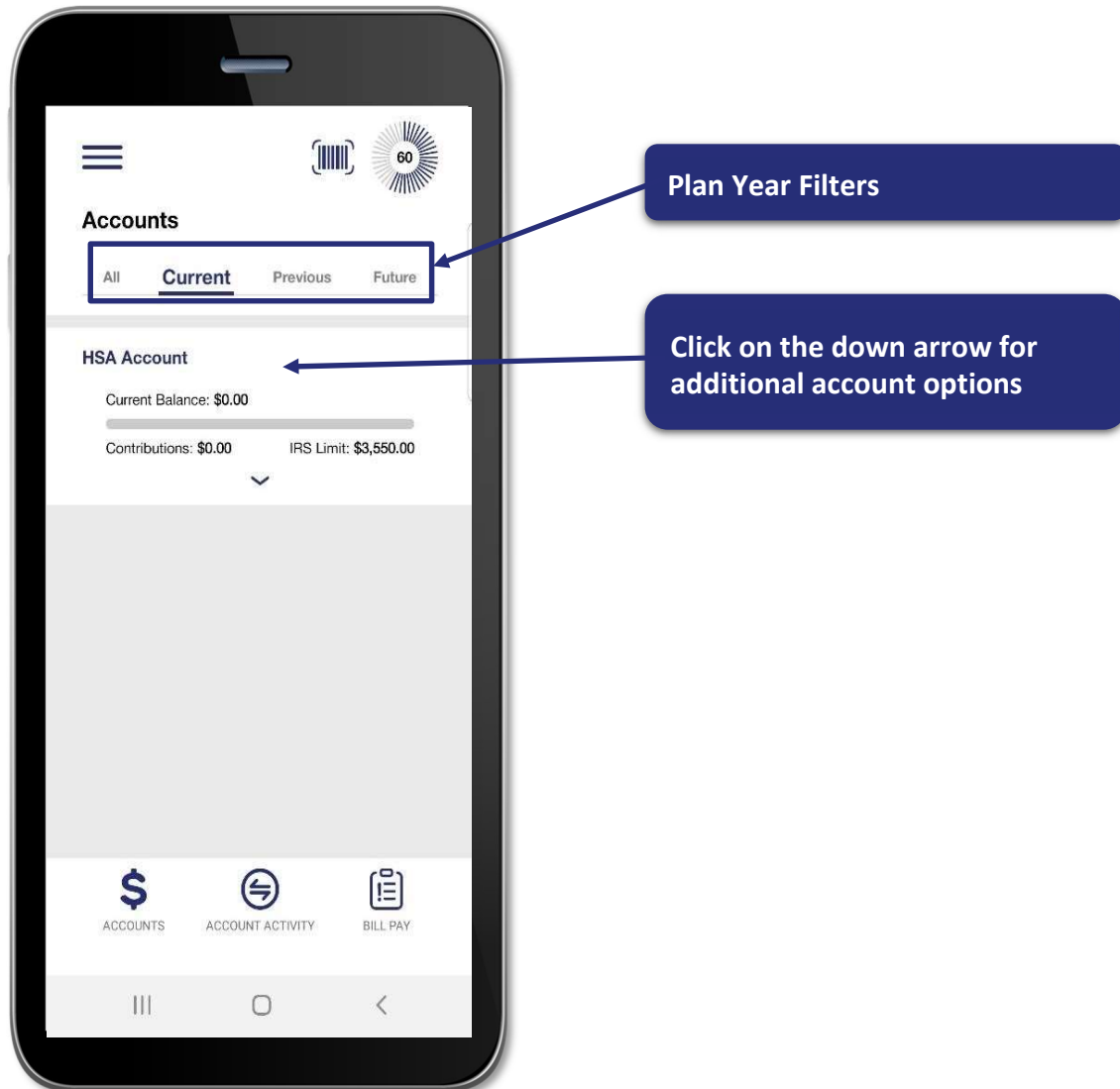
Claims Submission

The *Submit Claim* screen allows you to enter new claims and expenses, as well as view and edit pending items. If you have a receipt to substantiate your claim, you can take a photo of it with your device