



# MissionSquare Retirement

## Meritain Health® Website Guide

# Table of Contents

Introduction and How to Access Website.....	3-4
Welcome to your Claims Website .....	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

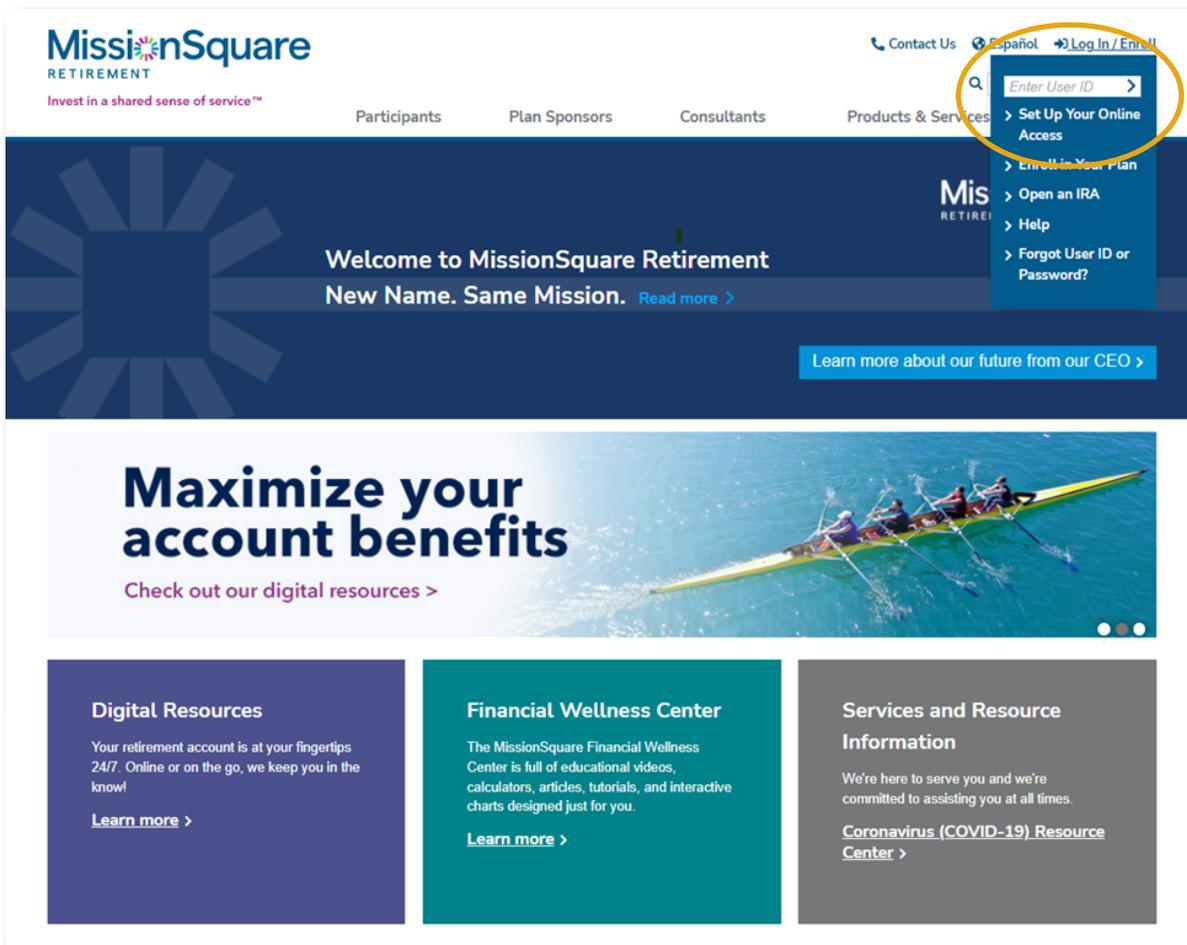


# Account Access Steps to the Meritain Health Website

Meritain Health is the third-party claims administrator for the MissionSquare Retirement Health Savings (RHS) plan. The Meritain Health Website is accessed through single sign-on from the MissionSquare Retirement's online Account Access.

