



Meritain Health® Employer Website User Guide

Simple. Transparent. Versatile.

At Meritain Health®, we're creating unrivaled connections.

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Meritain Health®
an  **aetna** company

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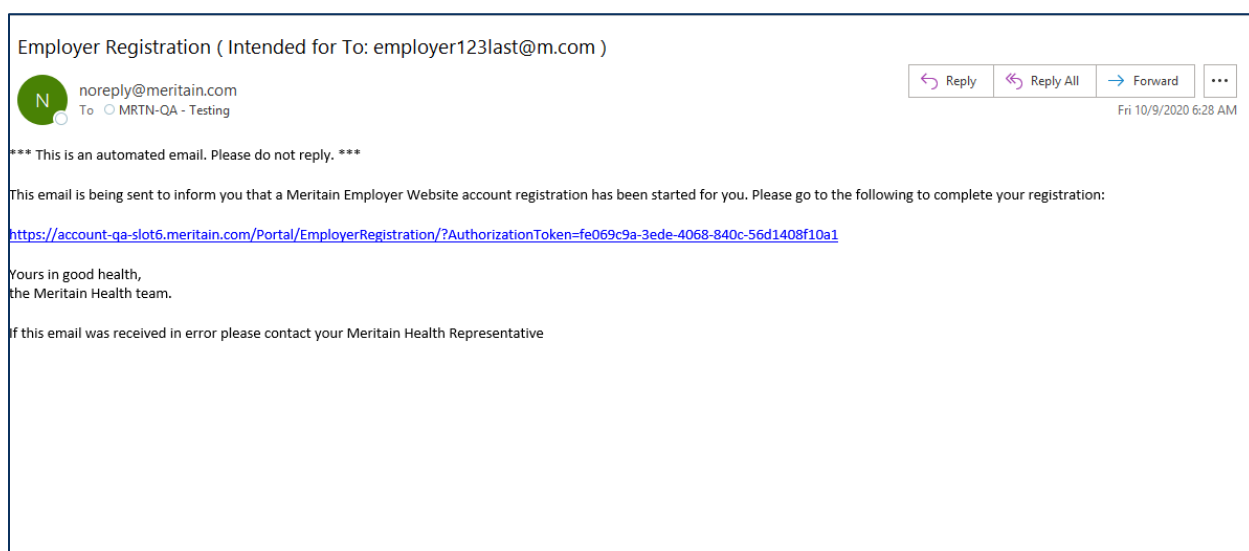
Introduction

Meritain Health® offers employers online access to account balances, claim information, member information, health coverage, drug and prescription information and invoices. Our employer portal is your resource to manage your employee benefits plan. Features may vary depending on your level of the access.

Registration

When a new employer is set up on the website, an employer user will be selected as the group's representative. A system generated email will be sent to the employer user to register. Invitations to register remain active for 15 days. Once registered, the group representative 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 provided in the system generated email.



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

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

The screenshot shows the 'Employer Registration' page, Step 1: Personal Information. The progress bar at the top indicates Step 1 is active, followed by Step 2, Step 3, and Step 4. The form title is 'Step 1 – Personal Information' and the step indicator is 'Step 1/4'. A red asterisk indicates mandatory fields. The form contains four input fields: 'First Name*' with the value 'Test', 'Last Name*' with the value 'Test', 'Business Email Address*' with the value 'testemp10@meritain.com', and 'Group ID*' which is empty. A 'Next' button is located at the bottom right.

Employer Registration

Step 1 Step 2 Step 3 Step 4

Step 1 – Personal Information Step 1/4

First Name* *Indicates mandatory fields

Last Name*

Business Email Address*

Group ID*

Next

Step 2: Create your username and password.

The screenshot shows the 'Employer Registration' page, Step 2: Username and Password. The progress bar at the top indicates Step 2 is active, followed by Step 1, Step 3, and Step 4. The form title is 'Step 2 – Username and Password' and the step indicator is 'Step 2/4'. A red asterisk indicates mandatory fields. The form contains three input fields: 'Enter Username*', 'Enter Password*', and 'Confirm Password*'. A password requirements box is located below the password fields, stating: '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...), and At least one of the following symbols: (#\$!%^ @ &*()=+-)'. 'Previous' and 'Next' buttons are located at the bottom left and right respectively.

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: Answer 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 pet's name?

Enter Security Answer *

test

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: 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.

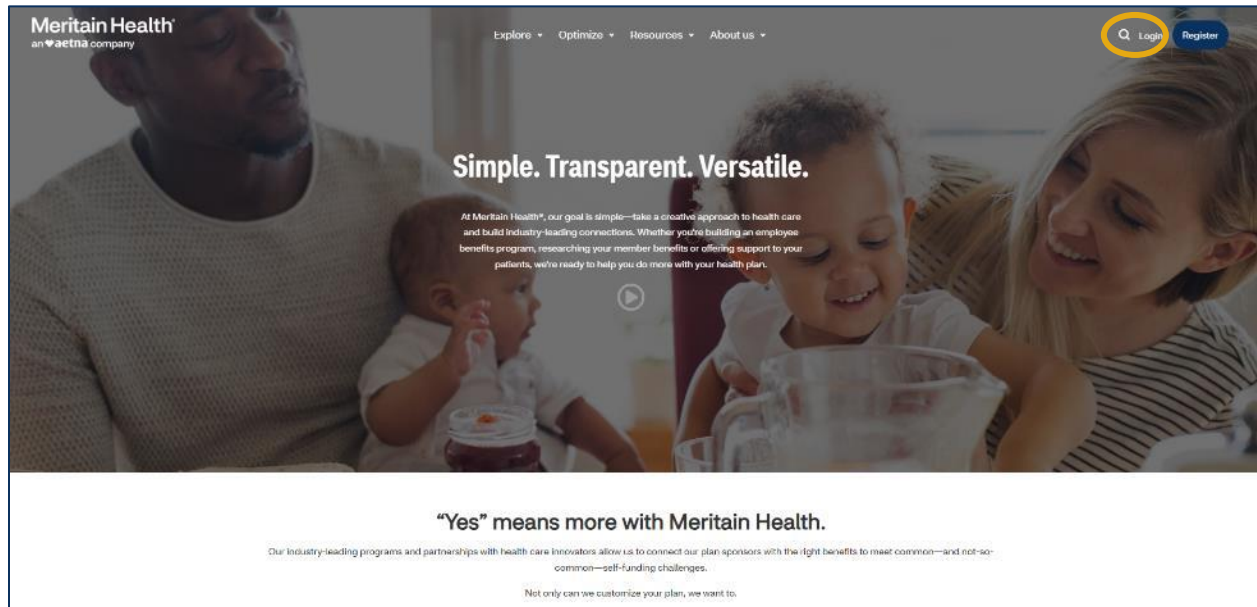
Subject to the terms set forth herein, Meritain Health grants to you a limited, non-exclusive, non-transferable, and terminable license to use the Site. You acknowledge and agree that the Site contains proprietary services and confidential information that belongs to Meritain Health or Meritain Health's 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.

Copyrights

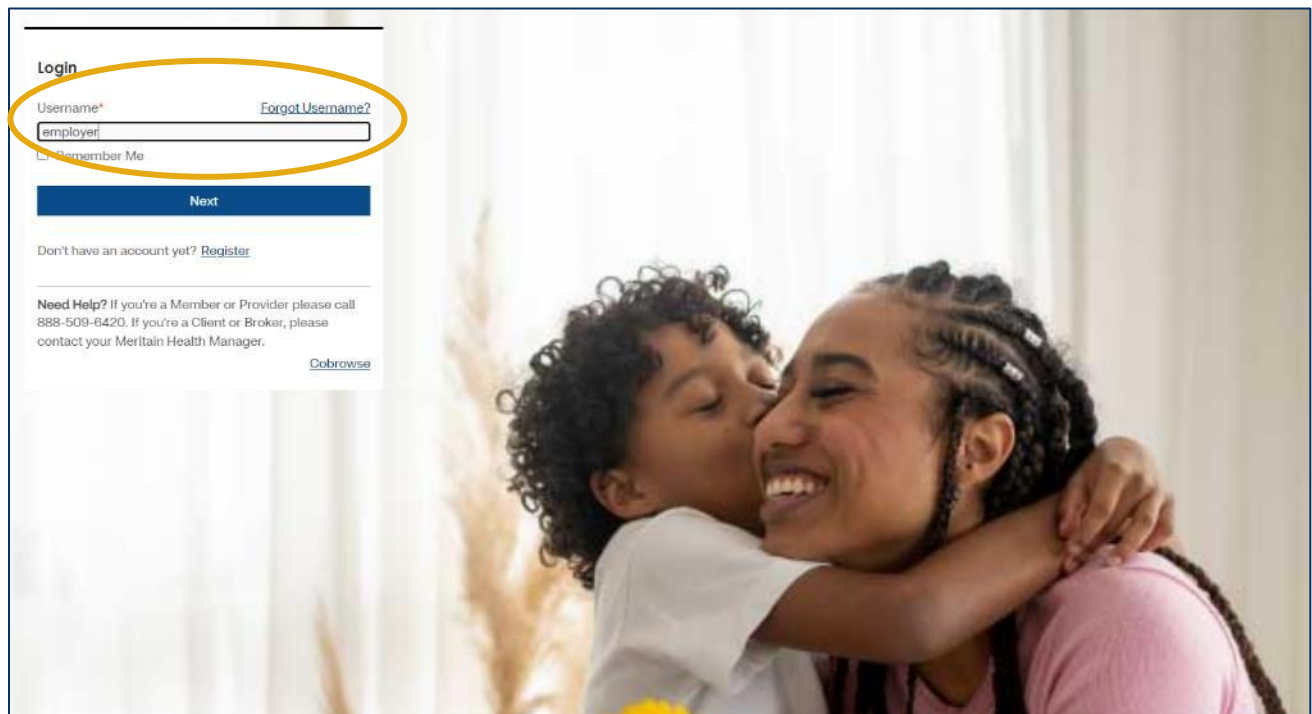
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Logging In

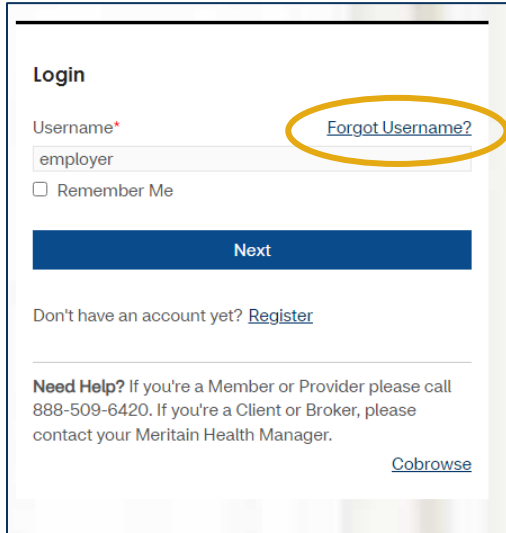
To log in to the portal, go to www.meritain.com and click *Login* in the upper right-hand corner of the Meritain Health home page.



