



Getting the Most From Your PlanSource Reimbursement Account

Follow these easy steps to optimize your account

☐ Register for the Portal

Check your balance, submit claims, view transactions and more.

1. Visit www.plansource.wealthcareportal.com/Page/Home and click *Register*
2. Create your username and password
3. Employee ID, is your social security number (no dashes)
4. Registration ID, select Employer ID and enter your employers assigned ID
5. Follow the prompts to complete your registration



You can also register on the mobile app! Your login credentials can be used for both

☐ Set up Account Alerts

Confirm your preferences for important communications and alerts.

1. Click on *Your Name > Communication Settings* in the top right corner
2. Register your mobile phone for SMS text alerts
3. For each alert type, choose how you want to receive the alert and click *Save* when you are done editing your preferences
4. From the Accounts Summary page, click on your name in the upper right hand corner, select Communication Settings and select Electronic as your delivery method for fast and secure access



Once your phone is registered, text BAL to 97487 to receive your current year account balances

☐ Enroll in Direct Deposit

Don't wait for reimbursement or waste time depositing checks.

1. Click on *Your Name > Profile* in the top right corner
2. Click *Edit* above *Reimbursement Method*
3. Select *Direct Deposit* and fill out your bank account information

☐ Download our Mobile App

Manage your account on the go and access tools to help you save money.

1. Search for My Benefits Accounts App on the **App Store** (iPhone) or **Google Play** (Android)
2. If you haven't registered yet, click *Sign Up* and follow the prompts
3. If you have already registered for the portal, use your same username and password to log in to the app

Congratulations!

Now that you're set up for success, take advantage of all the portal and mobile app have to offer.

- ✓ **Check your balance:** It's the first thing you'll see in the app and on your portal dashboard.
- ✓ **Get paid back:** If you pay out of pocket for a qualified expense, use the portal or app to submit a claim for reimbursement and upload any necessary documentation.
- ✓ **Take action:** You may be notified about items that need to be taken care of or opportunities to maximize your account value – don't delay!
- ✓ **Save money:** Use app features like Virtual Medicine Cabinet to find your medications at the most affordable price and Find Care to search for providers, and procedure and drug prices.

Call us at 888-266-1732, Option 2 for Reimbursement Support to learn more