



Meritain Health Employer Website User Guide

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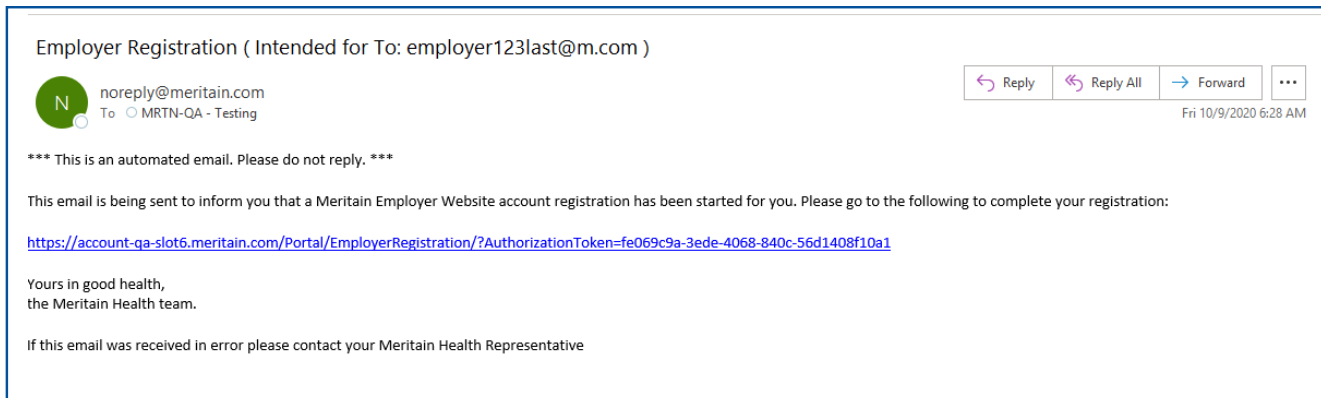
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Introduction

Meritain Health® offers employers the ability to access account balances, claim information, member information, health coverage, drug and prescription information, and invoices. The employer website is your resource to manage your employee benefits plan. Meritain Health features may vary depending on access rights.

Registration

When a new employer is set up on the website, an employer user will be selected as an employer group representative—a Super User. A system-generated email will be sent to the employer user to register. Invitations to register remain active for 15 days. Once registered, the employer Super User is able to request accounts for other employees. Once requested, a system-generated email will be sent to the employer user to register as well, remaining active for 15 days. To register a user account, use the link located in the system generated email.



Please note: If you will be registering as both an employer user and member user for the account, you can use the same email address for both registrations. However, you will need to setup a different username and password for each.

Step 1: Enter your personal information on the registration page and click *Next*.

Employer Registration

Step 1 Step 2 Step 3 Step 4

Step 1 - Personal Information Step 1 / 4

First Name*
Test

Last Name*
Test

Business Email Address*
testemp10@meritain.com

Group ID*
12721

*Indicates mandatory fields

Next

Step 2: Create your username and password.

Employer Registration

Step 1 Step 2 Step 3 Step 4

Step 2 - Username and Password Step 2/4

Enter a username / password of your choice. *Indicates mandatory fields

Enter Username*

Enter Password*

Confirm Password*

Please enter a password that contains:

- Minimum of 10 characters
- At least one uppercase letter (A, B, C,...)
- At least one lowercase letter (a, b, c,...)
- At least one number (1, 2, 3,...)
- At least one of the following symbols: (#\$%^ @ &*)(=+-)

Previous Next

Step 3: Choose and answer a security question.

Employer Registration

Step 1 Step 2 Step 3 Step 4

Step 3 - Security Question and Answer Step 3/4

Choose a security question and security answer that you wish to use for username / password recovery. *Indicates mandatory fields

Enter Security Question *

What is your favorite color?

Enter Security Answer *

blue

Note: Try to choose something memorable that is fixed over time (favorites come and go) that only you know the answer to and is not published online or in public records.

Previous Next

Step 4: Review terms and conditions.

Employer Registration

Step 1 Step 2 Step 3 Step 4

Step 4 - Terms and Conditions

Meritain Health's web portal is a free service to registered users of www.meritain.com. PLEASE READ THE TERMS AND CONDITIONS CAREFULLY BEFORE USING THIS SITE.

The following terms and conditions ("Terms and Conditions") govern your use of this web portal (the "Site"). The Site is an on-line information and communication service offered to assist you with respect to a plan administered by Meritain Health. By accessing, viewing, or using the information on the Site, you signify that you understand and agree to these terms and conditions and that it is the legal equivalent of a signed written contract between you, Meritain Health, Inc., its affiliates, and subsidiaries ("Meritain Health"). If you do not agree to these terms and conditions, please exit this Site immediately.

The terms and conditions can be modified at any time by Meritain Health. The modification will be effective immediately without notice upon the posting of the terms and conditions to the Site or by otherwise notifying you of the modification. By agreeing to these terms and conditions you also agree to periodically check the terms and conditions so that you are aware of any modifications.

Subject to the terms set forth herein, Meritain Health grants to you a limited, non-exclusive, non-transferable, and terminable license to use the Site. You acknowledge and agree that the Site contains proprietary services and confidential information that belongs to Meritain Health or Meritain Health's licensors. You agree that the services and confidential information provided within the Site are the property of Meritain Health or its licensors and are protected by laws, including, but not limited to, laws relating to patents, copyrights, trademarks, trade secrets, other proprietary and intellectual property rights, unfair competition, and privacy.

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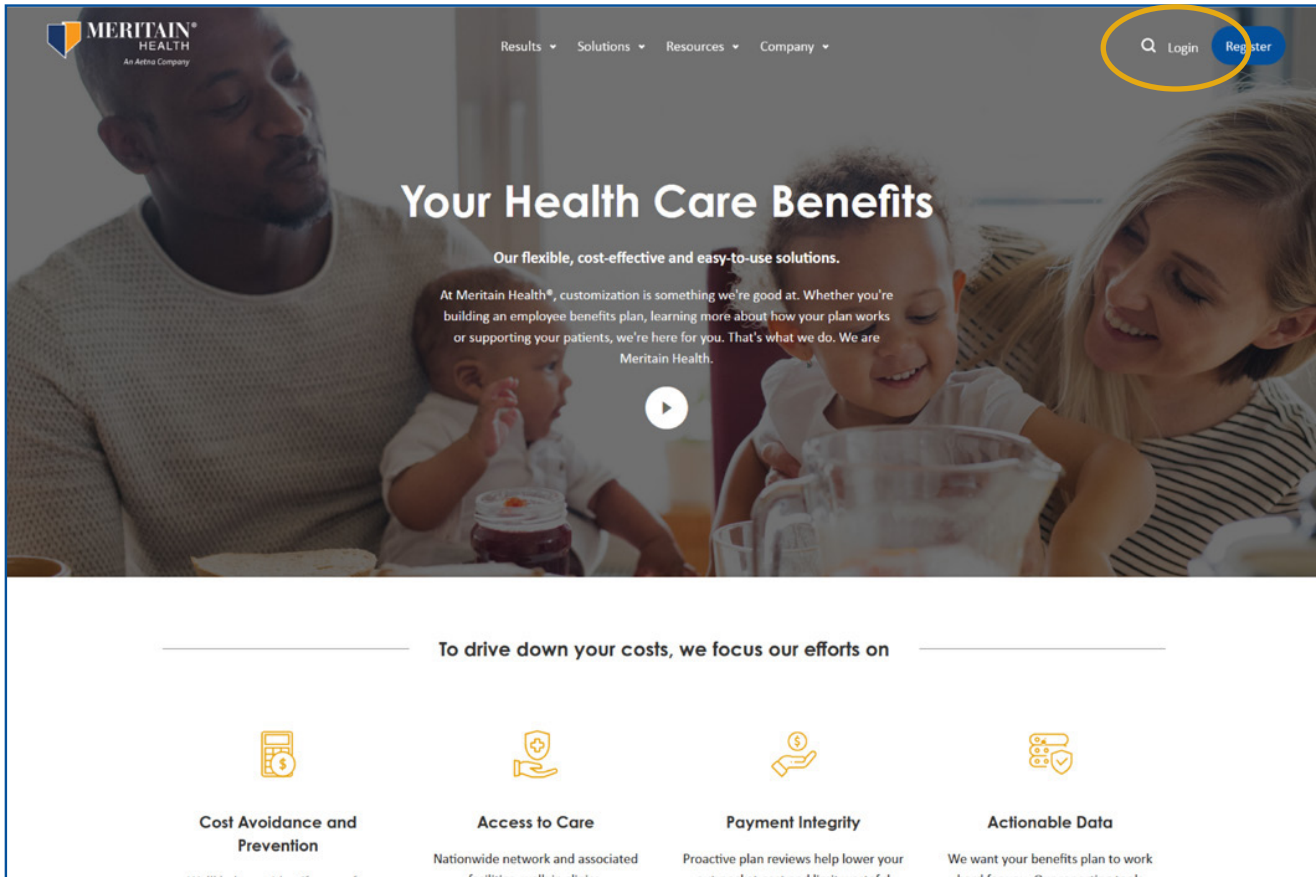
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Links to Other Sites

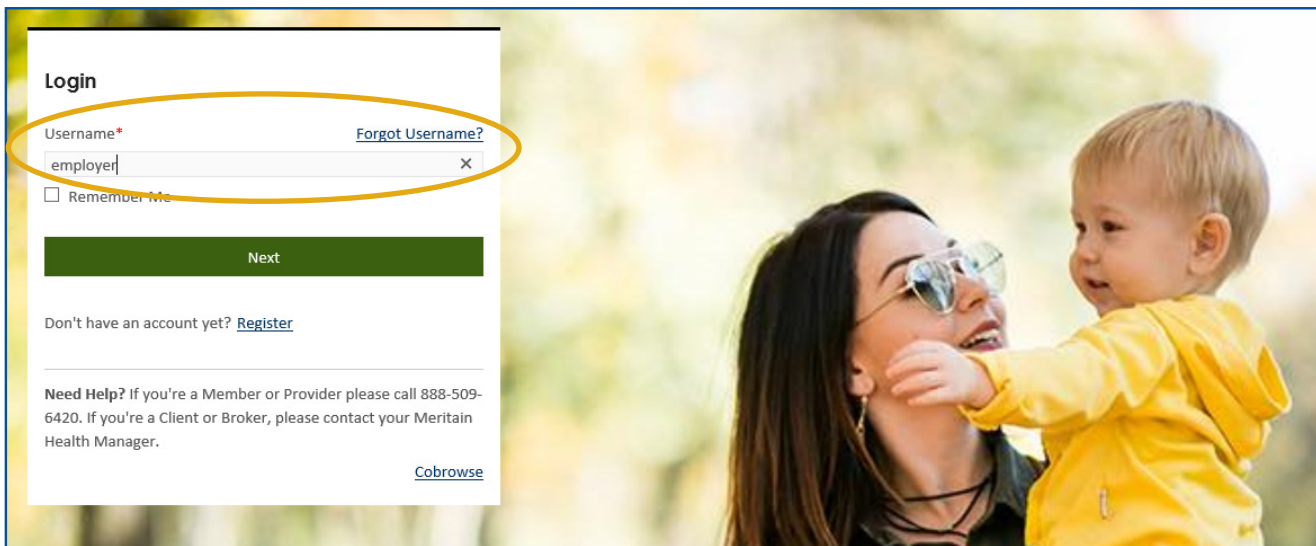
This Site contains links to other sites. Meritain Health is not responsible for the security privacy practices or the content of such web sites. Please read the privacy statements of the linked

Logging In

To log in, go to Meritain Health homepage at www.meritain.com and click *Login* in the upper right-hand corner of the page.



1. Enter your username in the *Username* field.



2. If you forget your username, simply click the *Forgot Username* link on the homepage and follow the prompts.

The screenshot shows the Meritain Health login page. At the top left is the 'Login' header. To the right is a link 'Login as a different user'. Below the header, it says 'Logging in as employer'. There is a 'Username*' field with the text 'employer' and a 'Forgot Username?' link circled in orange. Below the field is a 'Remember Me' checkbox. A green 'Next' button is below the field. At the bottom, there is a 'Need Help?' section with contact information and a 'Cobrowse' link.

3. Enter your password in the *Password* field.

The screenshot shows the Meritain Health login page. At the top left is the 'Login' header. To the right is a link 'Login as a different user'. Below the header, it says 'Logging in as employer'. There is a 'Password' field with masked characters and a 'Forgot Password?' link. A green 'Sign in' button is circled in orange. At the bottom, there is a 'Need Help?' section with contact information and a 'Cobrowse' link.

4. Then, click *Sign In*.

The screenshot shows the Meritain Health login page. At the top left is the 'Login' header. To the right is a link 'Login as a different user'. Below the header, it says 'Logging in as employer'. There is a 'Password' field with masked characters and a 'Forgot Password?' link. A green 'Sign in' button is circled in orange. At the bottom, there is a 'Need Help?' section with contact information and a 'Cobrowse' link.

5. If you forget your password, simply click the *Forgot Password* link on the login homepage and follow the prompts.

The screenshot shows the Meritain Health login page. At the top left is the 'Login' header. To the right is a link 'Login as a different user'. Below the header, it says 'Logging in as employer'. There is a 'Password' field with masked characters and a 'Forgot Password?' link circled in orange. A green 'Sign in' button is below the field. At the bottom, there is a 'Need Help?' section with contact information and a 'Cobrowse' link.

The Landing Page

Our employer landing page allows you to easily manage your employee membership. Here you can search for a specific member, review your activity log or add a new employee.

Manage Employees [Activity Log](#) [Add New Employee](#)

Look up member and plan information, view and request documents, update coverage.

Search by Individual

Member ID *

First Name *

Last Name *

Date of Birth

Search by Group

Member Type Group ID* Status

Division ID Product Department ID

Search by individual or group or by a combination of both sections.
User at least one required field. Name only search require First & Last.