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

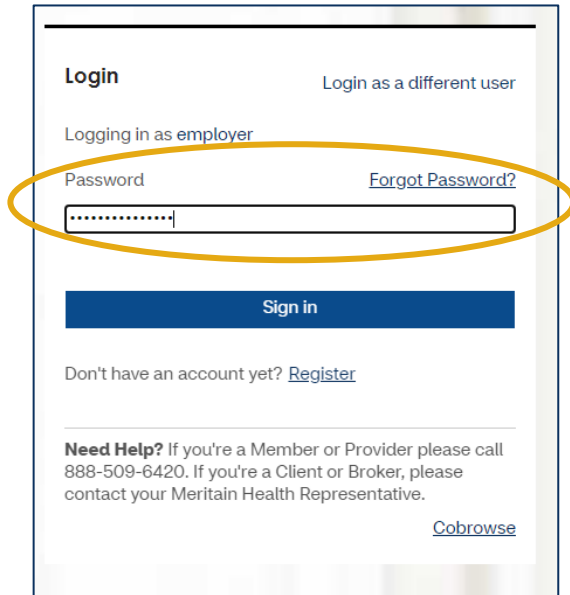


2. If you forget your username, click the *Forgot Username* link (located on the login page) and follow the prompts.



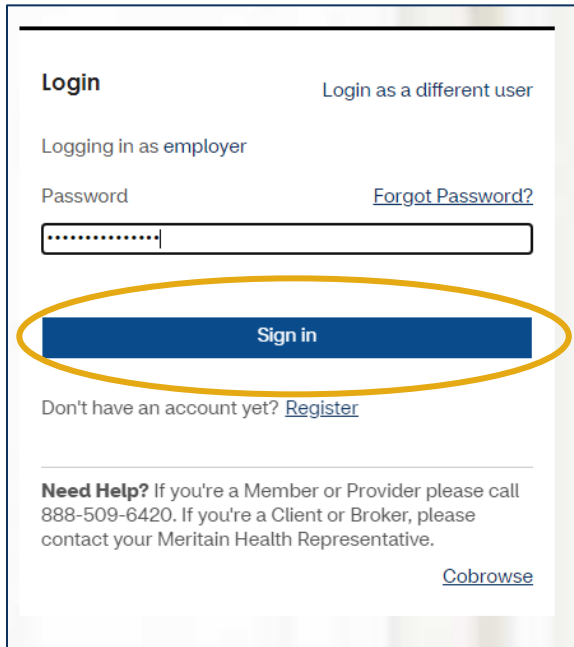
The screenshot shows the Meritain Health login page. At the top, there is a 'Login' heading. Below it, the 'Username*' field contains the text 'employer'. To the right of this field, the link 'Forgot Username?' is circled in yellow. Below the username field is a checkbox labeled 'Remember Me'. A blue 'Next' button is positioned below the checkbox. Further down, there is a link 'Don't have an account yet? Register'. At the bottom, there is a 'Need Help?' section with contact information and a 'Cobrowse' link.

3. Enter password in the *Password* field.



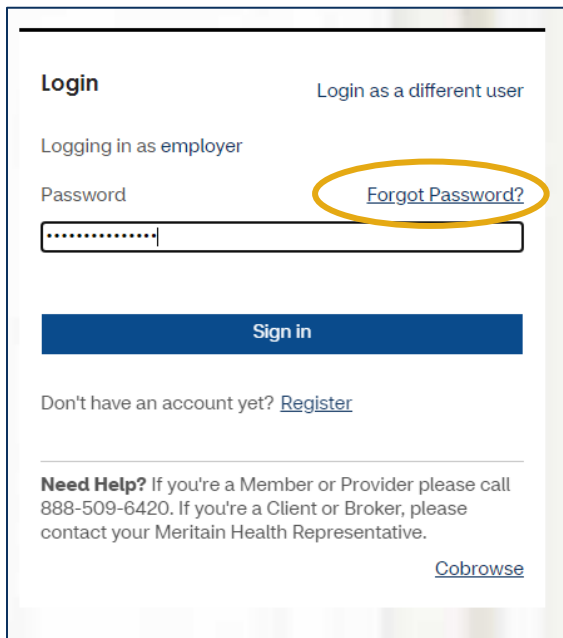
The screenshot shows the Meritain Health login page. At the top, there is a 'Login' heading and a link 'Login as a different user'. Below the heading, it says 'Logging in as employer'. The 'Password' field is circled in yellow, and the link 'Forgot Password?' is also circled in yellow. Below the password field is a blue 'Sign in' button. Further down, there is a link 'Don't have an account yet? Register'. At the bottom, there is a 'Need Help?' section with contact information and a 'Cobrowse' link.

4. Then, click the *Sign In* button.



The screenshot shows the Meritain Health login page. At the top left is the word "Login". To its right is a link "Login as a different user". Below this is the text "Logging in as employer". Underneath is a "Password" label followed by a text input field containing masked characters. To the right of the password field is a link "Forgot Password?". Below the password field is a blue button labeled "Sign in", which is circled in yellow. At the bottom of the login section is the text "Don't have an account yet? [Register](#)". Below a horizontal line is a "Need Help?" section with contact information: "If you're a Member or Provider please call 888-509-6420. If you're a Client or Broker, please contact your Meritain Health Representative." At the bottom right of this section is a link "Cobrowse".

5. If you forget your password, click the *Forgot Password* link (located on the login page) and follow the prompts.



This screenshot is identical to the one above, showing the Meritain Health login page. In this version, the "Forgot Password?" link is circled in yellow instead of the "Sign in" button. All other elements, including the "Login" header, "Login as a different user" link, "Logging in as employer" text, password field, "Sign in" button, "Register" link, and "Need Help?" section, remain the same.

Employer home page

Our employer homepage allows you to easily manage your employee membership. You can search for a specific member, review your activity log or add a new employee directly from the homepage.

Meritain Health
an **aetna** company

Messages and Links Welcome! Demo Employer

Employee Membership Reports Plan and PBM Information Invoices User Administration

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
mm/dd/yyyy

Search by Group

Member Type Group ID * Status
All Select All
Division ID Product Department ID
All All All

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

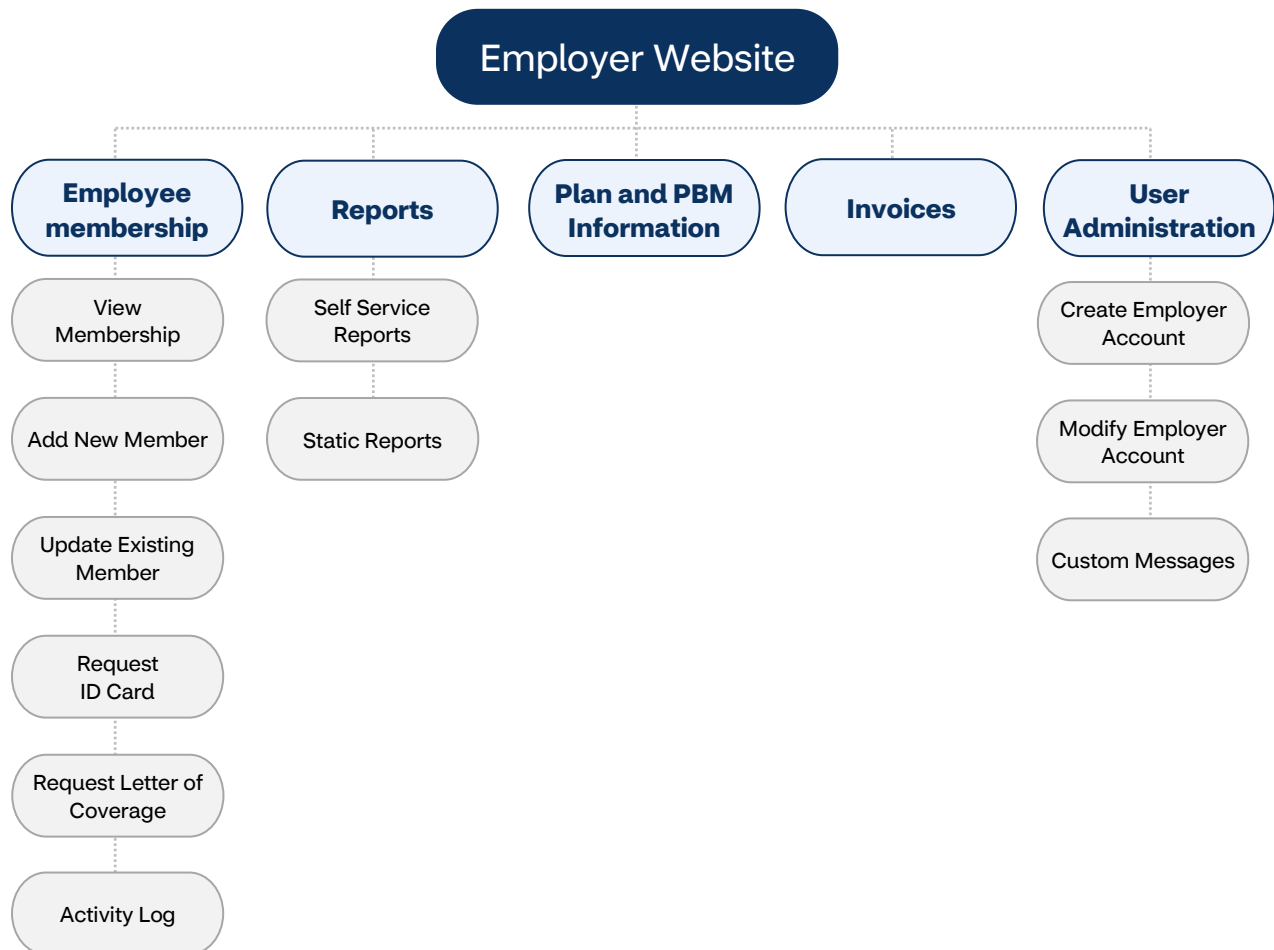
Membership Info
Registration & Group Data

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

The homepage also has convenient quick links to resources employers use most, such as reporting and invoicing. The *Custom Messages* link allows you to compose messages to your members and the *Membership Info* link gives you a high-level overview of your plan membership.

