

**Meritain Health**<sup>®</sup>  
an  **aetna**<sup>®</sup> company



# MissionSquare Retirement

## Meritain Health<sup>®</sup> Claims Portal Guide

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## 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](http://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

Participants will be taken to a transition page and should click on *View Accounts*.

Welcome, FNAME43220 LNAME43220 [Contact Us](#) [Log Out](#)

MissionSquare Retirement | City of Sample

**Independence Day**  
Please be advised that the New York Stock Exchange will be closed on 07/04/2024 in observation of Independence Day. Transaction requests will be processed on the next business day.

**Welcome!**  
Welcome to your enhanced MissionSquare Retirement login experience! Below you have access to the most popular tools and resources right on your homepage.

Value as of 6/21/2024

**My Total Balance**  
\$635,011.50

**My Vested Balance**  
\$635,011.50

**Did you Know?**  
Did you know that you can click on the View Accounts button below to view details about your accounts?

Account Name	Status	Last Contribution	Balance	Vested Balance	YTD Return
MissionSquare					
CITY OF SAMPLE457 000000 - 457	Separated	\$1,000.00	\$630,518.26	\$630,518.26	--
CITY OF SAMPLE401A/415M 000000 - 401(A)/415(M)	Separated	--	\$4,493.24	\$4,493.24	--
CITY OF SAMPLEX EXEC.MGMT. CONFID. PROFEES 000000 - 401(J)	Separated	--	--	--	--
CNTY TRANSPORTATION SAMPLE457 000000 - 457	Active	--	--	--	--
GRAND TOTAL			\$635,011.50	\$635,011.50	

**View Accounts**

Click on ( . . ) under Actions, then select *Benefits Reimbursement*.

Summary of all accounts as of 06/04/2022  
**\$8,053.85**

**Notifications**  
You have no notifications

**My Accounts**

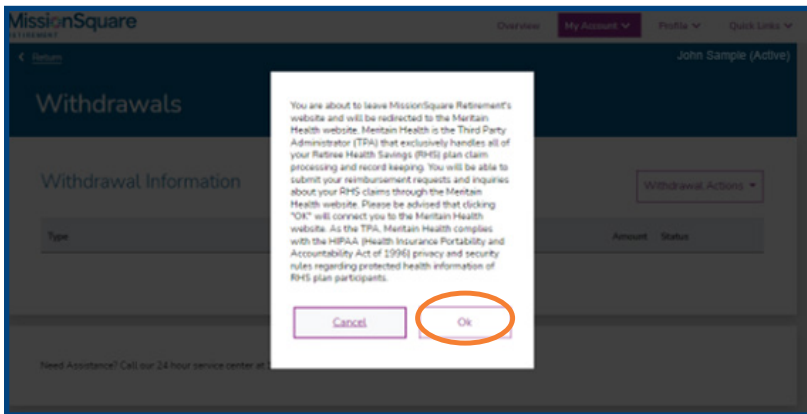
Account Name	Actions	Status	Last Contribution	Account Balance	Vested Balance	**YTD Return
COUNTY OF SAMPLE - HRA	(...)	Active	\$25.00	\$5,605.20	\$5,605.20	-12.98%
SAMPLE SANITATION DISTRICT - HRA	(...)		\$1,971.61	\$2,448.65	\$2,448.65	-13.19%
Combined Values			\$1,996.61	\$8,053.85	\$8,053.85	-13.04%

Benefits Reimbursement  
My Portfolio  
Contributions  
Withdrawals  
Statements  
My Plan Information

