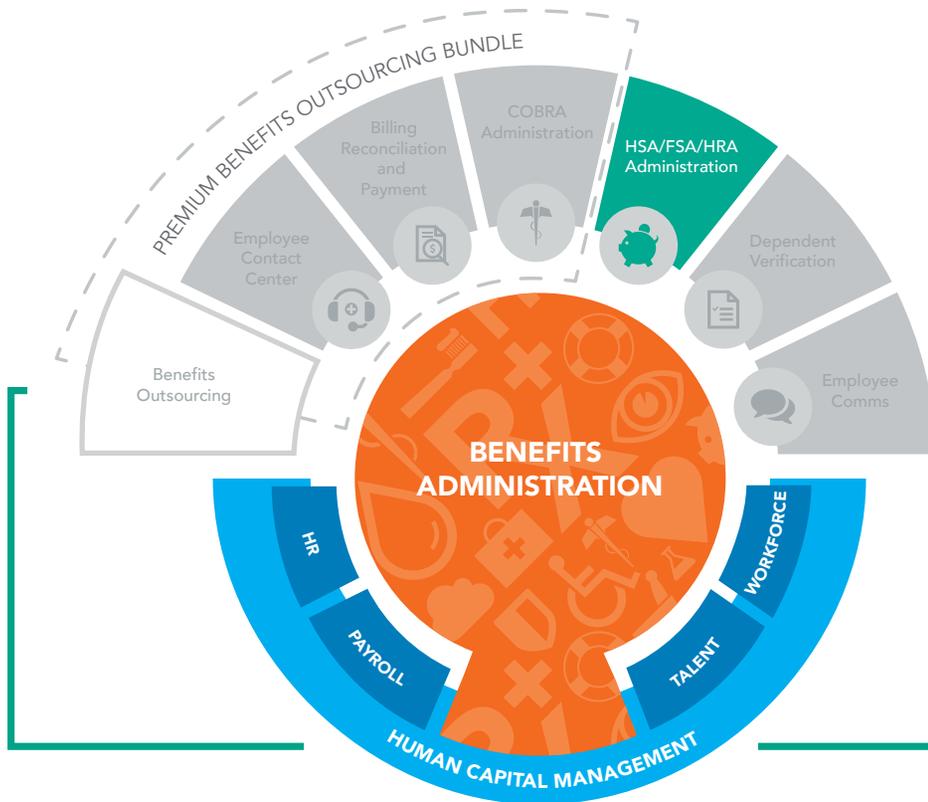




HSA/FSA/HRA Administration

PLANSOURCE®



Software + Services = A Better Benefits Experience

At PlanSource, we believe that the best way to build a better benefits experience is by combining best-in-class software with a range of high-touch benefit services. This simple equation provides brokers and employers with a complete solution that can help busy HR departments work more efficiently and focus on strategic initiatives rather than tedious tactics.

HSA/FSA/HRA Administration



PlanSource offers fully managed tax-advantaged health spending accounts, including Health Saving Accounts (HSAs), Flexible Spending Account (FSAs) and Health Reimbursement Accounts (HRAs) that add value to your benefits program and reduce your payroll tax obligations.

Why HSA/FSA/HRA Administration?

Increased Control

With money that belongs to them, employees have more control over their health care.

Competitive Benefits

With flexible options, employers can attract all-star talent with compelling benefits.

Payroll Tax Savings

With higher pre-tax employee contributions, employers pay less in payroll taxes.

What Types of Accounts Are Supported?

Health Care Flexible Spending

These plans allow employees to use pre-tax dollars to pay for medical expenses (full and limited purpose plans are supported).

Dependent Care Flexible Spending

These plans allow employees to use pre-tax dollars for child care, after school care, adult day care and summer day camps.

Parking and Transit Reimbursement

These plans allow employees to use pre-tax dollars for commuting-related expenses, and are popular in metropolitan areas.

Health Savings Accounts (HSA)

Employees with a qualifying High-Deductible Health Plan (HDHP) can use pre-tax dollars for medical expenses.

Health Reimbursement Arrangements

These plans are common with small employers and allow employees to use pre-tax dollars to pay for medical expenses.

What's Included with the Service?



Online Reimbursement

Request reimbursement and provide receipts



Online Account Management

View account balance and transaction history



Mobile App

Manage accounts and submit reimbursement requests



Contact Center Assistance

Get answers to questions about reimbursements, card status, etc.



Benefit MasterCards

Use one MasterCard for all benefit accounts



Dependent MasterCards

Request additional cards for eligible dependents



Educational Tools

Calculate tax savings and access list of eligible expenses



Online FSA/HSA Store

Purchase OTC items at a discounted price with FSA and HSA dollars