

Accessing Claims Retriever

What is Claims Retriever?

This new feature connects members' medical, dental or vision carrier portals with their HealthEquity member portal to automatically display claims. With Claims Retriever, members who are not currently receiving claims through integration can now enjoy the convenience of having their claims displayed within their HealthEquity portal.

How does Claims Retriever benefit my members?

Having claims automatically sent to members' HealthEquity portal allows them to:

- Trigger payments and/or reimbursements without having to manually enter claim information.
- Store claims for historical records.
- Substantiate card transactions to decrease the likelihood of having to provide a receipt or EOB for FSA or HRA account transactions.

How does it work?

Claims Retriever makes it easy to collect and sweep claims information from various carrier portals to HealthEquity accounts by allowing your members to enter their login credentials to each of their carrier portals.

Once they have set up their connections, Claims Retriever will take care of the rest by gathering and delivering any of their claims directly to their HealthEquity account. It does all the heavy lifting and presents claims so that your members can manage their healthcare expenses effectively.

The screenshot displays the HealthEquity member portal interface. At the top, the logo reads "HealthEquity Building Health Savings" and the user "John Doe (1242635) Sign Out" is logged in. The navigation bar includes "My Account", "Claims & Payments", "Docs & Forms", and "Resources".

Account Balances:

HSA Available to Spend	\$3,697.39
HSA Contributions YTD	\$0.00
HSA Distributions YTD	\$0.00

Quick Links:

- Pay Doctor/Provider
- Request Reimbursement
- Make Contribution
- Transaction History
- Investments

To Do:

- Unlinked Receipts/Docs: 0
- Unread Messages: 3

Maximize your tax savings by maximizing your HSA contribution

HSA contribution limits:

	2017	2018
Individual limit:	\$3,400	\$3,450
Family limit:	\$6,750	\$6,900

HSA Balances ROLL OVER year after year (DEC 31)

Resources:

- HSA Store
- Qualified Medical Expenses
- Proper HealthCare Lending
- LowestMed
- American Well
- Claims Retriever by TPA Stream

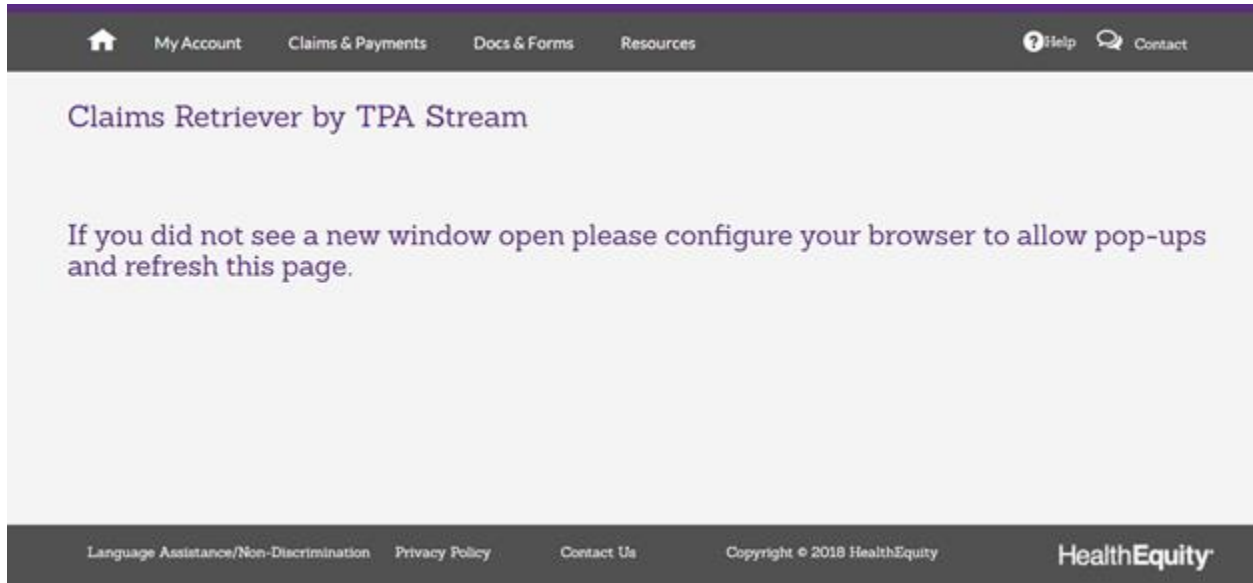
John Doe Overall Account Optimization: 8% (Optimize Your HSA)

CONGRATS! You can now begin investing & increase your earning potential. [INVEST NOW](#)