Reports

- [Static Reports](#)
- [Self Service Reports](#)

Invoices

- [View & Download](#)

Custom Messages

- [Account Message](#)
- [Promo Tile](#)

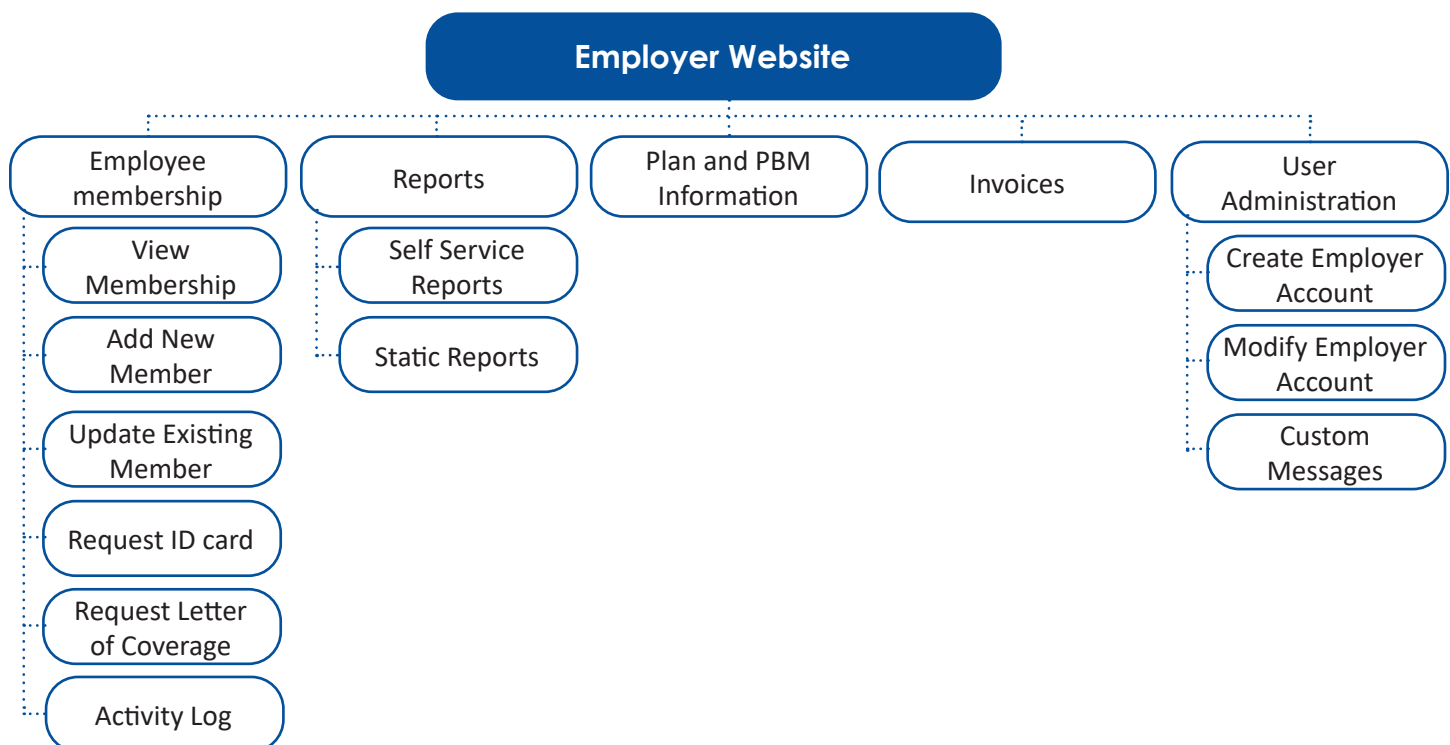
Membership Info

- [Registration & Group Data](#)

The landing page also has quick links to resources employers use most, like reporting and invoicing. You can use the *Custom Messages* section to send messages to your members. The *Membership Info* area gives you a high-level overview of your plan membership.

Employer Website Flow

The website also includes drop-down menus for easy navigation.



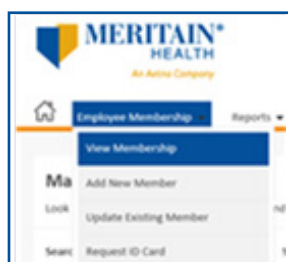
Employee Membership

The Meritain Health employer website is your one-stop-shop to easily find the benefits and eligibility information you need. You can find important member eligibility information, plus request and print ID cards, right on the employer homepage.

View Membership



You can view employee membership information by going to the Manage Employees section right on the homepage.

Search for members by entering the member's ID, name or group ID and click *Search*. If you need to start over, simply click *Reset* to clear the form.



You can also go to the Employee Membership drop-down on the top toolbar and click *View Membership* to search for members enrolled in the plan.

To view specific information about a member, click the arrow under the Action column, next to the member's name. You'll arrive at a *Member Information* page that contains: **subscriber information, dependent information, coverage, plan documents** and more.

Employee Membership / View Membership									
View Employee Membership									
Across all applicable groups									
Member Search									+
Member List									Export as  
Member ID	First Name	Last Name	Date of Birth	Member Type	Status	Group ID	Division ID	Department ID	Action
0044872730	PHILIP	KRUGER	03/07/1976	Subscriber	Termed	12415	12415.002		>
	KRISTINA	KRUGER	03/07/1982	Dependent	Termed	12415	12415.002		>

Use the *Task Menu* to navigate through employee records.

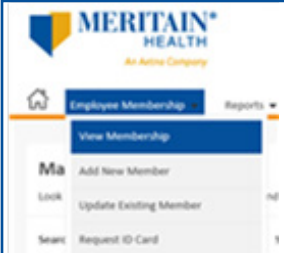
<div> Back to Member Search </div> <div> <div>Task Menu</div> <ul style="list-style-type: none"> Subscriber Information Dependent Information Coverage Information Plan Documents Summary of Out-of-Pocket Expenses HRA Prescription Plan Claims Request ID Card Request Letter of Coverage Update Existing Member View Submitted Transactions </div>		<div>ERIC DEAN - Subscriber</div> <div>Subscriber Information</div>	
		Member ID	8196288456
		Group ID	12721
		SSN	XXX-XX-5499
		Division ID	12721.C03
		Hire Date	07/20/1983
		Covered From	01/01/2009
		Term Date	
		Status	Active
		First Name	ERIC
		Last Name	DEAN
		Date of Birth	05/15/1956
		Gender	Male
		Address 1	123 HEALTHY ST
		Address 2	
		City	MINNEAPOLIS
		State / Province	MN
		Zip Code	55441

Task Menu

Subscriber Information	View demographics and ID numbers.
Dependent Information	Lists each dependent and their information.
Plan Documents	Links to documents for each plan.
Coverage Information	Lists both current and historical coverage information.
Summary of Out-of-Pocket Expenses	Graphs for tracking visit limits and out-of-pocket amounts for the plan and each member on the plan.
HRA	Health Reimbursement Account (HRA) is a type of U.S. employer-funded health benefit plan that reimburses employees for out-of-pocket medical expenses.
Prescription Plan	View prescription plan information.
Claims*	View details of processed and in-process claims and EOBs.
Request ID Card*	Request additional copies of an ID card.
Request Letter of Coverage*	Request a copy of a Letter of Coverage.
Update Existing Member*	Make demographic updates, changes in coverage, termination, COB updates.
View Submitted Transactions*	View transactions that have been entered or submitted to Meritain Health for processing.
* additional instructions are included in this document.	

Claims

You can view both in-process and processed claims for members enrolled in your benefits plan. Start by using the *Manage Employees* form on the homepage to access employee records.



You can also go to the Employee Membership drop-down on the top toolbar and click *View Membership* to search for members enrolled in the plan.

Click on *Claims* on the *Task Menu* to the left. The claims summary page will appear. Narrow your search by using claim type, claim status or, date of service or click the *Apply* button for a list of claims.

View Employee Membership

Across all applicable groups

Back to Member Search

Task Menu

Subscriber Information

Dependent Information

Coverage Information

Plan Documents

Summary of Out-of-Pocket Expenses

HRA

Prescription Plan

Claims

Request ID Card

Request Letter of Coverage

Update Existing Member

View Submitted Transactions

Claims Summary

ERIC DEAN KLEINHEN

Search

Claim Type

☒ Medical
 ☒ Dental
 ☒ Vision
 ☒ Rx

Paid by HRA

☐ Yes
 ☐ No
 ☒ Show All

Provider Name

Claim Number

Date of Service

From

To

Billed charges (\$)

You May Owe (\$)

Claim Status

☒ In process
 ☒ Processed
 ☒ Awaiting Information

Clear All

Apply

If you would like to view a claim from the list, click the *View link* next to the claim.

Claim Status	Claim Type	Provider Name	Date of Service	Claim Number	Billed Charges	Patient Responsibility	Details
Processed	Medical	SHIFLER DEALTON	07/25/2016	MGF3403	\$178.00	\$24.00	View
In Process	Medical	QULLIA GALES	02/01/2018	BZ85769	\$215.00		View

Information not available until claim completes processing.

Meritain Health Employer User Guide

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To view an EOB, click the green *View EOB* button.


Claim Details for Claim# ED9BN56

[Back To Claims Summary](#) [View EOB](#)

Claim Information

Group ID	C2721	Address 1	18824 93RD AVE. NE
Subscriber	GISA ERDNER	Address 2	
Patient Name	GISA ERDNER	City	STARR
Patient Account Number	I8333375165791	State/Province	SC
Provider Name	MCCLINTON	Zip Code	29684

Payment Information



You May Owe
124.87

Billed Charges \$435.00

* Exact amount owed may be different, see EOB for details

Processed Date	10/26/2021
Paid Date	10/26/2021
Paid Amount	\$0.00
Check Number	
Paid to	MCCLINTON
Paid to Address1	18824 93RD AVE. NE
Paid to Address2	
Paid to City	STARR

To view more details about each line on the claim, click the + in the Benefit column:

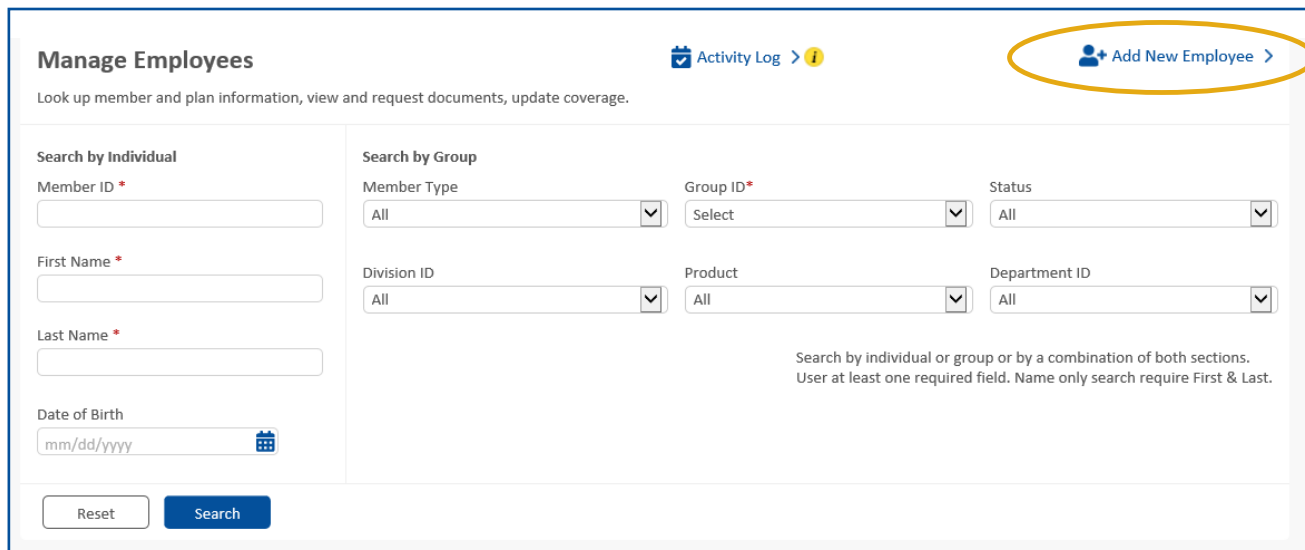
Benefit Information

Benefit	Date From	Date To	Incurred	Excluded	Notes	Eligible	Deductible	Co-pay
⊖ PROPHYLAXIS	07/25/2016		\$111.00	\$13.00	128	\$98.00	\$0.00	\$0.00
Coinsurance (%): 100 Paid Amount: \$98.00 You May Owe : \$13.00								
+ ROUTINE EXAMINATIONS	07/25/2016		\$67.00	\$11.00	128	\$56.00	\$0.00	\$0.00

Add New Member

In this section, you can add a new employee to your plan and any dependents. You'll also be able pick products they can access with their plan coverage.

To get started, click on the *Add New Employee* link on the homepage.



Manage Employees [Activity Log > i](#) [Add New Employee >](#)

Look up member and plan information, view and request documents, update coverage.

Search by Individual

Member ID *

First Name *

Last Name *

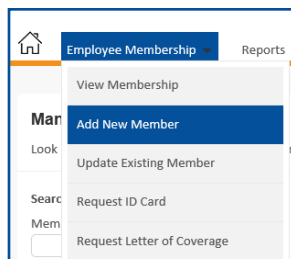
Date of Birth

Search by Group

Member Type Group ID * Status

Division ID Product Department ID

Search by individual or group or by a combination of both sections.
User at least one required field. Name only search require First & Last.

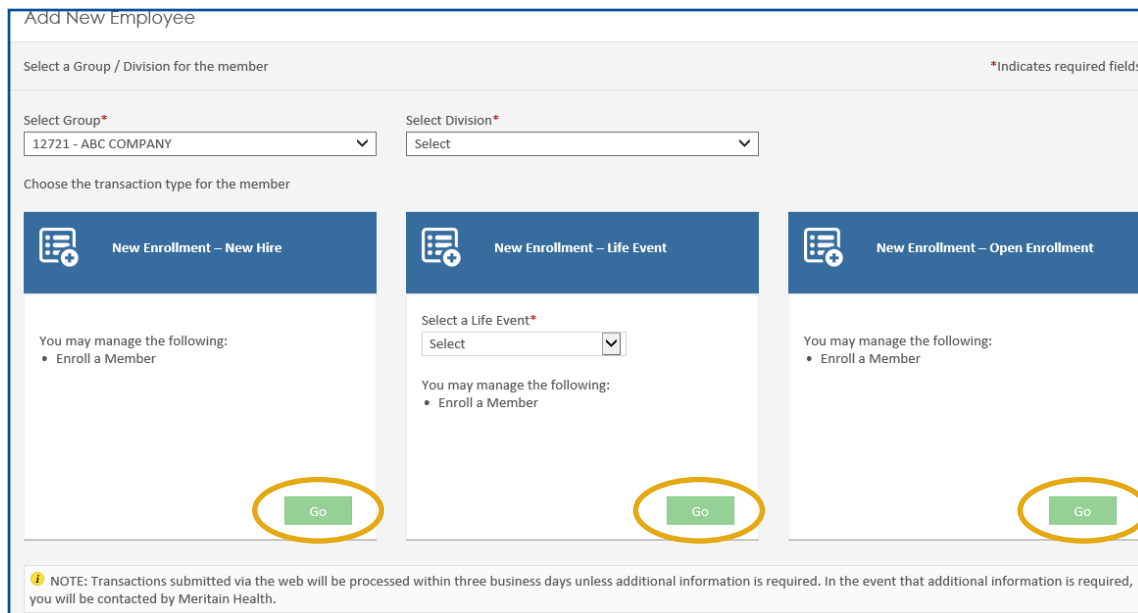


Employee Membership [Reports](#)

- View Membership
- Add New Member**
- Update Existing Member
- Request ID Card
- Request Letter of Coverage

You can also go to the Employee Membership drop-down on the top toolbar, and click *Add New Member* to enroll members in the plan.

