

QUICKSTART GUIDE

Your Medicare Part B Premium Reimbursement Program



At-a-Glance

Your Medicare Part B Premium Reimbursement Program: The Essentials

Managing Your Account

How To Request Reimbursement

Register online now!

If you haven't registered online yet, please do so today. To register, just visit www.healthequity.com/wageworks, select "LOG IN/REGISTER" and then "Employee Registration." You'll need to answer a few simple questions and create a username and password.

Questions?

If you have any questions or concerns, you can talk to a trained expert to learn more about the program. Just call 877.924.3967.

Download the EZ Receipts® mobile app!

Use your mobile device to file claims and take care of your account paperwork from anywhere. Go to www.healthequity.com/wageworks to learn more.

Welcome to HealthEquity. Start Saving. Here's How.

Welcome to your Medicare Part B Premium Reimbursement Program sponsored by Port Authority, and administered by HealthEquity. Through this program, Port Authority will reimburse you for Medicare Part B premiums that you have paid. You must submit proof of premium payments through the online portal, HealthEquity's EZ Receipts app or by fax or mail. Upon approval, you will receive reimbursement by direct deposit or check, depending on how you set up your account.

Inside you'll find the quick-reference information you need to pay for Medicare Part B Premiums using your Medicare Part B Premium Reimbursement Program and track your transactions – plus tips for getting the most from the program.

Your Medicare Part B Premium Reimbursement Program: The Essentials

Your Medicare Part B Premium Reimbursement Program is governed by IRS regulations that detail who is eligible to use the account, and where and how the money in it is to be used. Your Medicare Part B Premium Reimbursement Program was designed to be simple. To keep it that way, it's important to comply with the IRS regulations that govern the program. The following guidelines will help you avoid any inconvenience.

- **Make sure account funds are only spent on expenses for those who are eligible.** Those eligible are you and your spouse who are enrolled in the Medicare Part B plan.
- **Know what expenses are eligible.** The Medicare Part B Premium Reimbursement Program funds can only be used to receive reimbursement for Medicare Part B Premiums.
- **Keep an eye on your Medicare Part B Premium Reimbursement.** Log in to your account at www.healthequity.com/wageworks to monitor, manage and/or track your premium reimbursement(s) or call HealthEquity Customer Service at 877.924.3967 for assistance.
- **You can set up direct deposit as your reimbursement preference.** Be sure to have your bank name, routing number and account number handy.
- **Please note:** If direct deposit is not set as your reimbursement preference, payment to you will be sent via live check.

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Managing Your Account

You can manage and check up on your account through HealthEquity online or over the phone. The “Claims and Activity” page online details all your account activity.

For the latest information, visit www.healthequity.com/wageworks and log in to your account 24/7. In addition to reviewing your most recent Medicare Part B Reimbursement Program activity, you can:

- Update your account preferences and personal information.
- Set up direct deposit as your reimbursement preference. Be sure to have your bank name, routing number and account number handy.
- Manage your account while on the go via the HealthEquity mobile website.
- Download the EZ Receipts app to file claims.

Using Your Medicare Part B Premium Reimbursement Program Dollars

When you pay Medicare Part B premiums, you can request reimbursement right away. We give you multiple options for filing reimbursement requests.

Using your Mobile Device

With the EZ Receipts mobile app, you can file and manage your reimbursement claims on the spot, with a click of your mobile device camera, from anywhere.

To use EZ Receipts:

- Download at www.healthequity.com/wageworks/employees/go-mobile.
- Log in to your account.
- Choose the type of receipt from the simple menu.
- Enter some basic information about the claim.
- Use your mobile device camera to capture the documentation.
- Submit the image and details to HealthEquity.

Filing a claim

You also can file a claim online to request reimbursement for your Medicare Part B Premium expenses.

- Go to www.healthequity.com/wageworks, log in to your account and select “Submit Receipt or Claim.”
- Select “Pay Me Back.”
- Fill in all the information requested on the form and submit.
- Scan or take a photo of your receipts, COLA and all other necessary supporting documents.
- Attach supporting documentation to your claim by using the upload utility.
- Make sure your documentation includes the five following pieces of information required by the IRS:
 - Date of service or purchase
 - Detailed description (Ex: Medicare Part B premium for the period <include month and year>)
 - Retiree or spouse name
 - Proof of payment (e.g. cleared check, bank statement, or credit card statement that shows the amount you paid for the Medicare Part B premium). Additional instructions can be found within the Claims Filing Instructions document you received from Port Authority.

Most claims are processed within one to two business days after they are received, and payments are sent shortly thereafter.

If you prefer to submit a paper claim by fax or mail, download a Pay Me Back claim form at www.healthequity.com/wageworks and follow the instructions for submission.

The deadline for submitting your Medicare Part B form and documentation to HealthEquity is March 31 of the current year for the prior year. EX: March 31, 2023 for 2022.