

CONSUMER PORTAL QUICKSTART GUIDE

Welcome to your Benefit Accounts Consumer Portal.

This one-stop portal gives you 24/7 access to view information and manage your **Medical Expense Reimbursement Account (MERP)**. It enables you to:

- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Report a lost/stolen Card and request a new one
- Update your personal profile information
- Change your login ID and/or password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:

1. Work from sections within the Home Page, or
2. Hover over or click on the four tabs at the top.

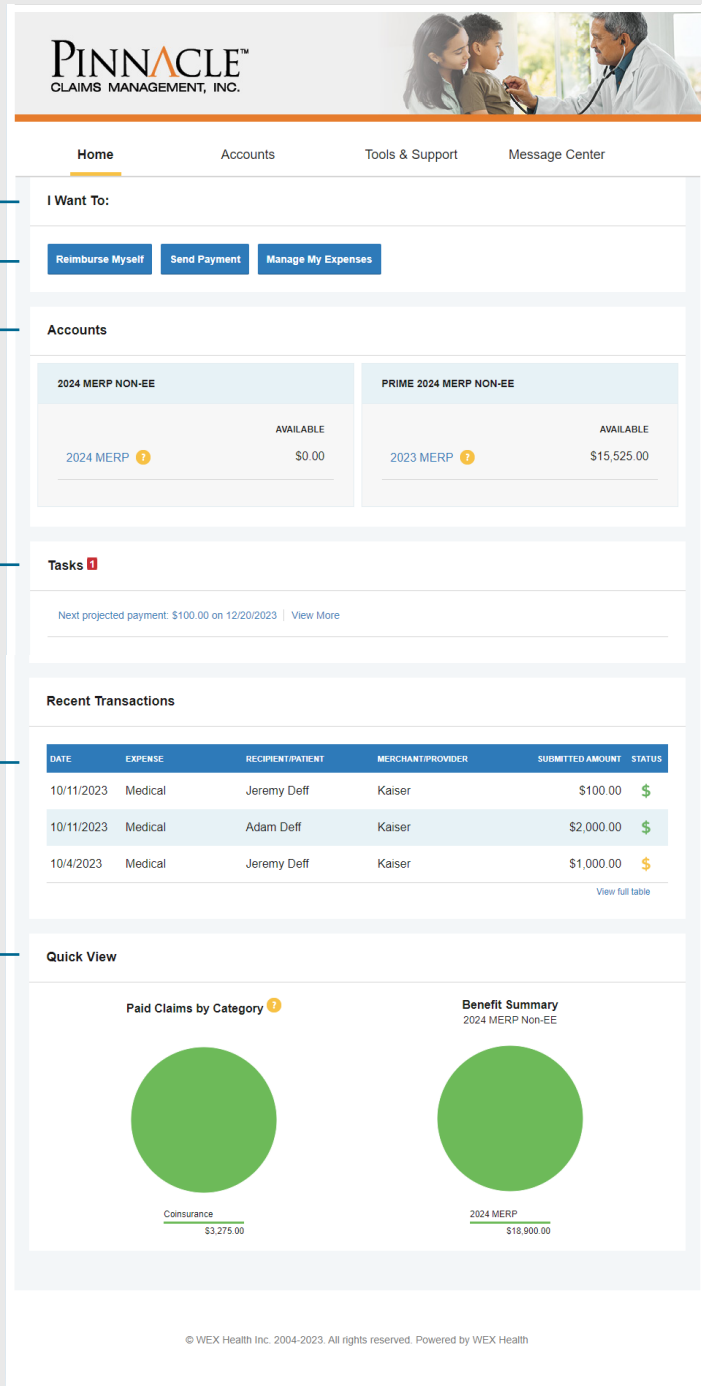
HOW DO I LOG ON TO HOME PAGE?

1. Go to prime.pinnacletpa.com/MERP
2. Enter your Username and Password
 - a. **Username:** Email Address
 - b. **Temporary Password:** First Name initial + Last Name + DOB (ddmmyyyy). Initial and last name needs to be in all CAPITAL LETTERS.
 Example: John Doe October 24, 1972, would be: JDOE24101972
3. Click **Login**.

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

- Easily access the **Available Balance** and **"I Want To"** sections to work with your accounts right away.
- The **I Want To...** section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to your Accounts and Profile.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Recent Transaction** section displays the last three (3) transactions on your account(s).
- The **Quick View** section graphically displays some of your key account information.

You can also hover over the tabs at the top of the page.



Pinnacle
CLAIMS MANAGEMENT, INC.