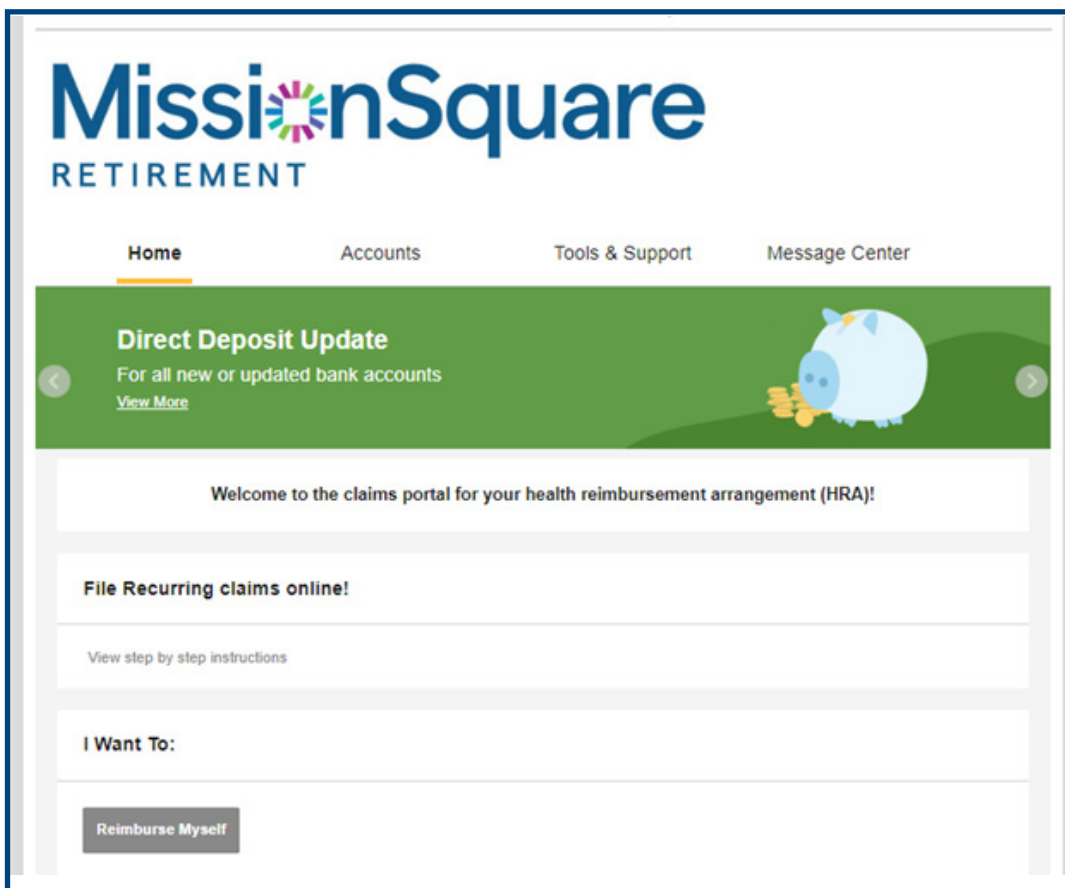
To see a more complete picture of your accounts, please link any other accounts you may have. [Add Accounts](#)

