

Direct Deposit Authorization Form



SEND COMPLETED FORM TO:

Meritain Health
P.O. Box 853921
Richardson, TX 750853921

Fax: **1.716.541.6672**

Email: **forms.direct@meritain.com**

Customer Service: **1.866.808.2609**

To be reimbursed directly into your bank account, Please complete this form and fax it to the number on the right. To finalize set-up, additional validation will be required, please review condition five below.

Type of Request				<input type="checkbox"/> New	<input type="checkbox"/> Change	<input type="checkbox"/> Cancellation
Employee Information		Employer:		Meritain Health ID:		
Name: (last, first, initial)			Home/Personal Phone:			
Address:			Work Phone:			
City:		State:		Zip Code:		
Financial Information		Name(s) on the account:				
Bank or Financial Institution:			Routing/Transit Number:			
Address:			Account Number:			
City:		State:		Zip code:		<input type="checkbox"/> Checking Account <input type="checkbox"/> Savings Account*

Voided check (for checking account) or deposit slip (for savings account*) - REQUIRED (Please place directly below)

Terms and Conditions

- You must complete, sign, and date this authorization form to enroll in the direct deposit program. If you have a joint account, the form must be signed by both parties. Once your form is received by Meritain Health, there may be up to a 7- 10 business day time period before the direct deposit becomes effective. Any claims paid during this time will be mailed to you as a check.
- In order to take advantage of the direct deposit program, your financial institution must be a member of an Automated Clearing House (ACH).
- You will receive a direct deposit statement each time an electronic transfer is made to your account. The statement will indicate what claims are paid, as well as year-to-date information on your reimbursement account. It can take up to 72 hours for a payment to post into your account after Meritain Health transmits the funds. **Please verify that the deposit has been made into your account before attempting to withdraw funds.**
- It is your responsibility to notify Meritain Health of any changes to your bank account, such as a closure, or a change in the account number. Complete this form with the new information, and check the change box. There may be up to a 7-10 business day processing period before the change becomes effective. During this time, you will receive checks for any reimbursement claims paid.
- Due to required security measures set by the National Automated Clearing House Association (NACHA), you will be required to take additional actions after the initial entry of your bank account information.

Once your bank account information has been added, a micro deposit transaction will be processed. A micro deposit is a random credit and debit transaction, the amount ranges between \$0.01 and \$0.99, Meritain does not control the amount processed.

Once the micro deposit is confirmed you must validate the bank account via the member portal, the mobile app or by contacting our customer service team.

This is a time sensitive matter; you will have 30 calendar days to validate the amount from the time the transaction is initially processed. If you do not validate within the 30 calendar days, the bank account on file will expire and will be updated to an inactive status.

Presence of bank account information does not guarantee a direct deposit disbursement, the account must be validated in order to be used for direct deposit reimbursements.

6. You may change or cancel direct deposit at any time by visiting your account online, change will take effect immediately **OR** by completing this form, checking the cancellation or change box and faxing to the number noted above. Once the form is received and processed by Meritain Health, it may take 7-10 business days before the update becomes effective.

7. If a direct deposit is returned to Meritain Health, or for any reason cannot be made to your account, Meritain Health will investigate the cause and if needed, issue a reimbursement check. Until the problem is corrected, you will continue to receive checks for any reimbursement claims paid.

8. Direct deposit services will remain in effect from one plan year to the next unless you cancel the direct deposit services.

9. Meritain Health reserves the right to automatically cancel your direct deposit services upon termination of employment or termination of your reimbursement account.

Questions? Please call Meritain Health at **1.800.566.9305, option 5.**

** If the savings deposit slip does not contain a routing number maintained by your bank, you will need to submit a bank form, or statement on bank letterhead that verifies the account and routing numbers of your savings account.*

Employee / Account Holder Certification

I certify that I have read and understand the terms and conditions on this form. By signing here, I authorize my Health Reimbursement Arrangement or Flexible Spending Account reimbursements to be sent to the financial institution and account designated above. This authorization is to remain in effect until Meritain Health has been given a reasonable amount of time to act on written notification from me to terminate the deposits and continue reimbursements with mailed checks.

Employee Signature: _____ Date: _____

Joint Account Holder's Signature: _____ Date: _____

Note: Any joint account holder MUST sign this form in order to be reimbursed.