

Flexible Spending Adding Direct Deposit

- Once you have successfully logged into the member portal.
 - Click on your user profile

PLANSOURCE


(888) 266-1732

Accounts ▾ Claims ▾ Resources ▾ Videos ▾   184  Robert Hayes
Last login: 12:45pm on Jan 31, 2020  log out

Personal Dashboard

- You will see the 'Edit' option just above the Reimbursement Method, click 'Edit'

User Profile


[change picture](#)

Robert Hayes

Date of Birth
Mar 31, 1983

Employee ID
*****5792


Marital Status
None

Phone
720-456-6569

Email Address [edit](#) [delete](#)
robert.hayes@mountaincreek.com


Home Address
101 S. Garland Ave.
Orlando
FL, 32803
US

[EDIT PROFILE](#)
[change password](#)

 Employer
PlanSource Demo Company


SSN
XXX-XX-6789

Employee Status
New

 [edit](#)
Reimbursement Method
Check

- Select 'Direct Deposit'

Reimbursement Method

 Reimbursement Method

Check Direct Deposit ←

- Input your Checking/Saving Account information, then click Save

✕

📄 Reimbursement Method

Check
 Direct Deposit

🏦 Bank Name *

🏦 Account *

🏦 Re-enter Account *

🏦 Account Routing *

🏦 Re-enter Routing *

🏦 Bank Account Type Saving ⌵

By providing my bank account and routing numbers, I agree to allow my administrator to direct deposit plan reimbursements into my accounts. I understand that I can change this directive at any time. *

Check example

Name _____ Date _____

Address _____

Pay to the order of: _____

Your bank

1: 2332 231:	234511	23456789 23
Routing Number	Check #	Account Number

ⓘ Please note: The order of Routing, Account and Check numbers will vary from financial institution to financial institutions and will not necessarily be in the same order as shown above.

✕ CANCEL
✎ EDIT
✓ SAVE

Direct Deposit Validation

To eliminate hassles and delays caused by invalid direct deposit accounts, you are required to complete the bank account validation process for new direct deposit accounts. Participants obtain micro-transaction amounts from their bank account and enter them into member portal.

When participants enter a new direct deposit bank account into the member portal the validation process is as follows:

1. Two small credits and one offsetting debit will be processed against the bank account entered. These credits are random amounts between \$0.05 and \$0.25.
2. The participant must check their bank account to obtain the credit and debit amounts.
3. They then log in to member portal and enter the transaction amounts on the reimbursement settings page. See Below)

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Personal Dashboard

📄 **My Accounts**

Plan years to show: Previous Current Future

Flexible Spending Account (FSA) (10/01/2019-09/30/2020)

\$2,700.00

📄 **Direct Deposit Options**

Finalize your direct deposit account by validating it ? ✎ VALIDATE

4. If the amounts are correct, the participant's bank account is successfully confirmed and ready for future direct deposit reimbursements.