

Registering a New Employee Account

STEP 1

To register your account in the Summit Portal you will need your **welcome notice** that you received from your third party administrator either as an email, or regular mail.

From this notice, you will need your **Employer ID** and **Participant ID**¹.

*If you received an email, the simplest way to get started is to **click the link in the email**², which will take you to your registration page. If you received a letter or have your portal information, enter the address into your browser. When the page opens, Click the register button.*

2

1

The screenshot shows an email titled "Welcome Notice" from Implementation 1 <dparkerdavis@gmail.com> to Annette Gadin. The email body includes the date and time (6/19/2019 11:06:54 AM), the address (1601 Westpark Dr, Suite 9, Little Rock, Arkansas 72227), and the name (Robert Jones). It also includes a "Dear Robert Jones" salutation and a welcome message to the ABC Company benefit plan. A list of features available upon registration is provided, including account balance, transaction activity, receipt requirements, plan information, and many other useful resources and tools. The email also mentions that users can use their personal portal to upload receipts and submit new claims for reimbursement. For account access on the go, it suggests downloading the free mobile app today for Android or Apple devices. The email concludes with the TPA ID (47), Employer ID (1), and Participant ID (148), and a note that users can reach an Implementation 1 representative by calling (XXX) XXX-XXXX. The email is signed "Sincerely,".

STEP 2

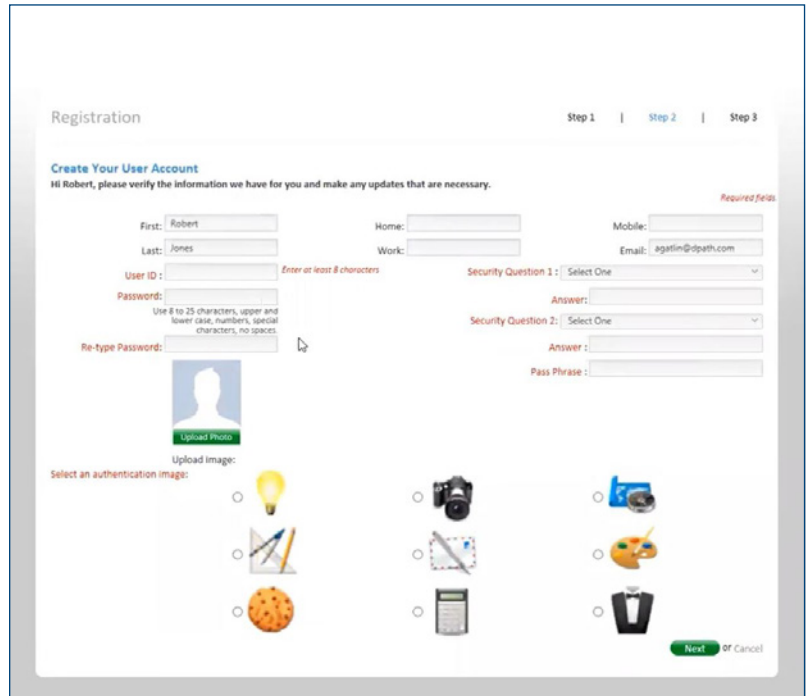
Enter your **Employer ID** found in the welcome notice. Select whether you are an **existing participant** or a **new enrollee**. Enter your **Participant ID**, and click **Next**.

The screenshot shows the "Registration" page in the Summit Portal. It has a progress bar at the top with "Step 1", "Step 2", and "Step 3". The "Enter Your Credentials" section asks the user to enter the Employer ID provided by their TPA. The Employer ID field is filled with "1". Below this, it says "Our records say that your employer is ABC Company". The "Select Registration Type" section has two radio buttons: "I am an existing participant. I am/was a participant in at least one of my employer's benefit plans." (which is selected) and "I am a new enrollee. I have never participated in one of my employer's benefit plans." Below this, it says "Now, please enter your Participant ID provided by your TPA." The Participant ID field is filled with "148". There are "Next" and "Cancel" buttons at the bottom right.

