



# ***MERS Health Care Savings Program***

*Claims Management Portal and  
Reimbursement Guide*

[www.mersofmich.com](http://www.mersofmich.com)

## Claims Management Portal and Reimbursement Guide

---

Welcome to your MERS Health Care Savings Program (HCSP) Claims Management Portal. This one-stop portal gives you 24/7 online access to view account information, manage your MERS HCSP and submit claims for reimbursement.

### *In the Claims Management Portal you can:*

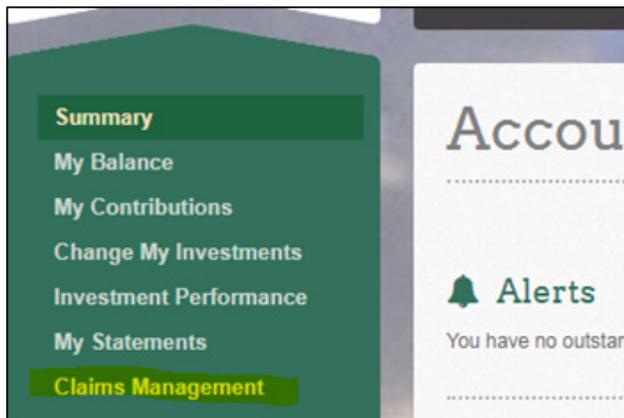
- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Report a lost/stolen card and request a new one
- Update your personal profile information
- Change your login ID and/or password
- Download plan information, forms and notifications

### *Logging in to Your Account*

Go to [mersofmich.com](http://mersofmich.com) > Login

- **Established myMERS Users:** Log in with your existing User ID and Password
- **First-Time Users:**
  - **User ID:** Enter your Social Security Number (SSN)
  - **Password:** Enter your birth year (4 digits), month and day and hire year (4 digits) before selecting “Next”
  - Hire year is the year you hired at the MERS municipality you were most recently employed with
  - You will then be prompted to create a new User ID and password
  - Select and answer the security questions, then click the “Continue” button. In the future when prompted, you will enter the User ID and Password you created, and may on occasion answer a security question upon log in

Once you’ve logged in, click on the “**Claims Management**” link on the left navigation bar.



## Navigating the Home Page

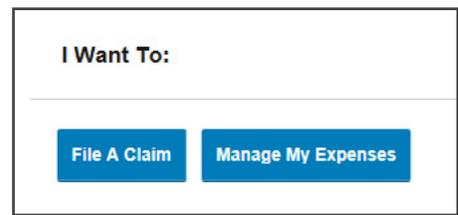
The home page is easy to navigate:

- Utilize the **Available Balance** and **I Want To** sections to work with your accounts right away
- The **I Want To** section contains the most frequently used features for the Claims Management Portal
- The **Accounts** section links to the Account Summary page, where you can see and manage your accounts
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts
- The **Recent Transaction** section displays the last three transactions on your accounts
- The **Quick View** section graphically displays some of your key account information

You can also hover over the tabs at the top of the page.

## Filing a Claim and Uploading Receipts

- On **Home Page > I Want To > File a Claim** or from any page on the portal, expand the **I Want To** section on the right side of the screen
- The claim filing wizard will walk you through the request including entry of information, payee details and uploading a receipt
- To submit more than one claim, click **Add Another**, from the Transaction Summary page
- When all claims are entered in the Transaction Summary, agree to the terms and conditions and click **Submit** to send the claims for processing
- The Claim Confirmation page displays. You may print the Claim Confirmation Form as a record of your submission. If you did not upload a receipt, you can upload the receipt from this screen or print a Claim Confirmation Form to submit to the administrator with the required receipts



**Note:** If you see a **Receipts Needed** link in the Tasks section of your home page, click on it. You will be taken to the Claims page. Click to expand the line item to view claim details and the upload receipts link.

