

WealthCare Portal Employee Guide

Simplify your healthcare finances with convenient, online access to your tax-advantaged benefit account

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Getting Started

Prior to your new plan year, you will receive an email notification with the following steps including your employee and employer ID.

The WealthCare Portal can be accessed by visiting the following URL:
<https://plansource.wealthcareportal.com>

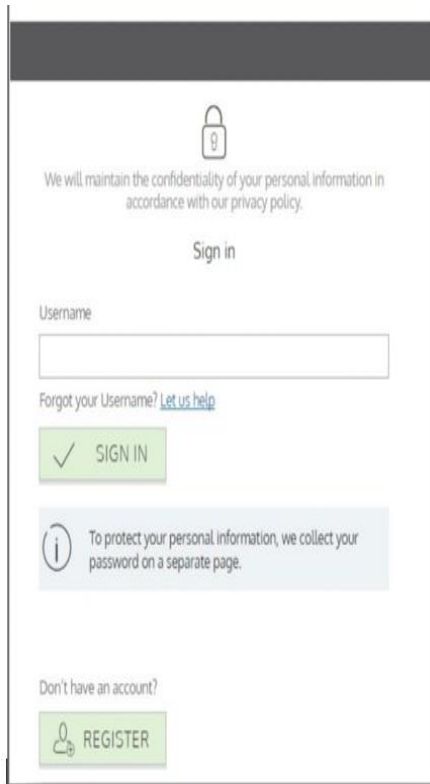
REGISTRATION

- **Step 1:** If this is your first time accessing <https://plansource.wealthcareportal.com> click the **register** button atop the right corner of the home screen.
- **Step 2:** Complete the registration form (as shown in the image on the lower right).
 - Choose a username & password
 - Enter your demographic information
 - Obtain your **employee ID** by following the below instructions that are also provided in the welcome email.
 - Employee ID is 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 was Jane Williams and the last four of your SSN was 1234, you would enter **jwillia1234** as the Employee ID. If your employer uses a custom ID and the provided standard does not work, please contact PlanSource at 1-888.266.1732, option 2 for FSA to obtain your Employee ID. The call center hours are Monday – Friday: 8am-8pm EST.
 - Your **employer ID** will be called out in the welcome email.

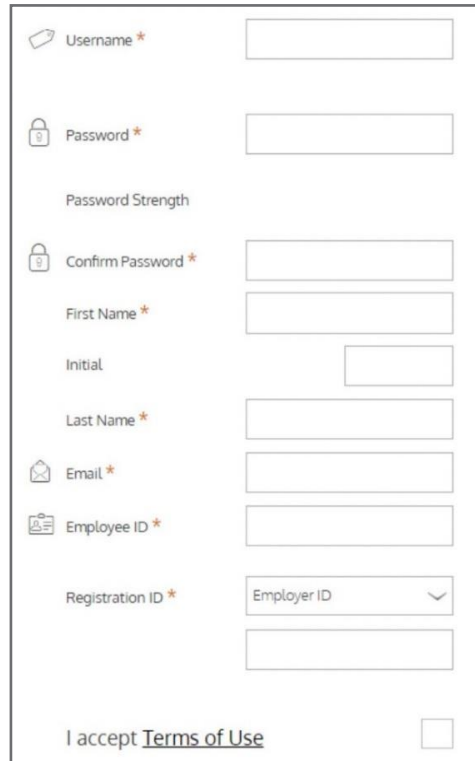
If you already have a benefit debit card, the debit card number can be used in place of the **employer ID** in the **registration ID** field.

Before clicking **register**, be sure to view and accept the terms of use.

- **Step 3:** Click **register**. The process may take a few seconds. Do not click your browser's back button or refresh the page.



