Instructions: How to submit an online reimbursement claim with TIAA/Connect Your Care

New Account Users
You’ll find everything you need to manage your account at www.TIAA.org. The website allows you to view your account balance, transfer funds within accounts, change the allocation of future contributions, update your personal information, review investment performance information and access your statements. Plus, you can sign up to receive information electronically.

Navigating to the Connect Your Care Claim Center:
Your online account puts everything you need to manage your funds at your fingertips.

- Go to TIAA.org and log-in (or create a log-in using “new user access”)
- Once you are logged in to the secure site, find your “Retirement Healthcare” Account. You may need to scroll down.
- Click on the ➔ (arrow button) next to the words “Retirement Healthcare”
• Click on the drop-down [Quick Links] button on your account and choose “Visit Claim Center”.

Online Claim Submission:

The process to create automatic recurring monthly reimbursements is detailed below. Documentation must be provided for the first claim and, after approval, the system will auto substantiate and reimburse based on the pay schedule.

1) Create a new reimbursement request in the portal by clicking the ‘Reimburse Myself’ tab at the top of the screen.
2) Enter claim details as prompted:
   Service Date: The day that the premium is taken from your bank account.
   **OPTIONAL: If you wish to have your reimbursement sent directly to your bank account you need to click “Set up Direct Deposit” now.

3) Review Screen:
   Double check that everything has been entered correctly.
4) **Documentation Screen:**
Upload documentation now or choose a method to supply documentation (fax or mail)

***PREFERRED DOCUMENTATION for Medicare Premium claims: a copy of the “Change Notification” letter sent by your insurance company + proof of payment (ex. a copy of your bank statement showing the monthly premium being deducted from your account or a cancelled check.)
5) Set Automatically Recurring Claim Schedule (for Premium Reimbursements):

Click ‘Set claim to repeat on a schedule’ and complete the process of creating a claim schedule.
The recurring payment schedule expires at the end of each calendar year, at which time, a new schedule with supporting documentation will need to be established for the upcoming year.

Documentation detailing the monthly premium cost along with proof of payment for the first claim will only need to be provided once, unless there is a change in the reimbursement amount.