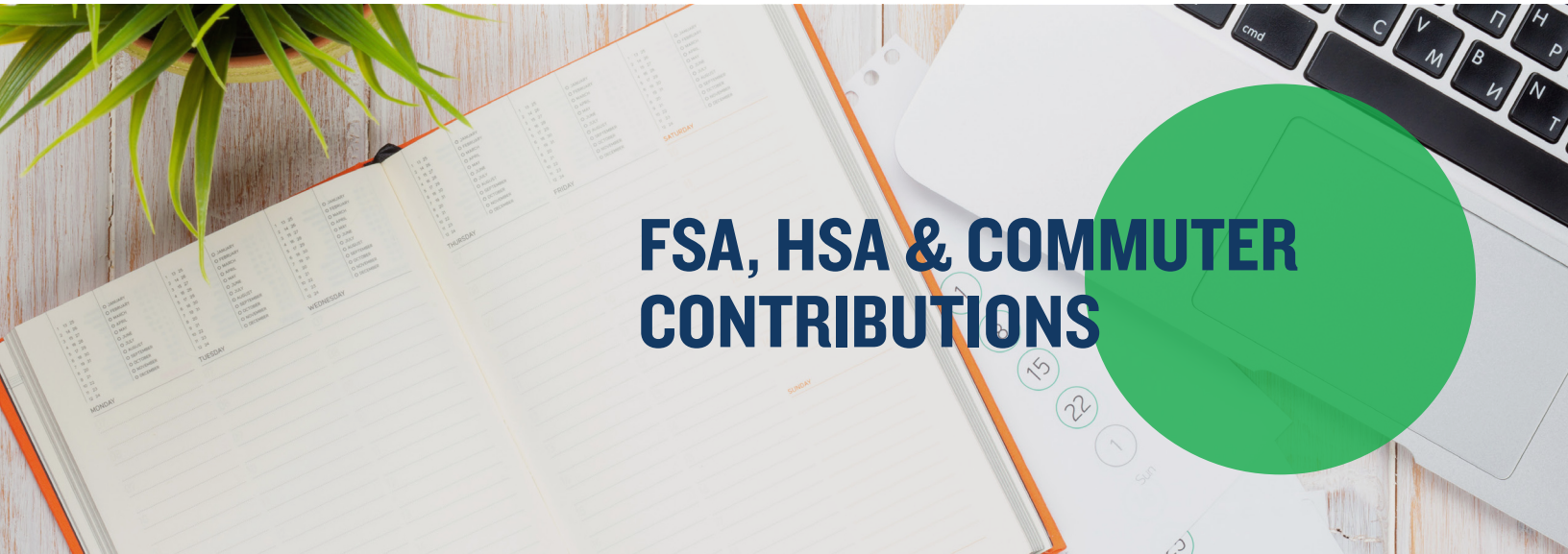


# Guide to Creating a Recurring Contribution Schedule



## FSA, HSA & COMMUTER CONTRIBUTIONS

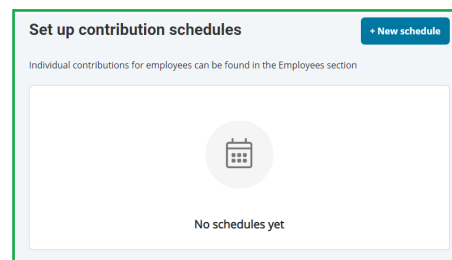
Mercer Marketplace offers the ability for employers to set up a recurring Contribution File through the employer portal. Simply log in to your employer portal and follow the steps below.

### Please note:

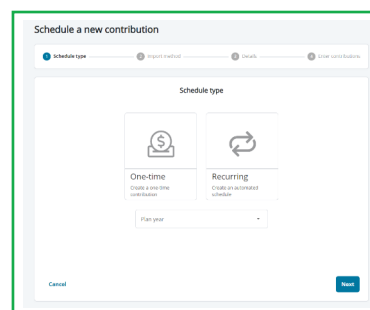
- The plan start date must have occurred for a recurring contribution schedule to be set up.
- Only one recurring schedule can be setup for each type of Flexible Spending Account (FSA) and Commuter plan.
  - For example, one schedule can be created for a Dependent Care FSA and another for the Medical FSA.
  - If a schedule is already setup for a plan, it will be grayed out in the contribution amounts section.
    - You may update a previously created recurring contribution schedule by going to the [Set Up Recurring Contributions](#) tab and clicking [Update](#) behind the schedule you'd like to update.