Employer Navigation Flow

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



Employee Membership

Our 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 *Manage Employees* 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, click *Reset* to clear the form.

The screenshot shows the 'Manage Employees' section of an employer website. At the top, there are links for 'Activity Log' and 'Add New Employee'. Below the header, a sub-header reads 'Look up member and plan information, view and request documents, update coverage.' The main area is divided into two search sections: 'Search by Individual' and 'Search by Group'. The 'Search by Individual' section includes input fields for 'Member ID *', 'First Name *', 'Last Name *', and 'Date of Birth' (with a calendar icon). The 'Search by Group' section includes dropdown menus for 'Member Type' (set to 'All'), 'Group ID*' (set to 'Select'), 'Status' (set to 'All'), 'Division ID' (set to 'All'), 'Product' (set to 'All'), and 'Department ID' (set to 'All'). At the bottom of the form are 'Reset' and 'Search' buttons. A note on the right 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.'

The image shows the Meritain Health logo, which includes the text 'an aetna company'. Below the logo is a navigation menu with options: 'Employee Membership', 'View Membership', 'Add New Member', and 'Look'. To the right of the menu, there is a dark blue box with white text that reads: '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 *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

Member ID	First Name	Last Name	Member Type	Status	Group ID	Division ID	Department ID	Action
DEMO05544	JANEY	DOEY	Subscriber	Active	99980	99980.001		>
	JOHNNY	DOEY	Dependent	Active	99980	99980.001		>
	ROBERT	DOEY	Dependent	Active	99980	99980.001		>
	MARY	DOEY	Dependent	Active	99980	99980.001		>

<

1

>

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

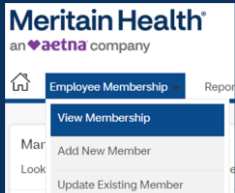
Employee Membership / View Membership / Member Information	
View Employee Membership	
Across all applicable groups	
<div> <div>< Back to Member Search</div> <div> <div>Task Menu</div> <div> <div>Subscriber Information</div> <div>Dependent Information</div> <div>Coverage Information</div> <div>Plan Documents</div> <div>Summary of Out-of-Pocket Expenses</div> <div>HRA</div> <div>Prescription Plan</div> <div>Claims</div> <div>Request ID Card</div> <div>Request Letter of Coverage</div> <div>Update Existing Member</div> <div>View Submitted Transactions</div> </div> </div> </div>	<div>JANEY DOEY - Subscriber</div> <div>Subscriber Information</div> <div> <div>Member ID</div> <div>36788E</div> </div> <div> <div>Group ID</div> <div>99980</div> </div> <div> <div>SSN</div> <div>XXX-XX-XXXX</div> </div> <div> <div>Division ID</div> <div>99980.001</div> </div> <div> <div>Hire Date</div> <div>12/01/2014</div> </div> <div> <div>Covered From</div> <div>01/01/2016</div> </div> <div> <div>Term Date</div> <div></div> </div> <div> <div>Status</div> <div>Active</div> </div> <div> <div>First Name</div> <div>JANEY</div> </div> <div> <div>Last Name</div> <div>DOEY</div> </div> <div> <div>Date of Birth</div> <div>XX-XX-XXXX</div> </div> <div> <div>Gender</div> <div>Female</div> </div> <div> <div>Address 1</div> <div>1044 EASTBURY DR NW</div> </div> <div> <div>Address 2</div> <div></div> </div> <div> <div>City</div> <div>LANSING</div> </div> <div> <div>State / Province</div> <div>MI</div> </div> <div> <div>Zip Code</div> <div>48917</div> </div>

Task Menu

Subscriber Information	View demographics and ID numbers.
Dependent Information	List each dependent and their information.
Plan documents	Links to documents for each plan.
Coverage Information	List 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 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 the ID card.
Request Letter of Coverage*	Request a copy of the 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 the 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
- Well-Being Program
- Prescription Plan
- Claims**
- Request ID Card
- Request Letter of Coverage
- Update Existing Member

Claims Summary

JANEY DOEY

Search

Claim Type

☒ Medical
 ☒ Dental
 ☒ Vision
 ☒ Rx

Paid by Well-Being Program

☐ Yes
 ☐ No
 ☒ Show All

Claim Status

☒ In process
 ☒ Processed
 ☒ Awaiting Information

Provider Name

Claim Number

Date of Service

From

To

Billed charges (\$)

You May Owe (\$)

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
In Process	Medical	INCOMPLETE/ILLEGIBLE CLAIM DEFAULT	07/05/2023	GLOM465	\$222.00	
In Process	Medical	REIMBURSEMENT FORM DEFAULT	09/14/2022	FH8W927	\$0.00	
In Process	Medical	INCOMPLETE/ILLEGIBLE CLAIM DEFAULT	02/02/2022	EQ3BB86	\$1.00	
In Process	Medical	INCOMPLETE/ILLEGIBLE CLAIM DEFAULT	07/10/2019	B45YR83	\$10.00	
Showing 1-4 of 4 results						
Information not available until claim completes processing.						

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

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

Claim Information

Group ID	12704	Address 1	APT 251 H
Subscriber	ERIC DEAN KI FINHEIN D	Address 2	
Patient Name	ERIC DEAN KI FINHEIN D	City	LANCASTER
Patient Account Number	K1252025400	State/Province	OH
Provider Name	FRIEDEL	Zip Code	43130-9539
Diagnosis Code			

Payment Information

Billed Charges \$25.00

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

Processed Date	06/27/2023
Paid Date	06/27/2023
Paid Amount	\$21.25
Check Number	89935273
Paid to	FRIEDEL
Paid to Address1	APT 251 H
Paid to Address2	
Paid to City	LANCASTER
Paid to State	OH
Paid to Zip Code	43130-9539

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

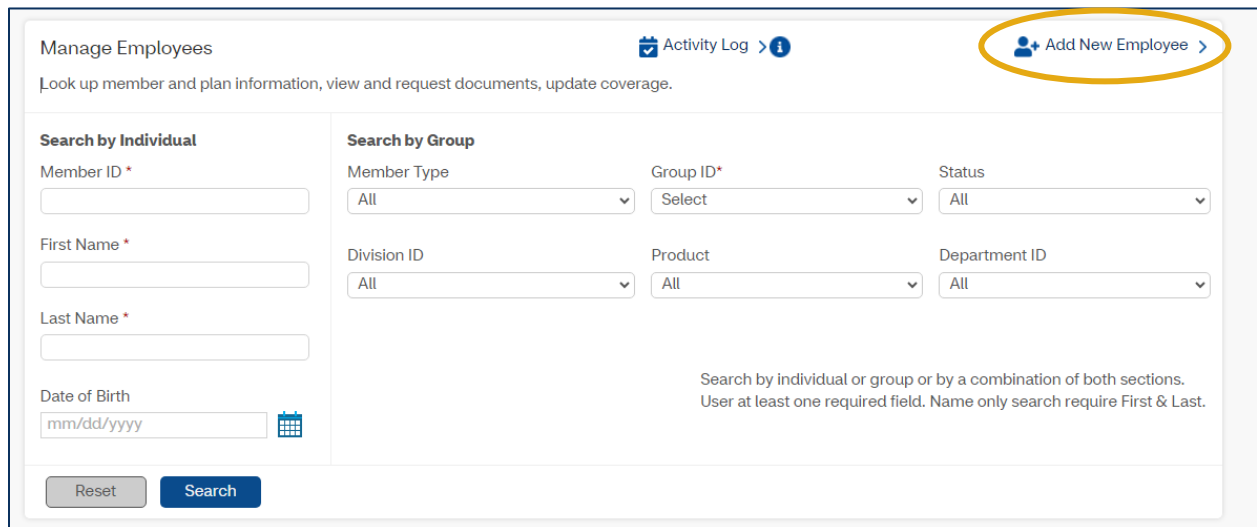
Benefit Information

Benefit	Diagnosis Code	Date From	Date To	Incurred	Excluded	Notes	Eligible
HCR PREVENTIVE SERVICES	Z00.00	6/16/2023		\$25.00	\$3.75	120	\$21.25
<p>Deductible: \$0.00</p> <p>Co-pay: \$0.00</p> <p>Coinurance (%): 100</p> <p>Paid Amount: \$21.25</p> <p>You May Owe : \$0.00</p>							

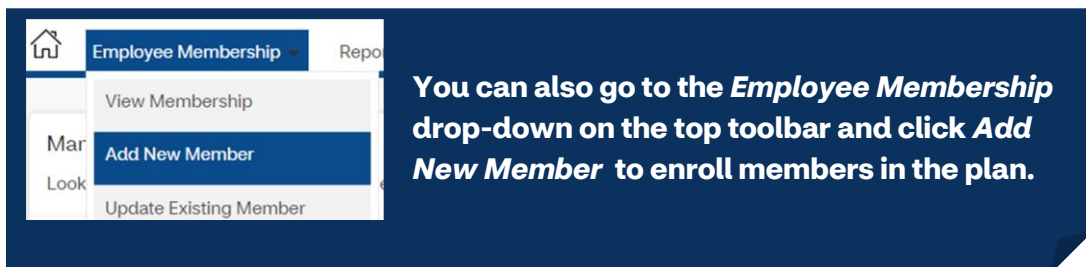
Adding a New Member

If an employee is joining your benefits plan, you can easily add them and their dependents on the website. You can also add any products they will access as part of their plan coverage.