The sign in page features a dark header bar. Below it, a lock icon is centered above the text: "We will maintain the confidentiality of your personal information in accordance with our privacy policy." Below this is a "Sign in" heading. A "Username" label is followed by a text input field. Below the field is a link: "Forgot your Username? [Let us help](#)". A green button with a checkmark and the text "SIGN IN" is positioned below the link. A light blue information box contains an 'i' icon and the text: "To protect your personal information, we collect your password on a separate page." At the bottom, the text "Don't have an account?" is followed by a green button with a person icon and the text "REGISTER".



The registration page contains several form fields, each with an icon and a red asterisk indicating a required field. The fields are: "Username" (key icon), "Password" (lock icon), "Confirm Password" (lock icon), "First Name" (person icon), "Initial" (person icon), "Last Name" (person icon), "Email" (envelope icon), "Employee ID" (ID card icon), and "Registration ID" (ID card icon). The "Registration ID" field is a dropdown menu currently showing "Employer ID". Below the fields is a checkbox labeled "I accept [Terms of Use](#)".

Secure authentication

The next phase of registration involves setting up your secure authentication. This crucial step helps ensure your account is secure and private.

After the registration form is successfully completed, you will be prompted to complete the secure authentication setup process.

- **Step 1.** Select your security questions. From the list, please select four security questions and provide your answers. These questions will be randomly asked during subsequent logins to ensure security. When finished, click *next*.
- **Step 2.** Verify your email address.

On the next page, you will be prompted to verify your email. Click *next*.

Register - Secure Authentication


STEP 1STEP 2STEP 3STEP 4

First Name


Test


Last Name


Account

 Confirm Email *

hjjones@mail.com

 The email address entered is used for security encryption only. It is not used for solicitation purposes.

 CANCEL

 NEXT

- **Step 3.** Submit setup information. On the next page, you'll be asked to verify the information you entered during the secure authentication process. After you've reviewed and confirmed the accuracy of this information, click **submit setup information**.

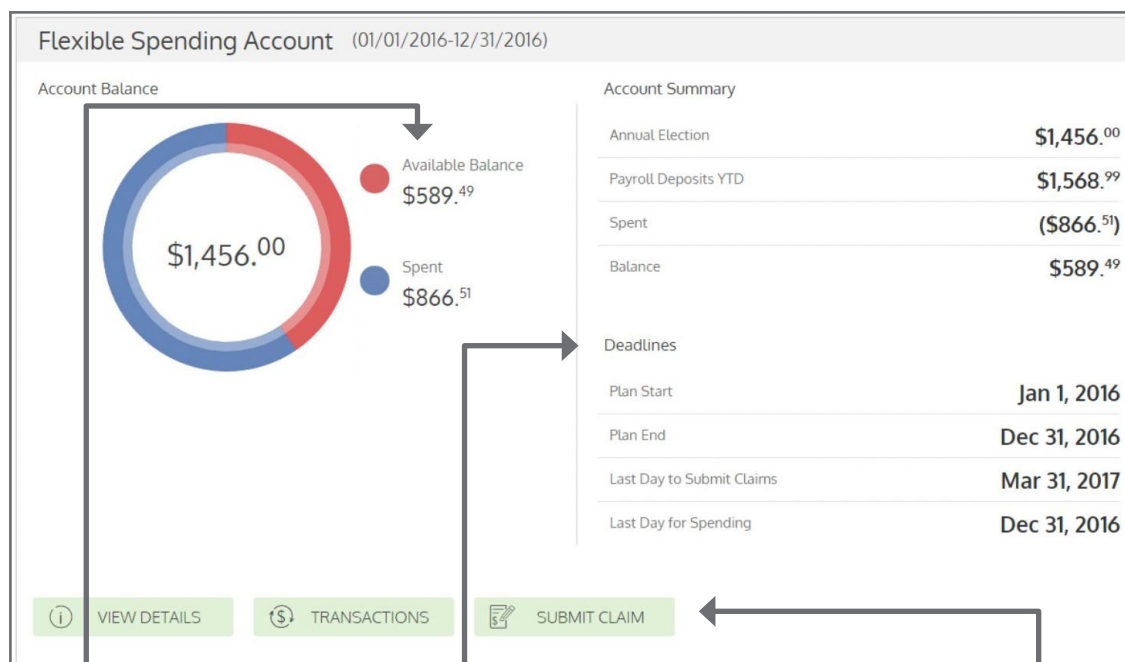
A confirmation page will display the successful completion of your registration.

