

# Guide to Setting Up Direct Deposit



## QUICK REIMBURSEMENT

Setting up a bank account (checking or savings) with Mercer Marketplace lets you quickly get reimbursed for claims via direct deposit. **Note:** No reimbursement limit applies to direct deposit. There is a \$25.00 reimbursement requirement for paper checks that are not issued directly to the provider. For check reimbursement not issued to the provider, claims will be held until they reach \$25.00 or until the end of the month.

**Step 1:** To set up direct deposit, log in to your online account and navigate to the Accounts tab. From there, click on Banking/Cards and select [Add Bank Account](#).

A screenshot of the Mercer Marketplace web interface. The top navigation bar includes "Home", "Accounts", "Videos & Forms", and "Message Center" with a notification icon. Below the navigation, the page title is "Banking / Cards". There are three buttons: "Bank Accounts", "Add Bank Account" (highlighted in blue), and "Debit Cards".

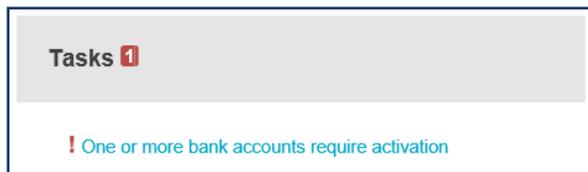
**Step 2:** On the next screen, fill in your bank account information and click "Submit."

A screenshot of the "Banking / Add Bank Account" form. The top navigation bar is the same as in the previous screenshot. The page title is "Banking / Add Bank Account". The form is divided into two sections: "Bank Account Information" and "Bank Institution Information".  
**Bank Account Information** (marked as required):  
- Routing Number \* (with an information icon) [text input]  
- Account Number \* [text input]  
- Confirm Account Number \* [text input]  
- Account Type \* [dropdown menu with "Checking" selected]  
- Account Nickname \* (with an information icon) [text input]  
**Bank Institution Information** (marked as required):  
- Bank Name \* [text input]  
- Bank Address \* [text input]  
- Address Line 1 [text input]  
- City [text input]  
- Select a state... [dropdown menu]  
- Zip Code [text input]

## Guide to Setting Up Direct Deposit, continued

**Step 3:** Next, answer the security question and indicate which plan years you would like to set up with direct deposit. Then, click “Submit.”

**Step 4:** Before your direct deposit can be set up, you will need to validate your bank account. A deposit between \$0.01 and \$0.99 will be made into your designated bank account — followed by an immediate withdrawal of the same amount — within 1-3 business days of your direct deposit submission. When you see this deposit in your bank account, log in to your online account and click on the activation link in the Tasks section of your homepage.



**Note:** By completing the online steps for establishing direct deposit, you are certifying the information provided is accurate. Further, the completion and submission of this information authorizes Mercer Marketplace to issue payment directly to the specified account unless notified to do otherwise. You understand and agree that Mercer Marketplace reserves the right to reverse any ACH deposit where an error occurs, in accordance with banking regulations.