- Click **Submit** to send the claims for processing
- The Claim Confirmation page displays. You may print the Claim Confirmation Form as a record of your submission. If you did not upload a receipt, you can upload the receipt from this screen or print a Claim Confirmation Form to submit to the administrator with the required receipts

### Valid Receipts Needed

In order to be reimbursed, you must provide a valid receipt for all transactions. A valid receipt is considered:

- Store/Pharmacy receipt
- Co-pay receipt from medical provider
- Itemized bill from medical provider
- Insurance company's "Explanation of Benefits"

Your receipt must include the date of service. Canceled checks and credit card statements are not accepted.

## Reimbursement Options

The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Make sure that your employer is offering direct deposit setup online.

- From **Home Page > Tools & Support > Change Payment Method** under the “How Do I” section
- Select the Primary Payment Method and/or Alternate Payment Method and click **Submit**. The Add Bank Account: Direct Deposit Setup page displays.
- Enter your bank account information and click **Submit**.
- The Payment Method Changed confirmation displays.

If there is a bank validation requirement, you will be notified on the portal to look for a small transaction or “micro-deposit” in your designated bank account in the next couple of days to enter online, which will validate your account.

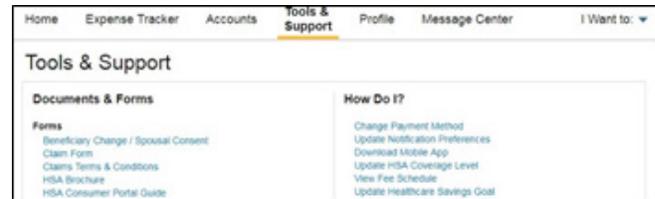
## Viewing Current Account Balances and Activity

- For current Account Balance only, go to **Home Page > Accounts**
- For all Account Activity, click on the Accounts tab from the Home Page to bring you to the Account Summary page. Select the underlined dollar amounts for more detail (e.g., click on the amount under “Eligible Amount” to view enrollment detail).

Note: You can see election details by clicking to expand the line item for each account.

## Viewing Payment (Reimbursement) History

- From **Home Page > Accounts > Payments** you will see reimbursement payments made to date, including debit card transactions.
- By clicking on the line of a payment, you can expand the data to display additional details about the transaction.

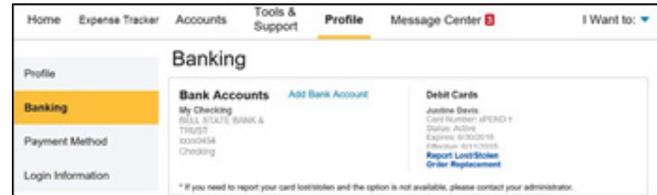


ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DEBITED	AVAILABLE BALANCE
Limited Purpose	\$2,600.00	\$1,001.21	\$0.00	\$0.00	\$1,001.21	\$2,600.00
Dependent Care	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,653.83

DATE	NUMBER	METHOD	STATUS	AMOUNT
There are no records to display.				

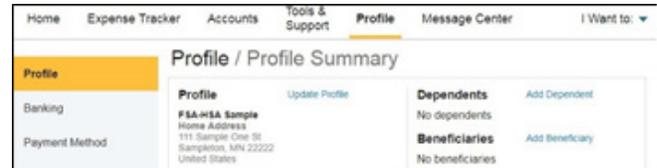
## Reporting a Debit Card Missing and/or Requesting a New Card

- From **Home Page > Profile > Banking**
- Under the Debit Cards column, click **Report Lost/Stolen or Order Replacement** and follow instructions.



## Updating Personal Profile

- From **Home Page > Profile**, you will find links to update profile information including profile summary details, dependents and beneficiaries.
- Click the appropriate link on the Profile screen for your updates: **Update Profile** or **Add/Update Dependent**. Some profile changes will require you to answer an additional security question.
- Complete your changes in the form.
- Click **Submit**.



## Expense Tracker

To view and manage ALL health care expense activity from EVERY source, use the Expense Tracker.