Your first login

Once registered, you will be able to enter your username, answer security questions, and enter your password on all subsequent login attempts.

Checking your account balance(s)

Navigate to the **benefit account summary** page to access a quick view of your account balance(s). Each of your accounts displays in its own box and provides at-a-glance details regarding your balance, funds spent, and important dates.



Displays how much of your annual election has been spent, and how much is still available.

Important dates, such as the last day to spend funds, and the last day claims can be submitted.

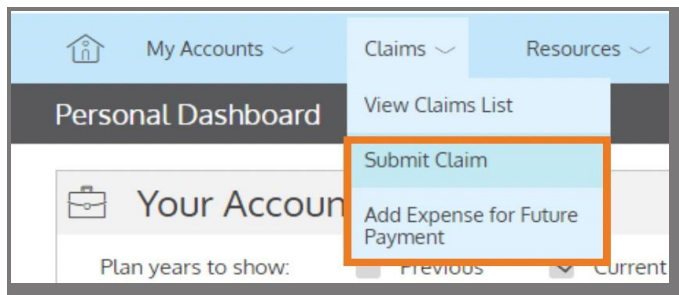
Links to additional account details, transactions, and claim submission forms.

Submitting expenses and filing claims

WealthCare Portal allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

What is the difference between a claim and expense?

- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Expenses can be manually entered by you, or can also be automated fed into your profile via electronic data feeds from your insurance carrier. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or later.



Submitting a claim

To enter a claim and request reimbursement, navigate to the **add claim** page (by clicking **submit claim** or via the menu bar) and complete the form. Once claim details are provide, click next to upload documentation if you have it. You can click **browse** to navigate to the file, or you can drag and drop from your computer. If you do not have documentation at the time, you can select **Validate Later**. Click **submit** to send the request for processing.

Send payment directly to your service provider. When entering a claim, you can choose to have the reimbursement funds sent directly to you, or you can have payment sent directly to your provider (on your behalf).

If you pay a provider, choose your provider name from the dropdown menu. If you don't see your provider listed, select **add new provider** record to add your provider

CLAIM DETAILS | DOCUMENTATION | CONFIRM SUBMISSION

Claim Form Instructions

Claim Entry Notes:

- Please be sure to select the plan and plan year from which you wish to receive reimbursement.
- Upload the substantiation of your claim (you may skip this step and download the Receipt Submittal Form after you have submitted your claim(s) to provide your substantiation manually) Important Note: Substantiation of your claim is required and your claim will not be processed until substantiation is received.
- Claims for future dates of service are not eligible for reimbursement.

Get your reimbursement as quickly and securely as possible by changing your reimbursement method to Direct Deposit.
Click Here to change your settings.

* - Required Field

Service Start Date *

Service End Date

Claimant

Account Type *

Claim Amount *

Whom shall we pay? *


☐ Pay Provider ☒ Pay Me


Provider Name

Account Number


Comments

CLAIM DETAILS DOCUMENTATION CONFIRM SUBMISSION


 Please Choose a Validation Method to Continue





Attach Claim Receipt
Take a photo of your receipt or attach an existing document now.





Validate Later
Submit the claim without a receipt now, knowing a receipt may be required for claim approval.