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



The screenshot shows the 'Manage Employees' interface. At the top right, there is a link 'Add New Employee' with a person icon, which is circled in orange. Below the header, there is a search section with two columns: 'Search by Individual' and 'Search by Group'. The 'Search by Individual' column has fields for Member ID, First Name, Last Name, and Date of Birth. The 'Search by Group' column has dropdown menus for Member Type, Group ID, Status, Division ID, Product, and Department ID. At the bottom of the search section are 'Reset' and 'Search' buttons. A note at the bottom right 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.'



The screenshot shows a dark blue banner with a white box on the left containing a screenshot of the 'Employee Membership' drop-down menu. The menu is open, showing options: 'View Membership', 'Add New Member' (highlighted in blue), and 'Update Existing Member'. To the right of the banner, white text reads: '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.'

Next, choose a group ID from the drop-down box. Then, choose the division ID from the next drop-down. From this page, you can choose from three different options: *New Hire*, *Life Event* or *Open Enrollment*—depending on the situation. Once you’ve made your selection, click the blue **Go** button.

Select a Group / Division for the member

*Indicates required fields


Select Group*

99980 - Demo Group

Select Division*

99980.001 - SMALL

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




COBRA Request

You may manage the following:

- COBRA Request

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 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 *

Gender*

Middle Initial

Social Security Number*

Marital Status

Last Name *

Date of Birth*

Annual Salary (\$)

Suffix

(Please enter numbers without commas or special characters)

Contact Information

Address 1*

State*

Primary Phone

Address 2

City*

Email

Country*

Postal / Zip Code*

Save

Save & Continue >

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Next is the *Dependents* tab. If you need to enter dependents, click *Yes* and enter all information marked 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

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

Would you like to add dependents?*

☒ Yes

☐ No

Dependent 1 Information

First Name *

Middle Initial

Last Name *

Suffix

Relationship to Member *

Select

Gender *

Select

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

○

⌚

✓

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 *

Select Division *

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

Coordination of Benefits

Is the member 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

Miscellaneous Notes

Use the space below to add any note

< Previous

Save

Save & Continue >

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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*


Provider Network*

AETNA OPEN CHOICE PPO



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


Medical

Carrier 1

Carrier Name *
Effective Date of Coverage *

Policy Holder's Date of Birth *


Plan Type *

Select


Policy Holder's Name *
Relationship to Policy Holder *

[Add another Carrier](#)

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.

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

✓ 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 : 99980
Division ID : 99980.001

Member Information [Edit](#)

First Name : Janey
Middle Initial :
Last Name : Doey
Suffix :
Date of Hire : 11/10/2025
Annual Salary :
Social Security Number : XXX-XX-XXXX 
Date of Birth : XX-XX-XXXX 
Gender : Female
Marital status :
Contact Information

Address 1 : 123 Test Street
Address 2 :
City : Test
State / Province : NEW YORK
Country : UNITED STATES OF AMERICA
Zip / Postal Code : 12345
Primary Phone :
Email :

Dependent Information [Edit](#)

Would you like to add dependents? **No**

Coverages [i](#) This section is incomplete or has errors [Edit](#)

Primary Products

Medical

Plan: No Plan
Provider Network: AETNA OPEN CHOICE PPO
Effective Date of Coverage:

Coordination of Benefits

Member covered by another plan : **No**

Medicare / Medicaid Information

Member covered by Medicare : **No**
Member covered by Medicaid : **No**

Miscellaneous Notes

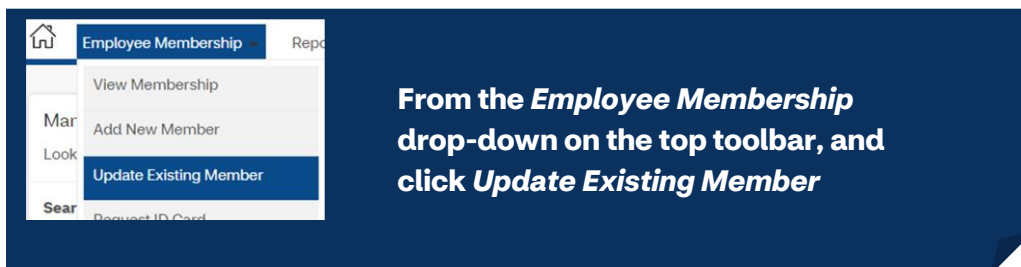
< Previous **Continue >**

On the *Next Steps* tab, click the blue *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 the 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 the 'Enroll a Member' task interface. On the left, there's a 'Tasks' sidebar with 'Enroll a Member' selected. Below it, a legend indicates 'Not Started' (circle), 'Incomplete' (hourglass), and 'Completed' (checkmark). A message says 'Click ↺ to reset to default'. Below that, a blue paper plane icon is shown with the text 'Submit transaction after completing all steps' and a 'Submit Transaction' button. At the bottom of the sidebar is a 'Back to Transactions' button. The main area has a breadcrumb trail: Member > Dependent > Plan Information > Summary > Next Steps. A message states '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:'. Below this is an 'Edit' button. Another message says 'You may save and exit, returning later to finish and submit the transaction:' with a 'Save and Exit' button. A third message says 'You may submit the transaction for processing:' with a 'Submit Transaction' button. A '< Previous' button is in the bottom right corner.

Update Existing Member

Several options are available for updating the records or coverage to an 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
Member ID *

First Name *

Last Name *

Date of Birth

Search by Group
Member Type
All
Division ID
All
Group ID*
Select
Product
All
Status
All
Department ID
All

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.

Member List									
Member ID	First Name	Last Name	Member Type	Status	Group ID	Division ID	Department ID	Action	
DEMO05544	JANEY	DOEY	Subscriber	Active	99980	99980.001		>	
	JOHNNY	DOEY	Dependent	Active	99980	99980.001			

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

Choose the transaction type for the member

 Demographic Update  You may manage the following: <ul style="list-style-type: none">• Update Member Info• Update Dependent Info Go	 Termination  You may manage the following: <ul style="list-style-type: none">• Update Member Info• Update Dependent Info• Terminate Coverage Go	 Mid-Year Life Event Change  Select a Life Event* <input type="text" value="Select"/> You may manage the following: <ul style="list-style-type: none">• Update Member Info• Update Dependent Info• Add Dependents• Terminate Coverage• Add or Change Coverage• Update Coordination of Benefits Go
 Open Enrollment Change  You may manage the following: <ul style="list-style-type: none">• Update Member Info• Update Dependent Info• Add Dependents• Terminate Coverage• Add or Change Coverage• Update Coordination of Benefits Go	 Coordination of Benefits  You may manage the following: <ul style="list-style-type: none">• Update Member Info• Update Dependent Info• Update Coordination of Benefits Go	 COBRA Request Change  You may manage the following: <ul style="list-style-type: none">• Update Member Info• Update Dependent Info• Add Dependents• Initial Notification• Qualifying Event Go

Demographic Update

Use this form to update member and dependent information, such as addresses and contact information.

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.

Demographic Update

JANEY DOEY
Member ID: 36786 Group ID: 99980 Employer: Demo Employer

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 *
JANEY

Date of Hire *
12/01/2014

Gender *
Female

Middle Initial

Social Security Number *
(xxx-xx-xxxx)

Marital Status
Select

Last Name *
DOEY

Date of Birth *
mm/dd/yyyy

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

Suffix

Contact Information

Address 1 *
123 Test Street

State *
NEW YORK

Primary Phone
111-111-1111

Address 2

City *
LANSING

Home Work Mobile

Country *
UNITED STATES OF AMERICA

Zip Code *
12345

Email
TESTING@MERITAIN.COM

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 *
JOHNNY

Relationship to Member *
Married Spouse

Primary Phone

Middle Initial

Gender *
Male

Home Work Mobile

Last Name *
DOEY

Date of Birth *
mm/dd/yyyy

Email
testing@meritain.com

Suffix

Social Security Number
(xxx-xx-xxxx)

Dependent Address *

Same as Member Different from Member

Dependent 2 Information

First Name *
Johnny JR

Relationship to Member *
Child by Birth

Primary Phone

Middle Initial

Gender *
Male

Home Work Mobile

Last Name *
DOEY

Date of Birth *
mm/dd/yyyy

Email

Suffix

Social Security Number
(xxx-xx-xxxx)

Full Time Student
Yes No

Disabled / Handicapped
Yes No

Termination

Remove coverage due to a 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

JANEY DOEY
Member ID: 367885544 : 99980 Employer: Demo Employer

Tasks

Complete one or more tasks

Member Info

▶ Update Member Info ☐ ↺

Dependent Info

▶ Update Dependent 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](#)

Member Information

Employee Name	JANEY DOEY
Member ID	367885544
Group ID	99980
SSN	XXX-XX-XXXX 
Division ID	99980.001
Department ID	
Hire Date	12/01/2014
Covered From	01/01/2016
Termination Date	
Status	Active
First Name	JANEY
Last Name	DOEY
Date of Birth	XX-XX-XXXX 
Gender	Female
Address 1	1044 EASTBURY DR NW
Address 2	
City	LANSING
State/Province	MI
Zip Code	48917

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- Users will have the option to check the box to terminate all coverages or select individual products to terminate.
- 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 transaction types, the steps described below will apply.
- Once the products are selected, users will see a question about standalone products.
- This question will always default to no but can be changed 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, the user will confirm whether the termination is for the member, which will terminate the member and any existing family members, or the user can opt to only terminate dependent(s).