### Step 3

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



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

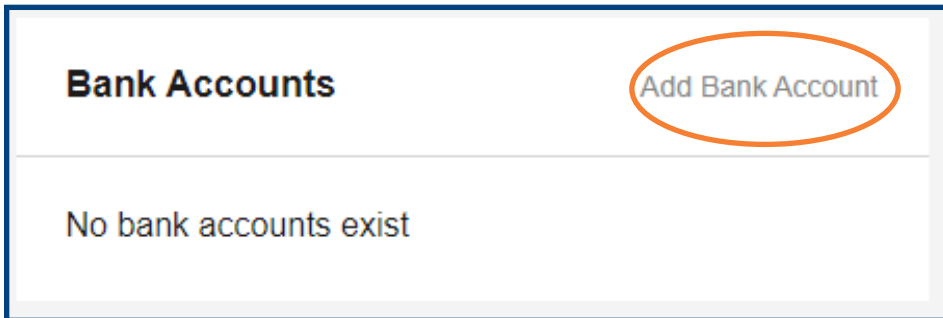


**Please reference the following instructions on how to complete any of the above options online.**

## Add direct deposit

### From the home screen:

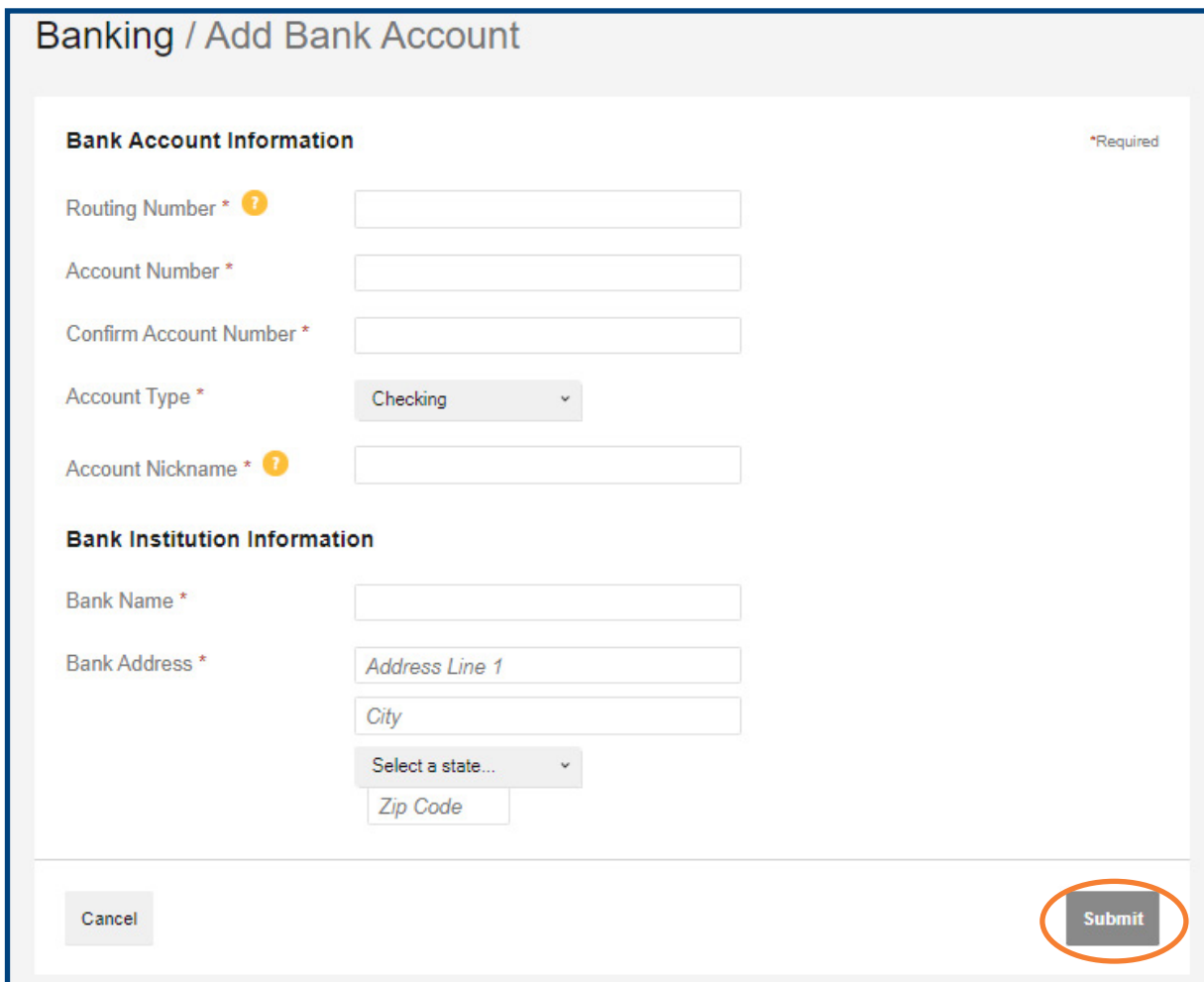
- Hover over *Accounts* tab and select *Banking*.
- Click on *Add Bank Account*.