 CANCEL

 Upload Receipt



DRAG & DROP
your receipts here

 CANCEL  NEXT

CLAIM DETAILS DOCUMENTATION CONFIRM SUBMISSION

Claim Details

Amount: **\$50.⁰⁰**

Claimant: **RICKEY SAMPLE**

Account Type: **Heath Reimbursement Account (HRA) (2019)**

Service Start Date: **Jan 24, 2019**


Service End Date: **Jan 24, 2019**



Comments:

Provider:

☐

To the best of my knowledge and belief, the above information is true and complete. I hereby certify the following: a member of my family has received the services described above on the dates indicated; the expenses are out-of-pocket and qualify as eligible expenses under the plan; these expenses have not been submitted previously for reimbursement under this or any other plan, insurance or otherwise, and I will not seek reimbursement for these expenses under any other plan; and, the unreimbursed health care expenses are for medical, dental or vision care (excluding cosmetic purposes), are not incurred for general health purposes. I understand the expenses reimbursed may not be used to claim federal income tax deduction or credit. I also understand that I may be asked to provide further detail about some expenses. I hereby authorize reimbursement of the above expenses.

By choosing Submit, you agree to the conditions for reimbursement 

 CANCEL  SUBMIT

Adding an expense for future payment

Similar to claim submission, to enter an expense, open the **add expense for future payment** page and complete the form. Be sure to include a receipt, if you have one.

- **Amount your provider charged.** Full amount billed for services provider.
- **Insurance allowed amount.** The maximum amount your health insurance plan will pay for services provided.
- **Amount covered by insurance.** The amount covered by your health insurance plan.
- **Amount you paid out-of-pocket.** The cost included in the insurance allowed amount that are for ineligible items or services.
- **My responsibility.** Any part of the insurance allowed amount that is not covered by your health insurance plan.
- **Reimbursed from my accounts.** The amount
- **My remaining responsibility.** The remaining amount you can submit for reimbursement.

Viewing claims and expenses Once entered, claims and expenses can be viewed on the **claims list** page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.

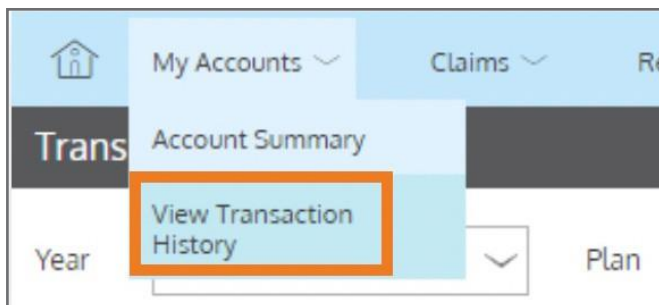
Action Needed			
\$100. ⁰⁰	Eligible for Reimbursement	Claim Date of Service: Oct 26, 2016	REQUEST REIMBURSEMENT
Approved/Paid/Submitted			
(\$32. ⁹⁹)	Paid	Claim Date of Service: Nov 4, 2016 Date of Transaction: Nov 9, 2016	
(\$43. ⁹⁹)	Paid	Claim Date of Service: Nov 3, 2016 Date of Transaction: Nov 9, 2016	
(\$54. ⁰⁰)	Paid	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	
(\$8. ⁰⁰)	Paid	Claim Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016	
\$100. ⁰⁰	Submitted	Claim Date of Service: Oct 26, 2016	ADD RECEIPT
Page 1 of 1			
Denied			
\$34. ⁰⁰	Denied	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	

Resolving pending debit card transactions

If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

- **Step 1.** Navigate to the **transactions** page.
- **Step 2.** Located the pending transaction (using the search filters)
- **Step 3.** Click to expand the transaction, and click **add receipt** to attach your supporting documentation to the transaction.

We will review the documentation you've submitted and update the transaction accordingly.



 A screenshot of the transaction details page. At the top, there are filters for 'Year' (2017), 'Plan' (Dependent Care FSA (Curr)), and 'Type' (All). Below these are checkboxes for 'Approved/Posted', 'Pending/Processing', and 'Denied'. A search bar labeled 'SEARCH FOR TRANSACTIONS' is on the right. The main transaction entry shows a pending amount of '\$(40.00)' for a 'Dependent Care FSA' transaction on 'Feb 27, 2017'. The status 'Pending' is highlighted with an orange box. To the right of the transaction details, there are buttons for 'ADD RECEIPT' and 'PRINT', with 'ADD RECEIPT' also highlighted with an orange box. The transaction details include: Date Of Service (Feb 27, 2017), Description (DR. SMITH), Claimant (NewApp Two), Account Type (DCA), Plan Start Date (Jan 1, 2017), Plan End Date (Dec 31, 2017), and Merchant Name (DR. SMITH).