- **Home Page > Expense Tracker** is an easy-to-use consolidated view of health care expenses for ongoing management of medical claims, premiums, and card transactions.
- Easily filter expenses by clicking on the filter options on the navigation pane on the left side of the screen or by clicking on the field headers within the Expense Tracker.
- Search for specific expenses using the search field.
- Export expenses into an Excel spreadsheet by clicking on the **Export Expenses** button.

Expense Tracker					
Expense Summary					
	Total Expenses	Total Paid Expenses	Total Unpaid Expenses		
	\$1,651.71	\$350.50	\$1,301.21		
Total Eligible to Submit: \$250.00					
DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	THIMMATED AMOUNT	STATUS
8/19/2018	Other	Undefined	medical	\$100.00	\$
8/16/2018	Other	Undefined	medical	\$100.00	\$
7/12/2018	Dental	FSA-HSA Sample	Park	\$1,050.00	\$
6/29/2018	Dental	FSA-HSA Sample	Park Nicolet	\$1.21	\$
6/21/2018	Medical	Undefined	-	\$0.00	\$
5/9/2018	Other	Undefined	-	\$150.00	\$

## Adding an Expense

- From **Expense Tracker >** click **Add Expense** button
- Complete the expense detail fields. You can even upload a copy of the receipt and add notes for your records.
- Once the expense has been added to the Expense tracker you can pay the expense, if desired.

## *Paying an Expense*

You may process payments/reimbursements for unpaid expenses directly from the Expense Tracker page.

- Expenses will be categorized and payment can be initiated for unpaid expenses by clicking on the button to the right of the expense details.
- Choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment.
- Click **Pay**; the claim details form the Expense Tracker will be pre-populated within the claim form. Review and edit the claim details as needed.
- You will have the option to either request a reimbursement to yourself or pay the provider.

1/1/2018	Vision	Undefined	Mayo Clinic Eye Center	\$250.00	\$	Pay
Expense Details		Description: Eye Glasses	Date(s) of Service: 1/1/2018			
		Source: Online	Total Billed Amount: \$250.00			
		Expense Amount: \$250.00	Received Date: 5/29/2018			
		Payable Amount: \$250.00				
		Upload Receipt(s)	Add Expense Note	Mark as Paid		
		Remove Expense	Update Expense			

## *Editing an Existing Expense*

You can edit expense details for all claims statuses directly from the Expense Tracker page.

- Expand the claim details by clicking on the expense line item from the Expense Tracker.
- You will be presented with options to add expense notes, update the expense details, mark the expense as paid/unpaid or remove the expense from the Expense Tracker.

## *Accessing Documents, Forms, Notifications and Plan Information*

### **Documents and Forms**

From **Home Page > Tools & Support**, click any form or document of your choice.

### **Notifications**

From **Home Page > Message Center**, click any link of your choice. You will be able to view and archive current documents as well as reference documents archived previously. You can update notification preferences by clicking on the link.

### **Plan Information**

On **Home Page > Accounts** you will be directed to the Account Summary page. Click into the applicable account name and the Plan Rules will open in a pop-up window. Or from **Home Page > Tools & Support**, you may view plan summaries for basic information. Then, click each applicable plan to see the plan details.



*This publication contains a summary description of MERS benefits, policies or procedures. MERS has made every effort to ensure that the information provided is accurate and (as of the date of publication 02/04/2019). If this publication conflicts with the relevant provisions of the Plan Document, the Plan Document controls. MERS, as a governmental plan, is exempted by state and federal law from registration with the SEC. However, it employs registered investment advisors to manage the trust fund in compliance with Michigan Public Employee Retirement System Investment Act. Past performance is not a guarantee of future returns. Please make independent investment decisions carefully and seek the assistance of independent experts when appropriate.*

PUB 3124 2019-02-04

**Municipal Employees' Retirement System of Michigan  
1134 Municipal Way, Lansing, MI 48917  
517.703.9030 • 800.767.MERS (6377) • [www.mersofmich.com](http://www.mersofmich.com)**