Select a Group and Division from the available choices in each of those drop-down fields. Next, choose from three different options: *New Hire*, *Life Event* or *Open Enrollment*—depending on the situation. Once you’ve made your selection, click the green **Go** button.



Add New Employee

Select a Group / Division for the member *Indicates required fields

Select Group*
12721 - ABC COMPANY

Select Division*
Select

Choose the transaction type for the member

New Enrollment – New Hire

You may manage the following:

- Enroll a Member

Go

New Enrollment – Life Event

Select a Life Event*
Select

You may manage the following:

- Enroll a Member

Go

New Enrollment – Open Enrollment

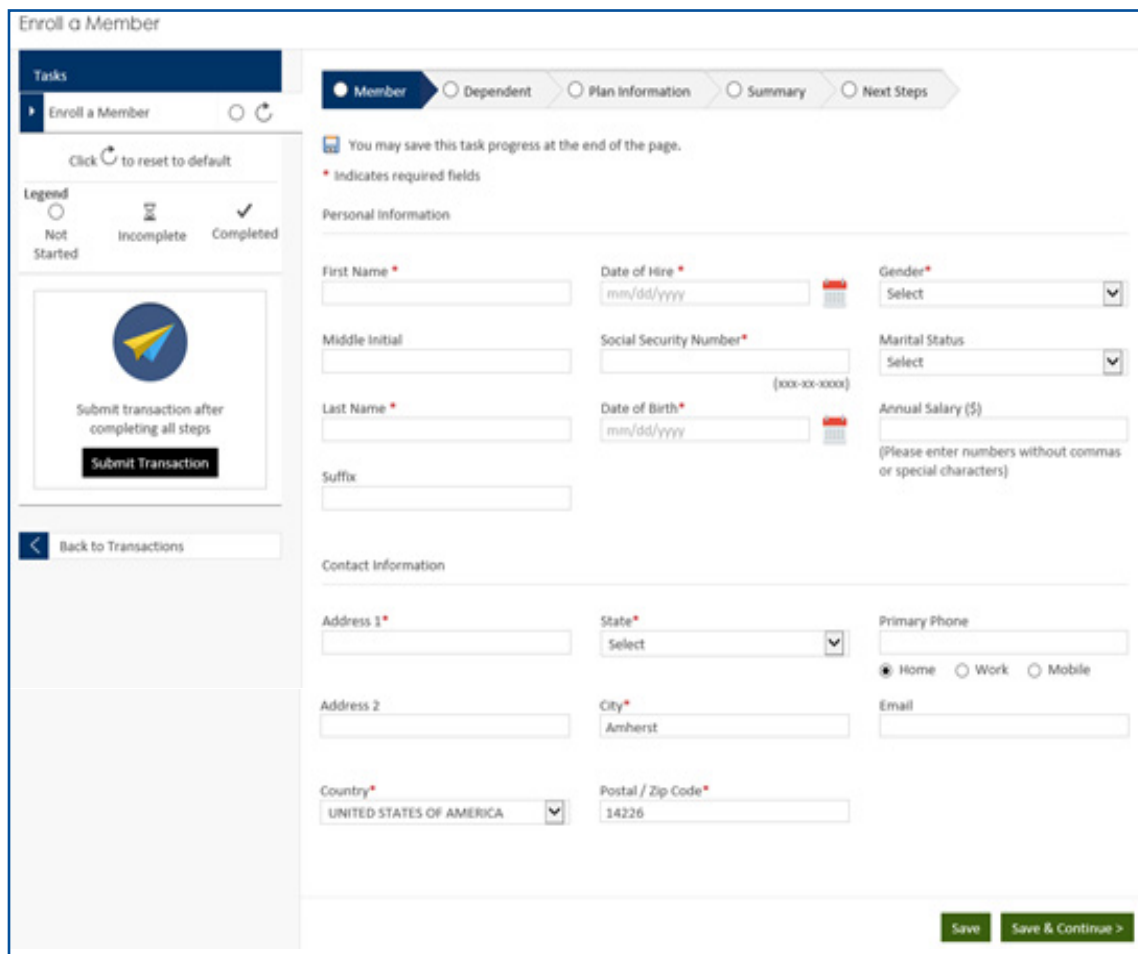
You may manage the following:

- Enroll a Member

Go

NOTE: Transactions submitted via the web will be processed within three business days unless additional information is required. In the event that additional information is required, you will be contacted by Meritain Health.

A progress bar at the top of the screen will guide you through the enrollment process. The system will prompt you if additional information is needed.



Enroll a Member

Tasks
Enroll a Member

Click to reset to default

Legend
Not Started Incomplete Completed

Submit transaction after completing all steps
Submit Transaction

Back to Transactions

Member Dependent Plan Information Summary Next Steps

You may save this task progress at the end of the page.

* Indicates required fields

Personal Information

First Name*
Date of Hire*
mm/dd/yyyy
Gender*
Select

Middle Initial
Social Security Number*
(xxx-xx-xxxx)
Marital Status
Select

Last Name*
Date of Birth*
mm/dd/yyyy
Annual Salary (\$)
(Please enter numbers without commas or special characters)

Suffix

Contact Information

Address 1*
State*
Select
Primary Phone
Home Work Mobile

Address 2
City*
Amherst
Email

Country*
UNITED STATES OF AMERICA
Postal / Zip Code*
14226

Save Save & Continue >

Under the Dependents tab, click *Yes* if you need to add dependents. Enter each required field, indicated with a red asterisk. Use the *Add Another Dependent* button to open additional forms for each dependent on the plan. If you're not adding dependents, click *No*. When finished, click *Save and Continue*.

Enroll a Member

Tasks

Enroll a Member

Click to reset to default

Legend

Not Started

Incomplete

Completed

You may save this task progress at the end of the page.

* Indicates required fields

Would you like to add dependents?*

☒ Yes ☐ No

Dependent 1 Information

First Name *

Middle Initial

Last Name *

Suffix

Relationship to Member *

Gender *

Date of Birth *

mm/dd/yyyy

Social Security Number

(xxx-xx-xxxx)

Full Time Student

☐ Yes ☐ No

Disabled / Handicapped

☐ Yes ☐ No

Dependent Address*

☒ Same as Member ☐ Different from Member

+ Add Another Dependent

< Previous

Save

Save & Continue >

Enter all applicable information on the Plan Information tab. Required fields are marked with a red asterisk. Additional fields may appear, based upon your answers.

Tasks

Enroll a Member

Click to reset to default

Legend

☐

Not Started

Incomplete

☒

Completed

Submit transaction after completing all steps

Submit Transaction

<

Back to Transactions

☒ Member

☒ Dependent

☒ Plan Information

☐ Summary

☐ Next Steps

You may save this task progress at the end of the page.

* Indicates required fields

Select Group, Division and Department

Select Group *

12721 - ABC COMPANY

Select Division *

12721.001 - ABC Company - Med Only

Select applicable products *

Primary Health Products

☐ Dental

☐ Medical

☐ Vision

Ancillary Products

☐ Dependent Care Account

☐ Short-term disability

☐ Life Insurance

☐ Supplemental Life Insurance for Children

☐ Supplemental Life Insurance for Spouse

☐ Long Term Disability

☐ Flexible Spending Account

☐ Basic Spouse and Child Life Insurance

☐ Supplemental Life Insurance for Employee

☐ RX

Dependent Coverage

Will the dependent have the same coverage as the member? * (applicable for Primary Health Products)

☐ Yes

☐ No

Coordination of Benefits

Is the member covered by another plan? *

☐ Yes

☐ No

☐ Unknown

Are dependents covered by any other plan? *

☐ Yes

☐ No

☐ Unknown

Medicare / Medicaid Information

Is the member covered by Medicare? *

☐ Yes

☐ No

☐ Unknown

Is the member covered by Medicaid? *

☐ Yes

☐ No

☐ Unknown

Is the dependent covered by Medicare? *

☐ Yes

☐ No

☐ Unknown

Is the dependent covered by Medicaid? *

☐ Yes

☐ No

☐ Unknown

Miscellaneous Notes

Use the space below to add any note

< Previous

Save

Save & Continue >

Cobrowse | Disclaimer | Privacy Statement | Terms & Conditions | FAQ | Contact Us | Accessibility Services

As you assign benefits, additional fields will become available. Depending on the setup needs for your group, the Plan and/or Provider Network fields may not require entry. If this is the case, the fields will be locked so no selection can be made. (This is expected and you can move to the next section.)

Select applicable products *

Primary Health Products

☐ Dental
☒ Medical
☐ Vision

Ancillary Products

☐ Dependent Care Account
☐ Short-term disability
☐ Life Insurance
☐ Supplemental Life Insurance for Children
☐ Supplemental Life Insurance for Spouse

☐ Long Term Disability
☐ Flexible Spending Account
☐ Basic Spouse and Child Life Insurance
☐ Supplemental Life Insurance for Employee
☐ RX

Medical

Effective Date of Coverage*

Plan*

Provider Network*

Once you choose an answer under Coordination of Benefits, be sure to mark all corresponding fields that appear.

Coordination of Benefits

Is the member covered by another plan? *

☒ Yes ☐ No ☐ Unknown

Select applicable products *

☐ Dental ☐ Medical ☐ Vision

Are dependents covered by any other plan? *

☐ Yes ☐ No ☐ Unknown

The Summary page lists all information you've entered. If this looks good, click *Continue*. If you need to make changes, click *Previous* to go back and edit.

Tasks

Enroll a Member


Click to reset to default

Legend

Not Started

Incomplete

Completed



Submit transaction after completing all steps

Submit Transaction

Back to Transactions

Member

Dependent

Plan Information

Summary

Next Steps

Enroll a Member task is saved.

You may edit it at any time before submitting the transaction

Note:Even though this task is completed, the transaction as whole is not yet submitted.

Group ID : 12415

Division ID : 12415.001

Member Information

Edit

First Name : Eric

Middle Initial :

Last Name : Dean

Suffix :

Date of Hire : 04/01/2022

Annual Salary :

Social Security Number : XXX-XX-6789

Date of Birth : 02/04/1987

Gender : Male

Marital status : Married

Contact Information

Edit

Address 1 :123 Test Street

Address 2 :

City :Test

State / Province :NEW YORK

Country :UNITED STATES OF AMERICA

Zip / Postal Code :12345

Primary Phone :

Coverages

Edit

Primary Products

Dental

Plan: No Plan

Provider Network: No PPO

Effective Date of Coverage: 04/01/2022

Coordination of Benefits

Member covered by another plan : No

Medicare / Medicaid Information

Member covered by Medicare : No

Member covered by Medicaid : No

Miscellaneous Notes

< Previous

Continue >

On the *Next Steps* tab, click the green *Submit Transaction* button then click *Yes*. You will receive a successful message and a transaction ID number. **Please note:** It can take up to three business days to process your transaction before you notice members you added within your website. The *Save and Exit* button does not send the transaction to Meritain Health. It saves the entered information in a saved queue for completion and submission later.

The screenshot shows a web interface for enrolling a member. On the left, a sidebar contains a 'Tasks' section with 'Enroll a Member' selected, a legend for 'Not Started', 'Incomplete', and 'Completed' statuses, and a 'Submit Transaction' button. The main area displays a progress bar with steps: Member, Dependent, Plan Information, Summary, and Next Steps (highlighted). Below the progress bar, instructions state: 'Enroll a Member task is saved. You must submit the transaction to have it be processed. You may edit it at any time before submitting the transaction: [Edit]'. Further instructions say: 'You may save and exit, returning later to finish and submit the transaction: [Save and Exit]'. The final instruction, 'You may submit the transaction for processing:', is followed by a green 'Submit Transaction' button, which is circled in yellow. A '< Previous' button is located at the bottom right of the main content area.

Update Existing Member

Several options are available for updating the records or coverage of existing member and their dependents. Access an employee record using *View Membership* from the landing page.



The following updates are available:

Demographic Update	Update name, address, date of birth, phone and email for a subscriber and dependents.
Termination	Ending coverage for member and/or dependents and remove coverage due to a termination of employment.
Mid-year Life Event Change	Add, change or terminate coverage for members or dependents based on events like adoption, marriage, or loss of coverage.
Open Enrollment Change	Make open enrollment corrections and division changes.
Coordination of Benefits	Record other insurance information for members and their dependents.

Update Existing Member
Across all applicable groups

Member Search

Enter any one or combination of the sections below, using at least one required field (name only searches require First & Last). * Indicates required fields

Search by Individual

Search by Group

Member ID *

First Name *

Last Name *

Date of Birth

Member Type

Group ID *

Status

Division ID

Product

Department ID

Search by individual or group or by a combination of both sections. User at least one required field. Name only search require First & Last.






Reset
Search

Next, click *Select* next to the member's name.

EMPLOYEE	ESCACTIVE	02/02/1982	Subscriber	Active	12415	12415.002	>
----------	-----------	------------	------------	--------	-------	-----------	---

Select the transaction type you would like to update for the member.

Choose the transaction type for the member

<div> Demographic Update</div> <div>You may manage the following:<ul style="list-style-type: none">• Update Member Info</div> <div>Go</div>	<div> Termination</div> <div>You may manage the following:<ul style="list-style-type: none">• Update Member Info• Terminate Coverage</div> <div>Go</div>	<div><div> Mid-Year Life Event Change</div><div>Select a Life Event* <div>Select ▼</div></div><div>You may manage the following:<ul style="list-style-type: none">• Update Member Info• Add Dependents• Terminate Coverage• Add or Change Coverage• Update Coordination of Benefits</div><div>Go</div></div>
<div> Open Enrollment Change</div> <div>You may manage the following:<ul style="list-style-type: none">• Update Member Info• Add Dependents• Terminate Coverage• Add or Change Coverage• Update Coordination of Benefits</div> <div>Go</div>	<div> Coordination of Benefits</div> <div>You may manage the following:<ul style="list-style-type: none">• Update Member Info• Update Coordination of Benefits</div> <div>Go</div>	

Demographic Update

1. Enter updated information for the member in the form. Click *Save and Continue*.
2. Use *Update Dependent Information*, in the left-side task bar to update dependent information.
3. Click Submit Transaction in the left-hand task bar, or continue to *Next Steps* and click *Submit Transaction*.
4. Confirm submission and receive a *Success* confirmation and transaction ID number.

