ThrivePass

Company Name

2025 Pre-tax Plan Year Renewal

Plan Information:

Plan Type	Current Election Maximum	Grace Period	Carryover Amount	Active Runout	Termed Runout	Keep	Term	Update *explain in notes
						☐	☐	☐
						☐	☐	☐
						☐	☐	☐
						☐	☐	☐
						☐	☐	☐

Current IRS Plan Maximums:

FSA/LPFSA - $3,200 (optional $640 Carryover)
DCA - $5,000/married filing jointly; $2,500 married filing separately
Transit - $315 monthly
Parking - $315 monthly

Plan Updates:

If the IRS increases the maximum contribution limit, do you want to automatically increase to the new limit?	❑ Yes ❑ No
If a new maximum Carryover is released, would you like to elect the increase?	❑ Yes ❑ No

Enrollment:

Open Enrollment Begins*:	Open Enrollment Ends*:
Date new enrollments will be posted to Prism*:	Date TP may pull new plan year enrollment through the API*: ***(Any changes that occur after the pull will require manual adjustments)***
Total number of employees*:	Total number of benefit eligible*:

Important Notes:

- Please provide updated Plan Year Mapping before Open Enrollment begins.
- Please note that deduction codes must be unique.

Client Notes:

❑ By checking this box, we confirm that we have provided the appropriate filter ID(s) to our bank(s) and/or we have multiple staff available to approve ACH transactions for Pre-Tax claims payment.

- ThrivePass debit filter ID for manual claim and subsidy replenishment settlement is **1472065790** or **1411447673**.
- Debit filter ID for debit card settlement is **1383261866** (Debit card settlement appears as MBI Settlement)
- Debit filter ID for HSA account funding is **A900808825**

Denied ACH transactions may incur a $75 fee per denied transaction

Plan Renewal Agreement Signature:

Signature:	Date:

***REQUIRED INFORMATION**