and attach it to a pending claim from this section of the app. Below is an example of the *submit claim* screens and the associated flow of submitting a claim:
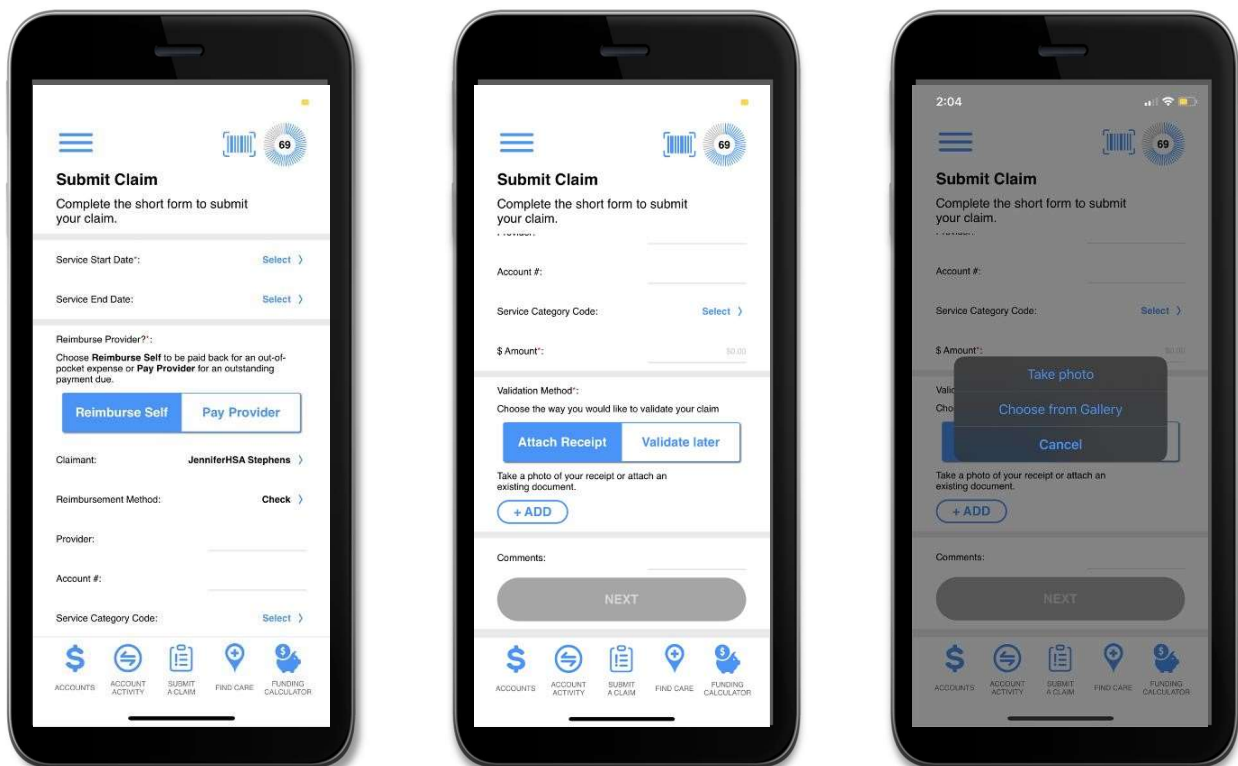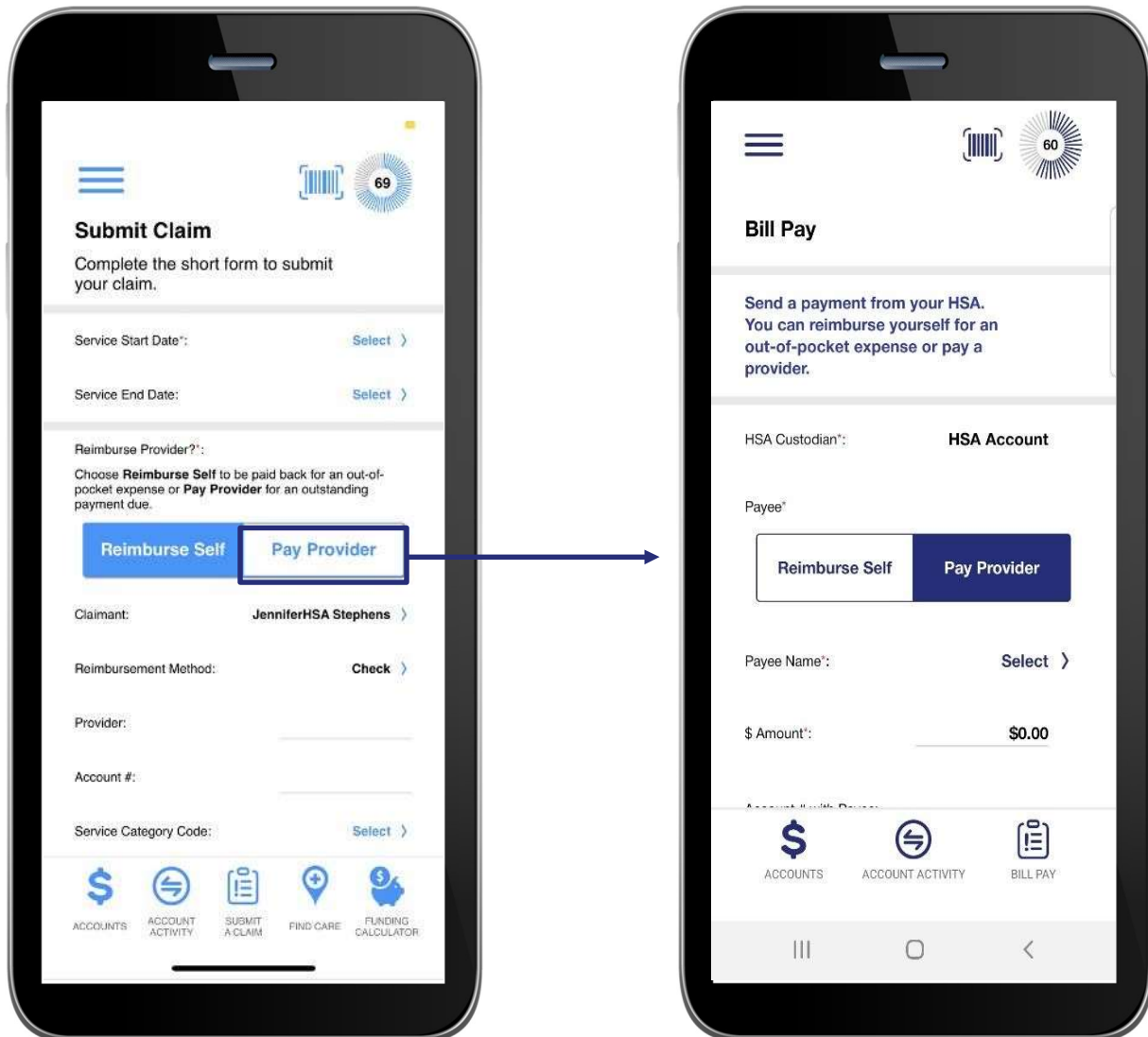
Check Item Eligibility