Updating your user profile

To access and edit your user profile, click the username hyperlink on the right side of the navigation bar. From this page, you can:

1. Update your phone number and address
2. Change your password
3. Update your reimbursement method
4. Add a new dependent and request debit card
5. Update or remove an existing dependent



The image on page 7 shows where each item in the list above is located.

1 EDIT PROFILE

2 change password

3 edit

4 + ADD FAMILY MEMBER

5 EDIT DEPENDENT

User Profile:

- Name:** NewApp Two
- Date of Birth:** Jan 1, 1950
- Employee ID:** *****P002
- Marital Status:** None
- Gender:** None
- Phone:** 555-444-1234
- Email Address:** [edit](#) [delete](#) hjones@mail.com
- Address:** 1 Main Street, Beverly, MA, 00000, US
- Alternate Address:** 40 Elm St, Orlando, FL, 32801, US
- Employer:** New Mobile App One
- SSN:** XXX-XX-5678
- Employee Status:** New
- Reimbursement Method:** Direct Deposit
- Eastern Bank**
 - Account Number:** ****2356
 - Routing Number:** ****1798
 - Checking**

Family Members:

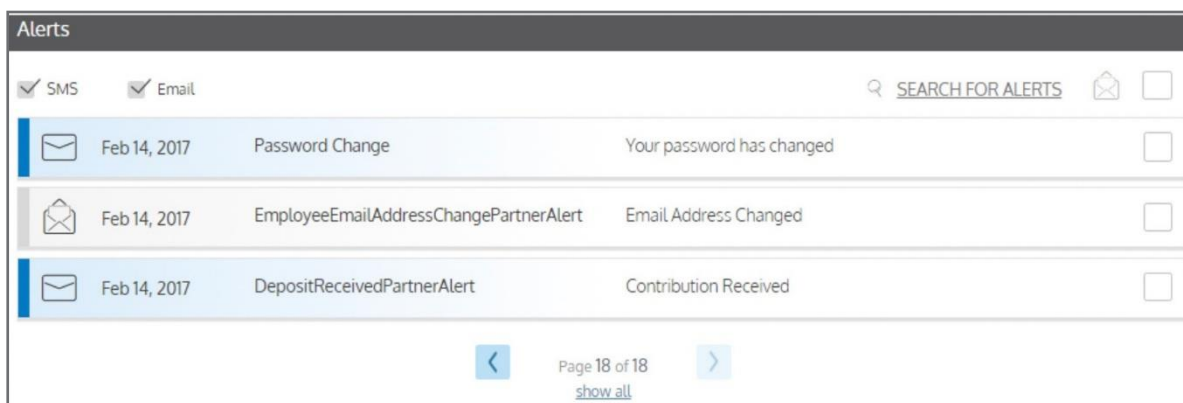
Spouse NewApp Two Spouse Or Common Law Spouse

- Date of Birth:** Mar 3, 1975
- SSN:** *****1555
- Address:** 1 Main Street, Beverly, 00000, US

