MEDSURETY
Health Savings

Welcome to your MEDSURETY Reimbursement Account Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Account(s).

CONSUMER PORTAL

QuickStart Guide

HOW DO I LOG IN TO THE HOME PAGE?

1. Go to www.medsurety.com and click **Login**.
2. Select **EMPLOYEE Login**.
3. **User ID**: Enter your last name + last 4 digits of your SSN (example: Smith1234). Click **Next**.
4. **Password**: Enter SetUp01! (first-time users only).
5. Click **Login**.

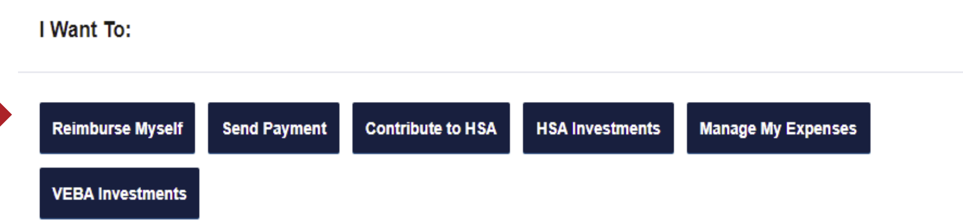
The **Home Page** is easy to navigate:

- **Accounts & Balances** – Quickly see all your accounts and available balances.
- **I Want To** – Shortcuts to the most commonly used Consumer Portal features.
- **Top Menu** – Hover over **Accounts** to view account activity, claim details, payments, statements, HSA investments, and your profile.
- **Tools & Support** – Access forms, plan summaries, quick links, and other helpful resources for your account(s).
- **Message Center** – View alerts and important updates about your account(s).
- **Quick View** – See key account details in an easy-to-read graphic format.
- **Tasks** – Stay on top of action items, like submitting receipts or checking your next scheduled payment.

HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

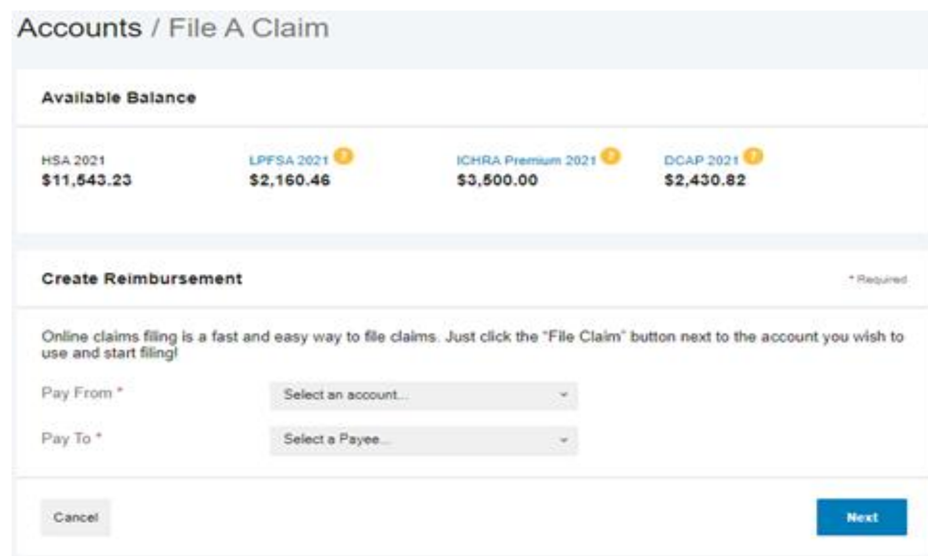
1. On the **Home Page**, click '**Reimburse Myself**' in the **I Want To** section.
2. Follow the on-screen claim wizard to enter:
    - Claim details
    - Payee information
    - Upload your receipt
3. To add more claims, click **Add Another** on the **Transaction Summary** page.
4. When all claims have been entered in the **Transaction Summary**, check the box to agree to the terms, then click **Submit**.
5. A **Claim Confirmation** page will appear.

- If you did not upload a receipt, you'll see a task reminder with a link to upload it later.
- You can also print the **Claim Confirmation Form** and send it with your required receipts by email, fax, or mail.