The *Check Item Eligibility* ⬛ function allows you to scan a barcode to determine if that particular item is an eligible expense under your FSA or HSA.
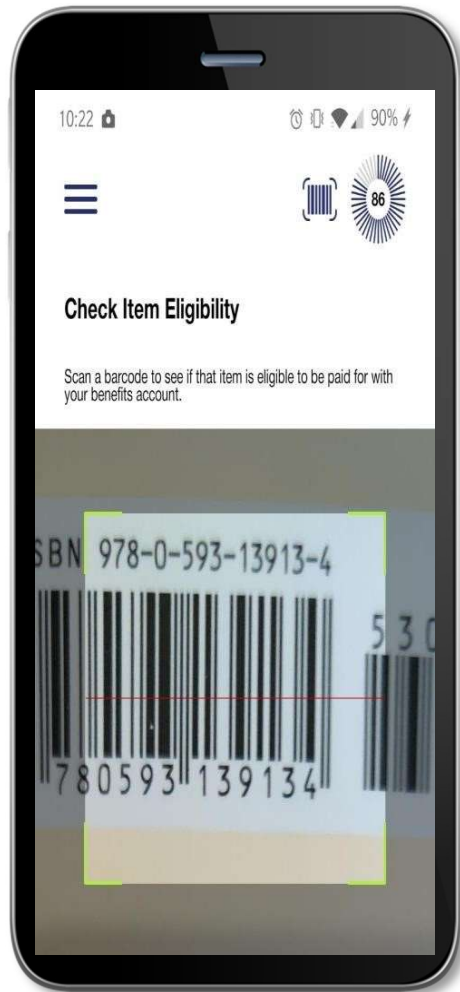
Bill Pay

To utilize the *Bill Pay* function. Simply select Bill Pay and follow the steps on the following screens. You may reimburse yourself or your provider directly.

