

Medical Reimbursement Account Online Claims Submission User Guide

Your Medical Reimbursement Account is a great way to save on eligible medical expenses, and HealthEquity|WageWorks has worked hard to make the claims and reimbursement process as simple as possible.

This guide outlines the claims/submission process using the HealthEquity|WageWorks website.

Before we outline the steps, here's a few things to know about the claims process:

- The Medical Reimbursement Account (MRA) is a healthcare account with funds that can be used for eligible healthcare expenses. This means transactions must be substantiated with documentation to prove the expense is eligible.
- A receipt or other applicable documentation with the following information will be required:
 - Provider Name
 - Patient Name
 - Type of Service
 - Service Date(s)
 - Patient Responsibility

Online claims process

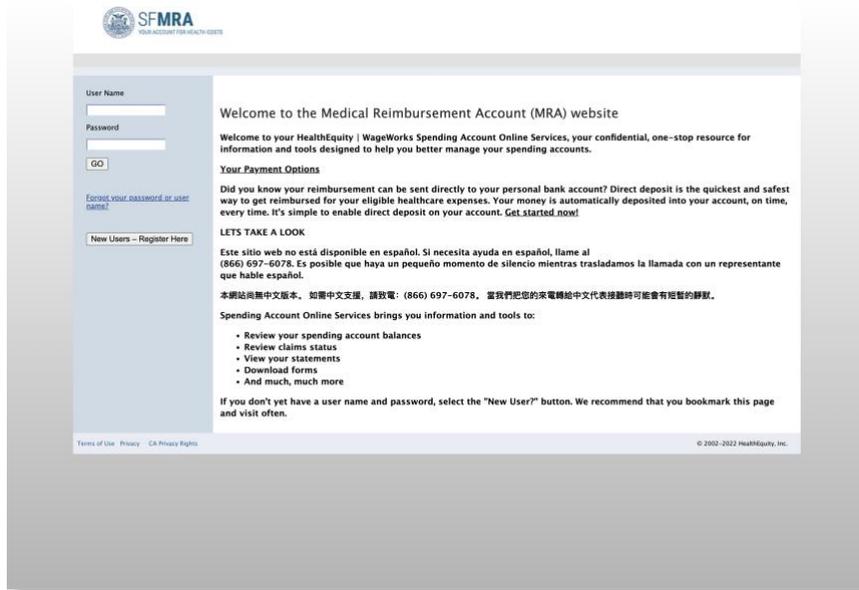
Create your account

To initiate a claim, you will need to first log into your account at <https://participant.wageworks.com/sfmra>. If you have not already created your account, you will need to do that first.

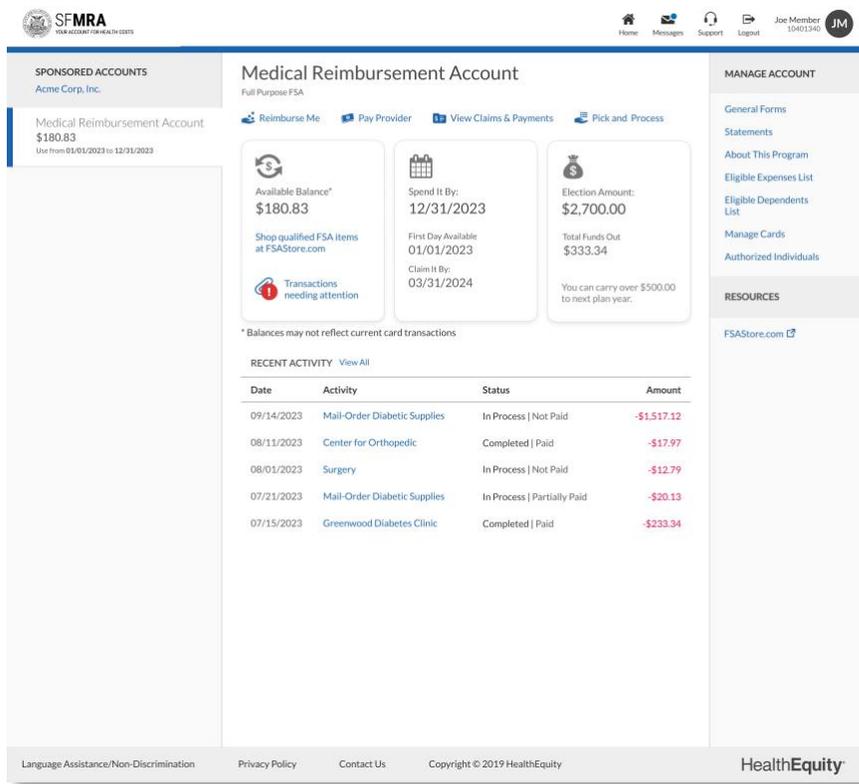
Filing a claim

After you have registered your account and created your username and password, you can submit claims for eligible healthcare expenses. To submit a claim via the web portal:

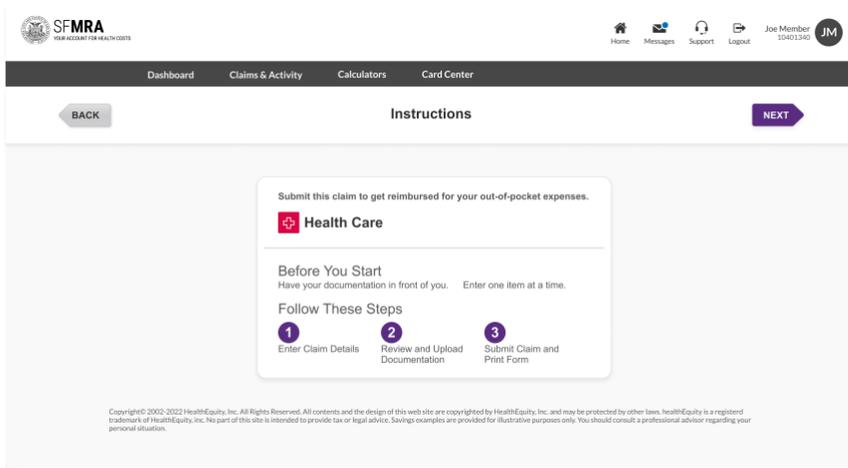
1. Log into your HealthEquity|WageWorks account at <https://participant.wageworks.com/sfmra>



2. From the main dashboard, click Reimburse Me

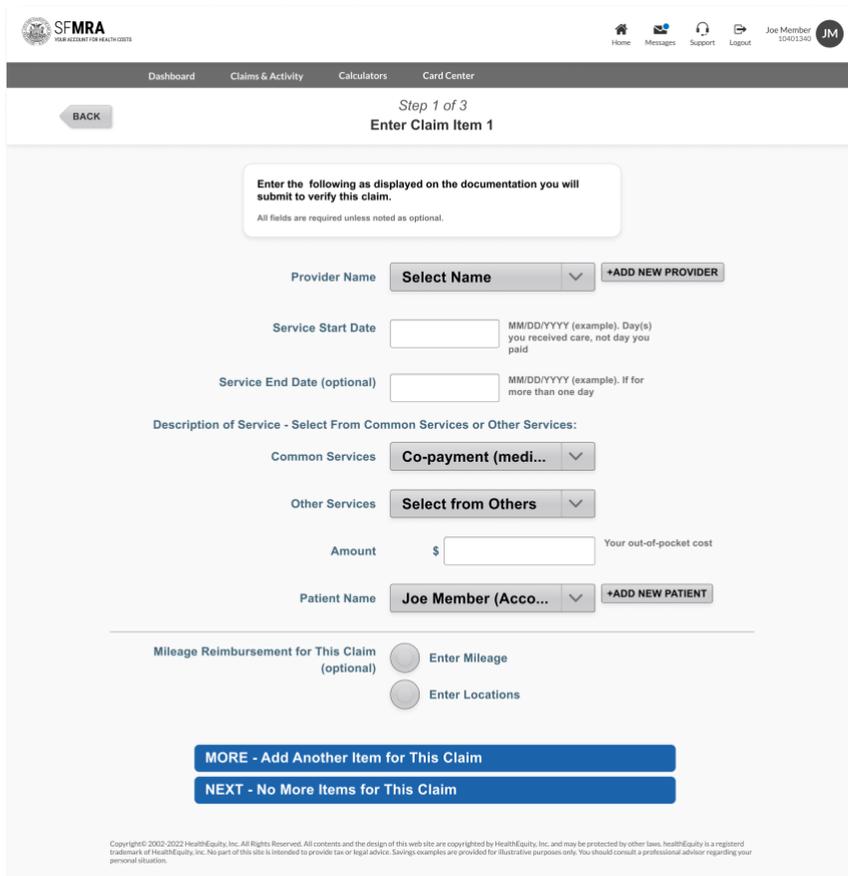


3. Review Claims Submission Instructions and click Next



4. Fill out the Provider Name, Service Date, and Service End Date (optional) fields

- Click 'Next – No More Items for This Claim'



5. Review and Submit or Save Claim

- If a receipt is needed, a pop-up message will appear stating “Saved but Need Receipt”