NOTE: If you see **Receipts Needed** in the Tasks section of your Home Page:

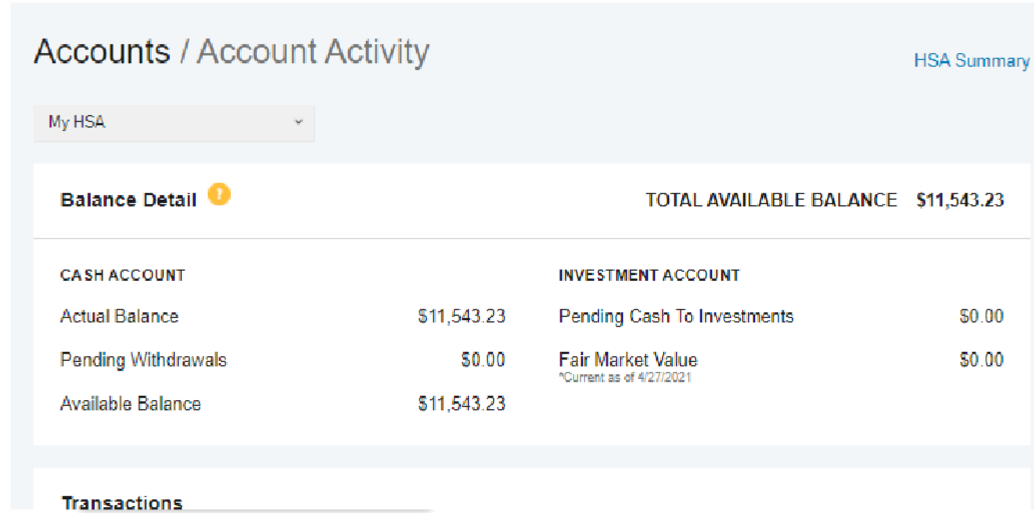
1. Click the link to go to the **Claims** page.
2. Find the claim that needs documentation.
3. Click the claim to expand the details.
4. Use the **Upload Receipts** link to attach your receipt.



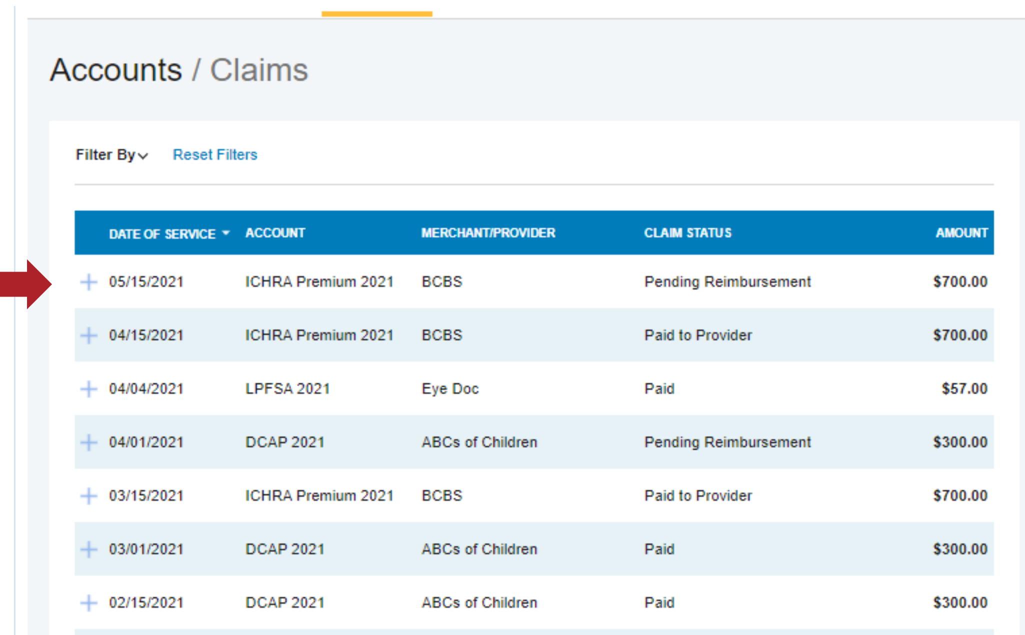
NOTE: FSA and HRA plans are regulated by the IRS, so we must collect valid documentation for certain expenses to keep the plan compliant. Some debit card payments automatically verify (auto-substantiate), so no documentation is needed for those. However, it's best practice to keep copies of all receipts and itemized bills for your records.

HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. Current Balance Only – On the **Home Page**, check the **Accounts** section.
2. Full Account or Claims Activity –
   - Click the **Account Name** on the **Home Page** to open the Account Summary or Claims Detail page, or
   - Hover over **Accounts** in the top menu and select **Account Summary** or **Activity**.
   - If you have multiple accounts, use the drop-down menu to switch between them.



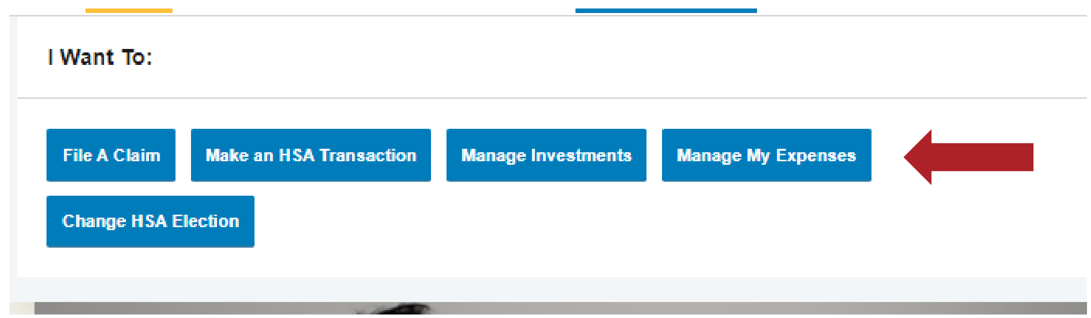
NOTE: To view claim details, click the **plus (+) sign** next to the claim to expand it.

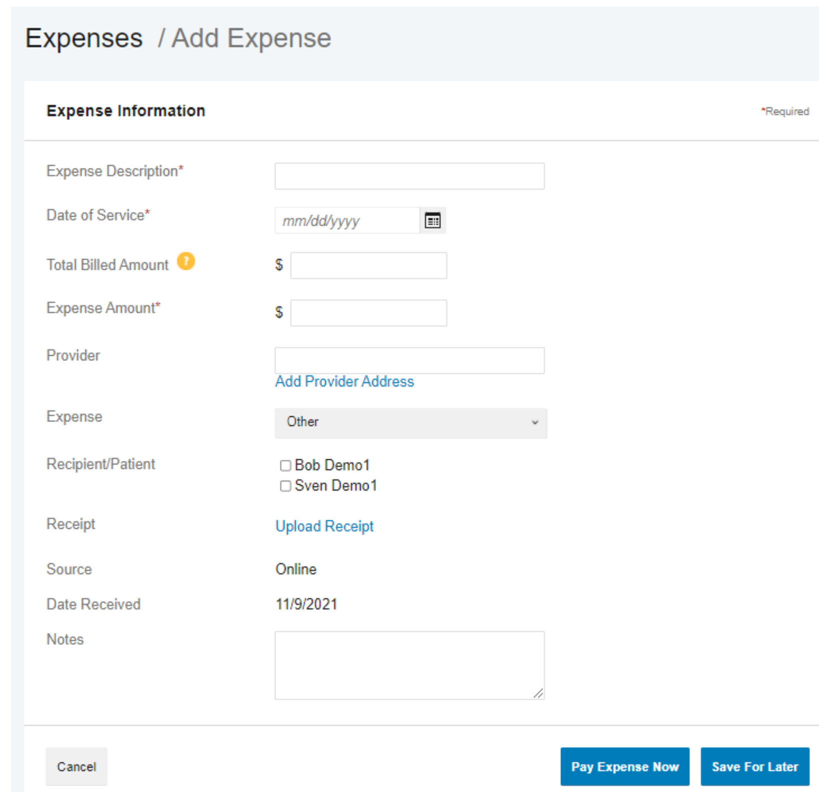


HOW DO I ADD AN EXPENSE TO MANAGE MY EXPENSES?

The "Manage My Expenses" tool lets you record expenses without requesting reimbursement right away. It's especially helpful for HSA account holders to store receipts and itemized bills in case of an IRS audit.