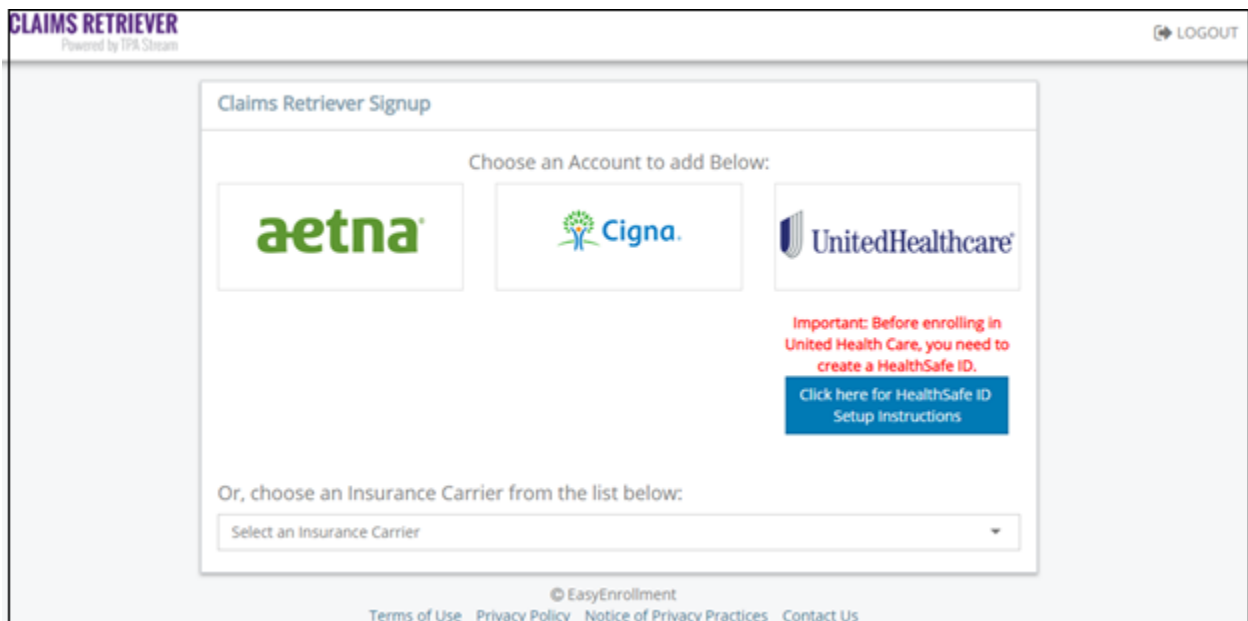
How it works

Eligible members must agree to begin receiving integrated claims by following these steps:

1. Member clicks 'Claims Retriever by TPA Stream' in the Resources section on their Health Equity Member Portal home page.
2. The Claims Retriever sign up page will open in a new window.



3. Member selects their carrier from those shown or from the drop down.



4. Member enters the username and password used to access their insurance carrier's site. Member must also agree to the Terms of Use and approve the transfer of their claims to HealthEquity. (This creates a single sign-on between HQY and the insurance carrier.)

CLAIMS RETRIEVER
Powered by TPA Stream

LOGOUT

Claims Retriever Signup

Enter Credentials for www.aetna.com

Before you proceed, make sure you have registered on www.aetna.com and have your Aetna username and password at your fingertips.

Aetna Username:

Aetna Password:

Show password

I have read and I agree to the [Terms Of Use](#)

I acknowledge that my claims will be automatically sent to HealthEquity

Validating Credentials. This may take a couple minutes...

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5. That's it! Member can click 'Add account' to add additional carriers such as Rx, dental, or vision.

CLAIMS RETRIEVER
Powered by TPA Stream

My Accounts

User: JohnDoe17

All of your accounts are in good shape. Click Add on the sidebar to add additional logins to your account.

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Future claims will be sent from the member's selected carriers to their member portal on a nightly basis. Prior claims will load in their member portal within two weeks after enrollment.

Troubleshooting

If the single sign-on is unsuccessful, member will be prompted to troubleshoot the issue.

Invalid Credentials

Why am I here?

Enrolling with links your insurance account with HealthEquity so that you don't have to manually submit your EOBs. After a one-time set up, all of your EOBs will be automatically submitted to HealthEquity for processing.

I think these credentials are valid.

I don't know my username or password.

[Let me try again](#) [Close](#)

If member is unsuccessful:

- Please ensure the member does not have pop ups blocked.



If member stops receiving integrated claims, they should:

- Click the ' Claims Retriever by TPA Stream' in the Resources list on their HealthEquity Member Portal home page.
- Follow instructions in red to fix the connection.

CLAIMS RETRIEVER

Powered by TPA Stream

My Accounts

- [Add Aetna, Cigna, or UnitedHealthCare account for Claims Retriever](#)
- 
User: JohnDoe17
- 
User: JohnDoe17

Your Aetna account requires attention.

The login information you provided for Aetna is invalid. Please re-enter your login information.

Before you proceed, make sure you have registered on www.aetna.com and have your Aetna username and password at your fingertips.

The username you formerly entered was JohnDoe17.

Aetna Username

Aetna Password

[Verify Credentials](#)

Questions? Contact support@healthequity.com

[Remove This Account](#)

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