The screenshot shows the 'Review and Submit Claim' interface. At the top, there are navigation links for Home, Messages, Support, and Logout, along with the user's name 'Joe Member 10401343' and initials 'JM'. Below this is a breadcrumb trail: Dashboard > Claims & Activity > Calculators > Card Center. The main heading is 'Step 2 of 3 Review and Submit Claim', with 'BACK' and 'SUBMIT CLAIM' buttons. A summary box shows 'Entered Claim Items (1)' with a 'Total' of '\$10.00'. Below this is a 'Delete All Claim Items' link. A detailed item entry shows 'Dental One Associates (SL... Co-payment (medical,... in-network) for John Doe (Account Holder)' with a '1' in a red box and a '\$10.00' total. A blue button labeled 'Add Documentation for This Claim' is present. Below the button, it states '*Max file size 5MB. Accepted file types are: JPG, PDF, TIFF, GIF, PNG'. A section titled 'The IRS require the following information for valid documentation' lists: Date of service or purchase, Description of service or purchase, Provider or merchant name, Patient name, and Your cost. A note says 'Note: Some plans require additional documentation'. A 'CERTIFICATION AND AUTHORIZATION' section contains a disclaimer: 'I certify that the information on this form is accurate and complete. I am requesting reimbursement for eligible expenses incurred by myself or an eligible dependent while I was a participant in the plan. I have already received these products and services and have not and will not seek reimbursement of this expense from any other plan or party. If I am covered under more than one health care account, reimbursement will be made according to the payment order determined by those plans and as stated on the WageWorks Web Site.' At the bottom, there is a small copyright notice: 'Copyright© 2002-2022 HealthEquity, Inc. All Rights Reserved. All contents and the design of this web site are copyrighted by HealthEquity, Inc. and may be protected by other laws. healthEquity is a registered trademark of HealthEquity, Inc. No part of this site is intended to provide tax or legal advice. Savings examples are provided for illustrative purposes only. You should consult a professional advisor regarding your personal situation.'

6. To submit a receipt, you have three options

- Submit Receipt Online NOW (recommended for faster processing)
- Submit Receipt Online LATER (claim will pend until receipt is received)
- Download Claim Form (Claim form will pre-populate with the information entered online and can be sent via fax or mail with your receipt for processing)

SFMRA
YOUR ACCOUNT FOR HEALTH COSTS

Home Messages Support Logout Joe Member 10401340 JM

Dashboard Claims & Activity Calculators Card Center

Step 3 of 3
Attach Documentation

BACK

Your Documentation is Needed
Your documentation must be received by a plan's "Claim it By" date in order to be considered for payment. All information will be verified when your claim is processed, and corrected if necessary.

Your Documentation Must Include:

- Date of service or purchase
- Description of service or purchase
- Provider or merchant name
- Patient name
- Your cost

Choose One of These Options

A Submit an electronic version of your documentation online **NOW**.

B Submit an electronic version of your documentation online **LATER**.

C Download a claim form to print and send via fax or mail.

Recommended! This is the fastest way to get your claim processed.

Attach Documentation Online NOW

Attach Documentation Online LATER

Download Claim Form (PDF)

Done

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7. To Submit Receipt NOW

- Click Submit Receipt NOW
- Click NEXT on the instructions screen

SFMRA
YOUR ACCOUNT FOR HEALTH COSTS

Home Messages Support Logout Joe Member 10401340 JM

Dashboard Claims & Activity Calculators Card Center

BACK Instructions NEXT

Attach Your Documentation Online
Your claim will be processed within a few days. return to this site to view the status of your claim and payment

Follow These Steps

1 Save a PDF of an Explanation of Benefits (EOB) from your health plan's website.

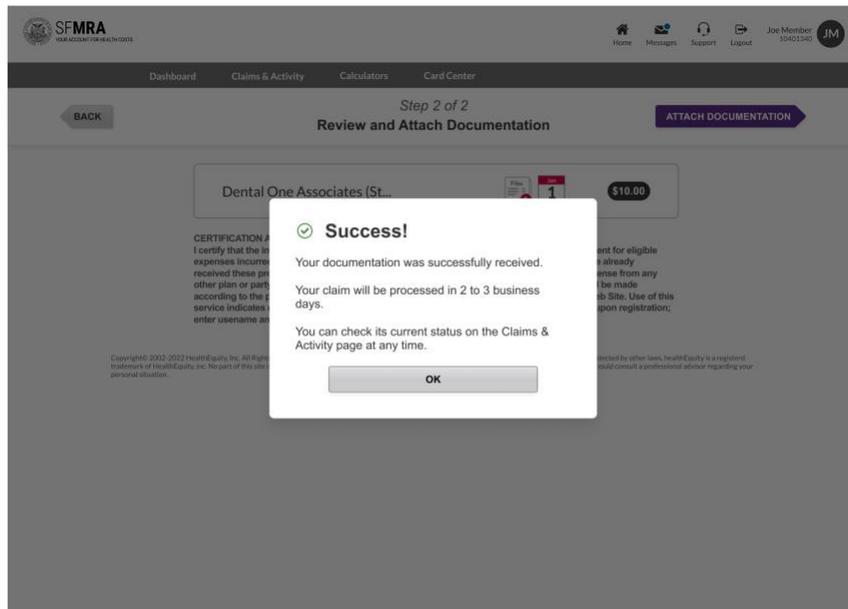
2 Save a digital copy or scan a paper copy as one of these file types:
JPG
PDF
TIFF
GIF
PNG

3 Each file can be no larger than 5 MB. You may need to compress them.

4 Click the Add Documentation button, select the file(s) then confirm.

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8. Upload receipt by selecting the receipt file
 - Review, delete, or add additional claims documentation
 - Select the receipt file and click SUBMIT RECEIPTS



Questions?

If you have any questions about submitting a claim online, our HealthEquity|WageWorks Member Services team is available 24/7 to help you with the process or to answer any account questions you have.

Give us a call at 866.697.6078.