Tasks

Complete one or more tasks

Member Info

Update Member Info ☐

Dependent Info

Update Dependent 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

Terminate Coverage

☒ Manage Termination
☐ Review
☐ Next Steps

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

* Indicates required fields

Select coverage(s) to be terminated *

☐ All Coverages

Primary Products

☐ Medical

Ancillary Products

No Products

And / Or

Are standalone coverages being terminated? *

☐ Yes
☒ No

Save

Save and Continue

Tasks

Complete one or more tasks

Member Info

Update Member Info

Dependent Info

Update Dependent 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

Back to Transactions

Terminate Coverage

Manage Termination

Review

Next Steps

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

* Indicates required fields

Select coverage(s) to be terminated *

☒ All Coverages

Selecting all coverages will result in a member level termination for each family member selected below

Primary Products

☒ Medical

Ancillary Products

No Products

And / Or

Are standalone coverages being terminated? *

☐ Yes ☒ No

All Coverages Termination

All Coverages being terminated for:

Member : ☐ JANEY DOEY

Dependents

☐ JOHNNY DOEY
☐ ROBERT DOEY
☐ MARY DOEY
☐ TEST TEST

Effective Date of Termination: *

Enter the last date in which the member/dependent is eligible for coverages.

mm/dd/yyyy

Termination Reason: *

Select

Termination Note:

8. Input the effective date of termination. You can manually enter the date or click on the date picker icon to select a date.
9. **Please note:** 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.
10. 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:


Member : ☐ JANEY DOEY

Dependents

☐ JOHNNY DOEY ☐ ROBERT DOEY ☐ MARY DOEY ☐ TEST TEST

Effective Date of Termination: *

Enter the last date in which the member/dependent is eligible for coverages.



Termination Reason: *

Select

Select

Divorce or Legal Separation

Loss of Dependent Status

Waiver of Coverage

Called to Active Duty - USERRA


Save

Save and Continue


Tasks

Complete one or more tasks


Member Info


Update Member Info ☐ 

Dependent Info

Update Dependent 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

Terminate Coverage

☒ 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	Member ID	Member Name
99980	367885544	JANEY DOEY

Member Information [Edit](#)

Member Name : JANEY DOEY
Member ID : 367885544

Coverage Information

Coverage(s) being terminated for dependent(s) : Medical
Standalone Coverage : No

All Coverages Termination

Coverage being terminated for : JOHNNY DOEY
Effective Date of Termination : 11/12/2025
Coverage will be not be applicable from : 11/13/2025
Termination Reason : Divorce or Legal Separation
Termination Note :

Previous

Continue

Termination

JANEY DOEY
Member ID: 367885544 Group ID: 99980 Employer: Demo Employer

Tasks

Complete one or more tasks

Member Info
Update Member Info

Dependent Info
Update Dependent 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

Terminate Coverage

✓ Manage Termination ✓ Review ● Next Steps

Terminate Coverage 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

Previous

Back to Transactions

11. Use the *Task* menu to complete related tasks and use the *Submit Transaction* to submit multiple tasks as a single transaction. A *Submit Transaction* button is also available in the *Next Steps* tab.
12. 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	+

- 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 member terminating has a dependent enrolled in standalone coverages only, we will need that dependent's demographic information to add the dependent 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, employer users should select the *Mid-Year Life Event Change* transaction type. It will allow a user to update *Member Info*, *Add Dependents*, *Terminate Coverage*, *Add or Change Coverage* and *Update Coordination of Benefits information*.

1. 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.

2. Select the applicable task(s) from the *Task Menu*. For the Marriage Life Event, select *Add Dependents*, if needed.

Remember, once a task is complete, additional tasks can be completed 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 blue *Save and Continue* button once all dependent information is completed.

Mid-Year Life Event Change

Life Event: Birth or Adoption [Edit](#)

JANEY DOEY

Member ID: 367 Group ID: 99980 Employer: Demo Employer

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

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 *

☒ Home
☐ Work
☐ Mobile

Last Name *

Date of Birth *

Email

Suffix

Social Security Number

☐ Yes ☐ No

☐ Yes ☐ No

☒ Same as Member
☐ Different from Member

[+ Add Another Dependent](#)

[Save](#) [Save and Continue](#)

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.

- 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 *

☐ Joe

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

5. Complete the required *Coordination of Benefits* questions, then click the blue *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](#)

6. 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 *blue 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 blue *Submit transaction* button.

7. 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.

Mid-Year Life Event Change

Life Event: Birth or Adoption [Edit](#)

JANEY DOEY

Member ID: 36788554 up ID: 99980 Employer: Demo Employer

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

Add Dependents

Dependent Info

✓ Plan Info

⌛ Review

● Next Steps

Add Dependents task is saved, but is incomplete.

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](#)
[Terminate Coverage](#)
[Add or Change Coverage](#)
[Update Coordination of Benefits](#)

Please complete or reset your in-progress tasks before submitting your transaction:

[Add Dependents](#)

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](#)

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

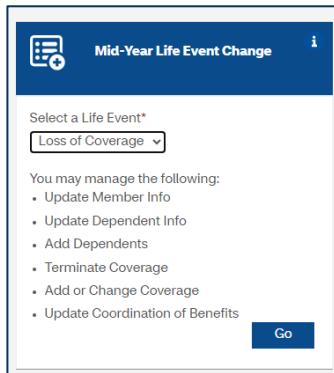
Submit Transaction

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

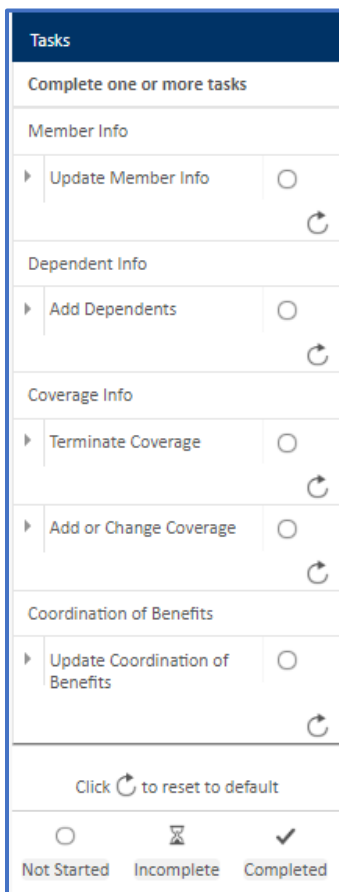

Congratulations! Your transaction has been submitted. Transaction ID is 1032958.

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 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". At the top, there is a blue header bar with a list icon and a plus sign on the left, the title "Mid-Year Life Event Change" in the center, and an information icon on the right. Below the header, the form has a section "Select a Life Event*" with a dropdown menu currently showing "Loss of Coverage". Underneath, a message states "You may manage the following:" followed by a bulleted list: "Update Member Info", "Update Dependent Info", "Add Dependents", "Terminate Coverage", "Add or Change Coverage", and "Update Coordination of Benefits". A blue "Go" button is located at the bottom right of this section.



The screenshot displays a "Tasks" section with a blue header. Below the header, it says "Complete one or more tasks". The tasks are organized into four categories, each with a list of tasks and a circular progress indicator (a circle with a refresh icon) to its right. The categories and tasks are: "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". At the bottom of the tasks list, there is a link that says "Click [refresh icon] to reset to default". Below this, there is a legend with three items: "Not Started" (represented by an empty circle), "Incomplete" (represented by a circle with a clock icon), and "Completed" (represented by a circle with a checkmark icon).

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*.

The screenshot displays the 'Add / Change Coverage' interface. On the left, a sidebar titled 'Tasks' lists various actions: 'Update Member Info', 'Update Dependent Info', 'Add Dependents', 'Terminate Coverage', 'Add or Change Coverage' (highlighted), and 'Update Coordination of Benefits'. The main area is titled 'Add / Change Coverage' and includes a progress bar with 'Plan Info' (selected), 'Review', and 'Next Steps'. Below the progress bar, a message states: 'You may save this task progress at the end of the page.' A note indicates that an asterisk (*) denotes required fields. A text box explains that to update an existing coverage, users should update the corresponding fields, and to add a new coverage, they should select the coverage and provide required information. The 'Coverages' section allows users to 'Select Group, Division and Department'. It features dropdown menus for 'Select Group' (99980) and 'Select Division' (99980.001 - SMALL GROUP SEGMENT - Gold Iv). Below this, users can 'Select applicable products'. Under 'Primary Health Products', 'Medical' is selected with a checkbox. Under 'Ancillary Health Products', several options are listed with checkboxes: 'Long Term Disability', 'Short-term disability', 'Life Insurance', 'Basic Spouse and Child Life Insurance', 'Supplemental Life Insurance for Employee', and 'Supplemental Life Insurance for Spouse'. At the bottom, the 'Medical' section shows the 'Effective Date of Coverage' as 01/01/2016 and the 'Provider Network' as AETNA OPEN CHOICE PPO.

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

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 Iv

Select applicable products *

Primary Health Products

Ancillary Health Products

☐ Dental

☒ Medical

☐ Vision

☐ Long Term Disability

☐ Short-term disability

☐ Life Insurance

☐ Basic Spouse and Child Life Insurance

☐ Supplemental Life Insurance for Employee

☐ Supplemental Life Insurance for Spouse

Medical

Effective Date of Coverage * 01/01/2016

Provider Network * AETNA OPEN CHOICE PPO

4. Use the Yes/No 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 *

☒ JOHNNY


JOHNNY

Select applicable products *

☒ Medical

Medical

Effective Date of Coverage *



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

Coordination of Benefits

Is the member covered by any other plan? *

☒ Yes ☐ No ☐ Unknown

Select applicable products *

☐ Dental ☐ Medical ☐ Vision

Are the dependents covered by another plan? *

☒ Yes ☐ No ☐ Unknown

Select the dependents *

☐ JOHNNY

6. Users must supply updated Coordination of Benefits information for all family members when using the *Add or Change Coverage* task. Click the blue *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? *
<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Unknown
Are the dependents covered by another plan? *
<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Unknown
Medicare / Medicaid Information
Is the member covered by Medicare? *
<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Unknown
Is the member covered by Medicaid? *
<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Unknown
Are the dependents covered by Medicare? *
<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Unknown
Are the dependents covered by Medicaid? *
<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> 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?
<input type="radio"/> Yes <input checked="" type="radio"/> 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 blue *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 blue *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.

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

Add / Change Coverage

Plan Info

Review

Next Steps

Add or Change 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 has not been submitted for processing.

Group ID
99980

Division
99980.001

Member ID
36i - - - - -

Coverages

Primary Products

Medical

Effective Date of Coverage
01/01/2016

Plan
No Plan

Provider Network
AETNA OPEN CHOICE PPO

Dependent Coverage

Does this change in coverage apply to dependents ? Yes
JOHNNY

Medical

Effective Date of Coverage
02/05/2025

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 such as *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 blue *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 blue *Save and Continue* button in the bottom right corner.