Employee Membership

Reports

Plan and PBM Information

Invoices

User Administration

Employee Membership / Existing Employee / Transactions / Employee Change

Demographic Update

TEST TEST
Member ID: ABCEFG123 Group ID: 99980 Employer: FNEmployer12721ABC LNEmployer12721ABC

Tasks

Complete one or more tasks

Member Info

Update Member Info

Dependent Info

Update Dependent Info

Click to reset to default

Not Started Incomplete Completed

When you have finished your tasks, submit them as a single transaction

Submit Transaction

Back to Transactions

Update Member Information

Update Information Review Next Steps

You may save this task progress at the end of the page.

Indicates required fields

First Name
TEST

Date of Hire
mm/dd/yyyy

Gender
Male

Middle Initial

Social Security Number
XXX-XX-5555
(xxx-xx-xxxx)

Marital Status
Select

Last Name
TEST

Date of Birth
01/01/1951

Annual Salary
(Please enter numbers without commas or special characters)

Suffix

Contact Information

Address 1
111 ANYWHERE ST

State
MICHIGAN

Primary Phone

Address 2

City
ANYPLACE

Home Work Mobile

Country
UNITED STATES OF AMERICA

Zip Code
48912

Email

Save Save and Continue

Tasks

Complete one or more tasks

Member Info

Update Member Info

Dependent Info

Update Dependent Info

Click to reset to default

Not Started Incomplete Completed

When you have finished your tasks, submit them as a single transaction

Submit Transaction

Back to Transactions

Update Dependent Information

Update Information Review Next Steps

You may save this task progress at the end of the page.

Indicates required fields

Dependent 1 Information

First Name
SPOUSE

Relationship to Member
Married Spouse

Primary Phone

Middle Initial

Gender
Female

Home Work Mobile

Last Name
TEST

Date of Birth
01/01/1980

Email

Suffix

Social Security Number
(xxx-xx-xxxx)

Dependent Address

Same as Member Different from Member

Dependent 2 Information

First Name
CHILD

Relationship to Member
Step Child

Full Time Student
Yes No

Middle Initial

Gender
Male

Disabled / Handicapped
Yes No

Last Name
TEST

Date of Birth
01/01/2011

Dependent Address

Same as Member Different from Member

Suffix

Social Security Number
(xxx-xx-xxxx)

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Termination

Remove coverage due to termination of employment.

1. To terminate members or coverages, select the Termination transaction type.
2. From the Task menu on the left, select the task to *Terminate Coverage* and/or *Update Member Info* which will allow updates to demographic information. Click *Terminate Coverage* to initiate the termination process.

TERMINATION

TEST TEST
Member ID: ABCEFG123 Group ID: 99980 Employer: FNEmployer12721ABC LNEmployer12721ABC

Tasks

Complete one or more tasks

Member Info

Update Member Info ☐

Coverage Info

Terminate Coverage ☐

Click to reset to default

☐ Not Started ☐ Incomplete ☒ Completed

When you have finished your tasks, submit them as a single transaction

Submit Transaction

Member Information

Employee Name	TEST TEST
Member ID	ABCEFG123
Group ID	99980
SSN	XXX-XX-5555
Division ID	99980.001
Department ID	
Hire Date	
Covered From	01/01/2016
Termination Date	
Status	Active
First Name	TEST
Last Name	TEST
Date of Birth	01/01/1951
Gender	Male
Address 1	111 ANYWHERE ST

3. You can check the box to terminate all coverages, or select individual products to terminate.
4. **Please note:** The Terminate Coverage task is the same across transaction types. Whether you attempt to terminate coverage using the *Termination*, *Mid-year Life Event Change*, or *Open Enrollment Change* transactions types, the steps described below will apply.
5. Once the products are selected you'll see a question about standalone products. This question will always default to *No* but can be changed to *Yes* by the user if the group has applicable standalone products to terminate (*the standalone process is detailed at the end of these steps.*)

- Next, confirm the termination, which will terminate the member and any existing dependents, or you opt to only terminate dependent(s).


[illegible]

7. Input the effective date of termination. You can manually enter the date, or click on the date picker icon to select a date.
8. Please note that the effective date entered in this field should be the date from which the member/dependents won't be covered. For example. If 7/31/2022 is used, this will mean that as of 8/1/2022, the member will no longer have coverage.
9. Select the applicable *Termination Reason* from the drop-down list. **Please note:** when terminating a dependent only, the list of Termination Reasons will only display dependent applicable termination reasons.

All Coverages Termination

All Coverages being terminated for: TEST TEST

Member : ☒ TEST TEST

Effective Date of Termination: *
Enter the last date in which the member/dependent is eligible for coverages.
 
Date from which the member / dependents won't be covered: 08/01/2022

Termination Reason: *

Select

Termination Note:


Save

Save and Continue

All Coverages Termination

All Coverages being terminated for: TEST TEST

Member : ☒ TEST TEST

Effective Date of Termination: *
Enter the last date in which the member/dependent is eligible for coverages.
 
Date from which the member / dependents won't be covered: 08/01/2022

Termination Reason: *

Select

Select

Termination of Employment

Termination of Employment due to Retirement

Termination of Employment - Involuntary

Reduction in Hours

Reduction in Hours - Involuntary

Employee Passed Away

Employee Becomes Entitled to Medicare

Waiver of Coverage

Lay-Off

Called to Active Duty - USERRA

Gross Misconduct - NO COBRA

Save

Save and Continue

[Home](#) | [Terms & Conditions](#) | [FAQ](#) | [Contact Us](#) | [Accessibility Services](#)

Termination

TEST TEST

Member ID: ABCEFG123 Group ID: 99980 Employer: FNEmployer12721ABC LNEmployer12721ABC

Tasks

Complete one or more tasks

Member Info

Update Member Info

Coverage Info

Terminate Coverage

Click to reset to default

Not Started Incomplete Completed

When you have finished your tasks, submit them as a single transaction

Submit Transaction

Back to Transactions

Manage Termination

Review

Next Steps

Terminate Coverage task is saved.

You may edit it at any time before submitting the transaction.

NOTE: Even though this task is completed, the transaction as a whole is not yet submitted.

Group ID: 99980

Member ID: ABCEFG123

Member Name: TEST TEST

Member Information

Member Name: TEST TEST

Member ID: ABCEFG123

Coverage Information

Coverage(s) being terminated for member: Medical, Dental, Vision

Standalone Coverage: No

All Coverages Termination

Coverage being terminated for: TEST TEST

Effective Date of Termination: 07/31/2022

Coverage will be not be applicable from: 08/01/2022

Termination Reason: Termination of Employment

Termination Note:

Edit

Previous

Continue

10. Use the Task menu to complete related tasks and use *Submit Transaction* to submit multiple tasks as a single transaction. A *Submit Transaction* button is also available in the Next Steps tab.
11. Users will confirm submission and receive a success message.

Terminations with Standalone Coverage

- When Meritain Health administers standalone COBRA for a client, you'll need to notify Meritain Health of any standalone benefits at termination. Users can do this by clicking Yes to the standalone question.
- Additional boxes will expand allowing the user to detail any standalone coverages using free form text boxes.

Are standalone coverages being terminated? *

☒ Yes
 ☐ No

Please list appropriate standalone plan information and corresponding level of coverage: *

Plan Information

Level of Coverage

1

Plan Information 1

Level of Coverage 1

+

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- Below is an example of how a user could complete these fields. The + and – signs can be used to add or subtract additional rows.

Are standalone coverages being terminated? *

☒ Yes ☐ No

Please list appropriate standalone plan information and corresponding level of coverage: *

	Plan Information	Level of Coverage	
1	Dental	Employee Only	
2	Vision	Employee Only	 

- Please note:** if the terminated member has a dependent enrolled in standalone coverages only, we will need that dependent's demographic information to add them to our system for the appropriate standalone COBRA offer. Please use the Termination Note section at the end of the termination transaction to provide the name, date of birth, gender, and relationship of the dependent.

Termination Note:

Mid-Year Life Event Change

When a member experiences a life event, select the *Mid-Year Life Event Change* transaction type. Selections to choose from include update Member Info, Add Dependents, Terminate Coverage, Add or Change Coverage, and Update Coordination of Benefits Information.

- Start by selecting the applicable life event from the drop-down menu. This field is required.
 - If none of the available life events apply, select *Other*. A free form text box will appear, allowing you to enter an event.

Mid-Year Life Event Change

Select a Life Event *

Select ▼

Select

Birth or Adoption

Marriage

Divorce

Loss of Coverage

Other

Following:

- Update Coordination of Benefits

Go

2. Select the applicable task(s) from the task menu. For the Marriage life event, select *Add Dependents*.

Remember, once a task is complete, additional tasks can be performed within the same transaction. This allows users the freedom to make multiple changes to the same contract at the same time.

3. First, add the new dependent's demographic information. Be sure to complete all the required fields. The website will display a warning message if you forget to complete a required field.

If you wish to add more than one dependent, click the *+Add Another Dependent* button. If you clicked *+Add Another Dependent* in error, click the link to reset and clear dependent 2 information. This will remove the additional dependent. Click the green *Save and Continue* button once all dependent information is completed.

Mid-Year Life Event Change
Life Event: Marriage Edit

TEST TEST
Member ID: ABCDEFG123 Group ID: 99980 Employer: FNEmployer12721ABC UNemployer12721ABC

Tasks
Complete one or more tasks

Member Info
Update Member Info

Dependent Info
Add Dependents

Coverage Info
Terminate Coverage
Add or Change Coverage

Coordination of Benefits
Update Coordination of Benefits

Click to reset to default

Not Started Incomplete Completed

Add Dependents
Dependent Info Plan Info Review Next Steps

You may save this task progress at the end of the page.
* Indicates required fields

Dependent 1 Information

First Name * Relationship to Member * Primary Phone
Middle Initial Gender *
Last Name * Date of Birth *
Suffix Social Security Number
Dependent Address *
Same as Member Different from Member

+ Add Another Dependent

Save Save and Continue

Tasks
Complete one or more tasks

Member Info
Update Member Info

Dependent Info
Add Dependents

Coverage Info
Terminate Coverage
Add or Change Coverage

Coordination of Benefits
Update Coordination of Benefits

Click to reset to default

Not Started Incomplete Completed

Next, users are directed to the Plan Info section. Coverage can be added, and users can also provide Coordination of Benefits information for the newly added dependents.

4. Select the dependents and applicable products. Users will be asked to provide an effective date for the addition of each coverage. Use the *calendar icon* or type in the effective date.

Add Dependents

✓ Dependent Info **Plan Info** ○ Review ○ Next Steps

You may save this task progress at the end of the page.

• Indicates required fields

Dependent Coverage

Select the dependents •

☒ SPOUSE ☒ CHILD


SPOUSE

Select applicable products •

☐ Dental ☒ Medical ☐ Vision

Medical

Effective Date of Coverage •

06/01/2022 


CHILD

Select applicable products •

☐ Dental ☒ Medical ☐ Vision

Medical

Effective Date of Coverage •

06/01/2022 

4. Complete the required Coordination of Benefits questions, then click the green *Save and Continue* button.

Coordination of Benefits

Are the dependents covered by another plan? •

☐ Yes ☐ No ☐ Unknown

Medicare / Medicaid Information

Are the dependents covered by Medicare? •

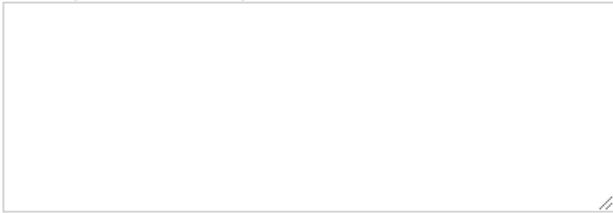
☐ Yes ☐ No ☐ Unknown

Are the dependents covered by Medicaid? •

☐ Yes ☐ No ☐ Unknown

Miscellaneous Notes

Use the space below to add any note



Previous Save **Save and Continue**

- The last step allows users to review everything completed for the Add Dependents task. Users can go back to specific sections and make edits if needed. Click the green *Continue* button in the bottom right corner.

Please note: even though the individual Add Dependents task is completed, the transaction as a whole is not yet submitted for processing until the user clicks the green *Submit transaction* button.

- Additional tasks can be selected from the Task Menu on the left side of the screen, or users can select from the additional tasks listed in blue.

The screenshot displays the 'Mid-Year Life Event Change' interface. At the top, it shows 'Life Event: Marriage Edit'. Below this, a 'TEST TEST' section contains member and employer information: 'Member ID: ABCEFG123', 'Group ID: 99980', and 'Employer: FNEmployer12721ABC LNEmployer12721ABC'. The main area is divided into a left 'Tasks' sidebar and a right 'Add Dependents' task pane. The sidebar lists tasks: 'Update Member Info', 'Add Dependents' (which is selected and marked as complete), 'Terminate Coverage', 'Add or Change Coverage', and 'Update Coordination of Benefits'. The 'Add Dependents' task pane shows a progress bar with steps: 'Dependent Info' (checked), 'Plan Info' (checked), 'Review' (checked), and 'Next Steps' (active). It includes instructions: 'Add Dependents task is saved. You must submit the transaction after you complete the appropriate tasks. You may edit it at any time before submitting the transaction: [Edit]'. It also lists other tasks the user can start: 'Update Member Info', 'Terminate Coverage', 'Add or Change Coverage', and 'Update Coordination of Benefits'. At the bottom, it offers to 'Save and Exit' or 'Submit Transaction' (highlighted in green). A 'Previous' button is in the bottom right corner.

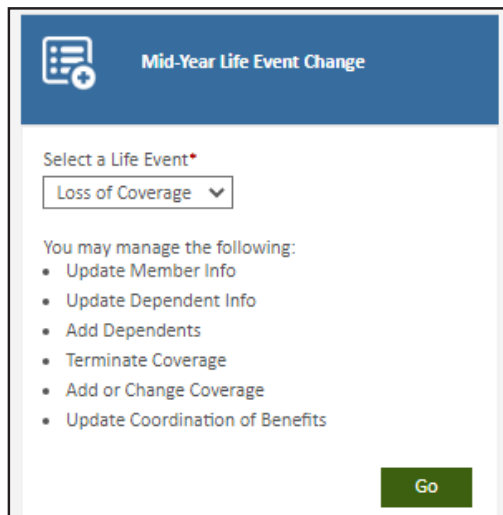
- Click the green *Submit Transaction* button to submit all completed tasks within the transaction for processing with Meritain Health, confirm submission and receive a confirmation message.

