

# CONSUMER PORTAL QUICKSTART GUIDE



Welcome to your PacificSource Administrator (PSA) Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your employer-sponsored benefit accounts such as your Flexible Spending Account (FSA), Health Reimbursement Arrangement (HRA), or Commuter Benefits (Transportation and Parking). The Consumer Portal enables you to:

- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Report a lost/stolen Card and request a new one
- Update your personal profile information
- Change your login ID and/or password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:

1. Work from sections within the Home Page, or
2. Hover over or click on the four tabs at the top.

## HOW DO I LOG IN?

1. Go to [psa.consumer.pacificsource.com](https://psa.consumer.pacificsource.com)
2. Enter your login ID and password (both provided by PacificSource Administrators) under the Existing User section of the login screen.
3. Click **Login**.

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Logging in as an Employer? [Click here!](#)

Login

**Existing User?**

Login to your account

Username  [Forgot Username?](#)

Password  [Forgot Password?](#)

**Login**

**New User?**

Create your new username and password

Contact Us - Call PSA Customer Service at (541) 485-7488, Toll Free at (800) 422-7035 or Email us at [PSAcustomerservice@pacificsource.com](mailto:PSAcustomerservice@pacificsource.com)

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The **Home Page** is easy to navigate:

- Easily access the **Available Balance** and **“I Want To”** sections to work with your accounts right away.
- The **I Want To...**section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to your Accounts and Profile.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Recent Transaction** section displays the last 3 transactions on your account(s).
- The **Quick View** section graphically displays some of your key account information.

You can also hover over the tabs at the top of the page.

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Home Accounts Tools & Support Message Center

Welcome!

**Tasks**

Next projected payment: \$400.00 | [View More](#)

To get your money faster, set up a bank account for direct deposit.

I Want To:

[File A Claim](#) [Manage My Expenses](#)

**Accounts**

Account Name	AVAILABLE
2020 Health FSA	\$2,000.00
Dependent Care Expense	\$150.00
Mass Transit	\$0.00
Parking	\$0.00

**Recent Transactions**

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
12/27/2019	Dependent Care	-	-	\$25.00	\$
12/20/2019	Dependent Care	-	-	\$25.00	\$
12/13/2019	Dependent Care	-	-	\$25.00	\$

[View full table](#)

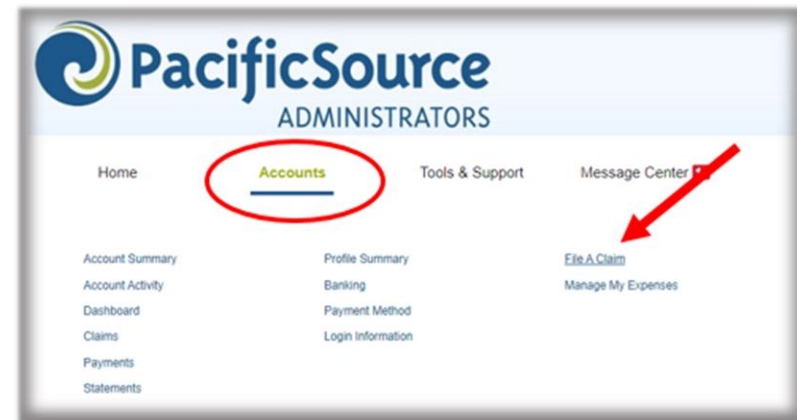
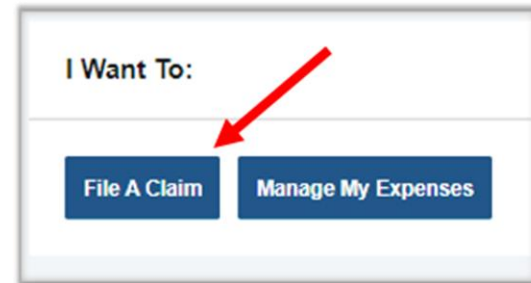
**Quick View**

