



MissionSquare Retirement

Meritain Health®
Claims Portal Guide

Table of Contents

Introduction and How to Access Claims Portal.....	3-4
Welcome to your Claims Portal	5
How to Add Direct Deposit	6-7
How to Add Dependents	8
How to File a Claim	9-11
How to File a Recurring Claim.....	12
Tools, Support and Additional Information	13



Participant Website Steps to the Meritain Health Claims Portal

Meritain Health is the third-party claims administrator for the MissionSquare Retirement Health Savings (RHS) plan. The Meritain Health claims portal is accessible through single sign-on from the MissionSquare Retirement's online account.

Step 1

Go to www.missionsq.org, select *Participant Log in* and enter your user ID and password.

MissionSquare
RETIREMENT

Our website was upgraded on October 9, 2022. Before logging in to our website for the first time, click [here](#) to create a new user ID and password.

Welcome!
We are here
to help you
achieve your
financial goals.

Log in to conveniently manage your account.

While logged in, check out the Financial Wellness Center — designed for you — and explore the many tools and resources to help you achieve your goals.

User ID

Password

Log In

[Forgot User ID?](#)
[Forgot Password?](#)
Need Access? [Start here.](#)

Step 2

For participants with multiple plans, expand menu option by clicking on "...", then select *Benefits Reimbursement*.

Account Name	Actions	Status	Last Contribution	Account Balance	Vested Balance	*YTD Return
COUNTY OF SAMPLE - HRA	⋮	Active	\$25.00	\$5,605.20	\$5,605.20	-12.98%
SAMPLE SANITATION DISTRICT - HRA	⋮		\$1,971.61	\$2,448.65	\$2,448.65	-13.19%
Combined Values			\$1,996.61	\$8,053.85	\$8,053.85	-13.04%

For participants with a single plan, select *My Account*, then *Benefits Reimbursement*.

Type	Actions	Id	Date	Amount	Status
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There is no withdrawal history

Step 3

Select *Ok* to be redirected to the Meritain Health claims portal.

You are about to leave MissionSquare Retirement's website and will be redirected to the Meritain Health website. Meritain Health is the Third Party Administrator (TPA) that exclusively handles all of your Retiree Health Savings (RHS) plan claim processing and record keeping. You will be able to submit your reimbursement requests and inquire about your RHS claims through the Meritain Health website. Please be advised that clicking "OK" will connect you to the Meritain Health website. As the TPA, Meritain Health complies with the HIPAA (Health Insurance Portability and Accountability Act of 1996) privacy and security rules regarding protected health information of RHS plan participants.

Cancel Ok

Welcome to your claims portal—where you can set up direct deposit, add eligible dependents and file claims.

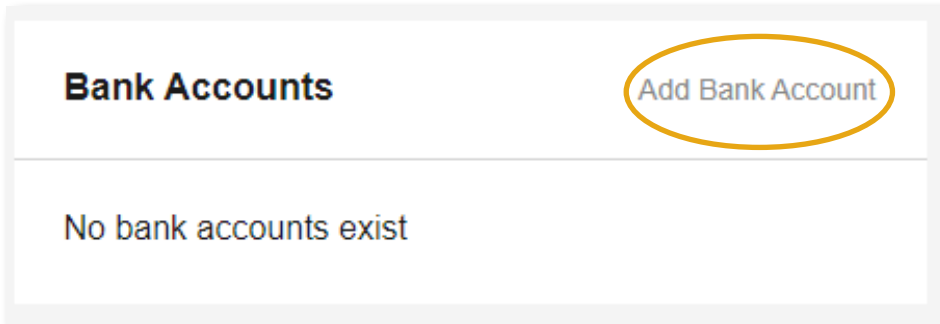
The screenshot shows the MissionSquare Retirement website. At the top left is the logo "MissionSquare" in blue, with a colorful sunburst icon in the letter 'i', and "RETIREMENT" in blue capital letters below it. A navigation bar contains four links: "Home" (underlined), "Accounts", "Tools & Support", and "Message Center". Below the navigation is a green banner with the text "Direct Deposit Update" and "For all new or updated bank accounts", with a "View More" link. To the right of the text is an illustration of a blue piggy bank with gold coins. Below the banner is a white box with the text "Welcome to the claims portal for your health reimbursement arrangement (HRA)!". Underneath is a section titled "File Recurring claims online!" with a link "View step by step instructions". Below that is a section titled "I Want To:" with a button labeled "Reimburse Myself".