STEP 3

On this page, you create your user profile. **Required fields are written in red.** Create a User ID that is at least 8 characters long. Next, create a password that is 8 – 25 characters long. *For security, use a mixture of upper and lower case letters, numbers, and special characters.* **Re-type your password.**

- To personalize your portal, you may upload a photo, but it is optional. Image should be a **jpeg, gif, or png** that is 100px by 100px.
- Enter **home, work, and mobile numbers**, and verify that the email is correct.
- Next, choose security questions and type your answers. *Provide a **pass phrase**, which is similar to a password, but instead of being a jumble of letters and numbers, it is a phrase.*
- Choose an image and **click next**.
- Review your information.** *If you need to make any changes, click edit at the bottom of the screen.* Once your information is correct, **click Finish**.



Registration

Step 1 | Step 2 | Step 3

Create Your User Account

Hi Robert, please verify the information we have for you and make any updates that are necessary.

Required fields

First: Robert Home: Mobile: Email: agatlin@dpath.com

Last: Jones Work:

User ID: Enter at least 8 characters

Password: Use 8 to 25 characters, upper and lower case, numbers, special characters, no spaces

Re-type Password:

Security Question 1: Select One Answer:

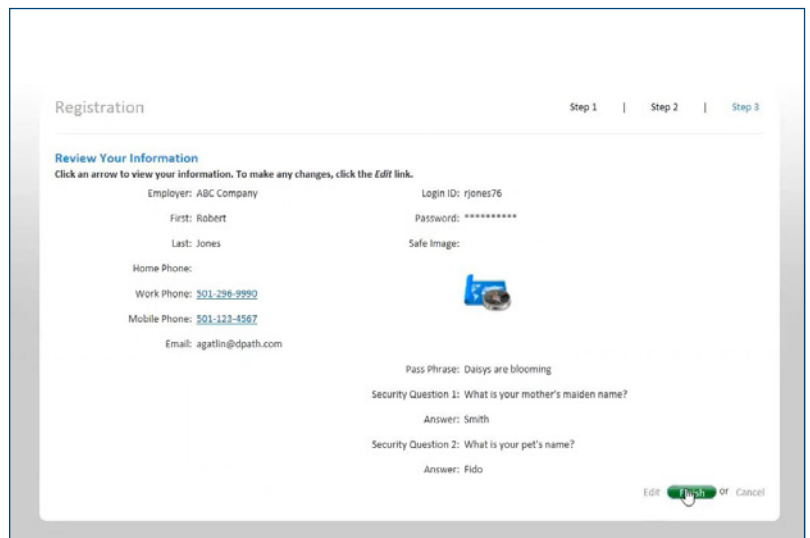
Security Question 2: Select One Answer:

Pass Phrase:

Upload Photo

Select an authentication image:

Next OF Cancel



Registration

Step 1 | Step 2 | Step 3

Review Your Information

Click an arrow to view your information. To make any changes, click the Edit link.

Employer: ABC Company Login ID: rjones76

First: Robert Password: *****

Last: Jones Safe Image:

Home Phone: Work Phone: 201-296-9990 Mobile Phone: 201-123-4567 Email: agatlin@dpath.com

Pass Phrase: Daisys are blooming

Security Question 1: What is your mother's maiden name? Answer: Smith

Security Question 2: What is your pet's name? Answer: Fido

Edit Finish OF Cancel

You are now registered in Summit. If you have questions, please contact your benefits representative.

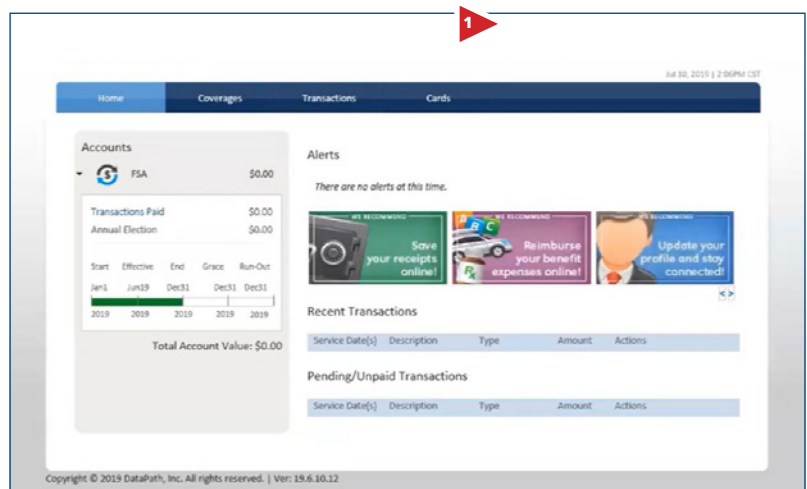
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Updating Your Employee Profile