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

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 * JANEY Date of Hire * 12/01/2014 Gender * Female

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

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

Suffix

Contact Information

Address 1 * Test State * MICHIGAN Primary Phone Home Work Mobile

Address 2 City * Test Email TESTING@MERITAIN.COM

Country * UNITED STATES OF AMERICA Zip Code * 12345

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.

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

Update Member Information

Update Information

Review

Next Steps

Update Member Info task is saved, but is incomplete.

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 Dependent Info

Add Dependents

Terminate Coverage

Add or Change Coverage

Update Coordination of Benefits

Please complete or reset your in-progress tasks before submitting your transaction:

Update Member 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

Previous

7. Under *Plan Info*, there is a field to *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.

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

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 Iv

Select applicable products *

Primary Health Products

Ancillary Health Products

Dental

Long Term Disability

Medical

Short-term disability

Vision

Life Insurance

Basic Spouse and Child Life Insurance

Supplemental Life Insurance for Employee

Supplemental Life Insurance for Spouse

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.

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 IV

Select applicable products *

Primary Health Products	Ancillary Health Products
<input 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

Medical

Effective Date of Coverage * 01/01/2016

Provider Network * AETNA OPEN CHOICE PPO

Dependent Coverage

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

☒ Yes ☐ No

9. Complete the *Coordination of Benefits* section, then click the blue *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 blue *Continue* button in the bottom right corner.
11. Select an additional task to complete if needed. Otherwise, click the blue *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.

Submit Transaction

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

No

Yes

Coordination of Benefits

- 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.
- If a user only needs to update Coordination of Benefits information, use the designated Coordination of Benefits transaction type. Click **Go**.
- 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.
- 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.
- 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.

Coordination of Benefits

You may manage the following:

- Update Member Info
- Update Dependent Info
- Update Coordination of Benefits

Go

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

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

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

Coordination of Benefits

Is the member covered by any other plan? *

☒ Yes
 ☐ No
 ☐ Unknown

Select applicable products *

☒ Dental

Dental

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


Select
Select
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, you'll be asked 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 blue *Save and Continue* button. Review and edit if necessary. Click the blue *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

JANEY DOEY
Member ID: 967885544 Group ID: 99980 Employer: Demo Employer

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

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

Submit Transaction

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:

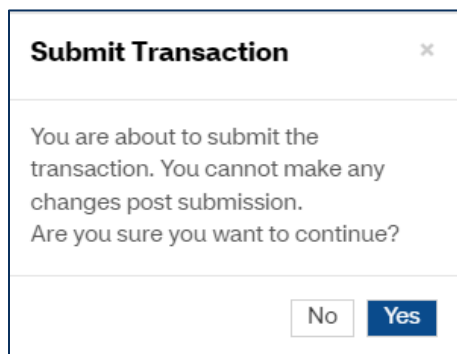
Save and Exit

You may submit the transaction for processing:

Submit Transaction

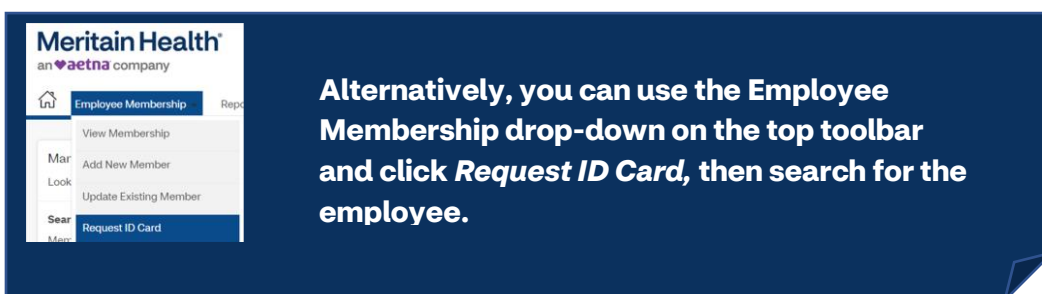
Previous

16. Click the blue *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.

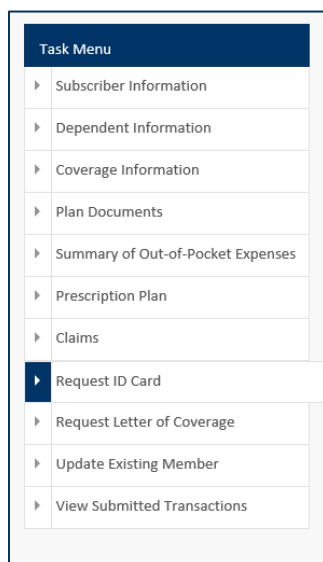


Request ID Card

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



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



[Home](#)
[Plan](#)
[Benefits and Coverage](#)
[Tools and Resources](#)
[Find Care](#)

[Benefits and Coverage](#) / [ID Card](#)

ID Card

<
>

Available ID Cards

i ID Cards will only go back for 7 years. Please select the appropriate card for your needs.

Benefit Plan Year	Action
2026	Click to View
2024	Click to View

[Cobrowse](#) | [Disclaimer](#) | [Privacy Policy](#) | [Terms & Conditions](#) | [FAQ](#) | [Contact Us](#) | [Accessibility Services](#)

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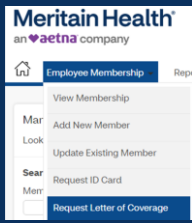
If the member has historical ID cards available in Meritain Health, you will see multiple Click to View selection options to view ID cards from specific plan years. Historical ID cards will go back seven years and the Meritain Health website will begin retaining historical ID cards as of 2026 plan year. Four options are available for card delivery; additional information fields will open based on choice.

If a member does not have multiple ID cards available for review, you will not be given specific benefit plan year options, and your active ID card will load without having to select an option.

When viewing your ID card, you'll be able to view your card and download a PDF, have a copy of your card emailed to you or emailed/faxed to your provider. We also provide an Order by Mail option when viewing active ID cards to have your ID mailed to you. **Please note:** we do not provide mail services for expired ID cards.

Request Letter of Coverage

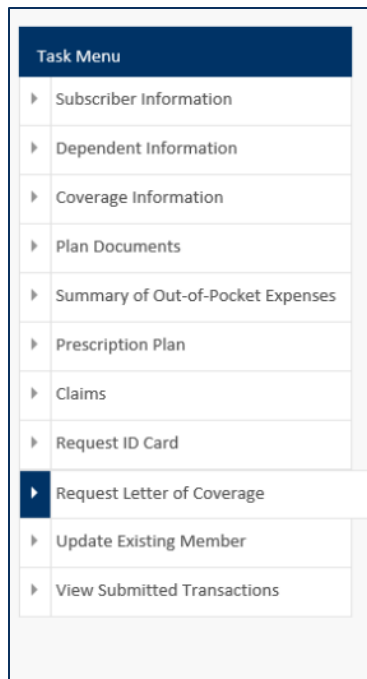
Request a letter of coverage by using the Manage Employee form to access the employee record.



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

The screenshot shows the Meritain Health logo and the 'Employee Membership' drop-down menu. The menu options are: View Membership, Add New Member, Update Existing Member, Request ID Card, and Request Letter of Coverage. The 'Request Letter of Coverage' option is highlighted.

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](#)

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

i 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](#)

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.

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

Manage Employees

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

[Activity Log](#)

[Add New Employee](#)

Search by Individual

Member ID *

First Name *

Last Name *

Date of Birth

Search by Group

Member Type

Group ID*

Status

Division ID

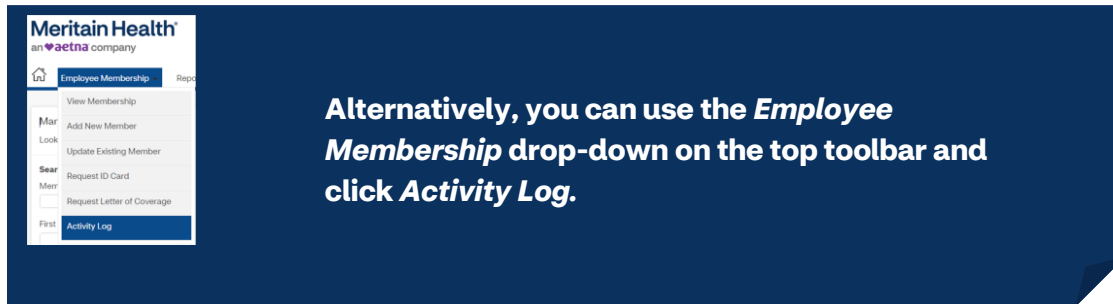
Product

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](#)

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 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.
- **Document Request** now shows all transactions related to a document requests (e.g., ID cards and Letter of Coverage). This allows the ability for a quick list of any *Document Request* sent previously.

Saved

Submitted

Pending Approval

Document Request

Search

By Group

By Division

Select all the groups which you want to search

☐ 99980 - Demo Group

Select all Groups

Clear all Groups

Member ID

Transaction Save Date

Transaction Started By

From

To

Life Event

Transaction Last Saved By

Last Name

Transaction Type

Reset

Apply

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

Employee Membership / Activity Log										
Activity Log										
<div> <div>Saved</div> <div>Submitted</div> <div>Pending Approval</div> <div>Document Request</div> </div>										
<div> <div>Search</div> <div></div> </div>										
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	
<input type="checkbox"/>	361	11/18/2025	JANEY	DOEY	Coordination of Benefits	99980	99980.001		Demo	
<input type="checkbox"/>	361	11/14/2025	JANEY	DOEY	Open Enrollment Change	99980	99980.001		Demo	
<input type="checkbox"/>	361	11/14/2025	JANEY	DOEY	Mid-Year Life Event Change	99980	99980.001	Loss of Coverage	Demo	

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.

The screenshot shows the 'Manage Employees' page. At the top, there are links for 'Activity Log' and 'Add New Employee'. Below this is a search section with two columns: 'Search by Individual' and 'Search by Group'. The 'Search by Individual' column has fields for Member ID, First Name, Last Name, and Date of Birth. The 'Search by Group' column has dropdowns for Member Type, Group ID, Status, Division ID, Product, and Department ID. Below these fields are 'Reset' and 'Search' buttons. At the bottom of the page, there are four widgets: 'Reports', 'Invoices', 'Custom Messages', and 'Membership Info'. The 'Reports' widget is circled in yellow and contains two options: 'Static Reports' and 'Self Service Reports'.