Opportunities & Smart Score

ThrivePass Pre-Tax Accounts mobile app includes a *smart score* feature which is present at the top right corner of every screen within the app. This score reflects the *opportunities* you have completed. The higher your score, the more benefits and potential savings you can gain from the app. Your score increases when you take advantage of opportunities such as switching to direct deposit or adding a receipt to a transaction.

1. You may click on the *smart score* icon at any time to view your *opportunities* list
2. When the *opportunities* screen opens, you can click on the 'info' icon to see more details about opportunities
3. Clicking on one of the individual opportunities will open the specified page
4. The page associated with the chosen opportunity will coach you through the steps to maximize your savings
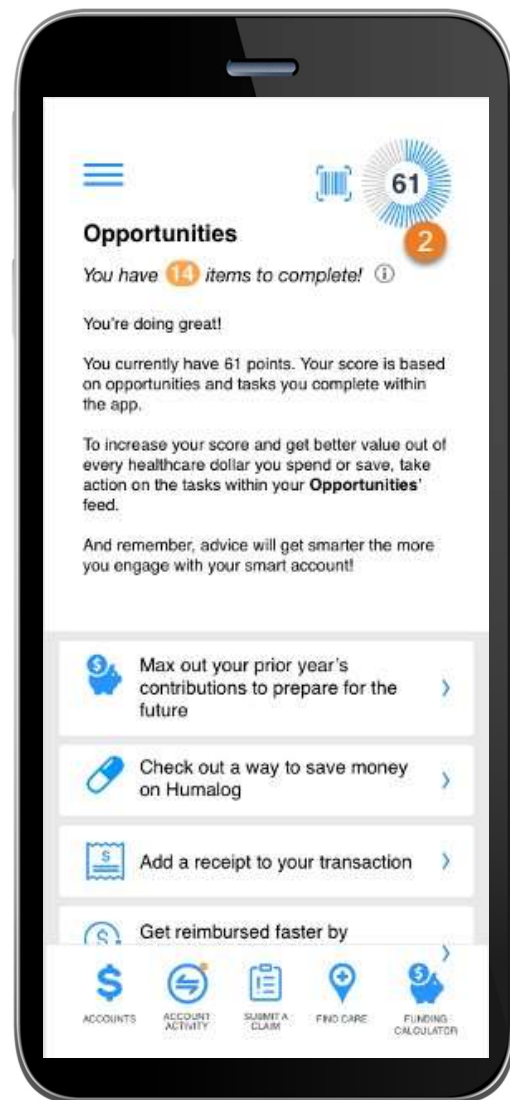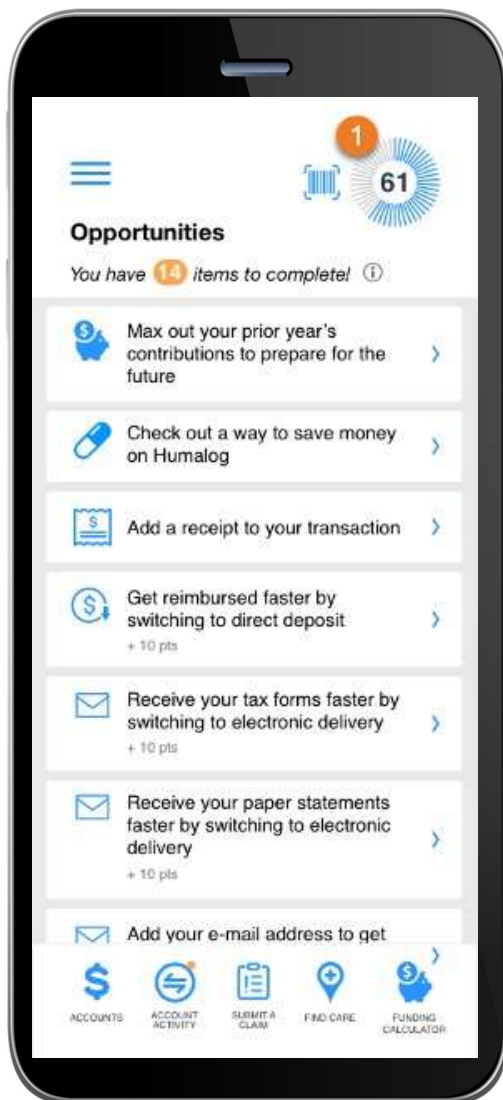
Medicine Cabinet