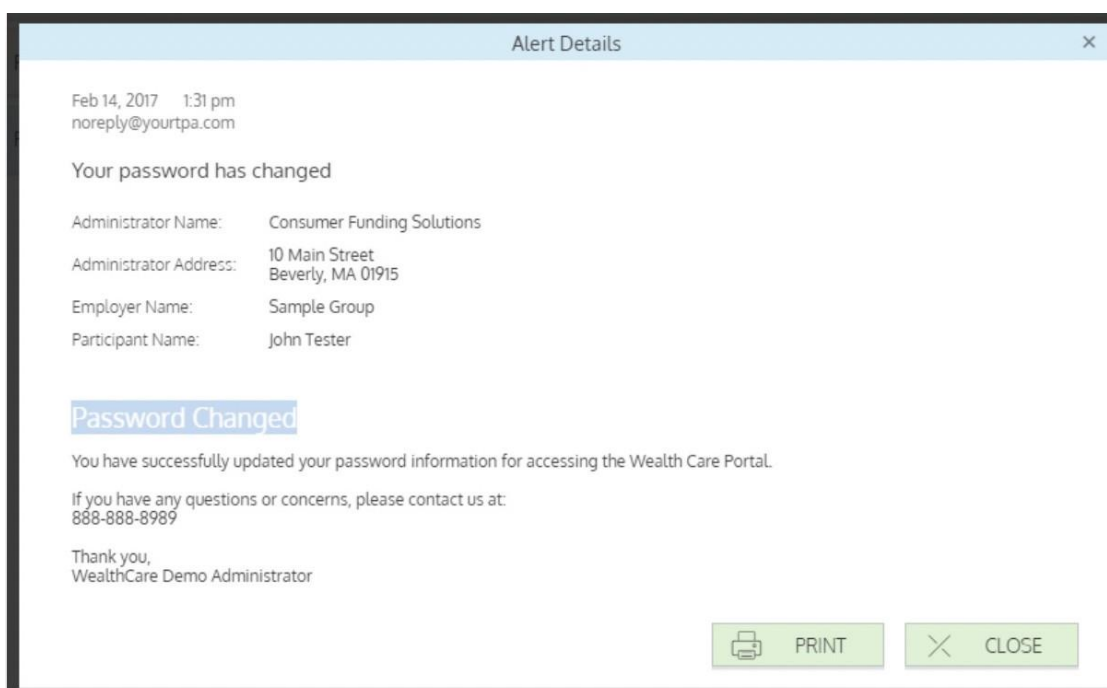
Managing alerts & messages

The bell icon in the navigation bar indicates when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts could be anything from confirmation of an email address or password change, to notification that a claim you submitted has been received, to an alert that a card transaction was denied, to a wide variety of other communication types.





Click on an individual message to see the full text:



Changing your alert preferences

You can change whether you receive certain alert types, as well as how you receive them from the **communication settings** page. This page can be accessed by clicking the sprocket symbol in the navigation bar.



You may choose, for each alert type, whether you receive it via mobile, email, both, or neither. Click **save** when you are done editing your preferences. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.

Assigned Notifications

The notifications below are available to you. Please define the delivery method for these notifications. If mobile number and/or email is not an available delivery method, please **make sure you have an active email address and registered mobile number** listed on the right.

	mobile	email	both	none
Account Balance Alert	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Account Deductible Met	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Billing Address Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Card Mailed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Card Transaction Approved	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Card Transaction Denied	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completed HSA Payment Notice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Deposit Received	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enrollee Welcome Email	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Failed HSA Payment Notice	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manual Claim Entered	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Password Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Year End Reminder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

SAVE

Email Address

email@email.com

Phone Registration Status

11234567891 Pending

You will receive a text to the number shown above asking you to complete the registration process. Once registered, your phone's status will show as Registered instead of Pending. If your number remains in Pending status or if you never receive the registration text, please contact support for assistance in resolving the issue. Once registered, text BAL to 97487 to receive your current year account balances. You can opt-out at anytime by texting STOP. For help with text commands, please text HELP to 97487.

The envelope icon in the navigation bar indicates when you have unread messages awaiting review. These messages include copies of manual claim letters, receipt notification letters, and reimbursement letters. Similar to alerts, you can simply click any message item to see the letter text in full.



Messages

☒ Unread
 ☒ Read

	May 1, 2018	Pending Letter	<input type="checkbox"/>
	Apr 17, 2018	Pending Letter	<input type="checkbox"/>
	Apr 17, 2018	Denial Letter	<input type="checkbox"/>

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