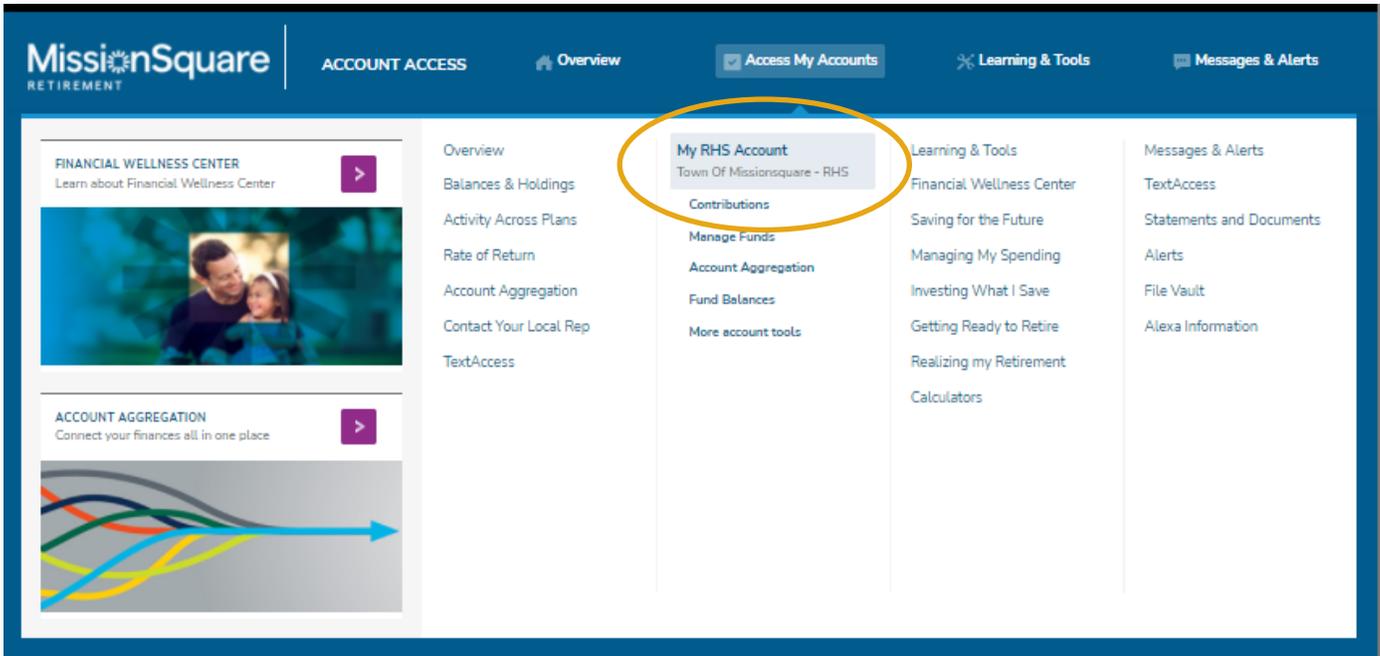
## Step 1

Go to [www.missionsq.org](http://www.missionsq.org) and select *Log In/Enroll* at the top, right corner. If you have your user ID, you can enter it where it states *Enter User ID*. If you need to set up your online access, you can select that option from the drop-down menu.



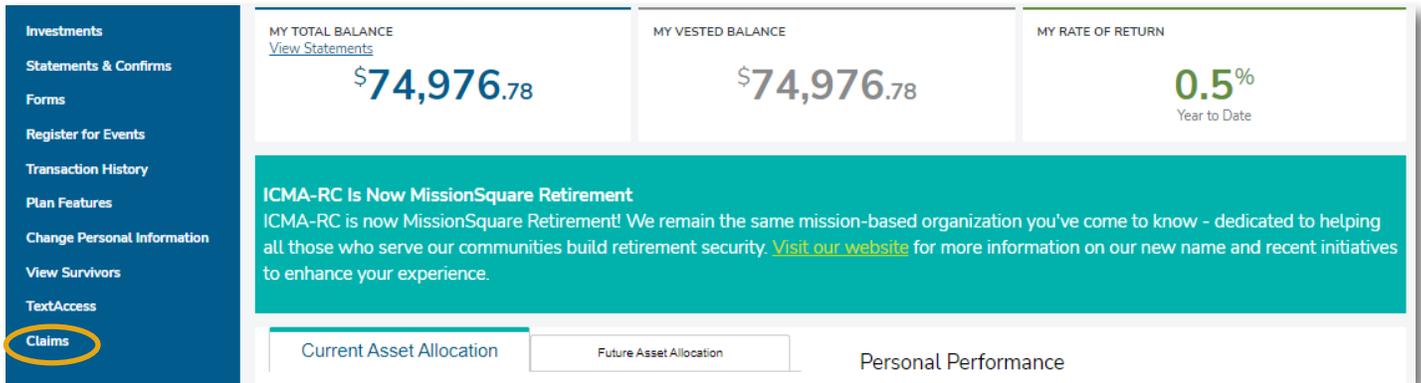
## Step 2

Once logged in, select *My RHS Account* from the *Assess My Accounts* tab on the landing page.