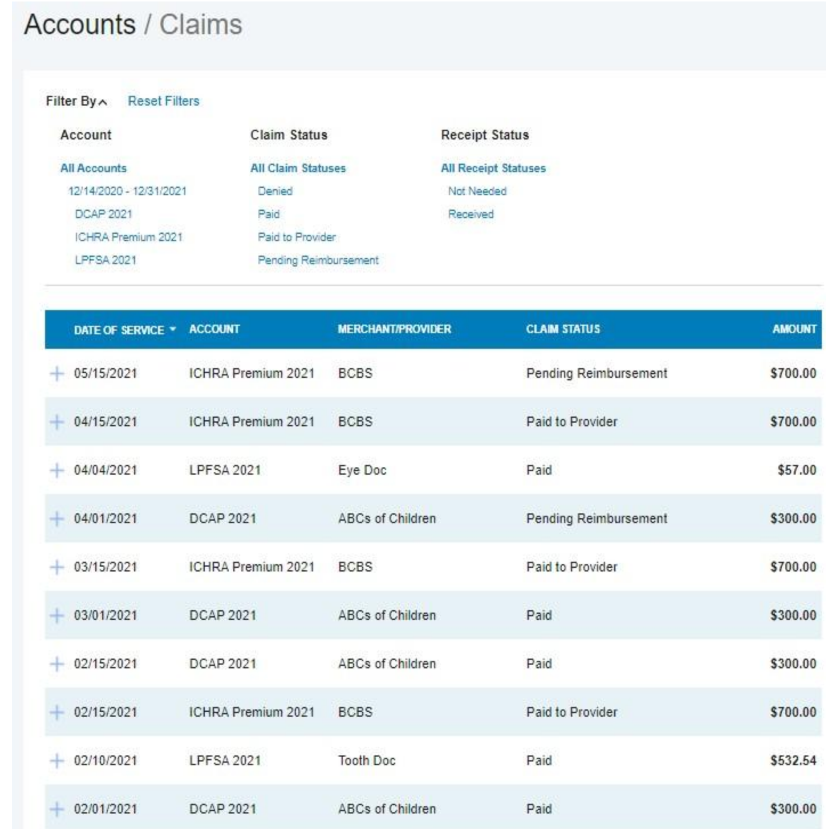
1. In the **I Want To** section on your Home Page, click **Manage My Expenses**.
2. Fill in the expense details. You can upload a receipt and add notes for your records.
3. Once the expense appears on your dashboard, you can choose to pay it, if desired.





HOW DO I PAY AN EXPENSE?

1. Go to the **Manage My Expenses** page to process payments or reimbursements for unpaid expenses.
2. Expenses are organized by category. Click the Pay button to the right of the expense you want to pay.
3. Select which expenses to pay, then choose the eligible account(s) to fund the payment.
4. When you click **Pay**, the claim details from the **Expense** will automatically appear in the claim form. Review and edit the information as needed before submitting.



HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

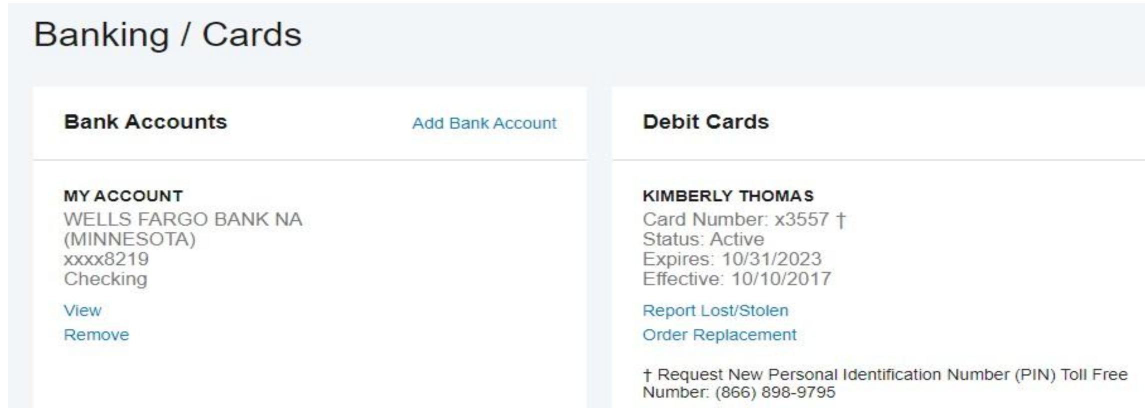
1. On the **Home Page**, hover over **Accounts** in the top menu and click **Claims** to see your claims history.
- Use the filters at the top to sort by plan year, account type, claim status, or receipt status.
2. Click the **plus (+) sign** next to a claim to expand and view additional details.