Election Summary  
2020 Debbie's test

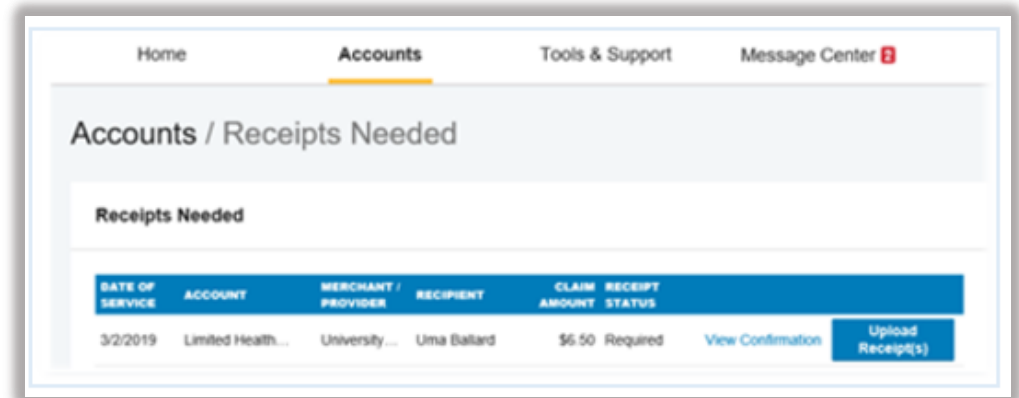
Account Name	Balance
Mass Transit	\$2,400.00
2020 Health FSA	\$2,000.00
Dependent Care	\$900.00
Parking	\$1,200.00

## HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select the “**File a Claim**” under the “I want to...” section, **OR** from any page on the portal, expand the **Accounts** tab on the top of the screen.
2. The claim filing wizard will walk you through the request including entry of information, payee details and uploading a detailed receipt (i.e. explanation of benefits, detailed account history, etc.).
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in the **Transaction Summary**, agree to the terms and conditions and click **Submit** to send the claims for processing.
5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a detailed receipt, you can upload that document from this screen or print a **Claim Confirmation Form** to submit to the administrator with the required documentation.



NOTE: If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the required documentation from this page. Simply click to expand the line item to view claim details and the **upload receipts link**.



## HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.
2. For all Account Activity, click on the **Accounts** tab from the Home Page to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under “Eligible Amount” to view enrollment detail.

NOTE: You can see election details by clicking to expand the line item for each account.

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Home Accounts Tools & Support Message Center 5

Accounts / Account Summary

The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits.

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ 2020 Health FSA	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,000.00
+ Dependent Care Expense	\$900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00
+ Mass Transit	\$2,400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Parking	\$1,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Home Accounts Tools & Support Message Center 5

## Enroll in Direct Deposit

Click here to sign up today!

**Tasks 1**

Next Projected Payment: \$385.00 | [View More](#)

Health FSA	\$100.00
Dependent Care Expense	\$285.00

**I Want To:**

[File A Claim](#) [Manage My Expenses](#)

