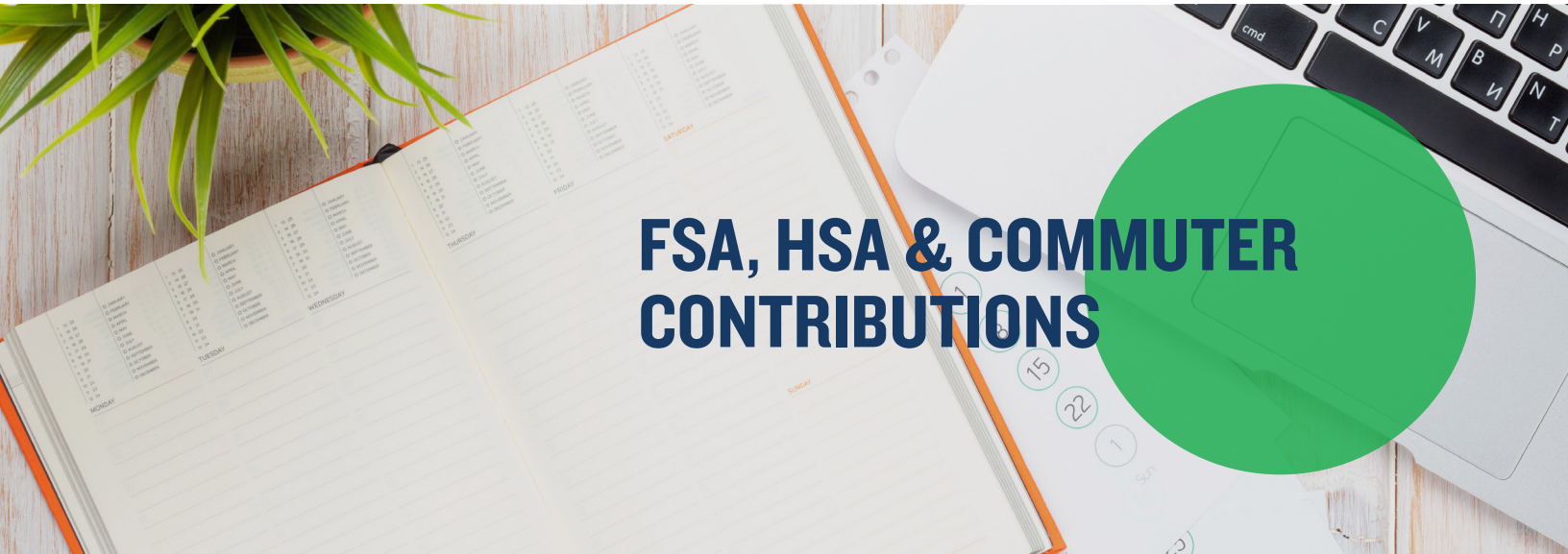# Guide to Creating a Recurring Contribution Schedule

## FSA, HSA & COMMUTER CONTRIBUTIONS

Aptia 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.
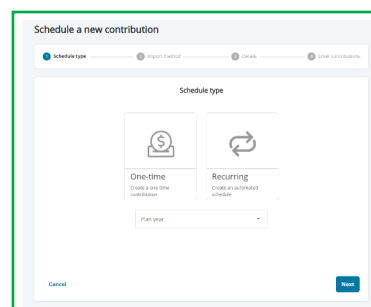
Please note:
- The plan start date must have occurred for a recurring contribution schedule to be set up.
- Only one recurring schedule can be setup for each type of Flexible Spending Account (FSA) and Commuter plan.
  - For example, one schedule can be created for a Dependent Care FSA and another for 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.

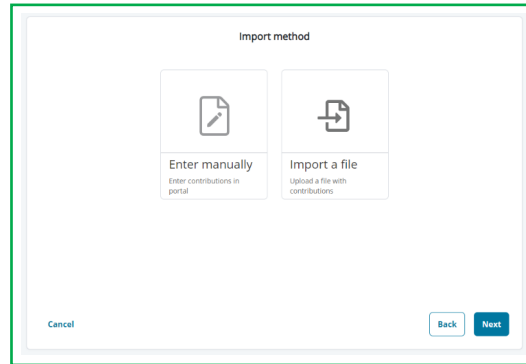**Step 2:** On the following screen, click the + New Schedule.
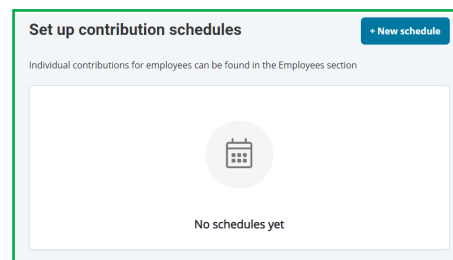
Step 3: Next, select if you would like to set up a one-time or recurring contribution, the plan year and click Next.

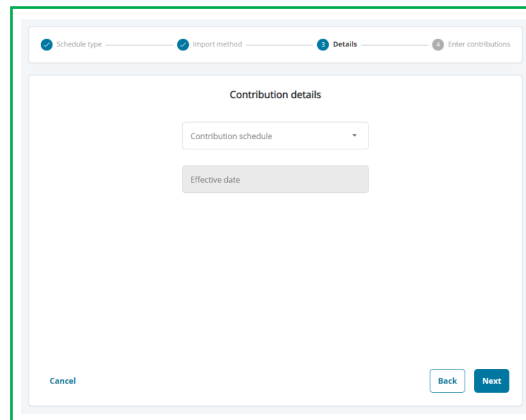**Setting Up a One-time Contribution**
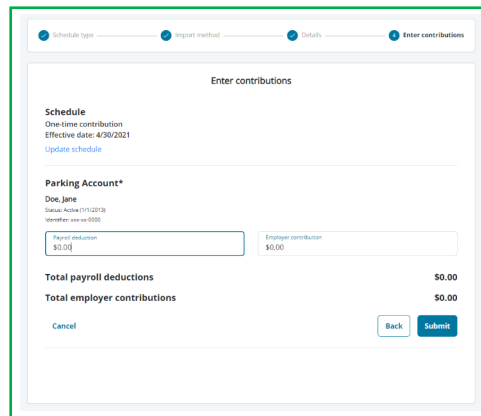Choose between entering the contribution manually or importing from a file.

Complete the contribution details and select Next.

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

Once complete, you will get the following notification:
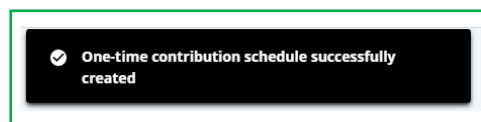
Guide to Creating a Recurring Contribution Schedule, continued

Setting Up a Recurring Contribution Schedule
Choose between entering the contribution manually or importing from a file.

Complete the contribution details and select Next.

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

Once complete, you will get the following notification:.