Employees

FSA Quick Start Guide

Lively Flexible Spending Account (FSA)

1 Check your email

You will receive an email from Lively to complete enrollment and sign into your new FSA. Click the **"Complete Enrollment Now"** button in the email to get started.

2 Complete enrollment

You will be redirected to the Lively website to complete enrollment. Depending on how your employer enrolled you, be prepared to provide:

- A secure password
- Your Social Security Number (SSN)

Please review and accept Lively's Terms & Conditions and Privacy Policy. If you're unable to complete enrollment with your email or SSN, reach out to Lively Support at support@livelyme.com for help.

3 View your Lively FSA dashboard

After accepting Lively's terms, you will be directed to access your Lively FSA via the Lively platform. If you are enrolled in more than one Lively benefit, you will be directed to the role selection page first, which will allow you to select which benefit to view.

4 Activate your Lively Visa® Benefit Access debit card

You may have already received your debit card, or it is currently on its way to you in the mail. You should receive your debit card by your plan year start date in a plain white envelope.

To activate your card, navigate to the **Debit cards** page from the top-left menu of your FSA dashboard or follow the instructions included in the envelope. If you also have a Lively Standard HRA, your Lively Benefit Access card can be used to pay for eligible expenses for your FSA and HRA. Learn more here.

Once you start contributing and using your debit card, you will see reporting and other important information in your dashboard, such as recent contributions, purchases, required actions, and more.

Lively

5 Link your bank account

Navigate to the **Settings** page from the top-left menu of your FSA dashboard to connect your bank account. This allows you to add direct contributions or to manually reimburse yourself for FSA eligible expenses paid out-of-pocket.

6 Order a dependent card (Optional)

You can do this from the **Debit cards** page mentioned in Step 4. It can take 10 to 13 business days for your dependent card to reach you.

7 Get familiar with important FSA details (Optional)

We recommend familiarizing yourself with the FSA plan timeline listed on your main dashboard. This includes details such as start date, end date, run-out period, and grace period.

New to FSAs? Check out Lively's FSA Guide to learn more, and our What's Eligible tool to search for FSA eligible expenses.

8 Download the Lively mobile app (Optional)

Download the "Lively Benefits" mobile app, available for iOS and Android, to take your FSA on the go.

Have questions? We're here to help.
Email or call Lively for responsive, expert assistance.