

HSA E-Statement Opt In

Step 1 – New Participants Only

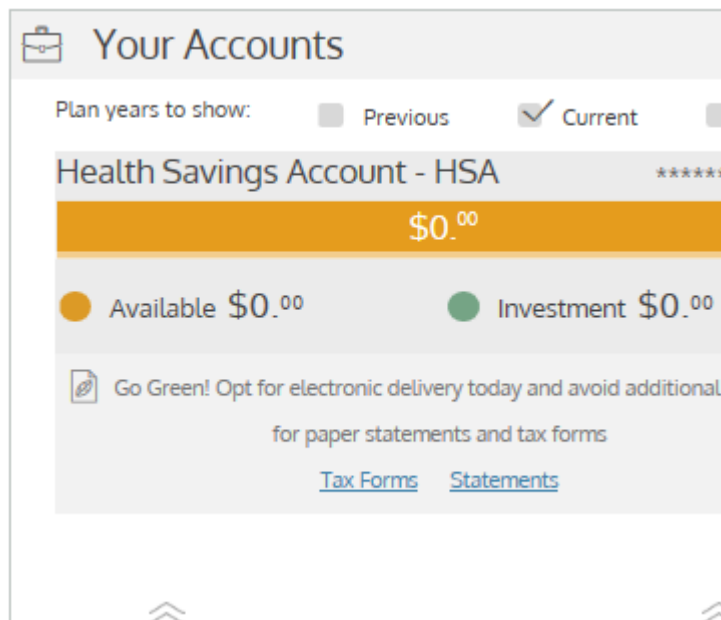
To access the system, go to <https://betterbusinessplanning.wealthcareportal.com>

Click on Register.

- Please enter a user name.
- Please create a password.
- Please retype your password.
- Please enter your first name.
- Please enter your last name.
- Please enter your e-mail address.
- Please enter your Employee ID. Your employee id is: **Social Security Number** (no dashes)
- Please enter your Employee Card Number. Click on the drop and select card number.
- Please check that you accept the Terms of Service.

You will then be asked to register your computer by completing answers to preset questions and then you will set-up a picture.

Step 2 – E-statement opt in – After you have logged in, click on the drop down arrows in the “Your Accounts” box and find your HSA account. You will then see 2 links to click on near the bottom of the HSA account box. Click on the “Statements” link.



Step 3 – Selecting the Online Statement Only – After you have clicked on the “Statements” button, enter into the field for the pdf code – 11011. You will know if you entered it in correctly by seeing the green check mark next to the code.

You will need to repeat steps 2-3 to opt in to the tax forms being sent electronically too. These are the same steps except you will click on “Tax Forms”