Please reference the following instructions on how to complete any of the above options online.

Add direct deposit

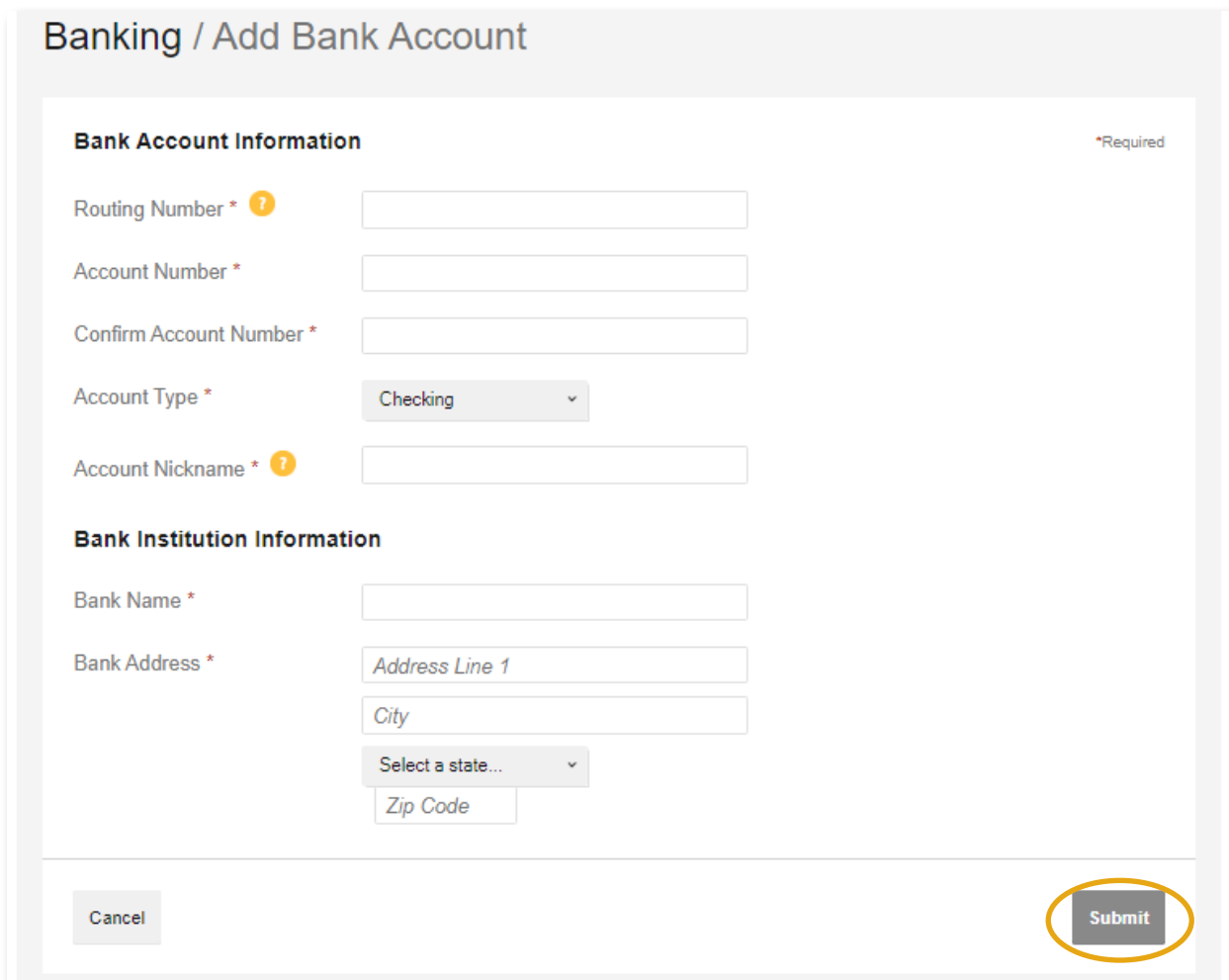
From the home screen:

- Hover over *Accounts* tab and select *Banking*.
- Click on *Add Bank Account*.