Home Accounts Tools & Support Message Center

I Want To:

Reimburse Myself Send Payment Manage My Expenses

Accounts

2024 MERP NON-EE		PRIME 2024 MERP NON-EE	
2024 MERP	AVAILABLE \$0.00	2023 MERP	AVAILABLE \$15,525.00

Tasks

Next projected payment: \$100.00 on 12/20/2023 | View More


Recent Transactions

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
10/11/2023	Medical	Jeremy Deff	Kaiser	\$100.00	\$
10/11/2023	Medical	Adam Deff	Kaiser	\$2,000.00	\$
10/4/2023	Medical	Jeremy Deff	Kaiser	\$1,000.00	\$

[View full table](#)


Quick View

Paid Claims by Category



Consurance
\$3,275.00

Benefit Summary
2024 MERP Non-EE



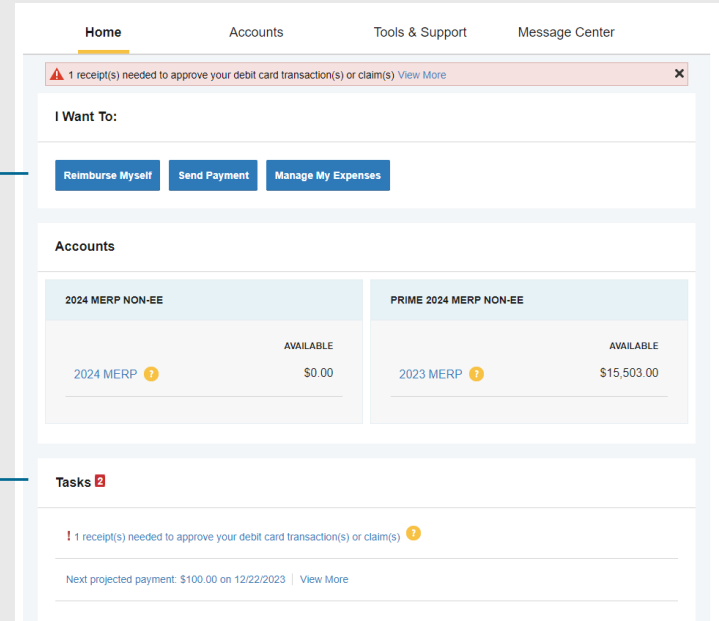
2024 MERP
\$18,900.00

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HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select **"Reimburse Myself"** or **"Send Payment"** under the "I want to..." section, **OR** from any page on the portal, expand the **Accounts** tab on the top of the screen.
2. The claim filing wizard will walk you through the request including entry of information, payee details and uploading a receipt.
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in the **Transaction Summary**, agree to the terms and conditions click **Submit** to send the claims for processing.
5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a receipt, you can upload the receipt from this screen or print a **Claim Confirmation Form** to submit to the administrator with the required receipts.

NOTE: If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page or use one of your **Mobile Quick Receipts**.



Home Accounts Tools & Support Message Center

1 receipt(s) needed to approve your debit card transaction(s) or claim(s) View More

I Want To:

Reimburse Myself Send Payment Manage My Expenses

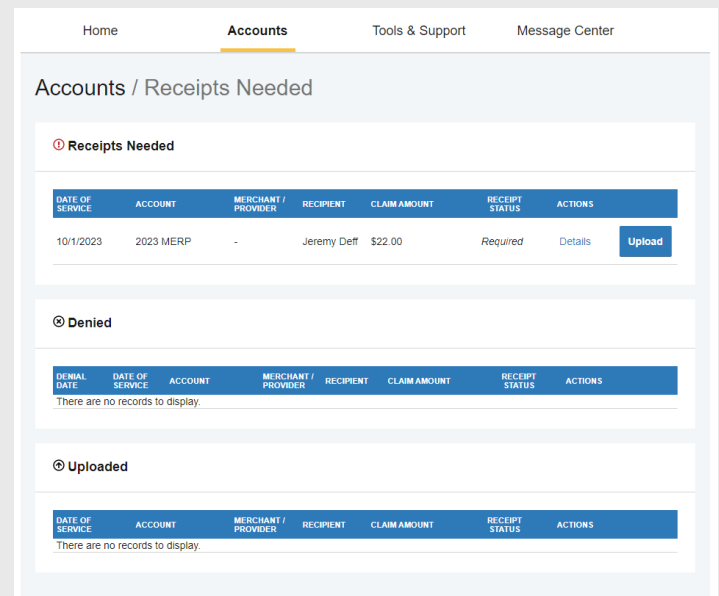
Accounts

Account Name	Available Amount
2024 MERP NON-EE	\$0.00
PRIME 2024 MERP NON-EE	\$15,503.00