ThrivePass Pre-Tax Accounts mobile app also includes a *Medicine Cabinet* feature which can be accessed from the main menu screen. You will also be prompted by the *opportunities* feature to enter your medications into the *medicine cabinet* if you did not do so during onboarding. The application will find cost-saving opportunities on your drugs. You can also set up your home pharmacy in the *medicine cabinet* in order to retain a search location and radius for more drug savings opportunities.

Once you complete the setup of your *medicine cabinet,* you will see a listing of all your drugs and their prices. You may also edit, delete, or add drugs or the price you paid for them at any time. The application helps you capture the most recent information about how much you are paying for your medications.

If applicable, the application may notify you if a cheaper alternative is available for any of your medications saved in the *medicine cabinet.*
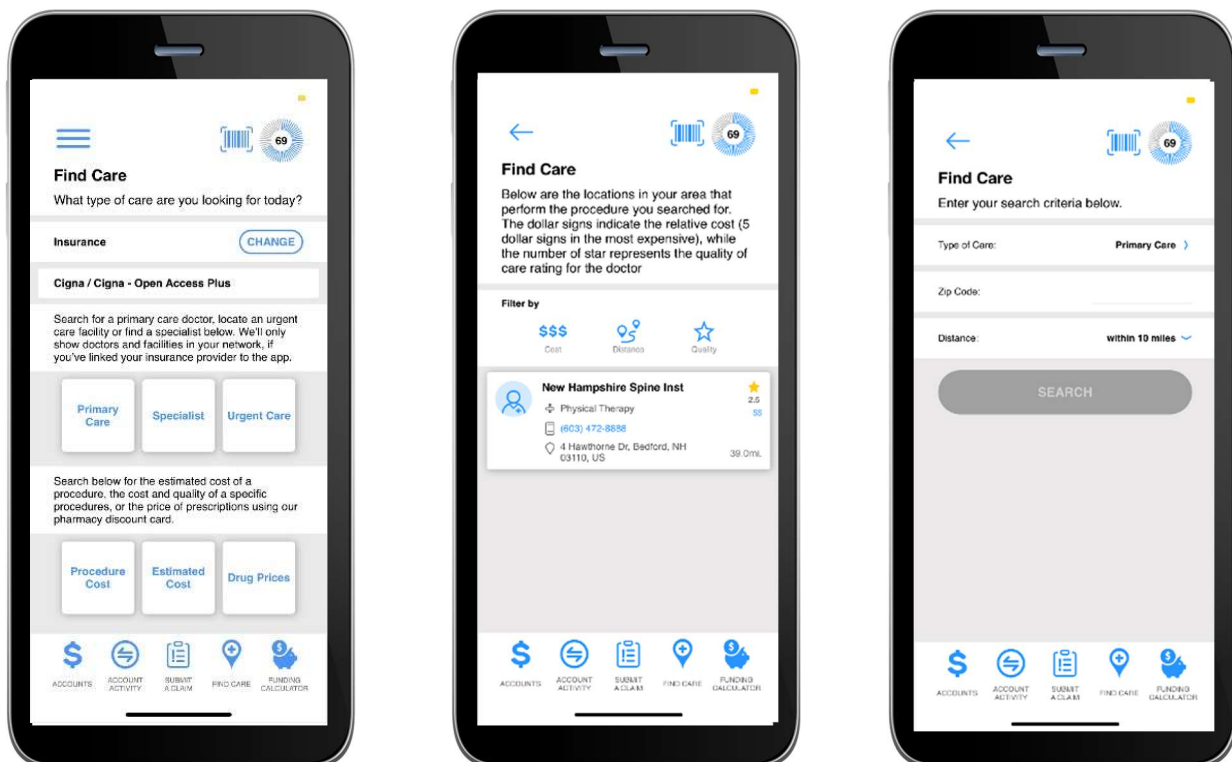
Below are some sample screenshots:
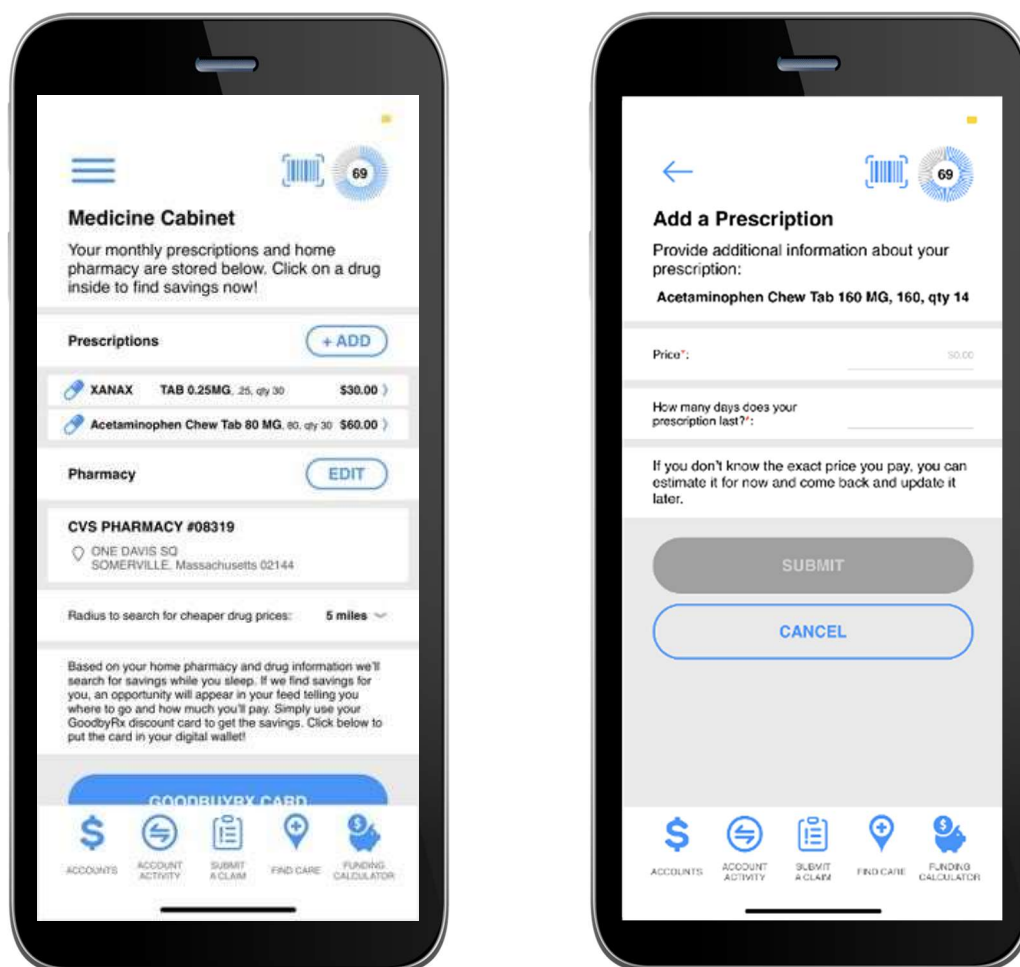
Find Care