The screenshot shows a 'Submit Transaction' dialog box. It contains the text: 'You are about to submit the transaction. You cannot make any changes post submission. Are you sure you want to continue?'. At the bottom, there are two buttons: 'No' and 'Yes'.

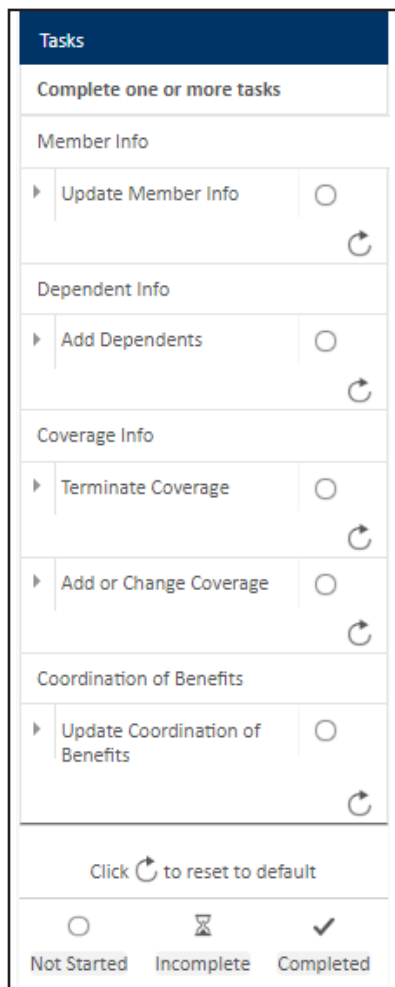
The screenshot shows a confirmation message in a box: '✓ Congratulations! Your transaction has been submitted. Transaction ID is 1032958.'

Mid-Year Life Event Change—Loss of Coverage Life Event

1. For Loss of Coverage, users could take a variety of actions. In this example, the subscriber is experiencing a loss of other coverage. We will reinstate the member's coverage with Meritain Health using the *Add or Change Coverage* task.
2. When using the *Add or Change coverage Coverage* task, it is important to remember this task only allows users to add new coverage(s) or make changes to existing coverage(s).



The screenshot shows a web form titled "Mid-Year Life Event Change" with a blue header bar containing a list icon and a plus sign. Below the header, there is a section "Select a Life Event*" with a dropdown menu currently showing "Loss of Coverage". Underneath, a list of tasks is provided: "Update Member Info", "Update Dependent Info", "Add Dependents", "Terminate Coverage", "Add or Change Coverage", and "Update Coordination of Benefits". A green "Go" button is located at the bottom right of the form.



The screenshot displays a "Tasks" section with a dark blue header. Below the header, a box says "Complete one or more tasks". The tasks are organized into categories: "Member Info" (with "Update Member Info"), "Dependent Info" (with "Add Dependents"), "Coverage Info" (with "Terminate Coverage" and "Add or Change Coverage"), and "Coordination of Benefits" (with "Update Coordination of Benefits"). Each task has a radio button and a refresh icon. At the bottom, there is a link "Click [refresh icon] to reset to default" and a status bar with three icons: a circle for "Not Started", a clock for "Incomplete", and a checkmark for "Completed".

If a termination of coverage is needed, use the Terminate Coverage task. Users cannot drop coverage from the Add or Change Coverage task.

3. On the Plan Info screen, users will see any current coverages the member is enrolled in along with the most recent effective date for each corresponding coverage. To update an existing coverage, update the fields corresponding to the coverage with the required information.

Select the coverage(s) using the check boxes and supply the required effective date and any other required information.

Please note: Any fields that are grayed out do not require an entry from the user. An example of this can be seen in the below picture under the Provider Network field for Dental coverage.

Add / Change Coverage

Plan Info

Review

Next Steps

You may save this task progress at the end of the page.

• Indicates required fields

To update an existing coverage, just update the fields corresponding to the coverage with the required information. To add a new coverage, select the coverage and provide required information

Coverages

Select Group, Division and Department


Select Group • 99980 ▼

Select Division • 99980.001 - SMALL GROUP SEGMENT - Gold Med; Lo ▼

Select applicable products •


Primary Health Products	Ancillary Health Products
<input checked="" type="checkbox"/> Dental	<input type="checkbox"/> Long Term Disability
<input checked="" type="checkbox"/> Medical	<input type="checkbox"/> Short-term disability
<input type="checkbox"/> Vision	<input type="checkbox"/> Life Insurance
	<input type="checkbox"/> Basic Spouse and Child Life Insurance
	<input type="checkbox"/> Supplemental Life Insurance for Employee
	<input type="checkbox"/> Supplemental Life Insurance for Spouse

Dental

Effective Date of Coverage • 08/01/2022 

Provider Network • No PPO ▼

Medical

Effective Date of Coverage • 08/01/2022 

Provider Network • FIRST CHOICE OF THE MIDWEST ▼

4. Use the Yes/No radio buttons to confirm whether the change in coverage also applies to dependents. Select the checkbox for the applicable dependents if needed.

Dependent Coverage

Does this change in coverage apply to dependents ? (Yes/No) *

☒ Yes ☐ No

Select the dependents *

☒ SPOUSE ☒ CHILD

SPOUSE

Select applicable products *

☐ Dental ☐ Medical

CHILD

Select applicable products *

☐ Dental ☐ Medical

5. Select the applicable products for each dependent. Add the effective dates and any other required information.

Dependent Coverage

Does this change in coverage apply to dependents ? (Yes/No) *

☒ Yes ☐ No

Select the dependents *

☒ SPOUSE ☒ CHILD


SPOUSE

Select applicable products *

☐ Dental ☒ Medical

Medical

Effective Date of Coverage *

08/01/2022 


CHILD

Select applicable products *

☐ Dental ☒ Medical

Medical

Effective Date of Coverage *

08/01/2022 

6. Users must supply updated Coordination of Benefits information for all family members when using the *Add or Change Coverage* task. Click the green *Save and Continue* button in the bottom right corner once all updates are complete.

Coordination of Benefits

Is the member covered by any other plan? *

☐ Yes ☒ No ☐ Unknown

Are the dependents covered by another plan? *

☐ Yes ☒ No ☐ Unknown

Medicare / Medicaid Information

Is the member covered by Medicare? *

☐ Yes ☒ No ☐ Unknown

Is the member covered by Medicaid? *

☐ Yes ☒ No ☐ Unknown

Are the dependents covered by Medicare? *

☐ Yes ☒ No ☐ Unknown

Are the dependents covered by Medicaid? *

☐ Yes ☒ No ☐ Unknown

Other Insurance Termination Information

If you and/or your dependent(s) had other insurance that ended within the past 18 months, please complete the following questions. Without this information, pending claims may be delayed. Please note, the following questions do **not** require completion if your other insurance ended prior to the start of your coverage here.

Did you and/or your dependent(s) have other insurance coverage that ended in the past 18 months?

☐ Yes ☒ No

7. The last step allows users to review everything completed for the *Add or Change Coverage* task. Users can go back to specific sections and make edits if needed. Click the green *Continue* button in the bottom right corner.

Please note: even though the individual task is completed, the transaction as a whole is not yet submitted for processing until the user clicks the green *Submit Transaction* button.

8. To complete an additional task, it can be selected from the Task Menu on the left side of the screen, or users can select from the additional tasks listed in blue.

Mid-Year Life Event Change

Life Event: Marriage Edit

TEST TEST

Member ID: ABCEFG123 Group ID: 99980 Employer: FNEmployer12721ABC LNEmployer12721ABC

Tasks

Complete one or more tasks

Member Info

Update Member Info ☐

Dependent Info

Add Dependents ☒

Coverage Info

Terminate Coverage ☐

Add or Change Coverage ☐

Coordination of Benefits

Update Coordination of Benefits ☐

Add Dependents

Add Dependents task is saved.

You must submit the transaction after you complete the appropriate tasks.

You may edit it at any time before submitting the transaction:

Edit

You may start a new task from the list below:

Update Member Info

Terminate Coverage

Add or Change Coverage

Update Coordination of Benefits

You may save and exit, returning later to finish and submit the transaction:

Save and Exit

You may submit the transaction for processing:

Submit Transaction

Previous

Open Enrollment Change

The Open Enrollment Change transaction type allows employer users to make any changes necessary to a member record due to open enrollment. Users can select options like, Update Member Info, Add Dependents, Change Divisions, Terminate Coverage, Add or Change Coverage, and Update Coordination of Benefits Information.

1. In this example, we will process a division change and update an address.
2. To update an address, select *Update Member Info* from the Task Menu.
3. Please note, if a demographic update for a dependent is needed, choose *Update Dependent Info* from the Task Menu.
4. Update the applicable fields under the Contact Information section. Click the green *Save and Continue* button when complete.
5. Review everything completed for the Update Member Info task. Users can go back to specific sections and make edits if needed. Click the green *Save and Continue* button in the bottom right corner.

Update Member Information

Update Information

Review

Next Steps

You may save this task progress at the end of the page.

• Indicates required fields

First Name •
TEST

Date of Hire •
01/01/2000

Gender •
Male

Middle Initial

Social Security Number •
XXX-XX-5555
(xxx-xx-xxxx)

Marital Status
Select

Last Name •
TEST

Date of Birth •
01/01/1951

Annual Salary
(Please enter numbers without commas or special characters)

Suffix

Contact Information

Address 1 •
111 ANYWHERE ST

State •
MICHIGAN

Primary Phone

Home Work Mobile

Address 2
APT 111

City •
ANYPLACE

Email

Country •
UNITED STATES OF AMERICA

Zip Code •
48912

Save

Save and Continue

Tasks

Complete one or more tasks

Member Info

Update Member Info

Dependent Info

Update Dependent Info

Add Dependents

Coverage Info

Terminate Coverage

Add or Change Coverage

Coordination of Benefits

Update Coordination of Benefits

Click to reset to default

Not Started

Incomplete

Completed

6. Select the *Add or Change Coverage* task from the Task Menu or set of blue buttons to complete the Division Change portion of the update.

Mid-Year Life Event Change
Life Event: Marriage [Edit](#)

TEST TEST
Member ID: ABCEFG123 Group ID: 99980 Employer: FNEmployer12721ABC LNEmployer12721ABC

Tasks

Complete one or more tasks

Member Info

Update Member Info ☐

Dependent Info

Add Dependents ☒

Coverage Info

Terminate Coverage ☐

Add or Change Coverage ☐

Coordination of Benefits

Update Coordination of Benefits ☐

Add Dependents

✓ Dependent Info ✓ Plan Info ✓ Review ● Next Steps

Add Dependents task is saved.

You must submit the transaction after you complete the appropriate tasks.
You may edit it at any time before submitting the transaction:

[Edit](#)

You may start a new task from the list below:

[Update Member Info](#)

[Terminate Coverage](#)

[Add or Change Coverage](#)

[Update Coordination of Benefits](#)

You may save and exit, returning later to finish and submit the transaction:

[Save and Exit](#)

You may submit the transaction for processing:

[Submit Transaction](#)

[Previous](#)

7. Under Plan Info, there is a field labeled *Select Division*. This field is pre-populated with the subscriber's current division. To change the division, select the appropriate division from the drop-down menu.

Add / Change Coverage

● Plan Info ○ Review ○ Next Steps

You may save this task progress at the end of the page.

• Indicates required fields

To update an existing coverage, just update the fields corresponding to the coverage with the required information. To add a new coverage, select the coverage and provide required information

Coverages

Select Group, Division and Department

Select Group • 99980

Select Division • 99980.002 - SMALL GROUP SEGMENT - Gold Med; Hi

8. Next, update the effective dates for all current coverages so the effective date of the division change is clear. When using the Open Enrollment Change transaction type, the effective date of the client's open enrollment should be used.

Plan Info

Review

Next Steps

You may save this task progress at the end of the page.

• Indicates required fields

To update an existing coverage, just update the fields corresponding to the coverage with the required information. To add a new coverage, select the coverage and provide required information

Coverages

Select Group, Division and Department


Select Group • 99980 ▼

Select Division • 99980.002 - SMALL GROUP SEGMENT - Gold Med; Hi ▼

Select applicable products •


Primary Health Products	Ancillary Health Products
<input checked="" type="checkbox"/> Dental	<input type="checkbox"/> Long Term Disability
<input checked="" type="checkbox"/> Medical	<input type="checkbox"/> Short-term disability
<input checked="" type="checkbox"/> Vision	<input type="checkbox"/> Life Insurance
	<input type="checkbox"/> Basic Spouse and Child Life Insurance
	<input type="checkbox"/> Supplemental Life Insurance for Employee
	<input type="checkbox"/> Supplemental Life Insurance for Spouse

Dental

Effective Date of Coverage • 08/01/2022 


Provider Network • No PPO ▼

Medical

Effective Date of Coverage • 08/01/2022 

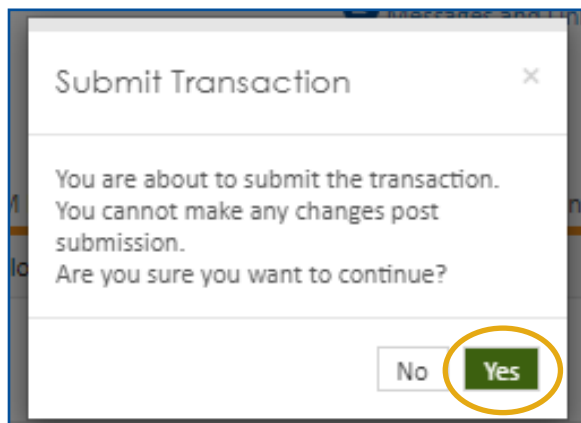
Provider Network • FIRST CHOICE OF THE MIDWEST ▼

Vision

Effective Date of Coverage • 08/01/2022 

Provider Network • No PPO ▼

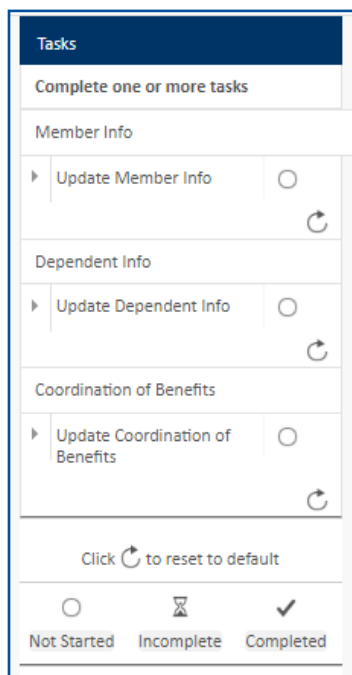
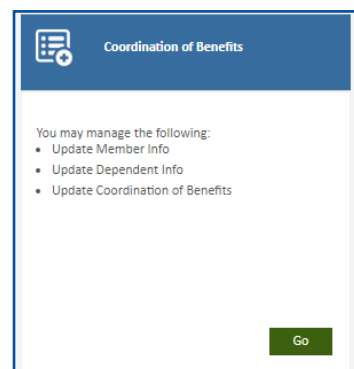
9. Complete the Coordination of Benefits section, then click the green *Save and Continue* button at the bottom right of the screen.
10. Review everything completed for the Add or Change Coverage task and make any edits if needed. Click the green *Continue* button in the bottom right corner.
11. Select an additional task to complete if needed. Otherwise, click the green *Submit Transaction* button to submit the address change and division change to Meritain Health for processing. A dialog box will appear to ensure the user is ready to submit the transaction. Click *Yes*.