Tasks 2

1 receipt(s) needed to approve your debit card transaction(s) or claim(s)

Next projected payment: \$100.00 on 12/22/2023 View More



Home Accounts Tools & Support Message Center

Accounts / Receipts Needed

Receipts Needed

DATE OF SERVICE	ACCOUNT	MERCHANT / PROVIDER	RECIPIENT	CLAIM AMOUNT	RECEIPT STATUS	ACTIONS
10/1/2023	2023 MERP	-	Jeremy Delf	\$22.00	Required	Details Upload

Denied

There are no records to display.

Uploaded

There are no records to display.

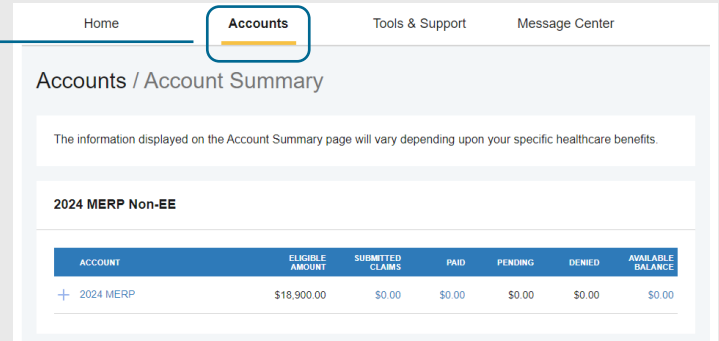
HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.
2. For all Account Activity, click on the **Accounts** tab from the Home Page to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under "Available Balance" to view enrollment detail.

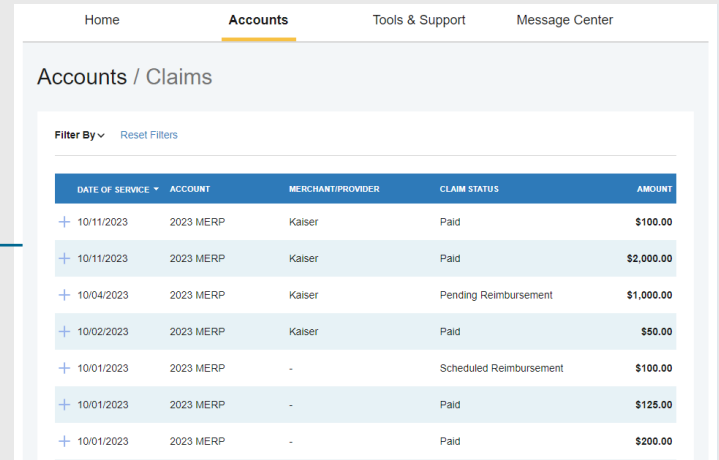
NOTE: You can see election details by clicking to expand the line item for each account.

HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

1. From the **Home Page**, click on the **Accounts Tab**, and then click on the **Claims** link to see your claims history. You can apply filters from the top of the screen. You can filter by plan year, account type, claim status or receipt status.
2. By clicking on the line of the claim, you can expand the data to display additional claim details.



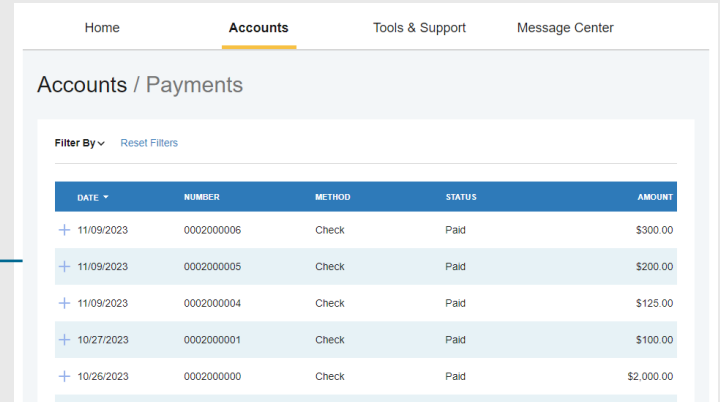
ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ 2024 MERP	\$18,900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 10/11/2023	2023 MERP	Kaiser	Paid	\$100.00
+ 10/11/2023	2023 MERP	Kaiser	Paid	\$2,000.00
+ 10/04/2023	2023 MERP	Kaiser	Pending Reimbursement	\$1,000.00
+ 10/02/2023	2023 MERP	Kaiser	Paid	\$50.00
+ 10/01/2023	2023 MERP	-	Scheduled Reimbursement	\$100.00
+ 10/01/2023	2023 MERP	-	Paid	\$125.00
+ 10/01/2023	2023 MERP	-	Paid	\$200.00

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.



