



summit ClaimsVault® User's Guide

DataPath's patented ClaimsVault® is an online 'shoebox' that allows Summit users to store their documents and receipts online for qualified expenses. The following guide provides an overview on how to use ClaimsVault:

1. Log in to the **Summit portal**.
2. Hover over Transactions, then click **ClaimsVault®**. (fig. 1)

The screenshot shows the Summit portal interface. At the top, the 'summit' logo is on the left, and the user name 'AaronDPTest' with a profile icon, 'Support', 'Documents', and 'Logout' links are on the right. The date and time 'Oct 09, 2017 | 9:39AM CST' are displayed. The main navigation bar includes 'Home', 'Coverages', 'Transactions', 'Cards', and 'Investments'. The 'Transactions' menu is open, showing 'Transaction History', 'Claims Vault™', and 'Transactions'. The 'Claims Vault™' option is selected, displaying a list of alerts. The first three alerts are about a password change, and the fourth is a test message. The left sidebar shows account balances for FSA (\$3,472.94) and HRA (\$331.13). The 'Claims Paid' section shows \$907.06 for FSA and \$68.87 for HRA. The 'Annual Election' section shows a table with columns for Start, End, Grace, and Run-Out, with a progress bar for the 2017-2018 period.

fig.1

Add a Transaction to ClaimsVault

From the 'ClaimsVault' page:

1. Click **Add Transaction** button. (fig. 2) A pop-up window displays. (fig. 3)
2. Select the **Transaction Type**.
3. Click **Browse** button to **Upload Receipt/EOB**.
4. Ensure **Add to ClaimsVault** is selected.



Add A Transaction

Upload your receipts to the Claims Vault to keep them easily accessible for filing your taxes or to later submit as a reimbursable claim. If you have multiple services on a single receipt or EOB, you can enter the details of a service and click **Add Line Item**. When you are done with that receipt or EOB, click **Submit**.

Transaction Type : **Required Information**

Upload Receipt/EOB :

Max Size: 100mb. Supported formats:pdf,bmp,gif,jpg,eps,tif or png.

Add to ClaimsVault™

Claimant:

Start Date: **End Date:**

Amount:

Provider:

Description of Service:

Notes:

Line Item Claims

Clear Form | Cancel |

fig.3

5. Select **Claimant**.
6. Enter a **Start and End Date**.
7. Enter total **Amount** of the charge.
8. Enter the **Provider name**.

9. Enter the **Description of Service**.
10. Enter **Notes**.
11. Click **Add Line Item**.
12. Repeat **steps 7–9** for additional line items on the EOB.
13. Click **Submit** if you are done with claims for that receipt/EOB. Repeat **steps 1–11** for additional line items.

Submit a Claim for Reimbursement

Once a receipt has been submitted to ClaimsVault, it will appear on the ClaimsVault page. To submit a claim for reimbursement:

1. Go to the **ClaimsVault** page.
2. Choose the claim from the menu and click the **Submit for Reimbursement** link next to it. A pop-up window displays. (fig. 4)
3. **Review** the information in the claim.

Edit Claim

If you don't have all of the details for your claim, click **Finish Later** to save what you have entered then come back later to finish and submit your claim.

Required Information

Upload Receipt/EOB : Browse [View Receipt](#)

Max Size: 100mb. Supported formats: pdf,bmp,gif,jpg,eps,tif or png.

Pay Me Pay Provider

Claimant:

Start Date: **End Date:**

Amount:

Provider:

Service Category: **Service Code:** *Select Service Category*

Description of Service:

Plan:

Reimbursement: Direct Deposit Check [View Banking Details](#)

Notes:

fig.4

4. Select a **Service Category and Service Code**.
5. Select a **Plan**.
6. Choose the **Method of Reimbursement**, Direct Deposit or Check. If you need to review your banking information, click the View Banking Details link.
7. Check the box for I have read and agree to the **Terms and Conditions** (click the link to read the Terms and Conditions).
8. Click **Submit**.



DataPath Administrative Services, Inc. | 1601 Westpark Drive Ste 6 | Little Rock, AR 72204
Toll-Free 866-898-4248 | Fax 501-687-3282 | abbes@datapathadmin.com
datapathadmin.com/abbenterprisesoftware