You will receive a congratulations message, as well as a transaction ID number once the transaction is successfully submitted.

Coordination of Benefits

1. Users can update Coordination of Benefits for existing members using the Mid-year Life Event Change, Open Enrollment Change, or Coordination of Benefits transaction types.
2. If a user only needs to update Coordination of Benefits information, it is most convenient to use the designated Coordination of Benefits transaction type. Click *Go*.



3. Click *Update Coordination of Benefits* from the Task Menu. **Please note:** users can also use the Update Member Info and Update Dependent Info tasks, if needed.
4. A blank Coordination of Benefits form will display. If a subscriber does not have dependents on file and has never previously enrolled with dependents, only questions pertaining to the member will display.
5. Make the appropriate selections for each question. A *Yes*, *No*, or *Unknown* selection is required for all questions to submit the transaction to Meritain Health. **Please note:** the form contains separate questions pertaining to other coverage through Medicare or Medicaid.

6. When the answer Yes is selected, additional boxes expand to capture the detailed information about the other insurance. Fields with a red asterisk indicate they are required.

Update Your Coordination of Benefits Information

☒ Plan Info ☐ Review ☐ Next Steps

You may save this task progress at the end of the page.

- Indicates required fields

Coordination of Benefits

Is the member covered by any other plan? *

☐ Yes ☐ No ☐ Unknown

Are the dependents covered by another plan? *

☐ Yes ☐ No ☐ Unknown

Medicare / Medicaid Information

Is the member covered by Medicare? *

☐ Yes ☐ No ☐ Unknown

Is the member covered by Medicaid? *

☐ Yes ☐ No ☐ Unknown

Are the dependents covered by Medicare? *

☐ Yes ☐ No ☐ Unknown

Are the dependents covered by Medicaid? *

☐ Yes ☐ No ☐ Unknown

Save

Save and Continue

Coordination of Benefits

Is the member covered by any other plan? *

☒ Yes ☐ No ☐ Unknown

Select applicable products *

☐ Dental ☒ Medical ☐ Vision

Medical

Carrier 1

Carrier Name *

Effective Date of Coverage *

Policy Holder's Date of Birth *

Plan Type *

Policy Holder's Name *

Relationship to Policy Holder *

[Add another Carrier](#)

Are the dependents covered by another plan? *

☐ Yes ☐ No ☐ Unknown

7. If a member or dependent(s) has Medicare, select *Yes* to the applicable question. A box will expand allowing the user to type the Medicare ID and indicate whether the Medicare beneficiary has Parts A, B, and/or D. A required Effective Date of Coverage field expands when Parts A, B, or D are selected.


Medicare / Medicaid Information

Is the member covered by Medicare? *

☒ Yes ☐ No ☐ Unknown

Medicare ID

Type of Coverage ☒ Part A

Effective Date of Coverage * 

Type of Coverage ☐ Part B

Type of Coverage ☐ Part D

Eligibility for Medicare due to *

8. Select the applicable reason for Medicare coverage from the drop down menu next to the *Eligibility for Medicare due to* field.


Medicare / Medicaid Information

Is the member covered by Medicare? *

☒ Yes ☐ No ☐ Unknown

Medicare ID

Type of Coverage ☒ Part A

Effective Date of Coverage * 


Type of Coverage ☐ Part B


Type of Coverage ☐ Part D

Eligibility for Medicare due to *

Is the member covered by Medicaid? *

☐ Yes ☐ No ☐ Unknown





Age

End Stage Renal Disease(ESRD)


Disability

Other

9. If the member or dependents have other coverage through Medicaid, select *Yes* to the Medicaid question and provide the Effective Date of Coverage.

Is the member covered by Medicaid? *

☒ Yes ☐ No ☐ Unknown

Effective Date of Coverage * 

10. If at least one family member has no other coverage, a final question will appear at the end of the Coordination of Benefits transaction. This question asks whether any family members had other insurance coverage that ended within the last 18 months. This question is important to ensure there are no gaps in the Coordination of Benefits history Meritain Health has on file, which could result in pended claims.
- This question is optional. It is not necessary to complete if a member or family members had other coverage, but it ended prior to their coverage with Meritain Health.
 - If any family members had other coverage that terminated within the past 18 months while they were also covered by Meritain Health, answer *Yes* to this question.

Other Insurance Termination Information

If you and/or your dependent(s) had other insurance that ended within the past 18 months, please complete the following questions. Without this information, pending claims may be delayed. Please note, the following questions do **not** require completion if your other insurance ended prior to the start of your coverage here.

Did you and/or your dependent(s) have other insurance coverage that ended in the past 18 months?

☐ Yes ☐ No

11. Checkboxes will expand allowing the user to select the applicable products if the member (subscriber) had the other insurance. Leave these blank if the member did not have other coverage.

Other Insurance Termination Information

If you and/or your dependent(s) had other insurance that ended within the past 18 months, please complete the following questions. Without this information, pending claims may be delayed. Please note, the following questions do **not** require completion if your other insurance ended prior to the start of your coverage here.

Did you and/or your dependent(s) have other insurance coverage that ended in the past 18 months?

☒ Yes ☐ No

Select Applicable Products for the member

☐ Dental ☐ Medical ☐ Vision

Select the dependent(s)

☐ SPOUSE TEST ☐ CHILD TEST

12. If it was a dependent(s) that previously had the other insurance, check the box with the applicable dependent name(s) and then select the applicable product(s).

13. For any other insurance products selected, a final set of fields will expand allowing the user to capture the previous other insurance carrier and the termination date of that other insurance.

Other Insurance Termination Information

If you and/or your dependent(s) had other insurance that ended within the past 18 months, please complete the following questions. Without this information, pending claims may be delayed. Please note, the following questions do **not** require completion if your other insurance ended prior to the start of your coverage here.

Did you and/or your dependent(s) have other insurance coverage that ended in the past 18 months?

☒ Yes ☐ No

Select Applicable Products for the member

☐ Dental ☐ Medical ☐ Vision

Select the dependent(s)

☒ SPOUSE TEST ☐ CHILD TEST

SPOUSE TEST


Select Applicable Products*

☐ Dental ☒ Medical ☐ Vision

Medical

Previous Other Insurance Carrier*

Other Insurance Termination Date*

Other Insurance Name 12/31/2021 

14. Once complete, click the green *Save and Continue* button. Review and edit if necessary. Click the green *Continue* button in the bottom right corner when finished.
15. Users can select additional tasks from the Task Menu on the left side of the screen, or select from the additional tasks listed in blue.

Coordination of Benefits

TEST TEST

Member ID: ABCEFG123 Group ID: 99980 Employer: FNEmployer12721ABC LNEmployer12721ABC

Tasks

Complete one or more tasks

Member Info

Update Member Info ☐ ↻

Dependent Info

Update Dependent Info ☐ ↻

Coordination of Benefits

Update Coordination of Benefits ☒ ↻

Click ↻ to reset to default

☐ Not Started
☒ Incomplete
☒ Completed

Update Your Coordination of Benefits Information

☒ Plan Info
☒ Review
☒ Next Steps

Update Coordination of Benefits task is saved.

You must submit the transaction after you complete the appropriate tasks.
You may edit it at any time before submitting the transaction:

[Edit](#)

You may start a new task from the list below:

[Update Member Info](#)

[Update Dependent Info](#)

You may save and exit, returning later to finish and submit the transaction:

[Save and Exit](#)

You may submit the transaction for processing:

[Submit Transaction](#)

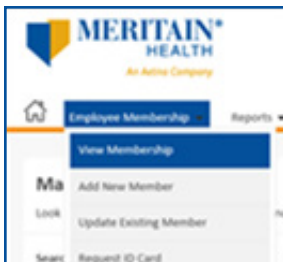
16. Click the green *Submit Transaction* button to submit all completed tasks within the transaction for Meritain Health processing. A dialog box will appear to ensure the user is ready to submit the transaction. Click *Yes*. You will receive a congratulations message, as well as a transaction ID number once the transaction is successfully submitted.

Submit Transaction

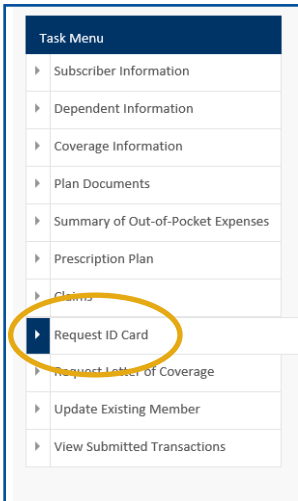
You are about to submit the transaction.
You cannot make any changes post submission.
Are you sure you want to continue?

Request ID Card

Search for employee record via the *Manage Employee* tile on the homepage.



Alternatively, you can use the Employee Membership drop-down on the top toolbar and click *Request ID Card*, then search for the employee.



Use the task menu on the left side of the page to navigate to *Request ID Card*.

Four options are available for card delivery, additional information fields will open based on choice.

Request ID Card
Across all applicable groups

ERIC DEAN - Subscriber

Card 1 of 1

Front View

Back View

Member Information: ABC COMPANY, Group #: 12721, Member: ERIC DEAN, Member ID: 8196288456, Division: C03

Medical Plan: Network By aetna, Coverage: Family, Plan: Aetna Choice POS II

Dental/Vision Plans: Dental Plan: Coverage: Family, Vision Plan: Coverage: Family

Pharmacy Plan: RX BIN: 094336, RX PCN: ADV, RX Group: RX2738, Member: 808.475.7589, Pharmacy: 800.364.6331

Claims Submission: Mail ALL Claims to: Meritain Health, P.O. Box 653671, Richardson, TX 75085-3021, EDI: WebMD/Endicon 41124 or McKesson/Raley Health 1701

Eligibility: Call 800.925.2272 or visit www.MERITAIN.com for inquiries regarding eligibility, claims and plan benefits.

Prequalification: For Prequalification call: 800.242.1199. Failure to comply with your plan's prequalification requirements may result in a reduction of benefits.

24-Hour Automated Customer Service: 800.566.9311 or www.MERITAIN.com

PHCS

Printed: 20160519 INDEX #: 909

Please choose how you would like to receive the ID Card

Email Download and Print PDF Order by Mail Fax

Email ID Card

Enter Email Address *

demo@meritain.com

Disclaimer

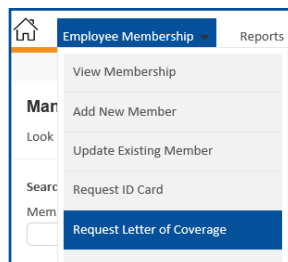
This information is being provided to you as an informational tool and is not a guarantee of benefits. All plan terms and conditions must be met to continue plan eligibility.

I Accept *

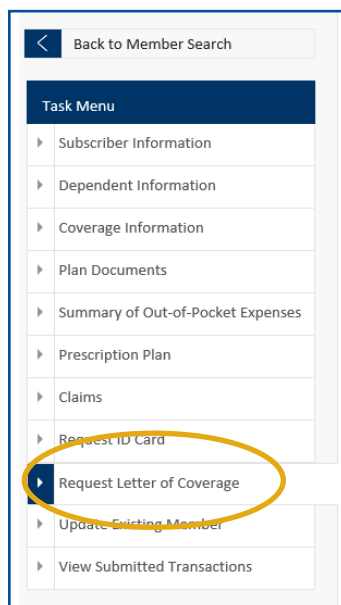
Cancel Submit

Request Letter of Coverage

Request a letter of coverage by using the *Manage Employee* form to access the employee record.



Alternatively, you can use the Employee Membership drop-down on the top toolbar and click *Request Letter of Coverage*, then search for the employee.

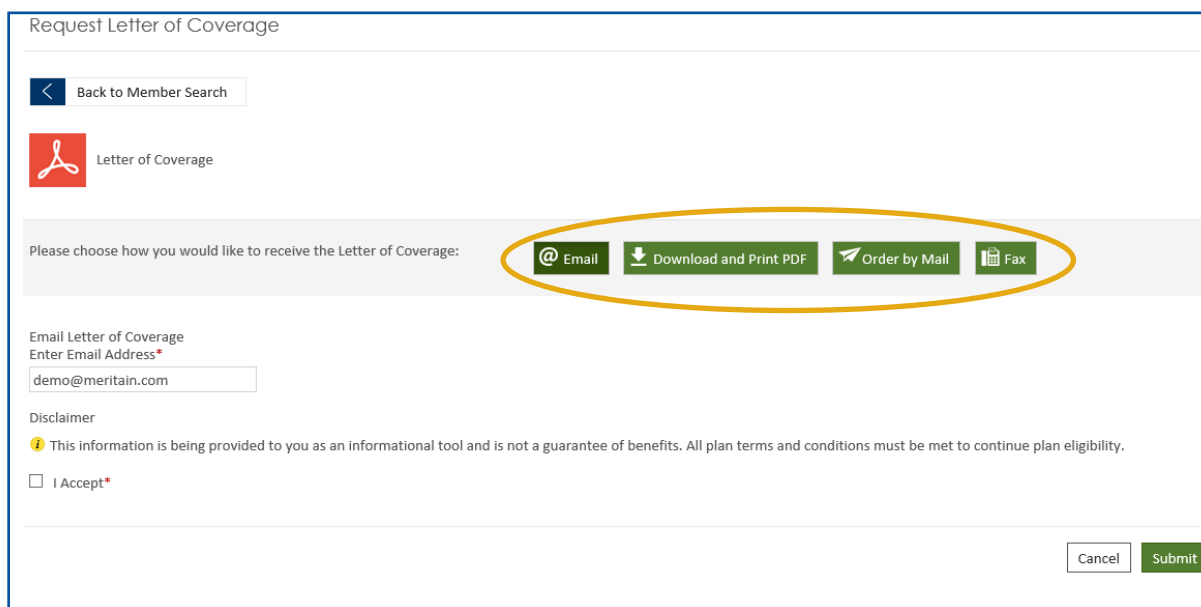


Task Menu

- Subscriber Information
- Dependent Information
- Coverage Information
- Plan Documents
- Summary of Out-of-Pocket Expenses
- Prescription Plan
- Claims
- Request ID Card
- Request Letter of Coverage**
- Update Existing Member
- View Submitted Transactions


Use the Task Menu to select *Request Letter of Coverage*.