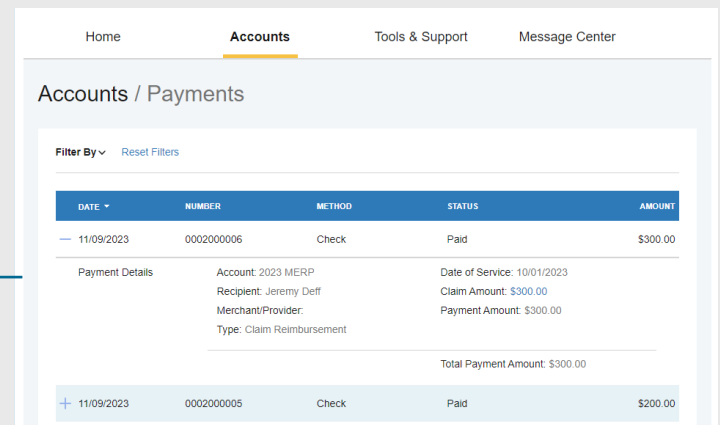
Home Accounts Tools & Support Message Center

Accounts / Payments

Filter By Reset Filters

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 11/09/2023	0002000006	Check	Paid	\$300.00
+ 11/09/2023	0002000005	Check	Paid	\$200.00
+ 11/09/2023	0002000004	Check	Paid	\$125.00
+ 10/27/2023	0002000001	Check	Paid	\$100.00
+ 10/26/2023	0002000000	Check	Paid	\$2,000.00

2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.



Home Accounts Tools & Support Message Center

Accounts / Payments

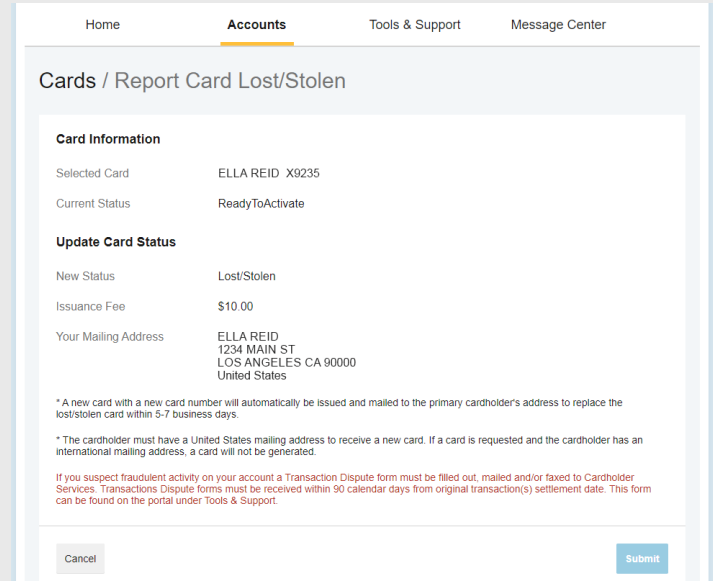
Filter By Reset Filters

DATE	NUMBER	METHOD	STATUS	AMOUNT										
- 11/09/2023	0002000006	Check	Paid	\$300.00										
<p>Payment Details</p> <table border="0"> <tr> <td>Account: 2023 MERP</td> <td>Date of Service: 10/01/2023</td> </tr> <tr> <td>Recipient: Jeremy Deff</td> <td>Claim Amount: \$300.00</td> </tr> <tr> <td>Merchant/Provider:</td> <td>Payment Amount: \$300.00</td> </tr> <tr> <td>Type: Claim Reimbursement</td> <td></td> </tr> <tr> <td colspan="2" style="text-align: right;">Total Payment Amount: \$300.00</td> </tr> </table>					Account: 2023 MERP	Date of Service: 10/01/2023	Recipient: Jeremy Deff	Claim Amount: \$300.00	Merchant/Provider:	Payment Amount: \$300.00	Type: Claim Reimbursement		Total Payment Amount: \$300.00	
Account: 2023 MERP	Date of Service: 10/01/2023													
Recipient: Jeremy Deff	Claim Amount: \$300.00													
Merchant/Provider:	Payment Amount: \$300.00													
Type: Claim Reimbursement														
Total Payment Amount: \$300.00														
+ 11/09/2023	0002000005	Check	Paid	\$200.00										

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

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.

