



# ThrivePass 2021 Open Enrollment Processing

With Open Enrollment season upon us for calendar plan years, we wanted to provide you with another update to our enhanced platform release that is coming next month – specifically around processing 2021 enrollments. We have addressed below the three ways that clients submit enrollment information. Please refer to the appropriate section and let us know if you have any questions.

*Note that if you have a plan year rather than a calendar year, you may disregard this notice. You will be receiving additional information at a later date regarding the ongoing procedure for processing open enrollment files.*

If you currently submit files from your payroll or HRIS system, please continue to do so. HOWEVER, because the file process is automated, *please use a different naming convention on the files (e.g. add “2021 OE” to the beginning of the typical filenames) or send via secure email directly to me or to [Enrollments@thrivepass.com](mailto:Enrollments@thrivepass.com)*. This will allow us to manually pull the files and review before processing. The ongoing files for the remainder of 2020 and into 2021 should process as usual.

The remainder of this message pertains to clients who are not using payroll / HRIS files, so you can disregard.

If you typically submit enrollment information using a spreadsheet, please continue to do so, but note that there is a specific template that we would like you to use (*please see attached*). Please follow the instructions below for submitting your Open Enrollment elections for the 2021 Plan Year. We will provide additional information on the ongoing process by mid-December.

- **How to Complete the Enrollment Manager Template:**

The Enrollment Manager Template contains two tabs – one for Demographic information and one for actual Enrollment information. Each member should have a single line on the Demographic tab, and each member should have a separate line on the Enrollment tab for each account type in which he or she has enrolled. For example, if the member has a Health FSA, Dependent Care FSA and Parking, he or she will show once on the Demographics tab and have three separate lines on the Enrollment tab.

**We have populated both tabs with an example for your reference.**

- Columns with gray headers (A-C on each tab) are for internal ThrivePass use and may be left blank.
- Columns with orange headers are either required fields or conditionally required fields that are only required for in certain instances – these are signified with an asterisk “\*” at the end of the description. You can click on each column header to view a description of the data needed in each column. *Please pay particular attention to the formatting notes (e.g. birthdates should be YYYYMMDD), and if you are copy/pasting in from another spreadsheet please review the pasted information to verify that the*



*formatting remains intact (e.g. ensure that leading or trailing zeroes on SSN's aren't dropped).*

- If you have non-standard codes for the Plan ID and Account Type Code fields, we have included a separate tab that shows your plan-specific information.
- **Where to Submit the Completed Spreadsheet:**

Once your Enrollment Manager spreadsheet is complete with 2021 open enrollment information, please send it via secure email it to [Enrollments@thrivepass.com](mailto:Enrollments@thrivepass.com) for processing. We will review the file to verify formatting and reach out if we spot any issues. Going forward, you will be able to load your own enrollments, as well as contributions, through the Employer Portal. We will provide you with “How to” Guides and short training videos within the next couple of weeks.

[If you typically use hard copy enrollment forms to submit enrollment data,](#) you are invited to consider using the Enrollment Manager spreadsheet process. See above for instructions on completing the two tabs of the spreadsheet and submitting to ThrivePass for processing. This procedure will apply just to the 2021 Open Enrollment season. Going forward, you will be able to load your own enrollments, as well as contributions, through the Employer Portal. We will provide you with “How to” Guides and short training videos within the next couple of weeks.