Four options are available for letter delivery, additional fields will open based on delivery choice.



Request Letter of Coverage


[Back to Member Search](#)

 Letter of Coverage

Please choose how you would like to receive the Letter of Coverage:

☒ Email ☐ Download and Print PDF ☐ Order by Mail ☐ Fax

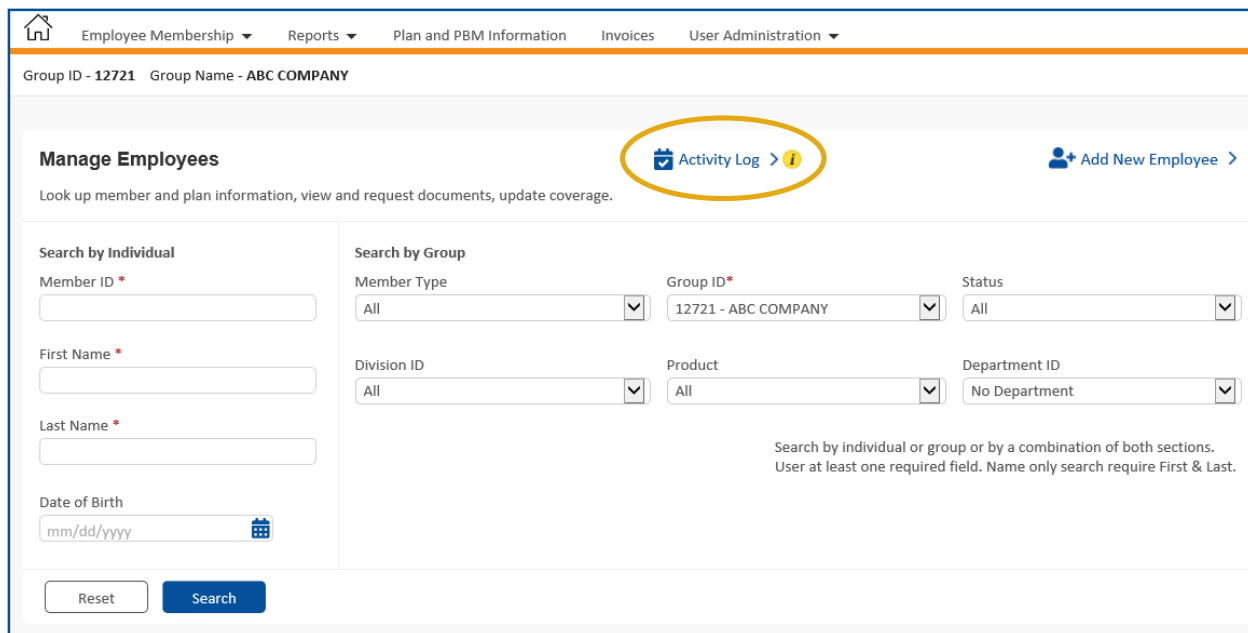
Email Letter of Coverage
Enter Email Address*

Disclaimer
 This information is being provided to you as an informational tool and is not a guarantee of benefits. All plan terms and conditions must be met to continue plan eligibility.

☐ I Accept*

Activity Log

The Activity Log feature allows you to view submitted, saved and pending transactions. You can access the feature right on the homepage—just click on the *Activity Log* link on the top.



The screenshot shows the 'Manage Employees' interface. At the top, there's a navigation bar with links: Home, Employee Membership, Reports, Plan and PBM Information, Invoices, and User Administration. Below this, the page header shows 'Group ID - 12721' and 'Group Name - ABC COMPANY'. The main section is titled 'Manage Employees' and includes a sub-header 'Look up member and plan information, view and request documents, update coverage.' A yellow circle highlights the 'Activity Log' link with a calendar icon and a warning icon. To the right of this link is an 'Add New Employee' button with a plus icon. Below the header, there are two search sections: 'Search by Individual' and 'Search by Group'. The 'Search by Individual' section has fields for Member ID, First Name, Last Name, and Date of Birth. The 'Search by Group' section has dropdowns for Member Type, Group ID, Status, Division ID, Product, and Department ID. A note at the bottom of the search section states: 'Search by individual or group or by a combination of both sections. User at least one required field. Name only search require First & Last.' At the bottom of the search section are 'Reset' and 'Search' buttons.

In addition, you can go to the Employee Membership drop-down on the top toolbar and click *Activity Log* to search and view transactions.



Once you reach the transaction search page, you may search saved, submitted and pending approval transactions by group or division. Then enter you will appear at the transaction search page. You may search saved, submitted and pending approval transactions by group or division. Then, enter your information in the required fields and click *Apply*.

- **Saved** transactions have been partially entered into the system, but not yet submitted to Meritain Health for processing.
- **Submitted** transactions have been submitted to Meritain Health for processing.
- **Pending Approval** are updates from members submitted via the member website. Once transactions have been reviewed, they can be submitted to Meritain Health for processing.

Activity Log

☒ Saved
 ☐ Submitted
 ☐ Pending Approval

Search [-]

☒ By Group
 ☐ By Division

Select all the groups which you want to search

☒ 12721 - ABC COMPANY

[Select all Groups](#)
[Clear all Groups](#)

Member ID
 Transaction Save Date
 From To
 Life Event
 Transaction Started By
 Transaction Last Saved By
 Transaction Type
 First Name
 Last Name

Reset

You may export your transactions in pdf or excel format. You also have the option to print the transactions or edit them.

Activity Log

☒ Saved
 ☐ Submitted
 ☐ Pending Approval

Search +

Saved Transactions
Click Edit to navigate to the transaction page

Select	Member ID	Transaction Save Date	First Name	Last Name	Transaction Type	Group	Division	Life Event	Transaction Started By	Transaction Last Saved By	Edit
<input checked="" type="checkbox"/>		06/11/2018	JOHN	DOE	New Enrollment – New Hire	12721	12721.001		Demo	Demo	<input type="button" value="Export"/> <input type="button" value="Print"/> <input type="button" value="Edit"/>

Showing 1-1 of 1 results

Delete

Reports

For help managing your health benefit plan, you can run reports right from the employer website. Go to the *Reports* widget at the bottom of the employer homepage and select the report options available.

Manage Employees Activity Log > i + Add New Employee >

Look up member and plan information, view and request documents, update coverage.

Search by Individual
Member ID *

First Name *

Last Name *

Date of Birth

Search by Group
Member Type:
Group ID *:
Status:
Division ID:
Product:
Department ID:
Search by individual or group or by a combination of both sections.
User at least one required field. Name only search require First & Last.

Reports
[Static Reports >](#)
[Self Service Reports >](#)

Invoices
[View & Download >](#)

Custom Messages
[Account Message >](#)
[Promo Tile >](#)

Membership Info
[Registration & Group Data >](#)

In addition, you can go to the *Reports* drop-down on the top toolbar, and select the *Self Service Reports*, *Static Reports* or *Report Briefs* option.

MERITAIN[®] HEALTH
An Aetna Company

Logout

Employee Membership **Reports** Plan and PBM Information Invoices User Administration

Manage Employees
Look up member and plan information, view and request documents, update coverage.

Self Service Reports
Static Reports
Report Briefs

Self Service Reports

Search by Individual
Member ID *

First Name *

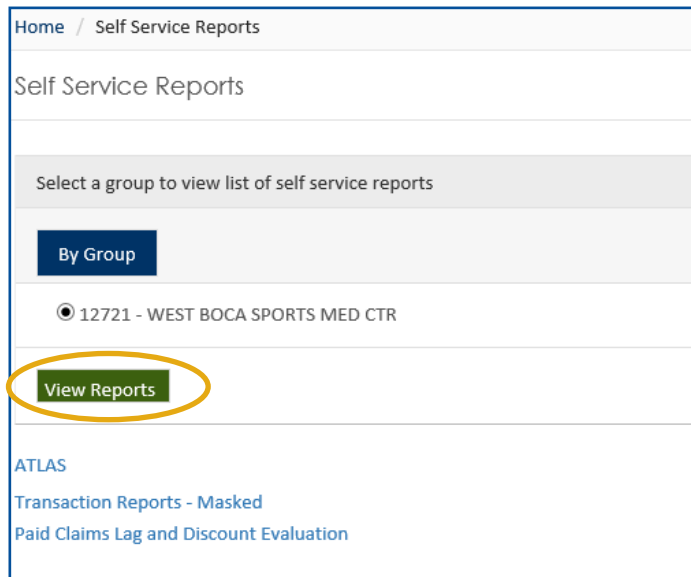
Last Name *

Search by Group
Member Type:
Group ID *:
Status:
Division ID:
Product:
Department ID:
Search by individual or group or by a combination of both sections.
User at least one required field. Name only search require First & Last.

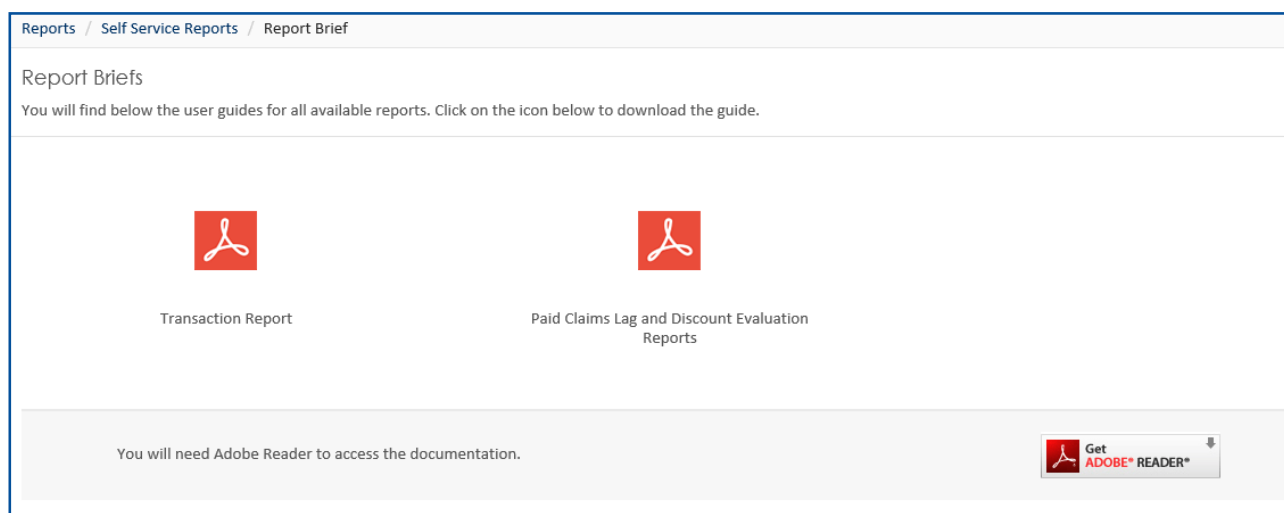
The Self Service Reports include:

- Transaction details—show any refunds received from the prior month. This information is listed at the top of the report.
- Claims log.
- Discount evaluation reports.

You can also access your plan utilization and performance reports under the link for our ATLAS reporting tool. To view the reports, simply click on the *View Reports* links.



The **Report Brief** (found in the Self-Service Report drop-down) contains all the user guides for all available reports. You can click on the link and then export to excel or access with the download button.



The **Static Reports** set up for each group is located in the drop-down list and may include:

- Daily check registers
- Various claims reports
- Stop loss reports
- Eligibility reports

To run a report, select the *Report Name* from the drop-down, specify the date range for the report and click the *Generate Report* button.

Home / Static Reports

Static Reports

Search

By Group

Select a group which you want to search*

12721 - ABC COMPANY

Report Name

ALL

Date Range

1/28/2022 From 4/28/2022 To







Reset Generate Report

The reports results will appear. To view the reports, choose from the *Open* and *View As* column.

Home / Static Reports

Static Reports

Search

Group ID	Report ID	Report Name	Report Date	Open and View As
12721	1375066	Group 12721 Daily Check Register	06/08/2018	 
12721	1375065	Group 12721 Eligibility Report	06/08/2018	
12721	1375064	Group 12721 Incomplete Claim Report	06/08/2018	
12721	1375063	Group 12721 Specific Report	06/08/2018	
12721	1375062	Group 12721 Aggregate Report	06/08/2018	

Showing 1-5 of 5 results

Plan and PBM Information

This section houses plan documents, URLs and PBM vendor information. It is split into two tabs: Plan Information and PBM Information.

You can access the plan information, right on the homepage. Just click on *Plan and PBM Information* on the top menu toolbar.

You will be able to select one or more groups. As you select groups, the divisions belonging to those groups selected are populated under the Divisions tab. Then, click *Search*.

The plan information list will appear. Click on the attachment to download and export in PDF or Excel format. In addition, you can print the attachment.

Plan and PBM Information

Plan Information

PBM Information

Search

Plan Information

Click on the accordion to view plan documents and URLs

If you are using a Chrome browser to open your medical documents, please read this: [Chrome Instructions](#)

Export

Print

Plan Docs & URLs	Group	Division	Plan Name	Product
—	12721	12721.001	Medical Benefits	Medical
Plan Documents			URLs	
12721-0118			AETNA PPO	
—	12721	12721.001	Dental Benefits	Dental
Plan Documents			URLs	
12721-0118			AETNA PPO	

The PBM information list will appear. Click on the attachment to download and export in pdf or excel format. In addition, you can print the attachment. Then, click on the PBM vendor name link.

Plan and PBM Information

Plan Information

PBM Information

Search

PBM Information

PBM information for search criteria entered is listed below

Export

Print

Group	Division	PBM Vendor Name
12721	12721.001	Meritain Health Pharmacy Solutions

Invoices

For help managing your health benefit plan, you can download invoices right from the employer website. Go to the *Invoices* widget at the bottom of the employer homepage and select *View & Download*.