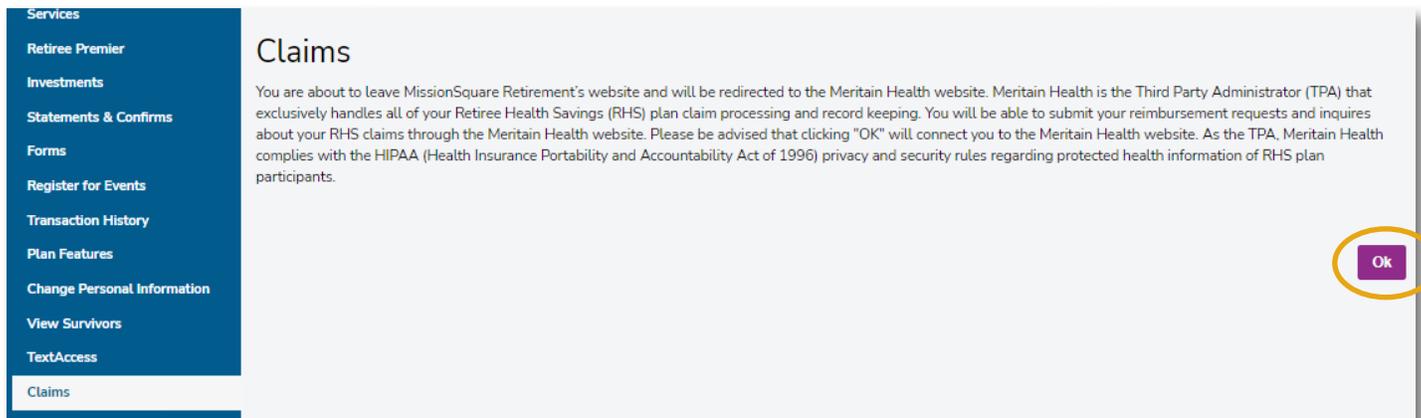
## Step 3

Select the *Claims* option at the bottom left of the page.



## Step 4

Select *Ok* to connect to the Meritain Health website.



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

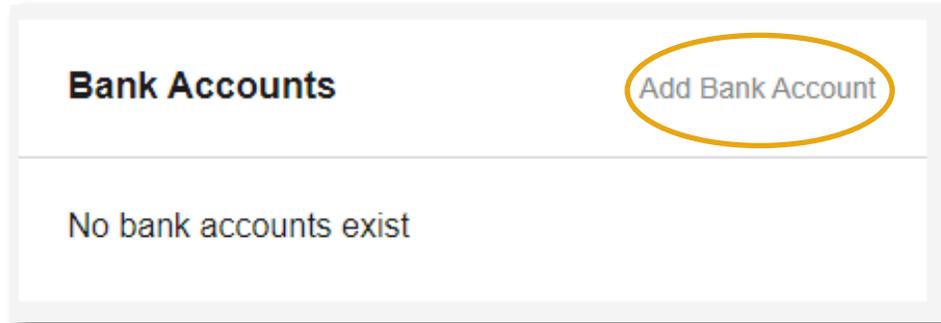
The screenshot shows the MissionSquare Retirement website. At the top left is the logo "MissionSquare" in blue, with "RETIREMENT" in a smaller blue font below it. The "i" in "Mission" has a colorful circular graphic. A navigation bar contains four items: "Home" (underlined), "Accounts", "Tools & Support", and "Message Center". Below the navigation is a blue banner with the text "Want to receive your reimbursement sooner?" and a white button that says "Click here for more info!". To the right of the text is an illustration of a person climbing a large green bill. Below the banner is a white box with the text "Welcome to the claims portal for your health reimbursement arrangement (HRA)!". Underneath this is a section titled "I Want To:" with a button labeled "File A Claim".

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*.



### Banking / Add Bank Account

**Bank Account Information** \*Required

Routing Number \* ?

Account Number \*

Confirm Account Number \*

Account Type \*

Account Nickname \* ?

**Bank Institution Information**

Bank Name \*

Bank Address \*

- Add required information and hit *Submit*.

