

Lively Flexible Spending Accounts

FSA suite

Offer a tax-free benefit for employees' health or dependent needs, while enjoying hassle-free FSA administration.

Lively combines innovation, customer support, and easy-to-use technology to **elevate the traditional FSA experience.**

General Purpose FSA

Covers eligible medical, dental, and vision expenses that may not be covered by health insurance.

Limited Purpose FSA

Covers eligible vision, dental, and select preventive services not covered by health insurance.

Dependent Care FSA

Covers care expenses for children up to age 13 and elderly or disabled adults claimed as federal tax dependents.

Learn about the benefits of offering FSAs by visiting the Lively blog: livelyme.com/blog.

Why FSAs with Lively?

Limited support and education from traditional FSA providers result in administrative burdens and forfeited funds for employees. At Lively, we design our FSA experience to help each account reach its maximum potential and simplify FSA administration.

Unparalleled customer service

- Leading 40 points over the competition in customer satisfaction.¹
- Support team available via chat, phone, and secure messages to help account holders.
- No bouncing around call centers, we solve 93% of account holder inquiries in one interaction.
- Direct access to a Customer Success Team dedicated to the needs of the FSA admin.

FSA administration made easy

- Personalized, on-hands support during implementation to make simplify onboarding.
- Third-party integrations that work with your tech's ecosystem.
- On-demand resources and timely account holder notices reduce questions and tasks for admins.
- Easy-to-use platform with smart automations and paperless billing.

Higher account holder usage

- Guided experiences and intuitive technology makes it easy to use funds from day 1.
- Educational resources and timely communication helps account holders use their FSA like a pro.
- Employees access funds for multiple Lively FSAs with one same debit card, reducing usage barriers.

Key features for Employers

From implementation all the way through to our platform, Lively makes managing FSAs simple.



On-demand reports via the Lively platform to help you make informed decisions about your FSA program. Reports include detailed Plan Summaries, Spend Details, FICA Savings —and more.



Multiple employee enrollment options to fit your needs. Enroll employees within the Lively platform, a secure file transfer, or a third-party integration.



Flexible extension options for each type of FSA. Configure your FSA benefit to offer carryover funds and grace or runout periods.



Smart payroll deductions logic that automatically calculates deductions, ensuring accurate account balances and taking the manual burden off of the admin.



Effortlessly fund employee FSA plans with Reserve Funding, Lively's funding method thoughtfully designed to be easy to set up and even easier maintain.

Key features for Employees

Intuitive technology, robust education, and a highly-rated support team makes it easy for employees to access FSA funds when and where they need.



At-a-glance dashboard with real-time account activity and key information. Valuable details include balance tracking, plan year information, tax savings, action needed — and more.



Personalized FSA guidance via the Lively platform, timely notices, and educational resources help account holders maximize their FSA benefit like a pro.



Intuitive claim and substantiation process. Clear guidance throughout the process and automated approval capabilities make Lively's approval process simple and easy for account holders.



Fast, paperless reimbursements. Once a claim is approved, employees receive reimbursement funds within 1-3 business days via direct deposit.



Manage and access funds on-the-go with one Lively Visa® Benefit Access Debit Card for all FSA accounts and Lively's Mobile App.

Raise your expectations for FSA benefits.

¹ Net Promoter Score (NPS) is a widely used metric that takes the form of a single question asking customers to rate the likelihood that they would recommend Lively. Lively holds a 70+ NPS score, compared to the industry average of 16-34.