The screenshot shows the 'Manage Employees' page. At the top, there's a header with 'Manage Employees', 'Activity Log', and 'Add New Employee'. Below the header is a search section with 'Search by Individual' and 'Search by Group' filters. The 'Search by Group' section includes dropdowns for 'Member Type', 'Group ID' (set to '12721 - ABC COMPANY'), 'Status', 'Division ID', 'Product', and 'Department ID'. A 'Search' button is at the bottom of the search section. Below the search section are four widgets: 'Reports', 'Invoices', 'Custom Messages', and 'Membership Info'. The 'Invoices' widget is highlighted with a yellow circle and contains a 'View & Download' link.

In addition, you can view invoices, right on the homepage. Just click on *Invoices* on the top menu toolbar.

The screenshot shows the homepage with a top menu bar. The menu items are 'Employee Membership', 'Reports', 'Plan and PBM Information', 'Invoices', and 'User Administration'. The 'Invoices' menu item is highlighted with a yellow circle. Below the menu bar, the page shows the 'Manage Employees' section, which is identical to the one in the first screenshot.

A list of all the invoices will appear. You can click on the attachment to download your invoices in PDF or Excel format. You can also print your invoices. These can be displayed by clicking on the icon.

Filter
+

Invoices
Click on the attachment to download the invoice

Export Print

Group ID	Invoice Date	Due Date	Invoice Amount(\$)	Attachment
12721	04/01/2018	04/01/2018	337.20	
12721	12/12/2017	12/01/2017	124147.09	
12721	11/14/2017	11/01/2017	121993.80	
12721	10/17/2017	10/01/2017	121884.74	
12721	09/19/2017	09/01/2017	119788.71	
12721	08/29/2017	08/01/2017	120685.53	
12721	06/30/2017	07/01/2017	113000.94	
12721	06/13/2017	06/01/2017	12736.79	
12721	05/09/2017	05/01/2017	111618.16	
12721	04/18/2017	04/01/2017	112217.49	

Showing 1-10 of 10 results 1

This is an example of an invoice in PDF form.

BILL.122751704.pdf - Adobe Acrobat Reader DC (32-bit)

File Edit View Sign Window Help

Home Tools BILL.122751704.pdf x

1 / 3 116%

Remitter: *ABC COMPANY
222 Advocate Pkwy
Morrow GA 30260-1600

BILLING STATEMENT
PREMIUM DUE DATE
April 1, 2018
for 04-01-18 to 04-30-18

PAGE 1

FILE NUMBER		STATEMENT DATE											
12721		4-01-18 13:42											
DIVISION: A01 NO LONGER USED													
Name	EE ID	Effective Date	MED COV	SPEC PREM	AGOR PREM	MED FEE	NETWORK FEE	DEN COV	FLEX	ADMIN FEES	Total		
ARDON DEMITRI	111111111	01-01-14	E	89.44	11.32	3.35	14.95	0.00	49.54	168.60	0		
FOETTELUR OATHA	222222222	01-01-14	E	89.44	11.32	3.35	14.95	0.00	49.54	168.60	0		
TOTAL FOR DIVISION: A01 NO LONGER USED													
CURRENT PREMIUM				178.88	22.64	6.70	29.90	0.00	99.08		337.20		
ADJUSTMENTS													
TOTAL				178.88	22.64	6.70	29.90	0.00	99.08		337.20		
UNIT COUNTS													
				CURRENT	ADJUSTMENTS		TOTAL						
MEDICAL EMPLOYEES				2	0		2						
DENTAL EMPLOYEES				0	0		0						
FLEX EMPLOYEES				0	0		0						
FLEX EMPL - PREMIUM ONLY				0	0		0						

User Administration

When it comes to managing your employee benefits plan, your Meritain Health website has everything you need! It's fast and easy to add or remove users to your group's account.

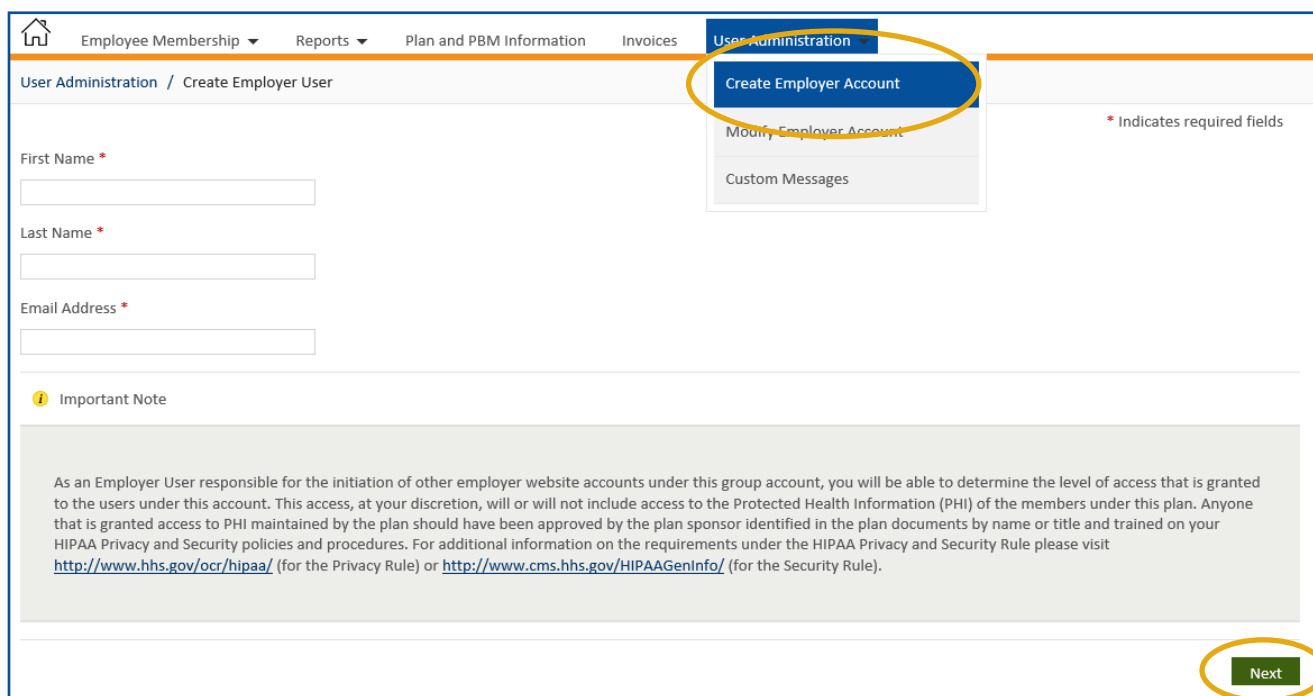
Please note, Meritain Health requires employer users to sign our Authorization Form and submit it to a client advocate. Once we've received your completed form, you will be authorized for the functions outlined in this guide. [add disclaimer to screen: *Not all groups have this feature available/elected for their employer users.*]

Create Employer Account

Once logged in, it's easy to add users to your Meritain Health website. First, click on the *User Administration* drop-down on the top toolbar of the homepage.

Next, click on *Create Employer Account*.

You'll be able to add user information, such as first name, last name and email address. After you've added this information, click *Next*.



The screenshot displays the Meritain Health website's 'User Administration' section. The top navigation bar includes links for 'Employee Membership', 'Reports', 'Plan and PBM Information', 'Invoices', and 'User Administration'. The 'User Administration' dropdown menu is open, showing options: 'Create Employer Account' (highlighted with a yellow circle), 'Modify Employer Account', and 'Custom Messages'. The main content area is titled 'User Administration / Create Employer User'. It features three input fields: 'First Name *', 'Last Name *', and 'Email Address *', each with a red asterisk indicating a required field. Below these fields is an 'Important Note' section with a yellow information icon. The note states that as an Employer User, the user can determine the level of access granted to other users under the group account, and that access to Protected Health Information (PHI) must be approved by the plan sponsor. It provides links to the HIPAA Privacy and Security Rule: <http://www.hhs.gov/ocr/hipaa/> and <http://www.cms.hhs.gov/HIPAAGenInfo/>. At the bottom right of the form, there is a green 'Next' button, which is also highlighted with a yellow circle.

After the new user is created, you can assign permissions to their account when you click the *Assign Permissions* button.

Permissions you can assign include:

- Access to view members' claims
- Access to read dashboard messages
- Ability to enroll members
- Ability to create more employer users

After you have assigned permissions to the user, click the *divisions and reports* they will have access to. Click the *Save Permission* button on the bottom right to save your changes.

User Administration / Create Employer User

Employer Information

First Name : Arthur

Last Name : Active

Business Email : ArthurActive@meritain.com

Access Grid

Group ID	Group Name	Has Inbound SSO?	Edit Access	Revoke Access
No data available in table				

Add Groups

Select a list of groups for the user to have access to

NOTE: Groups appearing disabled below have permissions defined. Please edit / remove existing access using the access grid above.

☒ 12721 - ABC COMPANY

[Select all items](#) [Clear all items](#)

Assign Permissions

i Important Note

As an Employer User responsible for the initiation of other employer website accounts under this group account, you will be able to determine the level of access that is granted to the users under this account. This access, at your discretion, will or will not include access to the Protected Health Information (PHI) of the members under this plan. Anyone that is granted access to PHI maintained by the plan should have been approved by the plan sponsor identified in the plan documents by name or title and trained on your HIPAA Privacy and Security policies and procedures. For additional information on the requirements under the HIPAA Privacy and Security Rule please visit <http://www.hhs.gov/ocr/hipaa/> (for the Privacy Rule) or <http://www.cms.hhs.gov/HIPAAGenInfo/> (for the Security Rule).

Previous Save

Modify Employer Account

If an employee no longer needs permission as a user on the website, you can easily remove them from the account. On the homepage, click on the *User Administration* dropdown on the top toolbar and choose *Modify Employer Account*.

The screenshot shows the top navigation bar with a dropdown menu for 'User Administration'. The 'Modify Employer Account' option is highlighted. Below the menu, the 'Edit Employer User' page is visible, featuring a search form with fields for First Name, Last Name, Group ID, Email Address, Username, and Account Status. A 'Search' button is at the bottom right of the form.

You will arrive at the Edit Employer User page. From here, enter identifying information for the group, such as name or group ID, and click *Search*.

Find the group in the list and click *Edit* in the last column on the left.

The screenshot shows the 'Edit Employer User' page with search results. The 'Group ID' field is populated with '12721 - ABC COMPANY'. The 'Search' button is highlighted. Below the search form, a table displays the search results. The 'Edit' button is highlighted in the first column of the table.

First Name	Last Name	Group ID	Username	Email Address	Account Status
Arthur	Active	12721	ActiveEmployer	ArthurActive@meritain.com	Active

You will pull up the access grid. Click the icon under *Edit Access* and choose *Inactive*. **Please note:** if you click *Revoke Access*, you will get an error message.

Next, click on the *Assign Permissions* button. In the list of permissions, uncheck all selections. Click the *Save Permission* button on the bottom right to save your changes.

User Administration / Create Employer User

Employer Information

First Name

:

Arthur

Last Name

:

Active

Business Email

:

ArthurActive@meritain.com

Access Grid

Group ID	Group Name	Has Inbound SSO?	Edit Access	Revoke Access
No data available in table				

Add Groups

Select a list of groups for the user to have access to

NOTE: Groups appearing disabled below have permissions defined. Please edit / remove existing access using the access grid above.

☒

12721 - ABC COMPANY

[Select all items](#) [Clear all items](#)

Assign Permissions

Important Note

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Previous

Save

Custom Messages

You can access Custom Messages in widget at the bottom of the employer homepage and select the report options available.

Manage Employees [Activity Log](#) [Add New Employee](#)

Look up member and plan information, view and request documents, update coverage.

Search by Individual

Member ID *

First Name *

Last Name *

Date of Birth

Search by Group

Member Type

Group ID *

Status

Division ID

Product

Department ID

Search by individual or group or by a combination of both sections.
User at least one required field. Name only search require First & Last.

[Reset](#) [Search](#)

Reports

- [Static Reports](#)
- [Self Service Reports](#)

Invoices

- [View & Download](#)

Custom Messages

- [Account Message](#)
- [Promo Tile](#)

Membership Info

- [Registration & Group Data](#)

You can also access Custom Messages, by clicking on the User Administration dropdown on the top toolbar of the homepage.

Next, click *Custom Messages*.

MERITAIN[®] HEALTH
An Aetna Company

[Messages and Links](#)

[Home](#) [Employee Membership](#) [Reports](#) [Plan and PBM Information](#) [Invoices](#) [User Administration](#)

Manage Employees [Activity Log](#)

Look up member and plan information, view and request documents, update coverage.

[Create Employer Account](#)

[Modify Employer Account](#)

[Custom Messages](#)

You can customize messages by selecting *Account Messages* or *Promo Tile*. You have the option to choose the type of member (Subscriber/Dependent/Employer) using the tabs available. You will be able to set dashboard message or promo tile for each type of member.

To add a new message for a group/division/employer click on *Account Messages*. Next, enter the information required and click *Search*.

Custom Messages

Menu

Account Messages

Promo Tile

Account Messages

Subscriber

Dependent

Employer

Add New Account Message

Search for custom messages you have created for various divisions. You may view, edit or delete existing messages, or create new ones.

Search

Content Type

☐ All

☐ High Alert

☐ Promotion

☐ Other

☐ Important Information

☐ Information / Education

Status

☐ All

☐ Pending Approval

☐ Scheduled

☐ Rejected

☐ Running

☐ Expired

Submitted Date

mm/dd/yyyy

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

Message Contains

Division

Group

Division ID *

Enter Complete Division ID

Add (Division ID added will be shown in grid below)

Division ID

Division Name

Delete

Sorry, we can't find any information. Please try again using different search terms.

Reset

Search

To add a new promo tile for a group/division/employer click on *Promo Tile*. Next, enter the information required and click *Search*.

Menu

Account Messages

Promo Tile

Promo Tile

Subscriber

Dependent

Employer

Add New Promo Tile

Search for custom messages you have created for various divisions. You may view, edit or delete existing messages, or create new ones.

Search

Content Type

☐ All

☐ High Alert

☐ Promotion

☐ Other

☐ Important Information

☐ Information / Education

Status

☐ All

☐ Pending Approval

☐ Scheduled

☐ Rejected

☐ Running

☐ Expired

Submitted Date

mm/dd/yyyy

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

Division

Group

Division ID *

Enter Complete Division ID

[Add](#) (Division ID added will be shown in grid below)

Division ID

Division Name

Delete

Sorry, we can't find any information. Please try again using different search terms.

Reset

Search

For more information

The Meritain Health employer website is your resource to manage your employee benefits plan.

If you have any questions about logging in or navigating the website, please contact your client advocate team member or your Meritain Health representative.