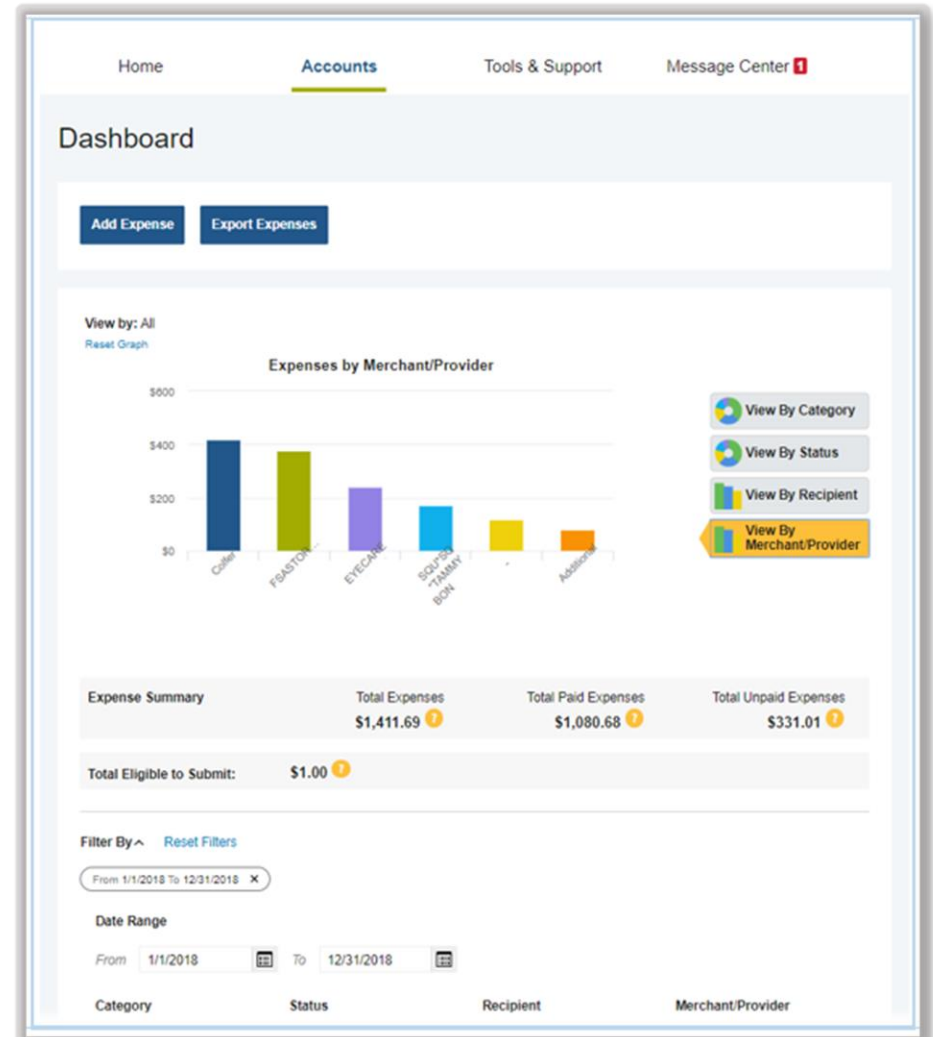
**Accounts**

	AVAILABLE
2020 Health FSA 1	\$2,000.00
Dependent Care Expense 2	\$175.00
Mass Transit 1	\$0.00
Parking 1	\$0.00

## ALL HEALTH CARE EXPENSE ACTIVITY IN ONE PLACE

To view and manage ALL healthcare expense activity from EVERY source, use the Dashboard

1. Under the **Accounts** menu is the **Dashboard**. The **Dashboard** provides you with an easy-to-use consolidated view of healthcare expenses for ongoing management of medical claims and card transactions.
2. Easily filter expenses by clicking on the **filter options** on the navigation pane on the left side of the screen or, by clicking on the **field headers** within the **Dashboard**.
3. Expenses can be exported into an Excel spreadsheet by clicking on the **Export Expenses** button on the top of the page.



## HOW DO I ADD AN EXPENSE TO THE DASHBOARD?

1. From the **Dashboard** click on the **Add Expense** button on the top of the page.
2. Complete the expense detail fields. You can even upload a copy of the receipt and, add notes for your records.
3. Once the expense has been added to the **Dashboard** you can pay the expense, if desired.

## HOW DO I PAY AN EXPENSE?

1. You may pay / request reimbursement for unpaid expenses directly from the **Dashboard** page.
2. Expenses will be categorized and **payment** can be initiated for unpaid expenses by clicking on the button to the right of the expense details.
3. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment.
4. When you click **Pay**, the claim details from the **Dashboard** will be pre-populated within the claim form. Review & edit the claim details as needed.
5. You will have the option to either request a reimbursement to yourself or pay the provider.

The screenshot displays the WEX Health dashboard interface. At the top, there are navigation links for 'Home', 'Accounts', 'Tools & Support', and 'Message Center'. The 'Accounts' tab is active. Below the navigation, there are buttons for 'Add Expense' and 'Export Expenses'. A red arrow points to the 'Add Expense' button. The main content area features a 'Dashboard' section with a 'View Non-Healthcare' link. Below this is a 'View by:' dropdown set to 'All' and a 'Reset Graph' link. A donut chart titled 'Expenses by Category' shows the distribution of expenses across categories: Medical (green), Undefined (blue), Vision (yellow), Pharmacy (orange), and Dental (purple). To the right of the chart are buttons for 'View By Category', 'View By Status', 'View By Year', 'View By Recipient', and 'View By Merchant/Provider'. Below the chart is an 'Expense Summary' table with the following data:

Expense Summary	Total Expenses	Total Paid Expenses	Total Unpaid Expenses
	\$416.50	\$265.00	\$151.50

Below the summary is a 'Total Eligible to Submit' of \$65.00. A 'Filter By' dropdown is set to 'Reset Filters'. At the bottom, there is a table listing individual expenses:

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
3/2/2019	Dental	Uma Ballard	University Clinic	\$6.50	\$
2/1/2019	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
1/1/2019	Medical	Uma Ballard	20/20 Vision	\$10.00	\$
1/1/2019	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
12/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
11/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
10/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
9/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
8/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
7/24/2018	Medical	Jonathan Ballard	Vision 20 Twenty	\$35.00	\$