**Step 1:** From the homepage, select the [Set Up Contributions](#) tab.

**Step 2:** On the following screen, click the [+ New Schedule](#).



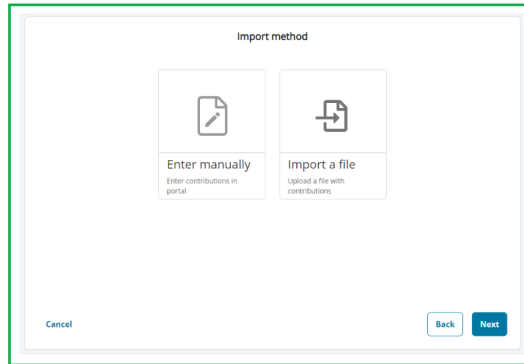
**Step 3:** Next, select if you would like to set up a one-time or recurring contribution, the plan year and click Next.



# Guide to Creating a Recurring Contribution Schedule, continued

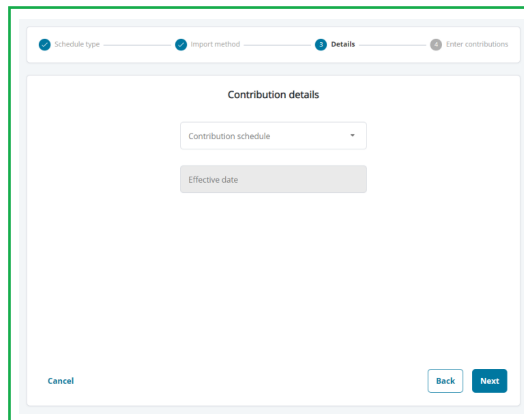
## Setting Up a One-time Contribution

Choose between entering the contribution manually or importing from a file.



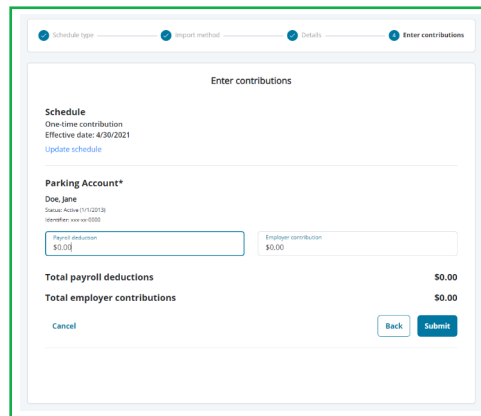
The 'Import method' screen offers two options: 'Enter manually' (with a document icon) and 'Import a file' (with a file upload icon). Below each option is a brief description: 'Enter contributions in portal' and 'Upload a file with contributions'. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons.

Complete the contribution details and select Next.



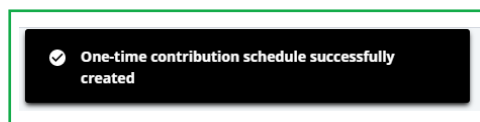
The 'Contribution details' screen features a progress bar at the top with four steps: 'Schedule type', 'Import method', 'Details', and 'Enter contributions'. The 'Details' step is currently active. Below the progress bar, there is a dropdown menu for 'Contribution schedule' and a text input field for 'Effective date'. 'Cancel', 'Back', and 'Next' buttons are located at the bottom.

You will be brought to the screen below to manually type in contributions and click Submit.



The 'Enter contributions' screen shows a progress bar with the 'Enter contributions' step active. It displays the following information: 'Schedule: One-time contribution, Effective date: 4/30/2021, Update schedule'; 'Parking Account\*: Doe, Jane, Status: Active (1/1/2018), Identifier: xxx-xx-0000'; 'Payroll deduction: \$0.00' and 'Employer contribution: \$0.00'. Summary rows show 'Total payroll deductions: \$0.00' and 'Total employer contributions: \$0.00'. 'Cancel', 'Back', and 'Submit' buttons are at the bottom.