**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 \*

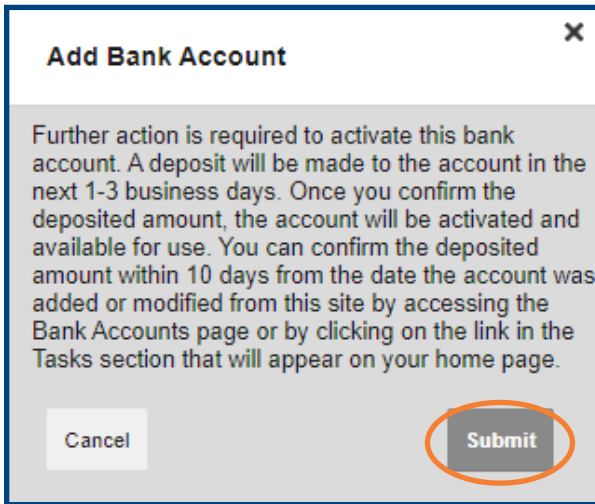
Bank Address \*

Select a state... v

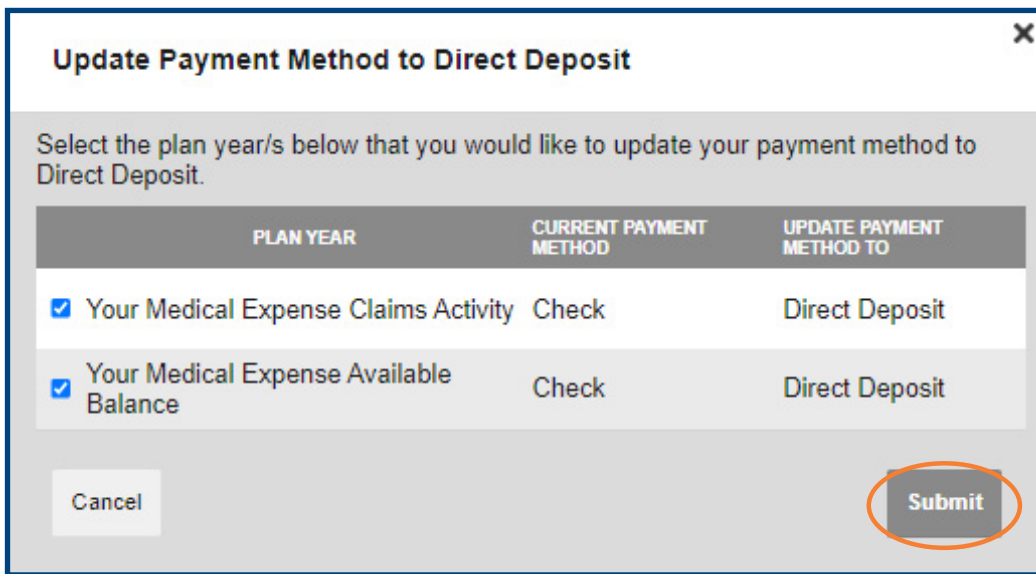
Cancel Submit

- 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.

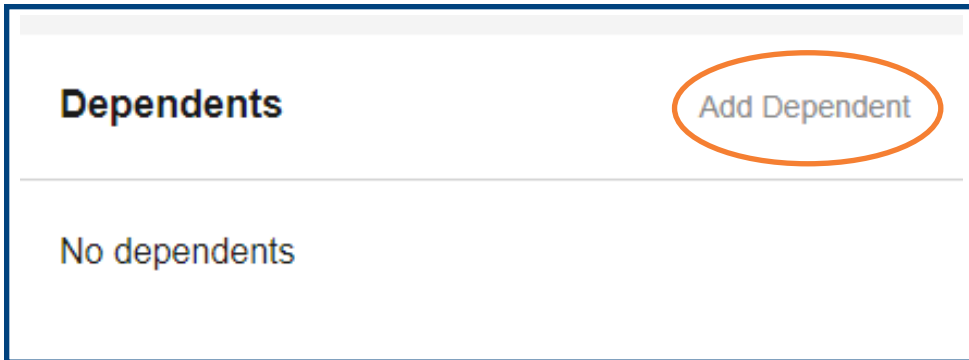
**Please note:** participants will not receive their reimbursement via direct deposit until they have completed the validation process.

**You have successfully added direct deposit!**

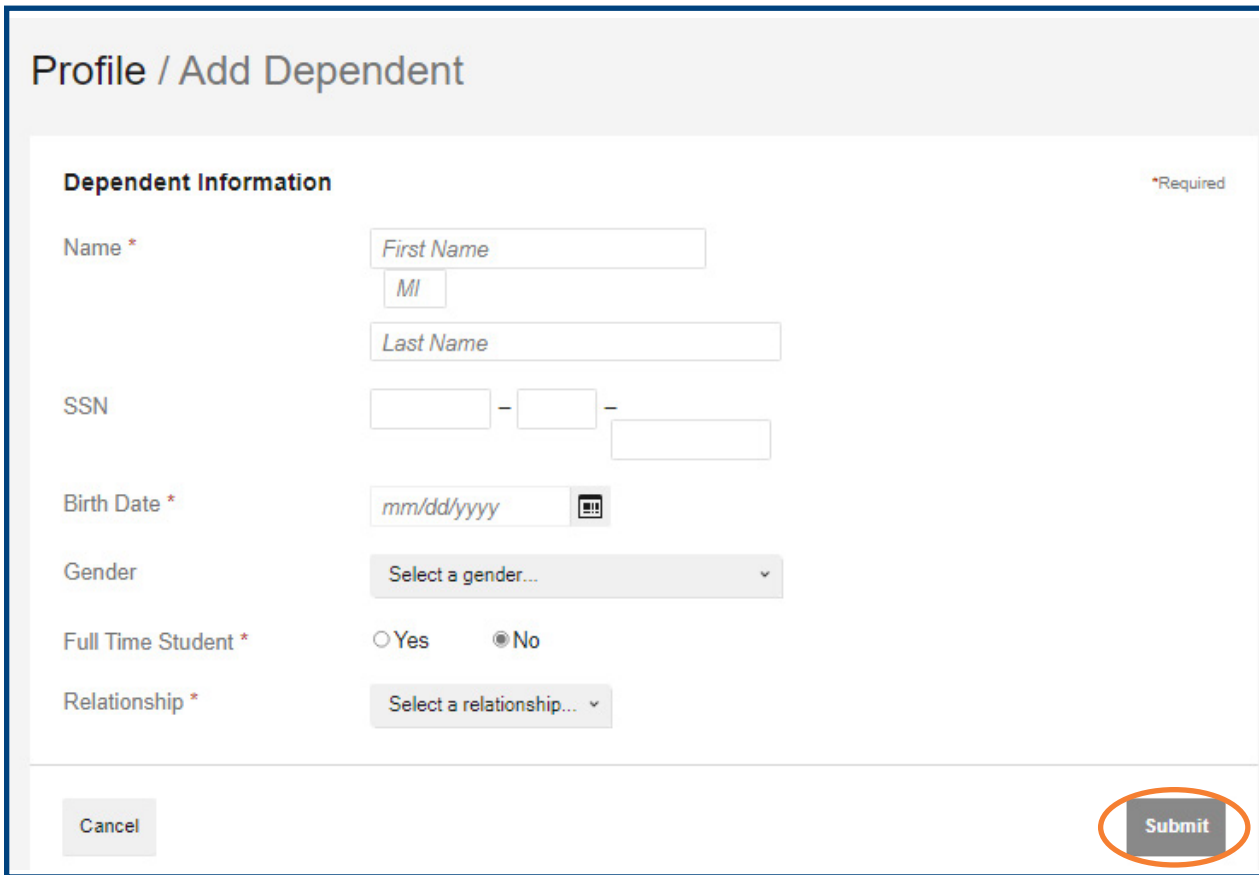
## Add eligible dependents

### From the home screen:

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



The screenshot shows a section titled "Dependents" with a button labeled "Add Dependent" circled in orange. Below the section, the text "No dependents" is displayed.



The screenshot shows the "Profile / Add Dependent" form. The form is titled "Dependent Information" and includes a "\*Required" label. The fields are:

- Name \*
  - First Name
  - MI
  - Last Name
- SSN
- Birth Date \* (mm/dd/yyyy)
- Gender (Select a gender...)
- Full Time Student \* (Yes/No)
- Relationship \* (Select a relationship...)

At the bottom, there are "Cancel" and "Submit" buttons, with the "Submit" button circled in orange.

