

How to Access Your Health Saving Account Online

To view your account balance or report a lost or stolen card, first you must access your account using the PlanSource System. *Please note, to best use this system you may need to disable any pop-up blockers.*

Using your web browser, navigate to <https://plansource.wealthcareportal.com/Page/Home>. First time users must "Register".

- **Username** – create your own username.
- **Password** – create your own password.
- **Employee ID** – first letter of your first name, up to the first six letters of your last name and the last four digits of your SSN. For example, if your name is Jane Williams and the last four of your SSN is 1234, you would enter jwillia1234 as the Employee ID. *If the standard Employee ID format does not work, please contact PlanSource.*
- **Registration ID** – Select Employer ID and enter **EMPLOYER ID** (all capital letters)
- Follow the remaining steps to register.

Returning Users: Click on "Log In". Enter your created Username and Password. If you have forgotten your Username or Password, please contact PlanSource.

After you have successfully created an account, you will have the ability to check your balance, update your personal information, request disbursement, and view past transactions. You may need your Employee ID again to reset your password.

ONLINE & MOBILE ACCESS

- Get instant access to your account with the PlanSource Consumer Portal and My Benefits Account Mobile App.
- View your account balance and transaction history.
- Submit and view disbursements.
- Make contributions.
- Invest HSA funds
- View important alerts and communications.
- Sign up for direct deposit.
- Sign up for text message alerts.

Register for the PlanSource
Participant Portal at
<https://plansource.wealthcareportal.com/Page/Home>

Download the My Benefits Account
Mobile App at from the Apple (iOS) Store

HELPFUL HINTS

- You must have funds in your HSA before you can spend them.
- You own the HSA, which means the money in the account is yours to keep and stays with you, even if you change medical plans or leave your employer.
- Withdrawals for qualified healthcare expenses are never taxable.
- Unused funds roll over, year to year.
- Once your account balance reaches \$1,000 you can invest funds above \$1,000 and accelerate your account savings.
- While your HSA funds are intended for healthcare expenses, once you reach 65 you have the choice to use your account for any purpose, without penalty. You will just owe income taxes on withdrawals for non-qualified expenses.
- The easiest way to manage your account is online at <https://plansource.wealthcareportal.com/Page/Home> or through the My Benefits Account Mobile App.