STEP 1

Log in to your account* to update your personal information, **including your profile, dependents, and bank account information.**

Click on your user name, picture, or arrow¹ at the top of the screen.



* Your home page and accounts may look different from what you see here, but the information will be in the same places.

STEP 2

In the top section, you can update your user information, including your **name, photo, phone numbers, and security information.**

Click Show next to any of the sections you would like to edit. *In the address section, you can verify or change your address.*

A screenshot of the 'User Account' form. The form is titled 'User Account' and includes a message: 'Hi Robert, please verify the information we have for you and make any updates that are necessary.' Below this, there's a 'Change Photo' button and a note: 'Image should be 100px by 100px and saved as a .gif, .jpg or .png'. The form contains several input fields for personal information: First Name (Robert), Middle Name (T), Last Name (Jones), User ID (jones76), Home, Work, Mobile, Pass Phrase (Daisies are blooming), and Email (egatin@dpeth.com). There are also two security questions: 'What is your mother's maiden name?' and 'What is your pet's name?'. At the bottom, there's an 'Address' section with fields for Mailing Address (1601 Westpark Dr), Address 2 (Suite 9), and City (Little Rock). There are 'Show' buttons next to the 'Dependents' and 'Banking Details' sections. A red arrow points to the 'Show' button next to the 'Address' section.

Dependents and Banking Information Updates

Click the **Dependents** section to add or edit your dependent information. *The fields in red are required.* If the dependent has a different address than the participant, uncheck the box that says "same as participant address" and fill in the information. If they do have the same address, you may leave it checked. If necessary, select the plans that the dependent should be linked to, and whether or not to issue a card, if that is an option.

Please note that if your dependent is not already enrolled in the benefit, you will need to contact your human resources director or plan administrator to enroll your dependent. Read the dependent disclaimer, Click the box to show you have read it, then **click Submit**.

Plan Type	Plan ID	Description	Start Date	End Date	Grace Period	Run-out
FSA	FSAMed	FSA	01/01/2019	12/31/2019		

To add your banking information, **click show** next to banking details. Select your bank name, or select other to add your bank. Enter or select the bank's routing number, enter your account number, and select the account type. *If this is your main bank account, you can click the make default check box so that this will automatically be the bank account used for any future reimbursements².*

2 Make Default: ☐

Authentication image:

STEP 3

Select your authentication image.
Click Save.

Your personal information is now updated. If you have questions, please contact your benefits representative.

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Checking Your Balance and Transactions

STEP 1

Log in to your account to check the **balance of your accounts**, and to **view your debit card transactions***.

- a. In the left column, you see the various accounts you have elected to participate in through your employer.

Your available balance is the number listed to the right¹. *In this example the participant has \$900 available in her FSA account, and \$2,800 available in her HRA account.* Click on the account type, to see how much has been spent so far this plan year, and how much you elected².

- b. On the right side of the screen is where you'll find any alerts that you need to know³. *Examples of the information you would find here are claims denials, or a request for a receipt.*

The screenshot shows a web application interface for checking account balances and transactions. At the top, there are navigation tabs: Home, Coverages, Transactions, and Cards. Below the navigation, the 'Accounts' section lists two accounts: FSA with a balance of \$900.00 and HRA2 with a balance of \$2,800.00. A callout box labeled '2' provides a detailed view of the FSA account, showing 'Transactions Paid' of \$600.00 and 'Annual Election' of \$1,500.00. To the right, the 'Alerts' section shows a red triangle icon labeled '3' and a list of alerts, including a claim denial for Lindsay Smith on 2/12/2019. A callout box labeled '1' points to the 'Accounts' section.