## HOW DO I EDIT AN EXISTING EXPENSE IN THE DASHBOARD?

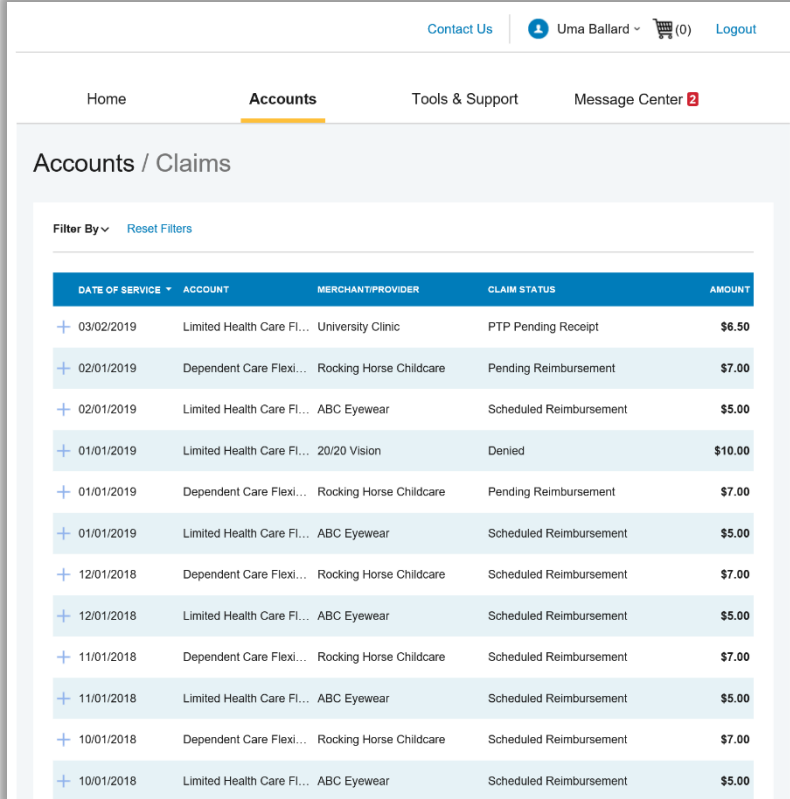
1. You can edit expense details for all claim statuses directly from the **Dashboard** page.
2. Expand the claim details visible by clicking on the expense line item from the Dashboard.
3. You will be presented with options to add expense notes, update the expense details, mark the expense as paid/unpaid or, remove the expense from the **Dashboard**.

Total Eligible to Submit: <b>\$8.00</b> <span style="color: orange;">?</span>					
DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
9/1/2018	Medical	Amity Anderson	ABC Ortho	\$3.00	\$
8/1/2018	Medical	Amity Anderson	ABC Ortho	\$3.00	\$
7/1/2018	Medical	Amity Anderson	ABC Ortho	\$3.00	\$
6/6/2018	Dental	Amity Anderson	Downtown Dental	\$3.00	\$ <a href="#">Pay</a>
<b>Expense Details</b>					
Description: Cavity		Date(s) of Service: 6/6/2018			
Source: Online		Total Billed Amount: <span style="color: orange;">?</span> \$3.00			
Expense Amount: \$3.00		Received Date: 6/6/2018			
Payable Amount: \$3.00					
<a href="#">Upload Receipt(s)</a>		<a href="#">Add Expense Note</a>		<a href="#">Mark as Paid</a>	
<a href="#">Remove Expense</a>		<a href="#">Update Expense</a>			

## HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

1. From the **Home Page**, click on the **Accounts Tab**, and then click on the **Claims** link to see your claims history. You can apply filters from the top of the screen. You can filter by plan year, account type, claim status or receipt status.
2. By clicking on the line of the claim, you can expand the data to display additional claim details.

**Did you Know?** For an alternative perspective, you may also view claims history and status for all claim types including dependent care on the **Dashboard** page. You can apply filters from the top of the screen. Filter options on the Dashboard screen include: expense type, status, date, recipient or merchant/provider. You may also search for a specific expense by entering a description into the search field.



The screenshot displays the 'Accounts / Claims' page in a web application. At the top, there are navigation links for 'Home', 'Accounts' (which is highlighted), 'Tools & Support', and 'Message Center'. The page title is 'Accounts / Claims'. Below the title, there is a 'Filter By' dropdown menu and a 'Reset Filters' link. The main content is a table with the following columns: 'DATE OF SERVICE', 'ACCOUNT', 'MERCHANT/PROVIDER', 'CLAIM STATUS', and 'AMOUNT'. The table contains 13 rows of claim data, each with a plus sign icon to its left, indicating that the row can be expanded for more details.