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.

The screenshot shows the top toolbar of the application. It includes a home icon, a dropdown menu for 'Employee Membership', and a 'Reports' dropdown menu. The 'Reports' dropdown menu is open, showing three options: 'Self Service Reports', 'Static Reports', and 'Report Briefs'. The 'Self Service Reports' option is highlighted. Below the dropdown menu, the 'Manage Employees' search section is visible, with the same fields and buttons as in the previous screenshot.

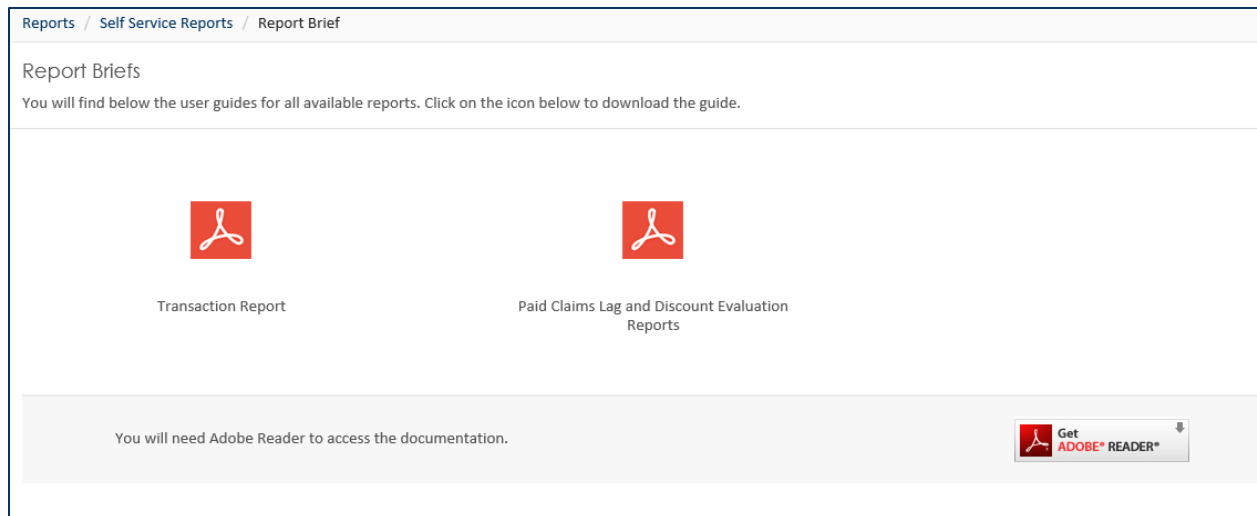
The *Self-Service Reports* include:

- 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 within our Meritain Health Ready Data reporting tool. To view the reports, click on the *View Reports* links.

The screenshot shows the Meritain Health user interface. At the top, the Meritain Health logo is displayed with the tagline 'an aetna company'. Below the logo is a navigation bar with links for 'Employee Membership', 'Reports', and 'Plan and PBM Information'. The main heading is 'Self Service Reports'. A section titled 'Select a group to view list of self service reports' contains a 'By Group' button. Below this, a radio button is selected for '99980 - Demo Group'. A 'View Reports' button is located at the bottom of this section. At the bottom of the page, there is a notice: 'Enlight Tool will be decommissioned on 12/31/25.' followed by links for 'Meritain Health Ready Data', 'Transaction Reports - Masked', and 'Paid Claims Lag and Discount Evaluation'.

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.

The report 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
99980	1513738	Group 99980 Daily Check Register	05/07/2019	

Showing 1-1 of 1 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 on the homepage. Just click on *Plan and PBM Information* on the top menu toolbar.

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

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
All ▾
Group ID*
Select ▾
Status
All ▾
Division ID
All ▾
Product
All ▾
Department ID
All ▾

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

Plan and PBM Information

Plan Information

PBM Information

Search

Select a group and division for which you want to search*

* Indicates required search / filter parameter

Group ID*

99980 - Demo Group

Division ID

99980.001

Plan Name

Product

☒ Medical
 ☒ Dental
 ☒ Vision
 ☒ Other

Reset

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 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](#)

Plan Docs & URLs	Group	Division	Plan Name	Product
+	99980	99980.001	MEDICAL BENEFITS (NONPPO)	Medical

Showing 1-1 of 1 results

1

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 Information

PBM Information

Search

+

PBM Information

PBM information for search criteria entered is listed below

Group	Division	PBM Vendor Name
99980	99980.001	MERITAIN PHARM SOLNS BY ESI

Showing 1-1 of 1 results

1

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 and Download*.

The screenshot shows the 'Manage Employees' page. At the top, there are links for 'Activity Log' and 'Add New Employee'. Below this is a search section with two columns: 'Search by Individual' and 'Search by Group'. The 'Search by Individual' column has fields for Member ID, First Name, Last Name, and Date of Birth. The 'Search by Group' column has dropdowns for Member Type, Group ID, Status, Division ID, Product, and Department ID. Below the search fields are 'Reset' and 'Search' buttons. At the bottom of the page, there are four widgets: 'Reports' (with links to Static Reports and Self Service Reports), 'Invoices' (with a 'View & Download' link highlighted by a yellow circle), 'Custom Messages' (with links to Account Message and Promo Tile), and 'Membership Info' (with a link to Registration & Group Data).

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

The screenshot shows the homepage with a top navigation bar. The 'Invoices' menu item is highlighted in blue. Below the navigation bar is the 'Manage Employees' section, which is identical to the one in the previous screenshot, showing search fields and the 'Invoices' widget.

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.

Invoices				
<div> Filter </div>				
Invoices Click on the attachment to download the invoice				
Group ID	Invoice Date	Due Date	Invoice Amount(\$)	Attachment
12	02/19/2025	03/01/2025	73874.48	
12	01/21/2025	02/01/2025	73324.73	
12	12/29/2024	01/01/2025	73757.69	

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

116%

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

MERITAIN™
HEALTH
www.meritain.com

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

FILE NUMBER
12

STATEMENT DATE
4-01-18 13:42

PAGE 1

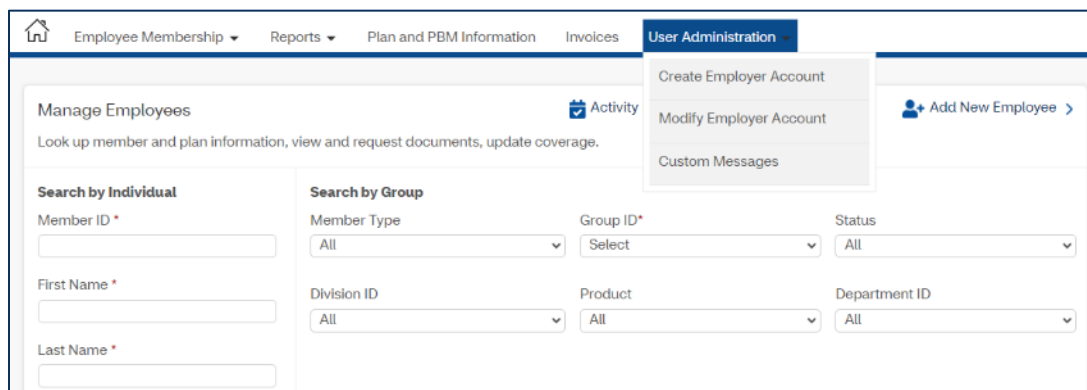
DIVISION: A01 NO LONGER USED

Name	EE ID	Effective Date	MED COV	SPEC PREM	AGOR PREM	MED FEE	NETWORK FEE	DEN FEE	FLEX	ADMIN FEES	Total
ANDON DEMITRI	111111111	01-01-14	E	89.44	11.32	3.35	14.95	0.00	49.54	168.60	0
PORTSELU JR GATIA	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											
				178.88	22.64	6.70	29.90	0.00	99.08	337.20	
CURRENT PREMIUM											
ADJUSTMENTS											
TOTAL				178.88	22.64	6.70	29.90	0.00	99.08	337.20	
UNIT COUNTS											
						CURRENT	ADJUSTMENTS	TOTAL			
MEDICAL EMPLOYEES						2	2				
DENTAL EMPLOYEES						0	0				
FLEX EMPLOYEES						0	0				
FLEX EMPL - PREMIUM ONLY						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.

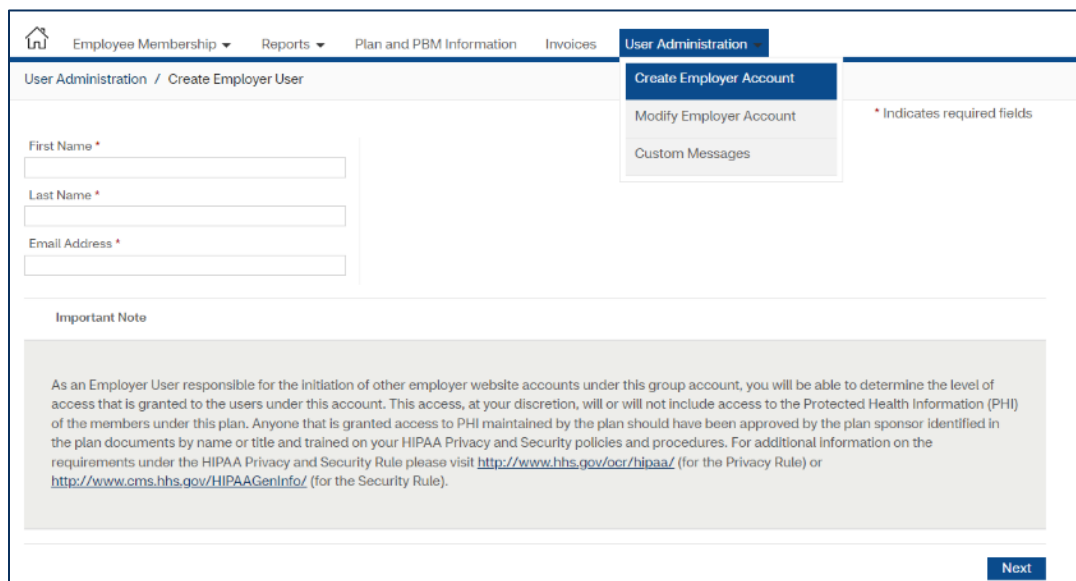


Create Employer Account

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



Note: Not all groups have this feature available/elected for their employer users.