- Next, from the home screen, hover over *Accounts* tab, select *Payment Method* and select *Update* for the Medical Activity/Premium Activity Account(s).

## Profile / Payment Method

### Current Payment Method

PLAN YEAR	ACCOUNT(S)	PRIMARY	ALTERNATE	
03/16/2000 - 12/31/2099	Available Balance	Direct Deposit	-	<a href="#">Update</a>
03/16/2000 - 12/31/2099	Medical Activity Premium Activity	Direct Deposit	-	<a href="#">Update</a>

- Select *Direct Deposit* under *Primary Payment Method* and submit.

[Home](#)

**[Accounts](#)**

[Tools & Support](#)

[Message Center](#)

## Payment Method / Update Payment Method

### Primary Payment Method

Direct Deposit

Signing up for direct deposit will allow your disbursements to be deposited in your designated bank account.

Check

A reimbursement check will be sent via U.S. mail based on your normal reimbursement schedule.

[Cancel](#)

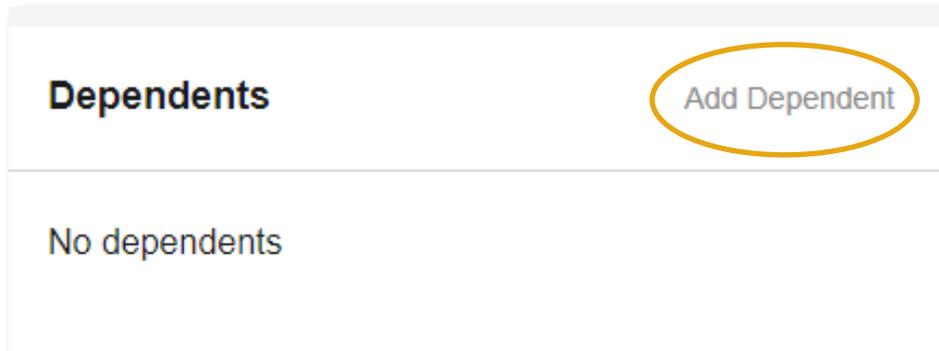
[Submit](#)