2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.



Home Accounts Tools & Support Message Center

Cards / Report Card Lost/Stolen

Card Information

Selected Card	ELLA REID X9235
Current Status	ReadyToActivate

Update Card Status

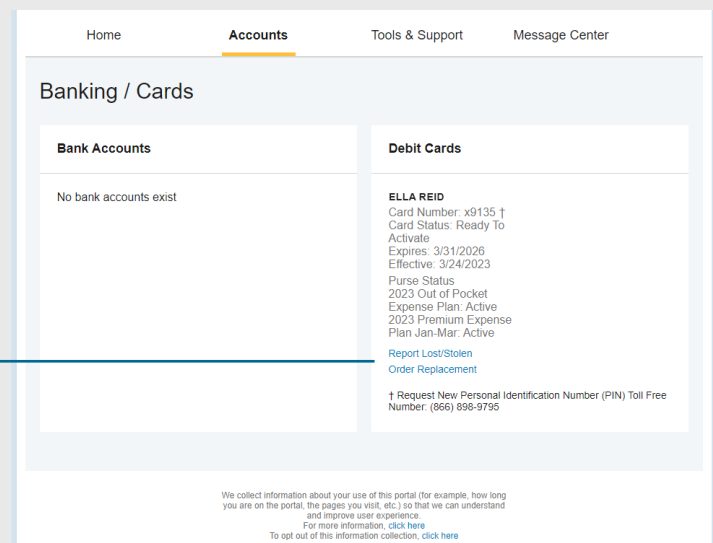
New Status	Lost/Stolen
Issuance Fee	\$10.00
Your Mailing Address	ELLA REID 1234 MAIN ST LOS ANGELES CA 90000 United States

* A new card with a new card number will automatically be issued and mailed to the primary cardholder's address to replace the lost/stolen card within 5-7 business days.

* The cardholder must have a United States mailing address to receive a new card. If a card is requested and the cardholder has an international mailing address, a card will not be generated.

If you suspect fraudulent activity on your account a Transaction Dispute form must be filled out, mailed and/or faxed to Cardholder Services. Transactions Dispute forms must be received within 90 calendar days from original transaction(s) settlement date. This form can be found on the portal under Tools & Support.