Bank Accounts Add Bank Account

No bank accounts exist



Banking / Add Bank Account

Bank Account Information *Required

Routing Number * ?

Account Number *

Confirm Account Number *

Account Type * Checking v

Account Nickname * ?

Bank Institution Information

Bank Name *

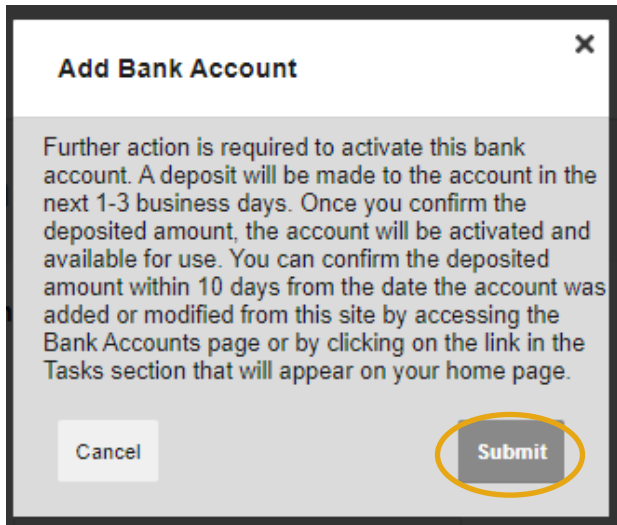
Bank Address *

Select a state... v

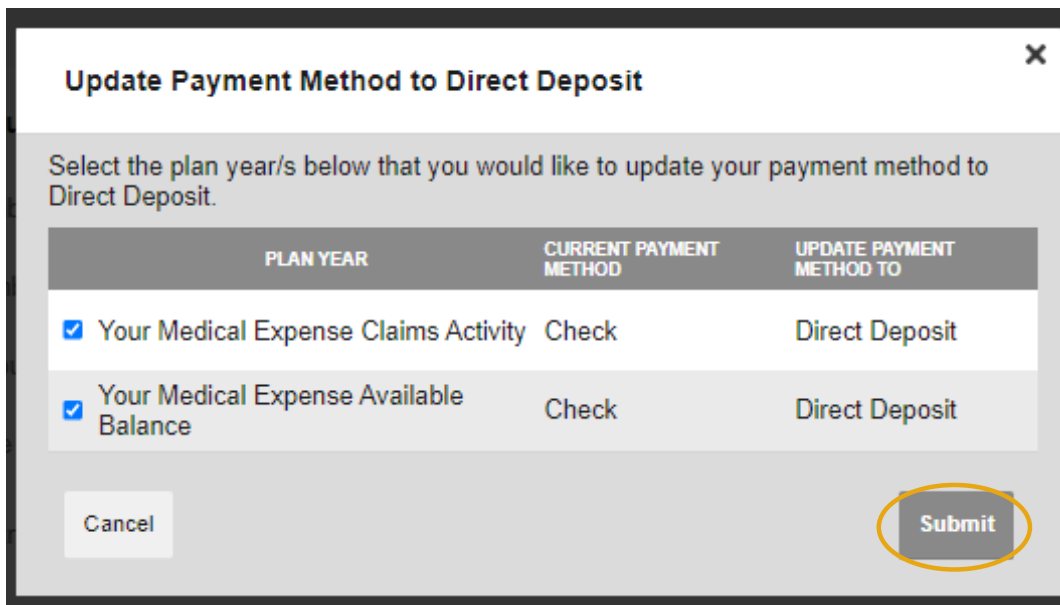
Cancel Submit

- Add required information and hit *Submit*.

- A pop-up message will appear advising you to validate your bank account. Click *Submit*.



- Another pop-up will appear to authenticate your entry asking you to answer one of your established security question. Answer and submit.
- Select the plan years to apply the direct deposit and click *Submit*.



When participants add a new or updated bank account to their participant profile, they will be required to validate the bank account. A micro-deposit will be made into the participants bank account within one to three business days. The participant will be required to confirm the amount of the deposit in order to validate the account. Participants may log into their participant website or contact Customer Service at **1.888.587.9441** to validate the account.