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. On the **Home Page**, under **Accounts**, click **Payments**. You'll see all reimbursement payments, including debit card transactions.
2. Click on a payment line to expand it and view more details about the transaction.

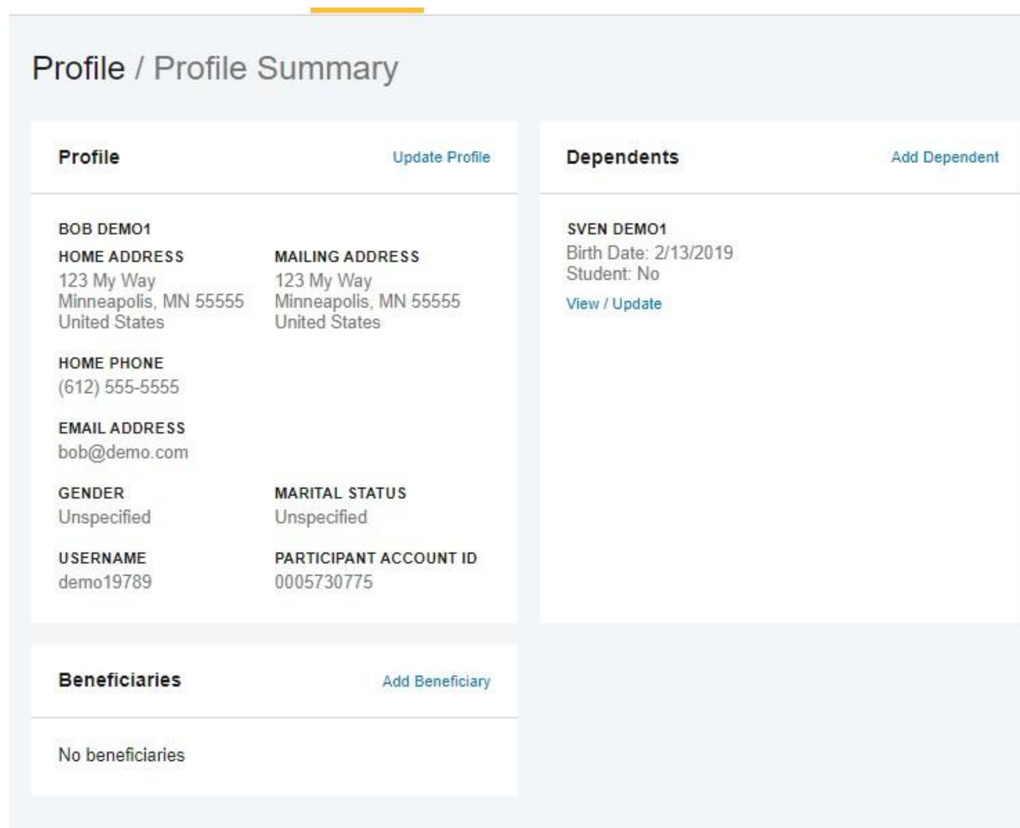
HOW DO I REPORT A MISSING DEBIT CARD AND/OR REQUEST A NEW CARD?

1. On the **Home Page**, under **Accounts/Profile**, click **Banking/Cards**.
2. In the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow the on-screen instructions.



HOW DO I UPDATE MY PERSONAL PROFILE?