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 03/02/2019	Limited Health Care Fl...	University Clinic	PTP Pending Receipt	\$6.50
+ 02/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 02/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 01/01/2019	Limited Health Care Fl...	20/20 Vision	Denied	\$10.00
+ 01/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 01/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 12/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 12/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 11/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 11/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 10/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 10/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00



## HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.
2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.

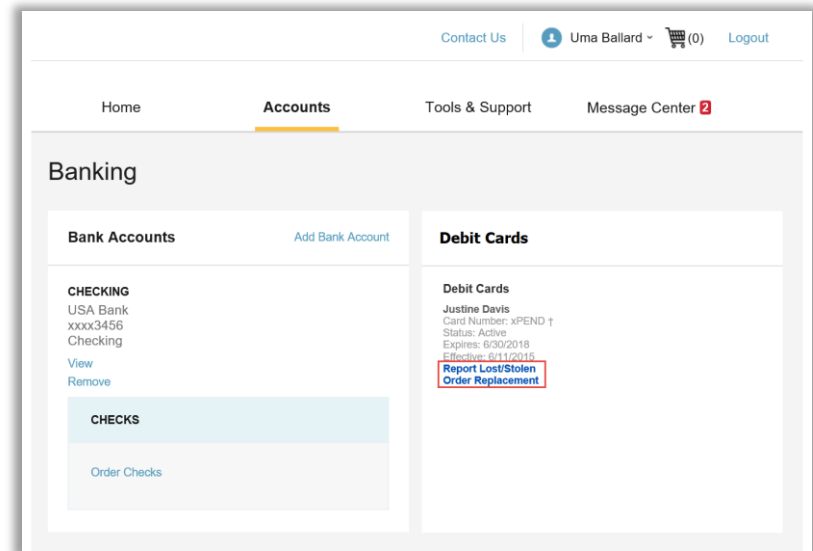


The screenshot shows the PacificSource Administrators interface. The top navigation bar includes 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center' with a notification icon. Below the navigation, the page title is 'Accounts / Payments'. A 'Filter By' dropdown and 'Reset Filters' link are visible. A table displays payment history with columns for DATE, NUMBER, METHOD, STATUS, and AMOUNT.

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 03/26/2020	000000514	Direct Deposit	Paid	\$10.00
+ 03/09/2020	000000503	Direct Deposit	Paid	\$1.00
+ 03/09/2020	000000491	Direct Deposit	Paid	\$25.00

## HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.



The screenshot shows the PacificSource Administrators interface for the Banking section. The top navigation bar includes 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center' with a notification icon. The user 'Uma Ballard' is logged in. The page title is 'Banking'. There are two main sections: 'Bank Accounts' and 'Debit Cards'. The 'Debit Cards' section shows details for 'Justine Davis' and includes a red box around the 'Report Lost/Stolen' and 'Order Replacement' links.

**Bank Accounts** [Add Bank Account](#)

**Debit Cards**

**Debit Cards**  
Justine Davis  
Card Number: xPEND †  
Status: Active  
Expires: 6/30/2018  
Effective: 6/11/2015  
[Report Lost/Stolen](#)  
[Order Replacement](#)

## HOW DO I UPDATE MY PERSONAL PROFILE?

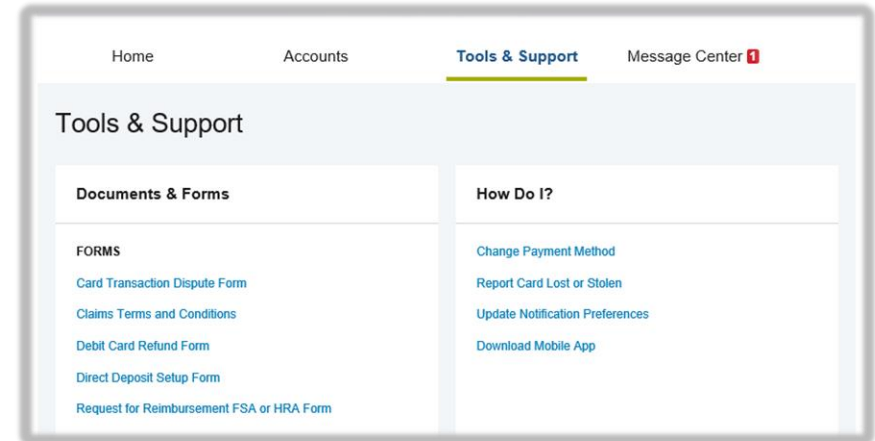
1. From the **Home Page**, under the **Accounts Tab**, you will find links to update profile information including profile summary details for yourself or existing dependents and beneficiaries.
2. Click the appropriate link under Profile for your updates: **Update Profile** or **Add/Update Dependent** or **Add Beneficiary**. Some profile changes will require you to answer an additional security question.
3. Complete your changes in the form.
4. Click **Submit**.