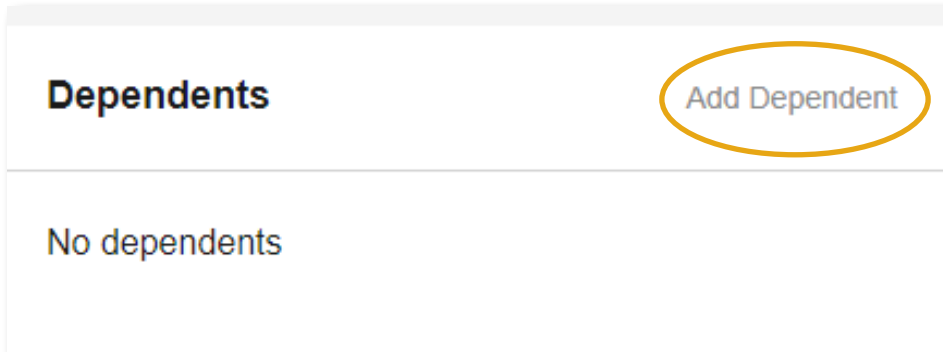
Please note: participants will not receive their reimbursement via direct deposit until they have completed the validation process.

You have successfully added direct deposit!

Add eligible dependents

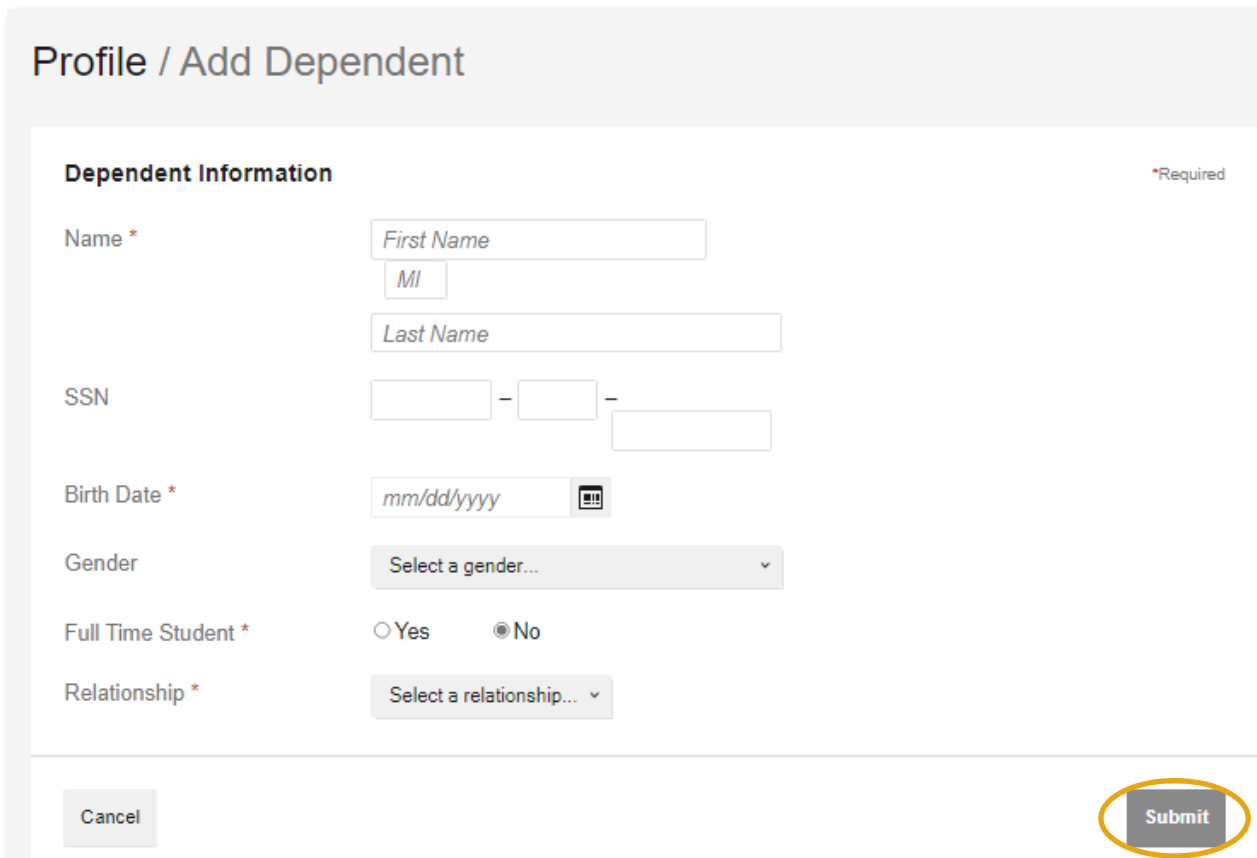
From the home screen:

- Hover over the *Accounts* tab and select *Profile Summary*.
- Under *Dependents* section select *Add Dependent*.