ThrivePass Pre-Tax Accounts mobile app includes a *find care* feature which can be accessed from the menu screen or by clicking on the icon at the bottom of most screens found throughout the app.
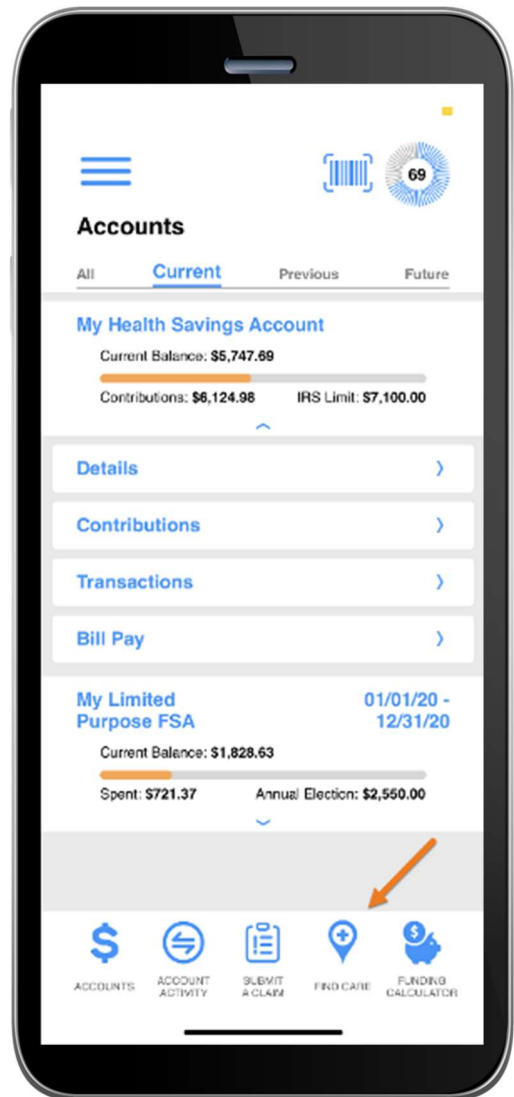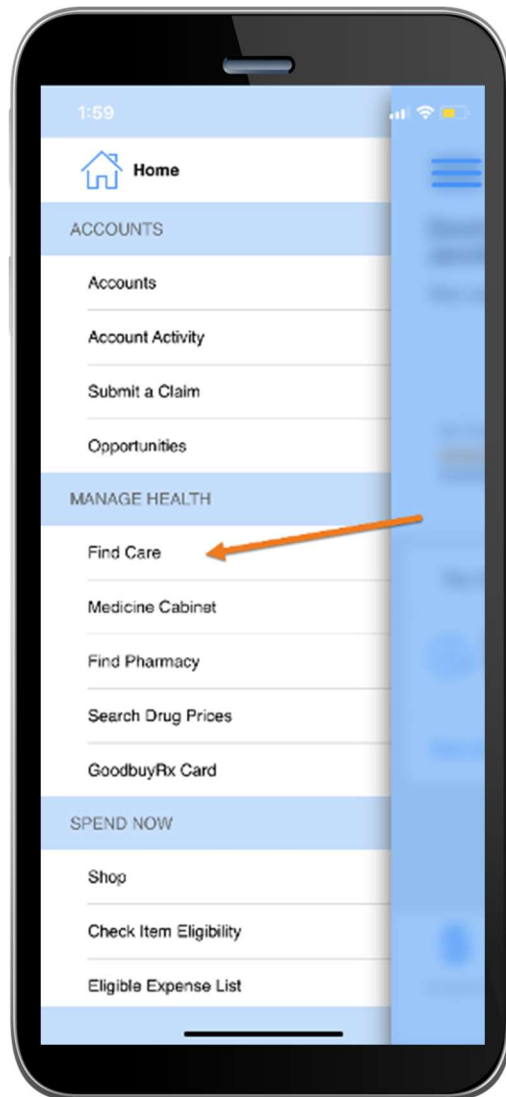
The *Find Care* screen allows you to search for care in a few different ways. By adding your insurance carrier, you will only see in-network providers.

1. If you search for Primary Care, Specialist, or Urgent Care, your results will display with options to filter by patient satisfaction scores and distance

2. You can search for Procedures in two ways:
   - *Procedure Cost* – your results would display with options to filter by quality, distance, and relative cost
   - *Estimated Cost* – your result would display the estimated cost for the procedure in your area

3. Searching for Drug Prices allows you to search for prescription drugs to find sales locations and prices

After you select the type of care, you will be prompted to enter additional information depending on the type of care selected.