The screenshot shows a web application interface. At the top right, there is a navigation bar with 'Contact Us', a user profile icon for 'Uma Ballard', a shopping cart icon with '(0)', and a 'Logout' link. Below this is a secondary navigation bar with 'Home', 'Accounts' (highlighted with an orange underline), 'Tools & Support', and 'Message Center' with a red notification badge '2'. The main content area is titled 'Profile / Profile Summary'. It is divided into three main sections: 'Profile', 'Dependents', and 'Beneficiaries'. The 'Profile' section has a blue link 'Update Profile' and contains information for 'UMA BALLARD', including home and mailing addresses, email, gender, marital status, and a consumer communication number. The 'Dependents' section has a blue link 'Add Dependent' and contains information for 'JONATHAN BALLARD', including birth date and student status, with a blue link 'View / Update'. The 'Beneficiaries' section has a blue link 'Add Beneficiary' and shows 'No beneficiaries'.

## HOW DO I GET MY REIMBURSEMENT FASTER?

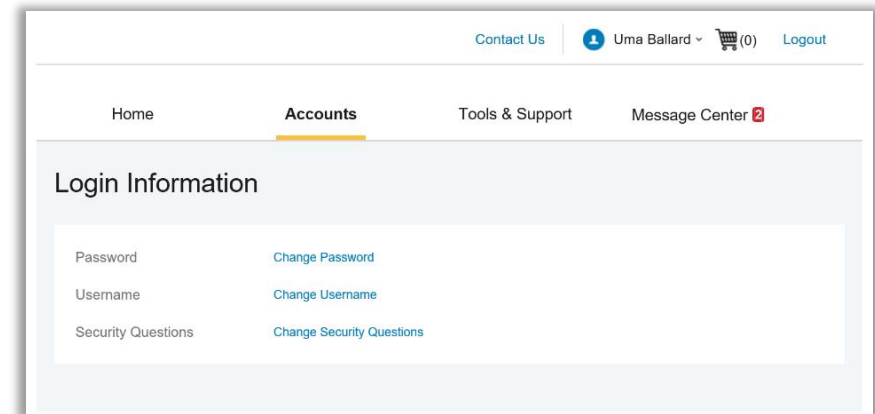
The fastest way to get your money is to sign up online for direct deposit to your personal checking account.

1. From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the “**How Do I**” section
2. Select the **Update** for the appropriate plans. The **Payment Method/Update Payment Method** page displays.
3. Select **Reimburse Myself Using Direct Deposit** and **Update Bank Account**.
4. Enter your bank account information and click **Submit**.
5. The **Payment Method Changed** confirmation displays.



## HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click **Save**.



## HOW DO I VIEW OR ACCESS:

### ...DOCUMENTS & FORMS?

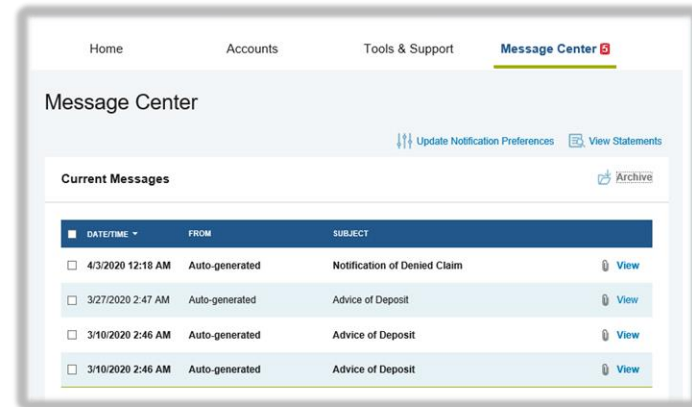
1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

### ...NOTIFICATIONS?

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.

### ...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts Tab**, you will be directed to the **Account Summary** page
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.  
**OR** from the **Home Page**, under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.



## MORE HELPFUL INFORMATION

From the **Home Page**, under the **Tools & Support** tab, you will find helpful links to documents and forms, plan information, and can view the Contact Us section for PacificSource Administrators.