- 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.

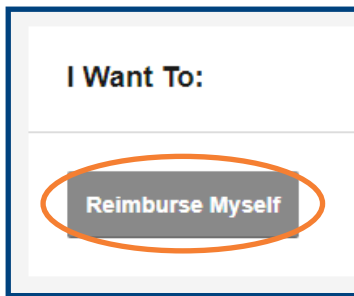
#### Common examples include:

- 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](#).

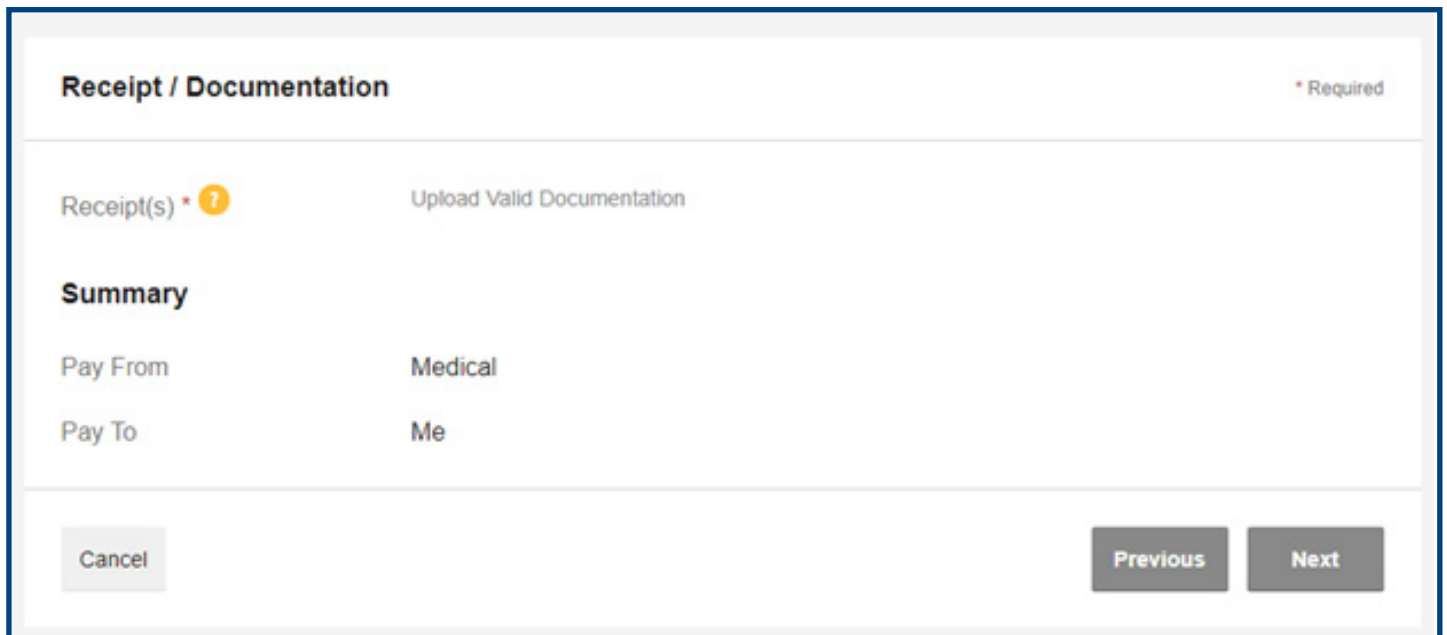
### Step 2

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 in the top right. The form has a section for "Receipt(s) \* ?" with a "Upload Valid Documentation" link. 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" on the left, and "Previous" and "Next" on the right.

## Step 4

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

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

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	

Buttons: 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.

Category \* ? Insurance ← Select: Insurance

Type \* Medical Insurance ← Select: Insurance Type

Description Reimburse premiums on a monthly basis. ← Provide recurring frequency. System default is **MONTHLY**.

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

Recipient \*  JOHN Q DOE [Add Dependent](#)

Set up a recurring claim for this expense  ← 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](mailto:missionsq@meritain.com).**

### Simple. Transparent. Versatile.

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