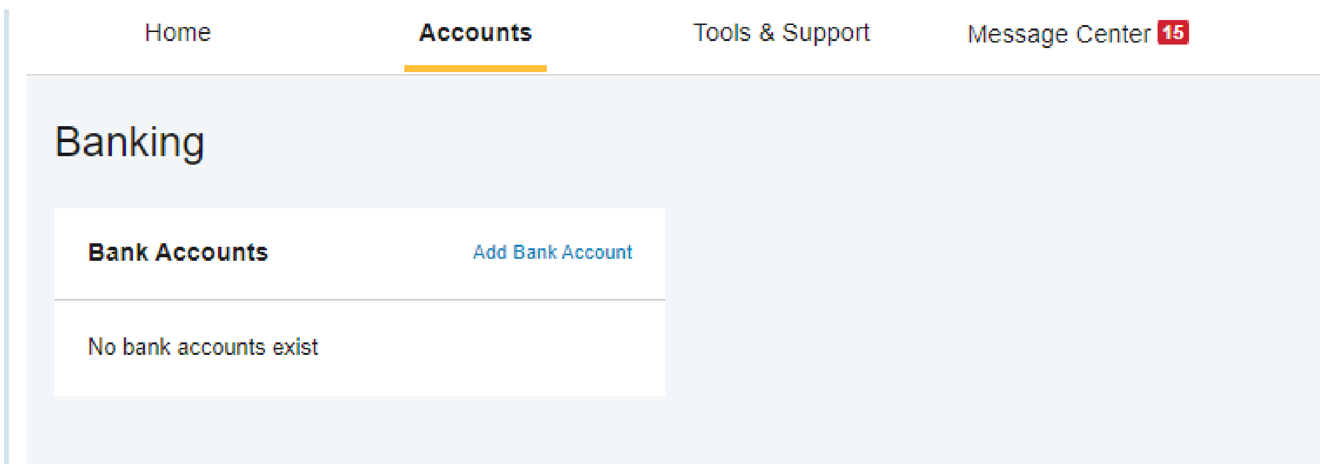
1. On the **Home Page**, under **Accounts**, click the links to update your profile, dependents, or beneficiaries.
2. On the Profile screen, choose the appropriate option: **Update Profile**, **Add/Update Dependent**, or **Add Beneficiary**.
    - Some changes (like updating your address) require contacting Customer Service for security reasons.
3. Fill out the form with your changes.
4. Click **Submit**.



HOW DO I GET MY REIMBURSEMENT FASTER?

The quickest way to receive your reimbursement is by setting up direct deposit to your checking account.

1. On your **Home Page**, under **Tasks**, click **Get Your Money Faster**. This will take you to the **Banking/Cards** section.
2. Or, go directly: under **Accounts**, click **Banking/Cards**.
3. Click **Add Bank Account**.
4. Enter your bank information and click **Submit**.



HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. On the **Home Page**, hover over **Accounts** and click **Login Information**.
2. Follow the on-screen instructions.

- *For first-time logins, you'll be prompted to change the temporary password assigned by your plan administrator. Follow the instructions.*

3. Click **Save** when finished.

HOW DO I VIEW OR ACCESS DOCUMENTS AND FORMS?

1. Click the **Tools & Support** tab at the top of the page.
2. **Documents & Forms** – Access any forms or documents for your account(s).
3. **Plan Summaries** – View descriptions of each plan your employer offers.
4. **Rules & Agreements** – Find HSA terms and conditions you'll review and accept when enrolling.
5. **Contact Us** – Get our mailing address and customer service information.
6. **Quick Links** – Watch short education videos about CDH plans, Clever Rx, and FSA/HSA eligibility.

Tools & Support

Documents & Forms

FORMS

- Claims Terms and Conditions
- Direct Deposit Form
- FSA/HRA/DCAP Individual Claim Form
- HSA Account Information Change Notification
- HSA Additional Debit Card Request Form
- HSA Beneficiary Change - Spousal Consent Form
- HSA Contribution Form
- HSA Distribution Request Form
- HSA Information Access Authorization
- HSA Power of Attorney Form
- HSA Tax Documents
- Orthodontic Worksheet & Claim Form
- Recurring Dependent Care Claim Form

PLAN SUMMARIES

- DCAP 2021 Plan Rules
- DCAP 2021 Plan Descriptions
- DCAP 2021 Plan Details
- HSA 2021 Plan Rules
- HSA 2021 Plan Descriptions
- HSA 2021 Plan Details
- ICHRA Premium 2021 Plan Rules
- ICHRA Premium 2021 Plan Descriptions
- ICHRA Premium 2021 Plan Details
- LPFSA 2021 Plan Rules
- LPFSA 2021 Plan Descriptions
- LPFSA 2021 Plan Details

How Do I?

- Update Notification Preferences
- Update HSA Coverage Level

Quick Links

DISCOUNT DRUG CARD PROGRAM

- CleverRX

EDUCATION

- IRS Pub 502 - Eligible Expenses
- Videos

SHOP FOR ELIGIBLE ITEMS

- FSA Eligibility List
- HSA Eligibility List