**You have successfully added direct deposit!**

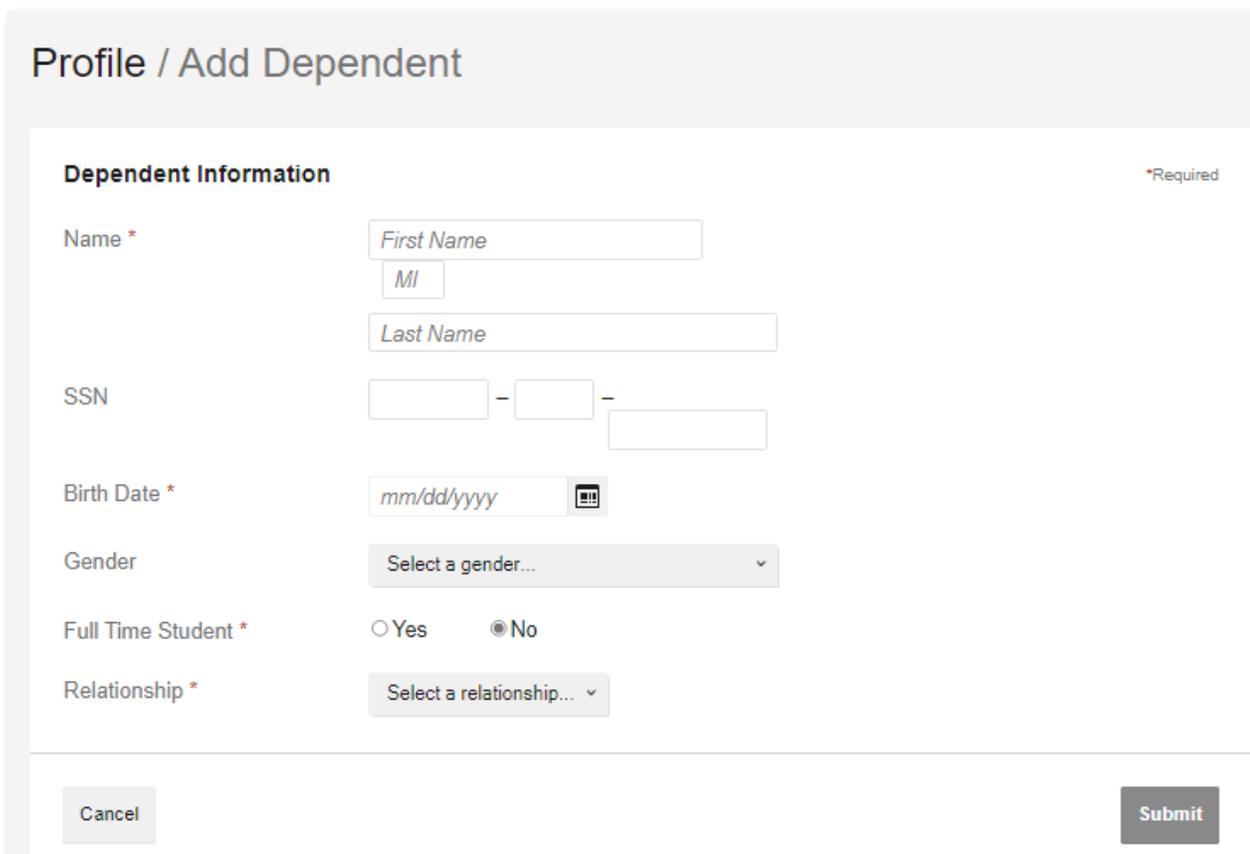
## Add eligible dependents

### From the home screen:

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



The screenshot shows a header with the word "Dependents" on the left and a button labeled "Add Dependent" on the right. The "Add Dependent" button is circled in orange. Below the header, the text "No dependents" is displayed.



The screenshot shows a form titled "Profile / Add Dependent". The form is divided into a "Dependent Information" section, which is marked as "\*Required". The form contains the following fields:

- Name \***: Three input fields for "First Name", "MI", and "Last Name".
- SSN**: Three input fields separated by dashes.
- Birth Date \***: An input field with a date format "mm/dd/yyyy" and a calendar icon.
- Gender**: A dropdown menu with the text "Select a gender..." and a downward arrow.
- Full Time Student \***: Two radio buttons labeled "Yes" and "No", with "No" selected.
- Relationship \***: A dropdown menu with the text "Select a relationship..." and a downward arrow.

At the bottom of the form, there are two buttons: "Cancel" on the left and "Submit" on the right.

- 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.

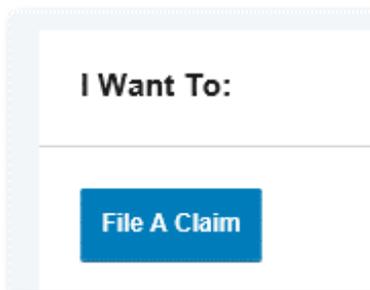
#### Common examples include:

- 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](#).