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

:

Test

Last Name

:

Test

Business Email

:

testing@meritain.com

Access Grid

Search:

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.

☒ 12

- ABC company

Select all items

Clear all items

Assign Permissions

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* drop-down on the top toolbar and choose *Modify Employer Account*.

The screenshot shows the top navigation bar with a home icon and several menu items: Employee Membership, Reports, Plan and PBM Information, Invoices, and User Administration. The User Administration menu is open, showing three options: Create Employer Account, Modify Employer Account (highlighted in blue), and Custom Messages. Below the navigation bar, the breadcrumb trail reads 'User Administration / Edit Employer User'. The main heading is 'Edit Employer User' with a subtext 'Search for employer by entering values in one or more fields below'. A search form titled 'Search Employer' contains a message: 'Please provide either a Group ID or Email Address in your search criteria.' The form has six input fields: First Name, Last Name, Group ID (a dropdown menu with 'Select' as the current value), Email Address, Username, and Account Status (a dropdown menu with 'Active' as the current value). At the bottom right of the form are 'Reset' and 'Search' buttons.

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.

This is a duplicate of the search form shown in the previous screenshot. It includes the same navigation bar, breadcrumb trail, heading, subtext, search form with six input fields, and 'Reset' and 'Search' buttons.

First Name	Last Name	Group ID	Username	Email Address	Account Status
Arthur	Active	12	ActiveEmployer	ArthurActive@meritain.com	Active
Edit:					

Showing 1-1 of 1 results

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.

Employer Information

First Name

:

12...

Last Name

:

emp1

Business Email

:

user287678111@domain.com

Using the radio buttons below, indicate if the user should be active or inactive

☒ Active ☐ Inactive

Access Grid

Search:

Group ID	Group Name	Has Inbound SSO?	Edit Access	Revoke Access
12	ABC company	Yes		

Showing 1-1 of 1 results

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.

☐ 12 - ABC company

Select all items

Clear all items

Assign Permissions

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

Custom Messages

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

The screenshot shows the 'Manage Employees' widget interface. At the top, there's a navigation bar with links: Employee Membership, Reports, Plan and PBM Information, Invoices, and User Administration. Below this, the 'Manage Employees' section includes an 'Activity Log' icon and a link to 'Add New Employee'. The main area is divided into two search sections: 'Search by Individual' (with fields for Member ID, First Name, Last Name, and Date of Birth) and 'Search by Group' (with dropdowns for Member Type, Group ID, Division ID, Product, Status, and Department ID). A 'Reset' and 'Search' button are at the bottom of the search section. Below the search section, there's a row of four widgets: 'Reports' (with links to Static Reports and Self Service Reports), 'Invoices' (with a View & Download link), 'Custom Messages' (which is circled in yellow and contains links to Account Message and Promo Tile), and 'Membership Info' (with a Registration & Group Data link).

You can also access *Custom Messages* by clicking on the *User Administration* drop-down on the top toolbar of the homepage.

Next, click *Custom Messages*.

This screenshot shows the 'User Administration' dropdown menu. The menu is open, displaying three options: 'Create Employer Account', 'Modify Employer Account', and 'Custom Messages'. The 'Custom Messages' option is highlighted with a blue background. The background of the page shows the 'Manage Employees' widget with the 'Search by Individual' and 'Search by Group' sections visible.

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 the specific 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*.

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

Prescription DC Self Reporting

You can now log into the Meritain Health website and access the Rx Dc Self Reporting via Footer on the employer website and update the Rx DC Plan sponsor data. This feature will allow the users to search by Group ID and fill in the Groups Stoploss Premiums and Claims Cost for the previous year.

The user will have to select their desired group and fill in the required fields. Once the fields are filled in, the user will click *Submit* and be redirected to a submission success page.

RxDC Self Service Reporting

RxDC Plan Sponsor Data Collection for 6/1/25 Reports (Data for 2024 calendar year)

Meritain Health Group ID*

Please Select...

Determine Market Segment: Your average # of employees in 2023.*
 Consider employees even if they are not enrolled in the health plan. This will be used to determine your market segment.

Please Select...

Premium Reporting – Any amounts in the "What we Show on File" Column is meant as a starting point ONLY. It is your responsibility to ensure the numbers reported are complete and accurate. We will report what you enter in the "Your 2024 Data Submission" column.

Data Request Description	What We Show on File for 2024	Your 2024 Data Submission
Total Stoploss Premium Paid in Calendar Year The amount you enter must be included in the amount you reported (shown on the right, if applicable) for total premium equivalents. Enter 0 if group does not purchase stoploss.	0	
Total Premium Paid by Members If you did not charge members a premium in 2024, enter 0 and check this box. Report the total annual premium collected from members during 2024. <ul style="list-style-type: none"> • Include actual spending by members in 2024, even if the plan does not run on a calendar year. • Include premium or premium equivalents paid by members. • Exclude premium or premium equivalents paid by employers or other plan sponsors on behalf of members. 	We do not collect member premium data, so we have no number to provide here.	
Total Premium Equivalents - Total Plan Cost for Self-Funded Coverage Report the total annual premium equivalent amounts representing the total cost of providing and maintaining coverage for all members. Enter the amount that best represents the total cost of providing and maintaining coverage in calendar year 2024. <ul style="list-style-type: none"> • Include claims cost, administrative cost, Administrative Services Only (ASO) and other TPA fees, stop-loss premiums, network access fees, payments made under capitation contracts with providers for benefits covered under the plan. • Subtract stop loss reimbursements and prescription drug rebates received by the plan during 2024. • Exclude amounts paid by Medicare, premium equivalents that will be reported by another reporting entity (i.e., another vendor is reporting premium equivalents for your pharmacy carve out or stop loss purchased outside of Meritain Health), amounts related to account-based plans or HRAs, excepted benefits, and member cost share amounts. 	According to claims paid in our system, we show your total claims cost in 2024 as: 0 Please remember that claims are only one part of the calculation.	
Total Premium Paid by Employers This number is calculated from the entries above: Total Premium Equivalents minus Total Premium Paid by Members. The number CANNOT not be negative. To change the number, you must adjust the Total Premium Equivalent and/or Total Premium Paid by Members. Contact your Account Manager if you believe a negative number is accurate.		

i Check box to certify the calculation for Total Premium Paid by Employers above is correct. ☐*

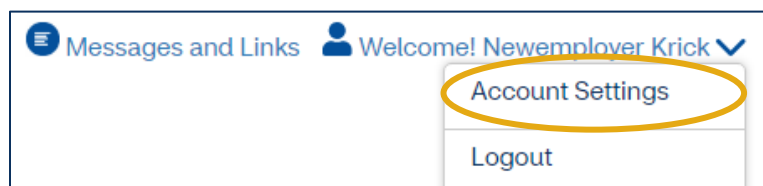
Submit

Submission Message

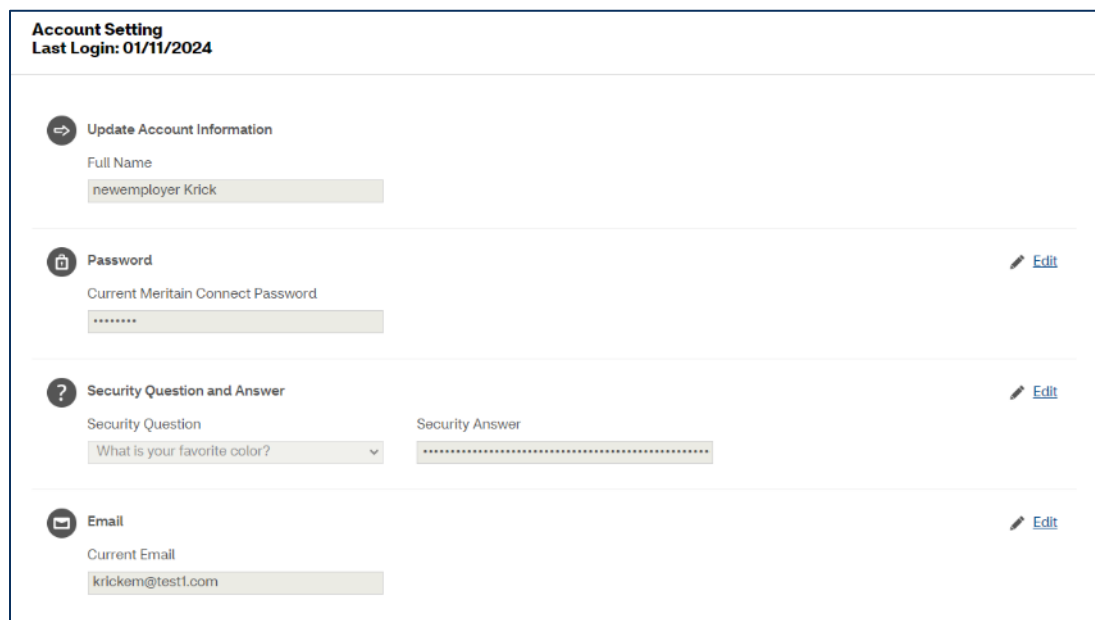
Rx Dc Self Service Reporting
Your Rx Data Collection Information has been submitted.

Account Settings

You can update and change your account information in the Account Settings feature. This feature will allow you to update password, current security question and answer and email address.



The screenshot shows a user profile dropdown menu. At the top, it says 'Welcome! Newemployer Krick' with a checkmark. Below this, the 'Account Settings' option is highlighted with a yellow oval. The 'Logout' option is visible below it.



The screenshot shows the 'Account Setting' page with the following sections:

- Update Account Information**
Full Name: newemployer Krick
- Password**
Current Meritain Connect Password: [masked] [Edit](#)
- Security Question and Answer**
Security Question: What is your favorite color? [Edit](#)
Security Answer: [masked]
- Email**
Current Email: krickem@test1.com [Edit](#)

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 or your Meritain Health consultant.

Simple. Transparent. Versatile.

At Meritain Health®, we're creating unrivaled connections.

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