Funding Calculator

ThrivePass Pre-Tax Accounts mobile app includes a *find care* feature which can be accessed from the menu screen or by clicking on the icon at the bottom of most screens found throughout the app.
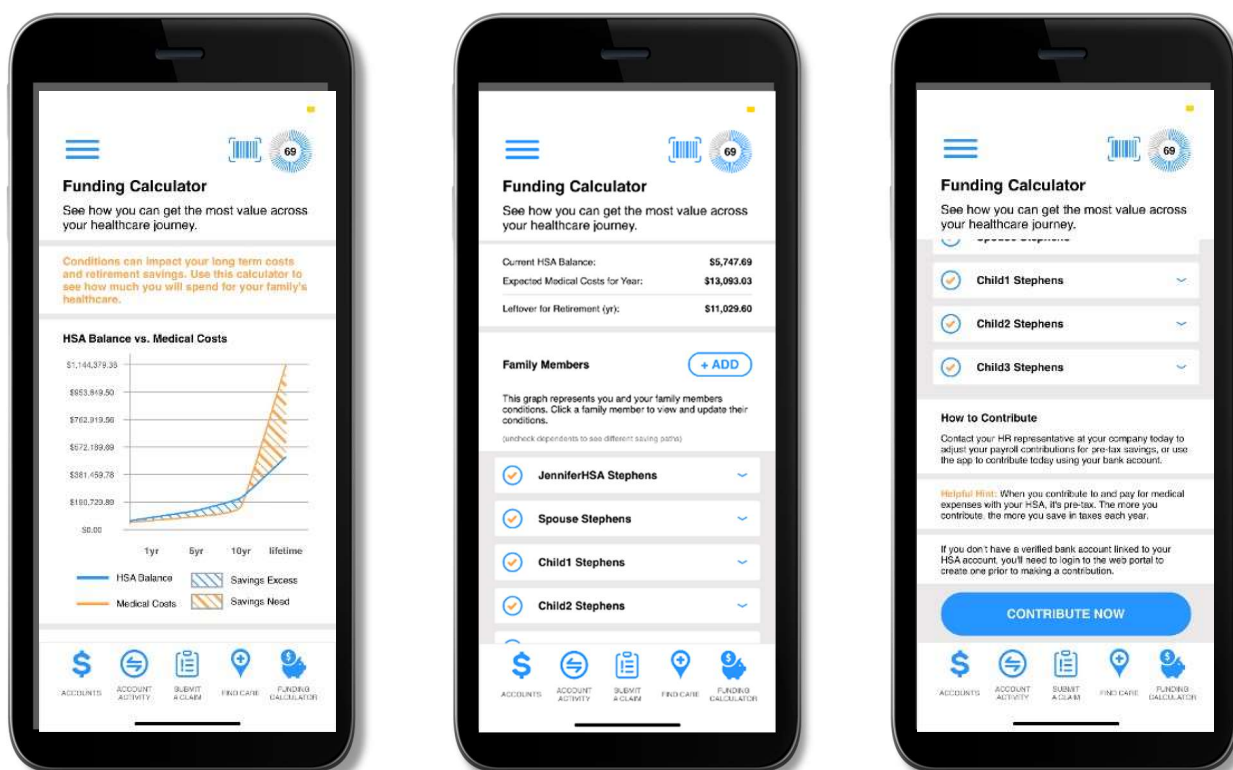
Cards

The *My Cards* screen allows you to view all details related to your benefit debit card(s); you may also access the four-digit PIN associated with your card on this screen. Additionally, you can use this section of the app to mark a card lost/stolen or request a new card.

As seen in the screenshot below, the *my cards* screen displays the cardholder, last four digits of the card number, the card status, and whether the card is associated with a dependent. Tap any individual card on the screen to access the card details:

- **View PIN**
  If you tap the *view PIN* button, an image of the four-digit PIN associated with the selected card displays. You can use this PIN when a card transaction is processed as a debit at the point-of-sale (instead of as a credit, with a signature).

- **Mark as lost/stolen**
  If your card has been lost or stolen, notify your plan administrator by tapping the *lost/stolen* button from the *my cards* details screen. You can choose whether you would like to have a new card issued. If your card is marked as lost/stolen, the card status changes accordingly on the *my cards* main screen.

- **Activate card**
  If you have a new card, you may opt to activate your card later or during your current session.
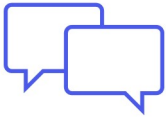
Get In Touch

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.