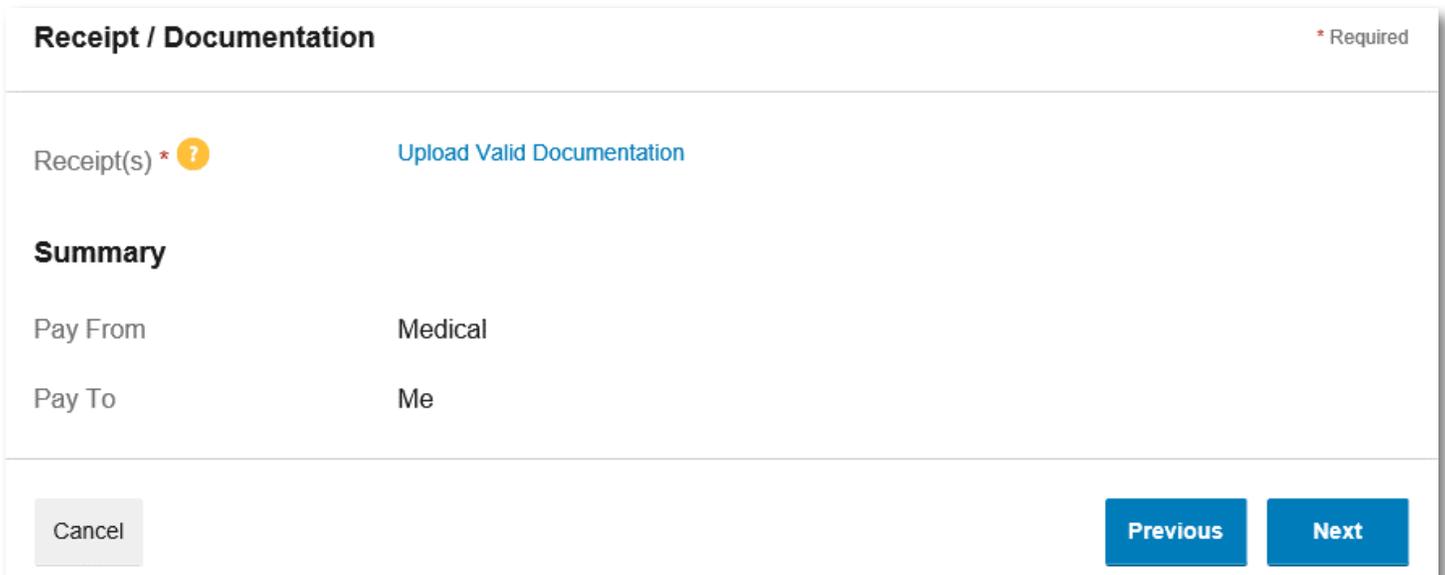
### Step 2

Click on *File a Claim* to start the process.



### Step 3

You will be prompted to upload your supporting documents.

A screenshot of a web form titled "Receipt / Documentation" in the top left corner, with a "\* Required" indicator in the top right. The form has a white background and a thin border. Below the title, there is a section for "Receipt(s) \* ?" with a blue link "Upload Valid Documentation" to its right. Below this is a "Summary" section containing two rows of text: "Pay From" followed by "Medical", and "Pay To" followed by "Me". At the bottom of the form, there are three buttons: a grey "Cancel" button on the left, and two blue buttons labeled "Previous" and "Next" on the right.

## 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. See page 12 for more information on how to file a recurring claim.

### Accounts / File A Claim

---

**Available Balance**

Available Balance <sup>?</sup>	Medical Activity <sup>?</sup>	Premium Activity <sup>?</sup>
\$1,000.00	--	--

---

**Claim Details** \* Required

Start Date of Service \*

End Date of Service

Amount \* \$

Provider \*

Category \* <sup>?</sup>

Type \*

Description

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

Recipient \*  Test Participant

[Add Dependent](#)

Set up a recurring claim for this expense

Did You Drive To Receive This Product/Service? \* <sup>?</sup>  Yes  No

---

**Summary**

Pay From	Medical
Pay To	Me
Documentation Uploaded	Yes

---

## Step 5

Click *Add Another* to file more than one claim. In order to process your claims on time, please itemize them. Claims must be broken down by expense type and date of service.

### Transaction Summary (2)

FROM	TO	EXPENSE	AMOUNT	APPROVED AMOUNT 		
+ Medical Activity	Me	Prescription Medication Copay/Cost	\$10.00	\$10.00	<a href="#">Remove</a>	<a href="#">Update</a>
+ Medical Activity	Me	Laboratory Fees	\$5.00	\$5.00	<a href="#">Remove</a>	<a href="#">Update</a>
<b>Total Amount</b>			<b>\$15.00</b>	<b>\$15.00</b>		

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 website.

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

- Category \***: A dropdown menu with "Insurance" selected. A callout box points to it with the text "Select: Insurance".
- Type \***: A dropdown menu with "Medical Insurance" selected. A callout box points to it with the text "Select: Insurance Type".
- Description**: A text area containing "Reimburse premiums on a monthly basis." A callout box points to it with the text "Provide recurring frequency. System default is **MONTHLY**." Below the text area, a note reads: "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 callout box points to it with the text "Ensure you check this box to enable recurring reimbursements."

**After accessing Meritain Health's website, your home page is easy to navigate:**

- On the home screen, select the option to file a claim.
- Upload your supporting documentation. All supporting documentation must show your coverage is active within 60 days of desired start the date of recurring reimbursement. Documentation may consist of: itemized bills, EOBs, premium notices and/or itemized receipts.
  - Documentation must show the premium is paid after taxes and include the following: (i) insurance carrier; (ii) type of insurance; (iii) policy holder's name; (iv) amount; and (v) coverage period.
- Next, add the following details requested on the *Claim Details* screen.

### Please note:

- Once your recurring set up is complete, you will receive a *Recurring Claim Complete* notification.
- Recurring requests will default to a frequency of monthly unless otherwise noted.
- All online recurring submissions must be paid to the participant directly.
- Any request to change or stop an existing recurring set up must be submitted to Meritain Health by completing the Reimbursement Request Form found under the *Tools and Support* menu.

## Tools and support

- 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](mailto:missionsq@meritain.com).

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