Cancel Submit



Home Accounts Tools & Support Message Center

Banking / Cards

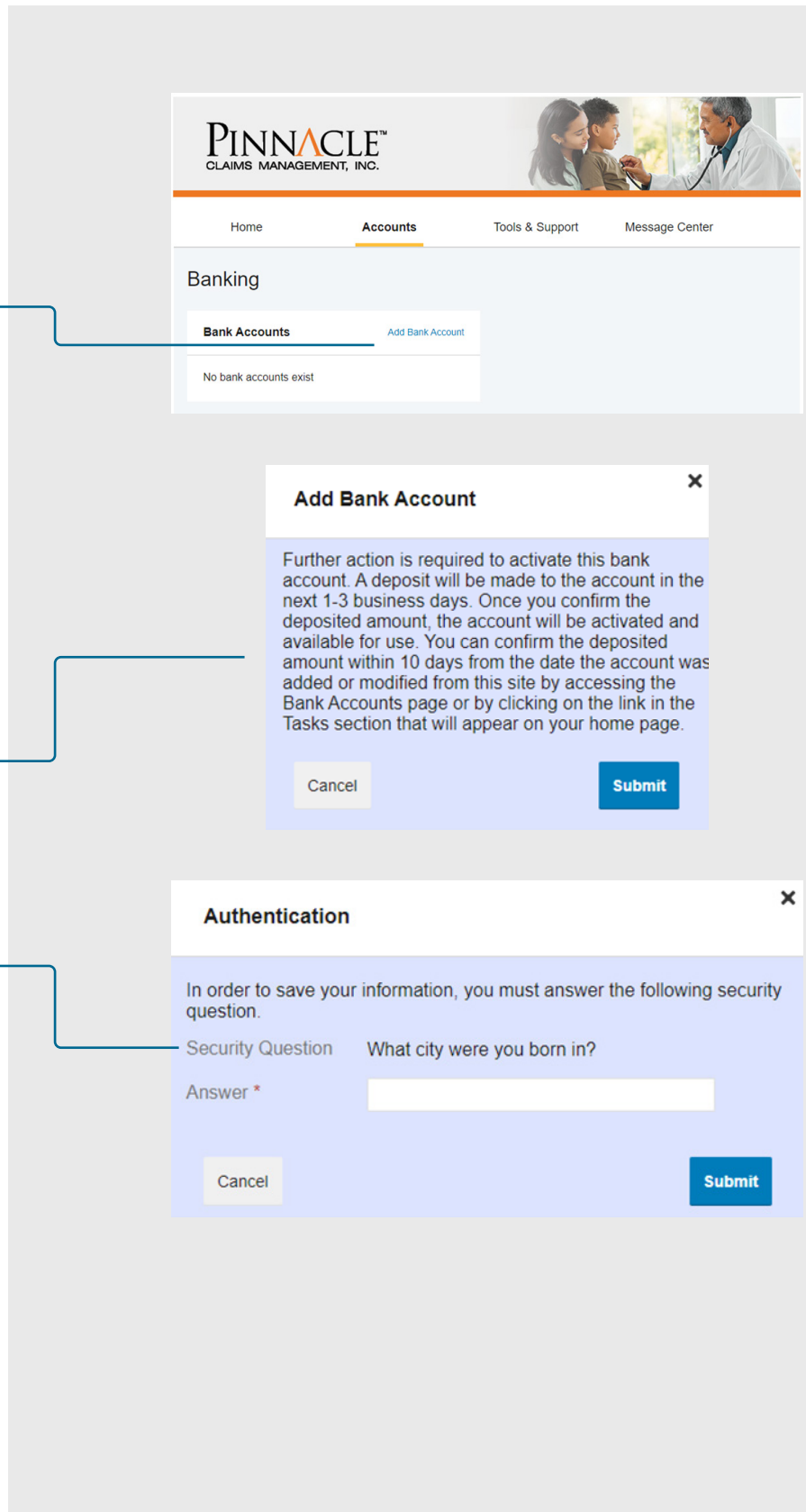
Bank Accounts	Debit Cards
No bank accounts exist	ELLA REID Card Number: x9135 † Card Status: Ready To Activate Expires: 3/31/2026 Effective: 3/24/2023 Purse Status 2023 Out of Pocket Expense Plan: Active 2023 Premium Expense Plan Jan-Mar: Active Report Lost/Stolen Order Replacement † Request New Personal Identification Number (PIN) Toll Free Number: (866) 998-9735

We collect information about your use of this portal (for example, how long you are on the portal, the pages you visit, etc.) so that we can understand and improve user experience.
For more information, [click here](#)
To opt out of this information collection, [click here](#)

HOW DO I GET MY REIMBURSEMENT FASTER?

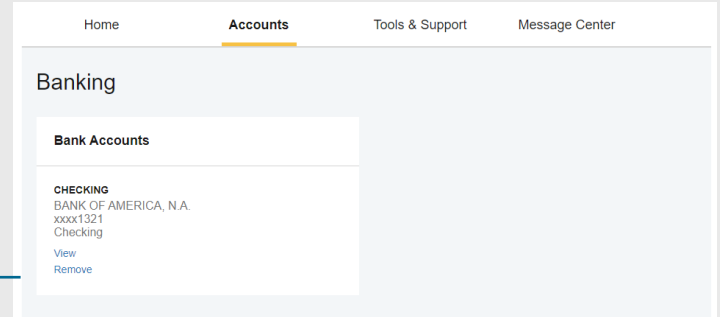
The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit setup online.

1. From the **Home Page**, under the **Accounts** tab, select Banking, and click on **Add Bank Account**.
2. Select **Update** for the appropriate plans. Update the secondary reimbursement method to **Direct Deposit**.
3. Enter your bank account information and click **Submit**.
4. The **Payment Method Changed** confirmation displays.
5. **If there is a bank validation requirement**, you will be notified on the portal to look for a small transaction or "micro-deposit" in your designated bank account in the next couple of days to enter online, which will validate your account.
6. An Authentication pop-up message will display. You must answer the security question and click Submit.