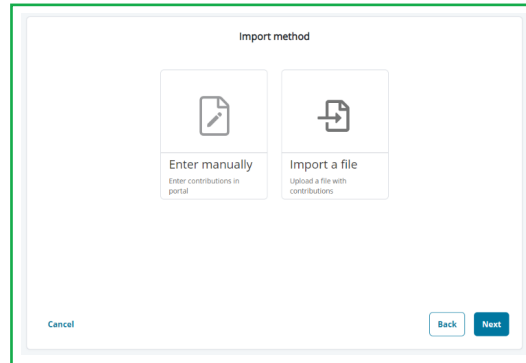
Once complete, you will get the following notification:



# Guide to Creating a Recurring Contribution Schedule, continued

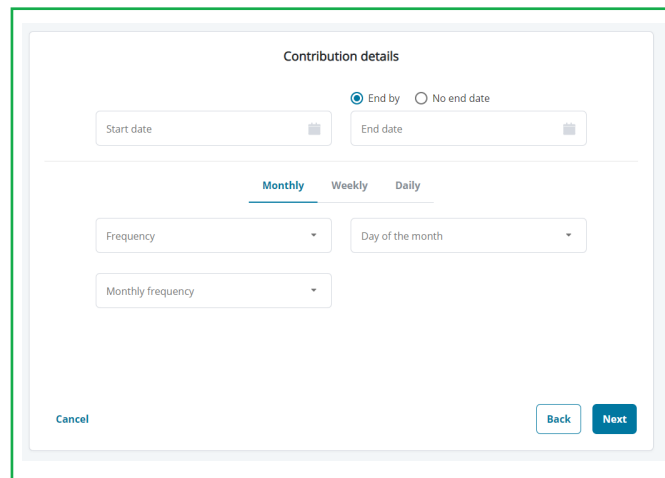
## Setting Up a Recurring Contribution Schedule

Choose between entering the contribution manually or importing from a file.



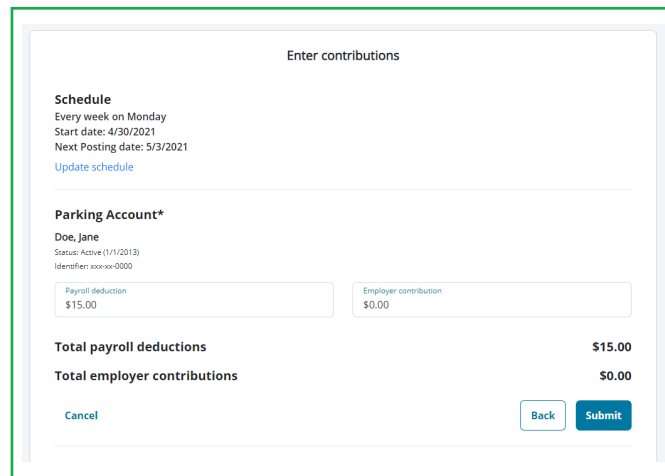
The 'Import method' screen features two main options: 'Enter manually' (with a document icon) and 'Import a file' (with a file upload icon). Below each option is a brief description: 'Enter contributions in portal' and 'Upload a file with contributions'. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons.

Complete the contribution details and select Next.



The 'Contribution details' form includes fields for 'Start date' and 'End date', with radio buttons for 'End by' (selected) and 'No end date'. Below these are tabs for 'Monthly', 'Weekly', and 'Daily'. Under the 'Monthly' tab, there are dropdown menus for 'Frequency', 'Day of the month', and 'Monthly frequency'. 'Cancel', 'Back', and 'Next' buttons are at the bottom.

You will be brought to the screen below to manually enter contributions and select Submit.



The 'Enter contributions' screen displays the schedule: 'Every week on Monday', 'Start date: 4/30/2021', and 'Next Posting date: 5/3/2021'. It shows the 'Parking Account\*' for 'Doe, Jane' with status 'Active (1/1/2013)'. Input fields show 'Payroll deduction' at \$15.00 and 'Employer contribution' at \$0.00. A summary table shows 'Total payroll deductions' as \$15.00 and 'Total employer contributions' as \$0.00. 'Cancel', 'Back', and 'Submit' buttons are at the bottom.

Total payroll deductions	\$15.00
Total employer contributions	\$0.00

Once complete, you will get the following notification.:

