

Direct deposit setup guide



This guide shows how to set up direct deposit within the Optum Financial member portal and the Optum Financial mobile app, so you can enjoy the convenience of having claim reimbursements deposited directly to your personal bank account.

Optum Financial Member Portal

1. Direct deposit setup page

Once logged in to your account, locate your name in the upper right-hand corner of the screen and click *Settings & Preferences* from the drop-down list. Then click *Bank Accounts* and select *Add Account*. Follow the instructions to enter your bank information.

✕
Close

Direct Deposit Information

BANK ACCOUNT INFORMATION
Please complete all the fields below if you wish to have claims reimbursements deposited directly into your bank account.

BANK NAME *

ACCOUNT TYPE *

ROUTING NUMBER * ⓘ

ACCOUNT NUMBER * ⓘ

RE-ENTER ACCOUNT NUMBER *

CONTACT INFORMATION
Please enter the current email address that you would like associated with this account. Correspondence concerning your account will be sent to this email address.

EMAIL ADDRESS *

Cancel

Verify

Member Portal

2. Verification page

×

CLOSE

Verify direct deposit information

BANK ACCOUNT INFORMATION

BANK NAME

ABC Bank

ACCOUNT TYPE

Checking Account

ROUTING NUMBER

ACCOUNT NUMBER

EMAIL ADDRESS

directdeposit@connectyourcare.com

CLAIM REIMBURSEMENT

METHOD

Direct Deposit

Back

Continue

3. Authorization page

×

Close

ACH authorization agreement

ACH AUTHORIZATION

I hereby authorize Optum Financial to initiate deposits to and/or withdrawals from the bank account indicated here. I authorize credit entries, debit entries and, if necessary, adjustments for any credit entries made in error to my account. This authority will remain in effect until my Optum Financial account has terminated or I have updated my payment preferences. Optum Financial reserves the right to terminate electronic payment services in the event of unsuccessful or rejected funds movement attempts. I acknowledge the origination of ACH transaction to or from my account must comply with the provision of U.S. law.

I HAVE READ THE ACH AUTHORIZATION AND WISH TO CONTINUE

Yes

✓

Back

Save

4. Confirmation page

Settings and preferences

Personal Information

Bank Accounts

SMS Access

Beneficiaries

Communication Preferences

Direct Deposit Information

Direct Deposit is a free feature that automatically deposits claims reimbursements directly to your checking or savings account.

BANK ACCOUNT INFORMATION

ABC Bank

Account Type

Checking Account

Routing Number

123455667

Account Number

.....5667

Email Address

directdeposit@connectyourcare.com

Delete

Edit

2

Entering a new claim

When entering a “Reimburse Myself” claim in the future, your bank account information will display in the “Pay To” section on the claim details screen. If you see your mailing address in this section, then your reimbursements are set to check.

Be sure to always check your information before finalizing your claim submission. Click “Edit Direct Deposit” to change your bank information if needed.

Reimburse myself

✓

2

3

4

ENTER DETAILS

SERVICE DATE
04/01/2020

REIMBURSEMENT AMOUNT
\$20.00

SERVICE FOR
Claire Evans (Default) ✓

SERVICE TYPE
Allergy Treatment ✓

[Add Dependent](#)

VENDOR/PROVIDER
Dr. Smith

DESCRIPTION
Optional (maximum 100 characters)

PAY TO
Reimbursement will be deposited to
ABC Bank
xxxxx5667
Checking Account
[Edit Direct Deposit](#)

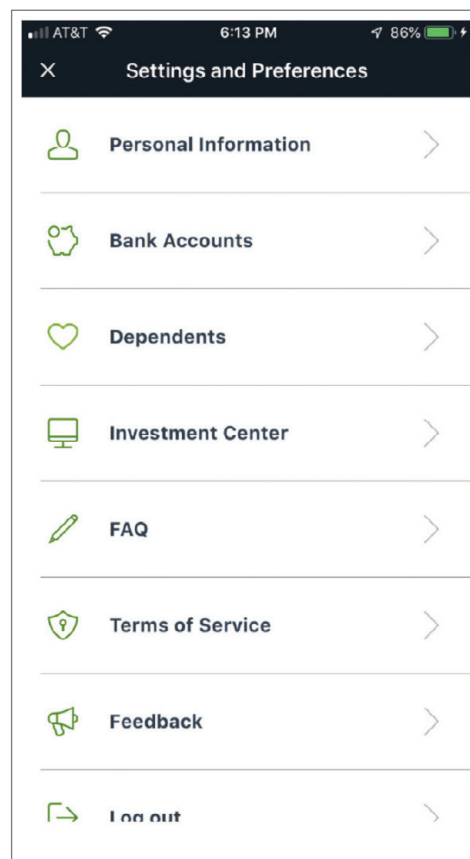
Optum Financial Member Portal

Direct deposit setup page

You can also set up and manage your personal bank account within the mobile app, Optum Financial.

Once logged in to the mobile app, select the Settings option from the top of the screen. Click "Bank Accounts" to enter your personal bank account information.

You can review and update your bank account information within the mobile app at any time.



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