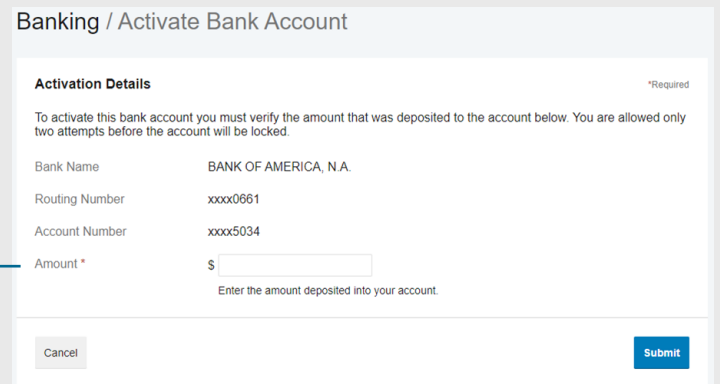
The screenshot displays the Pinnacle Claims Management, Inc. portal. The top navigation bar includes 'Home', 'Accounts', 'Tools & Support', and 'Message Center'. The 'Accounts' tab is active, showing a 'Banking' section with a 'Bank Accounts' link and an 'Add Bank Account' button. Below this, a message states 'No bank accounts exist'. Two pop-up messages are shown: 'Add Bank Account' and 'Authentication'. The 'Add Bank Account' pop-up contains a message: 'Further action is required to activate this bank account. A deposit will be made to the account in the next 1-3 business days. Once you confirm the deposited amount, the account will be activated and available for use. You can confirm the deposited amount within 10 days from the date the account was added or modified from this site by accessing the Bank Accounts page or by clicking on the link in the Tasks section that will appear on your home page.' It has 'Cancel' and 'Submit' buttons. The 'Authentication' pop-up contains a message: 'In order to save your information, you must answer the following security question.' It asks 'Security Question: What city were you born in?' and has an 'Answer *' input field, 'Cancel', and 'Submit' buttons.

7. Your bank account will be added to your profile. To finish activating your account, click the Activate link.



Bank Accounts	
CHECKING BANK OF AMERICA, N.A. xxxx1321 Checking	View Remove

8. Enter the prenote amount that was deposited to your account and click Submit.



Activation Details *Required

To activate this bank account you must verify the amount that was deposited to the account below. You are allowed only two attempts before the account will be locked.

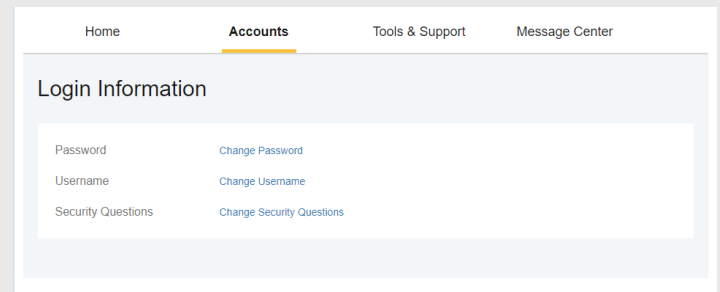
Bank Name	BANK OF AMERICA, N.A.
Routing Number	xxxx0661
Account Number	xxxx5034
Amount *	\$ <input type="text"/>

Enter the amount deposited into your account.

[Cancel](#) [Submit](#)

HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click **Save**.



Password	Change Password
Username	Change Username
Security Questions	Change Security Questions

HOW DO I VIEW OR ACCESS:

...DOCUMENTS & FORMS?