Dependents Add Dependent

No dependents



Profile / Add Dependent

Dependent Information *Required

Name *
First Name
MI
Last Name

SSN - -

Birth Date *

Gender

Full Time Student * Yes No

Relationship *

Submit

- Add required information and hit *Submit*. If you need to add more dependents, repeat the steps until completed.

You have successfully added dependents!

Want to file a claim?

Step 1—ensure your documentation is in good order!

Prior to submitting your claim(s), you should check your available balance and obtain the appropriate supporting documentation. **Please note:** multiple claims should be submitted individually.

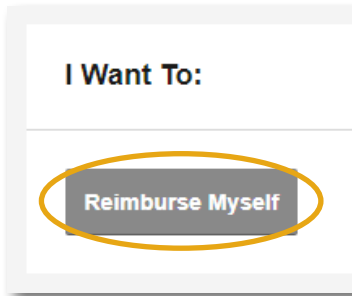
Common examples include:

- Premium Itemization Notice.
- Explanation of Benefits (EOB).
- Itemized statements or bills.

For more information on supporting documentation, review the [Necessary Documentation for In Good Order Submissions](#).

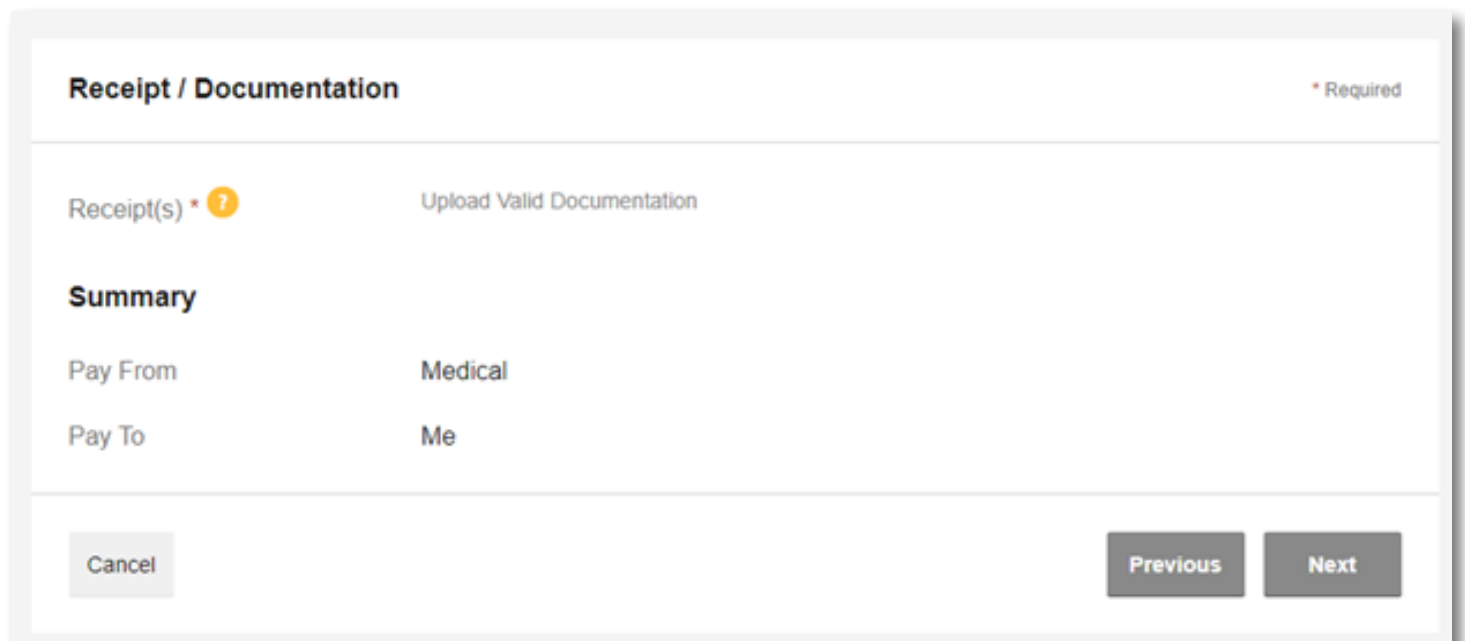
Step 2

Click on *Reimburse Myself* to start the process.



Step 3

You will be prompted to upload your supporting documents.

A screenshot of a web form titled "Receipt / Documentation" with a "* Required" indicator. The form has a section for "Receipt(s) * ?" with a sub-label "Upload Valid Documentation". Below this is a "Summary" section with two rows: "Pay From" with the value "Medical" and "Pay To" with the value "Me". At the bottom of the form, there are three buttons: "Cancel", "Previous", and "Next".

Step 4

Enter your claim details—mandatory fields are indicated with an asterisk (*). Required fields:


- Date of service
- Amount
- Provider
- Category and claim type
- Recipient (select dependent if applicable)


You can establish a recurring claim by selecting this option as shown below:

Available Balance

Available Balance [?]	Medical Activity [?]	Premium Activity [?]
\$1,000.00	--	--

Claim Details * Required

Start Date of Service * 

End Date of Service 

Amount * \$

Provider *

Category * [?]

Type *

Description

If the category is 'Other' or 'Over-the-Counter Drugs', you must provide a description.

Recipient *
 MARY SMITH
 Michael Smith

Add Dependent

Set up a recurring claim for this expense

Did You Drive To Receive This Product/Service?* [?]
 Yes No


Summary

Pay From	Medical
Pay To	Me
Documentation Uploaded	Yes

Step 5

Click *Add Another* to file more than one claim. To ensure claims are processed in a timely manner, they must be broken down by expense type and date of service. **Example:** if you have multiple prescriptions, you must file them separately.

Transaction Summary (1)

FROM	TO	EXPENSE	AMOUNT	APPROVED AMOUNT 		
+ Medical Activity	Me	Medical Copay	\$100.00	\$100.00	Remove	Update
Total Amount			\$100.00	\$100.00		

Cancel Save for Later Add Another Submit

How to file recurring claims

Instead of faxing or mailing recurring claim requests, you can submit them online using the participant retiree health claims portal. **Please note:** recurring claims require documentation of premium amount within 60 days of your requested start date.

The screenshot shows a web form for filing a recurring claim. The form has the following fields and annotations:

- Category ***: A dropdown menu with "Insurance" selected. A red box with an arrow points to it with the text "Select: Insurance".
- Type ***: A dropdown menu with "Medical Insurance" selected. A red box with an arrow points to it with the text "Select: Insurance Type".
- Description**: A text area containing "Reimburse premiums on a monthly basis." A red box with an arrow points to it with the text "Provide recurring frequency. System default is **MONTHLY**." Below the text area, it says "If the category is 'Other' or 'Over-the-Counter Drugs', you must provide a description."
- Recipient ***: A radio button selected for "JOHN Q DOE". Below it is a link "Add Dependent".
- Set up a recurring claim for this expense**: A checkbox that is checked. A red box with an arrow points to it with the text "Ensure you check this box to enable recurring reimbursements."

After accessing Meritain Health's claims portal, your home page is easy to navigate:

- On the home screen, select the option to *Reimburse Myself*.
- Upload your supporting documentation. Documentation may include: itemized statements from the provider, retirement paystubs, enrollment confirmation letters, etc.
 - Documentation must show that the premium is paid after taxes and include the following: insurance carrier; type of insurance; policy holder's name; amount; and coverage period.
- Next, add the following details requested on the *Claim Details* screen.

Please note:

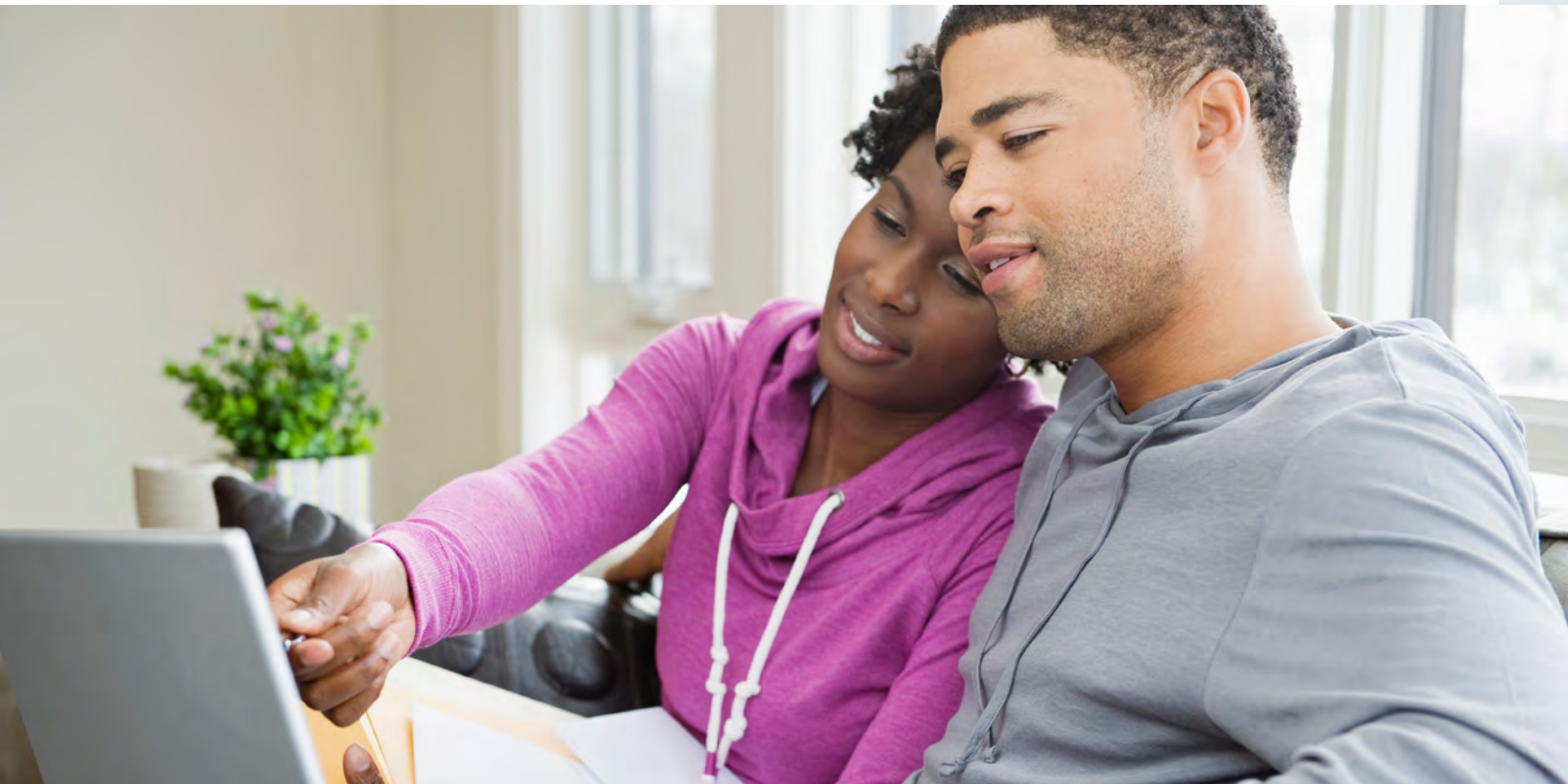
- Once your recurring setup is complete, you will receive a *Recurring Claim Complete* notification.
- Recurring requests will default to a frequency of monthly, unless otherwise noted.
- Change recurring: complete and upload part C, section B of the RHS reimbursement request form found under tools and support, along with supporting documentation.
- Stop recurring: complete and upload part C, section C of the RHS reimbursement request form found under tools and support.

Tools and support


- Gives you access to all forms.
- Includes information on how to contact Meritain Health.

Message center

- If you have an email on file with MissionSquare, you will be able to review denial letters.
- If you are receiving direct deposits and have an email on file with MissionSquare, you can view your advice of deposit.



Questions? Contact us by phone at 1.888.587.9441, by fax at 1.888.665.8495 or by email at missionsq@meritain.com.

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