1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

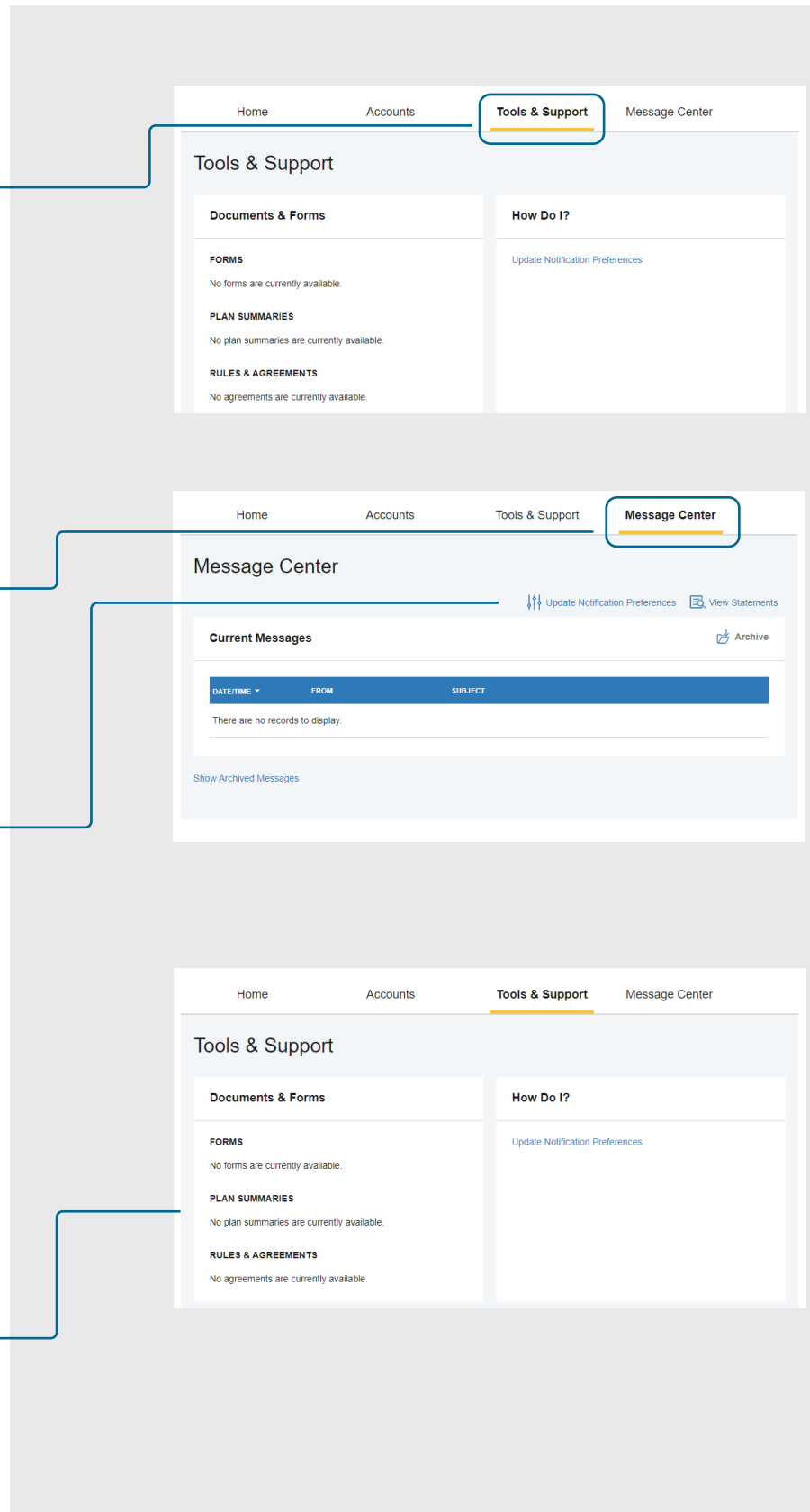
...NOTIFICATIONS?

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.

...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts Tab**, you will be directed to the **Account Summary** page.
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.

OR from the **Home Page**, under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.



The image displays three screenshots of the Prime Healthcare web interface, illustrating navigation paths for different sections. Each screenshot has a blue box highlighting a specific tab, with a blue line connecting it to the corresponding instruction in the text.

- Top Screenshot:** Shows the navigation bar with 'Home', 'Accounts', 'Tools & Support' (highlighted), and 'Message Center'. Below, the 'Tools & Support' page is shown with sections for 'Documents & Forms' (containing 'FORMS', 'PLAN SUMMARIES', and 'RULES & AGREEMENTS') and 'How Do I?' (containing 'Update Notification Preferences').
- Middle Screenshot:** Shows the navigation bar with 'Home', 'Accounts', 'Tools & Support', and 'Message Center' (highlighted). Below, the 'Message Center' page is shown with options for 'Update Notification Preferences' and 'View Statements', a section for 'Current Messages' with an 'Archive' button, and a table with columns 'DATE/TIME', 'FROM', and 'SUBJECT'. A message below the table states 'There are no records to display.' and a 'Show Archived Messages' link is at the bottom.
- Bottom Screenshot:** Shows the navigation bar with 'Home', 'Accounts', 'Tools & Support' (highlighted), and 'Message Center'. Below, the 'Tools & Support' page is shown, identical to the top screenshot.



...PLAN INFORMATION?

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Home	Accounts	Tools & Support	Message Center
Tools & Support			
Documents & Forms		How Do I?	
FORMS No forms are currently available.		Update Notification Preferences	
PLAN SUMMARIES No plan summaries are currently available.			
RULES & AGREEMENTS No agreements are currently available.			
Contact Us		Quick Links	
Pinnacle Claims Management, Inc. 15525 Sand Canyon Avenue Irvine, CA 92618 Phone: (949) 863-1000 Toll Free: (800) 649-9121 Fax: (949) 809-8939 Email: customerservice@pinnacletpa.com		No quick links are currently available.	