* Your home page and accounts may look different from what you see here, but the information will be in the same places.

STEP 2

Below the alerts, you will find **Recent Transactions** and **Pending/Unpaid Transactions**. **Click View All** to see a Transaction History.

Recent Transactions				
Service Date(s)	Description	Type	Amount	Actions
01/01/2019	Blonde Doctor	Manual Claim	\$350.00	View Details
02/12/2019	mr mister	Debit Card	\$100.00	View Details
02/12/2019	mr mister	Debit Card	\$100.00	View Details
02/12/2019	mr mister	Debit Card	\$150.00	View Details
02/12/2019	mr mister	Debit Card	\$150.00	View Details
View All				
Pending/Unpaid Transactions				
Service Date(s)	Description	Type	Amount	Actions
02/12/2019	mr mister	Debit Card	\$100.00	View Details Add Receipt
02/12/2019	mr mister	Debit Card	\$50.00	View Details Add Receipt
02/12/2019	mr mister	Debit Card	\$50.00	View Details Add Receipt
02/12/2019	mr mister	Debit Card	\$50.00	View Details Add Receipt
View All				

Continued next page.

- a. At the top, you see **Transactions Requiring Attention**. *This person needs to upload a receipt for a claim. They would just click **upload receipt**⁴ to attach a scan or photo of the receipt to the claim⁵.*

Receipt Details

Claim Details

Claimant: Lindsay Smith
Service Start: 2/12/2019
Denied Amount: \$0.00
Claim#: 457
Review Status: Pending
Claim Received Date: 02/12/2019

Transaction Type:
Service End: 2/12/2019
Total Claim Amount: \$130.00
Entered Date: 2/12/2019
Reviewed Date:
Service Category:

Provider:
Approved Amount: \$300.00
Claim Status: Request
Entered By: Card Transaction Service
Reviewed By:

Receipt Details

Upload Receipt(s):

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

Home Coverages **Transactions** Cards

Aug 01, 2019 1:24 PM CST

Transaction History

Transactions Claims Vault™ Transaction History

Transaction Search

Transactions Requiring Attention

Service Date(s)	Description	Type	Claimant	Original Amount	Processed Amount	Status	Action Required
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$100.00	Receipt Overdue	Upload Receipt
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$50.00	Receipt Overdue	Upload Receipt
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$50.00	Receipt Overdue	Upload Receipt
02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$50.00	Receipt Overdue	Upload Receipt

Recent Transactions

Add/View Online Claims

Plan	Service Date(s)	Description	Type	Claimant	Original Amount	Processed Amount	Reimbursement Method	Status
FSA	01/01/2019	Blonde Doctor	Manual Claim	Lindsay Smith	\$350.00	\$350.00	Check	Approve
HRA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
FSA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
HRA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue
FSA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue

- b. Below **Transactions Requiring Attention** is the history of **Recent Transactions**, or any activity that affects the balance of your accounts. *Such as:*

- Card transactions
- Reimbursements
- Manual claims that have been submitted

Recent Transactions

Add/View Online Claims

Plan	Service Date(s)	Description	Type	Claimant	Original Amount	Processed Amount	Reimbursement Method	Status
FSA	01/01/2019	Blonde Doctor	Manual Claim	Lindsay Smith	\$350.00	\$350.00	Check	Approve
HRA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
FSA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$100.00	\$100.00	Debit Card	Receipt Overdue
HRA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue
FSA	02/12/2019	mr mister	Debit Card	Lindsay Smith	\$150.00	\$150.00	Debit Card	Receipt Overdue

Here, you can see which benefit plan the transaction affects, the service date, a description, the type of transaction, claimant, amount, reimbursement method, and transaction status. **Click the word under transaction type to view even more details of each transaction⁶.**

Transaction Details

Requested Reason:

Claimant: Lindsay Smith
Provider: Blonde Doctor
Claim Status: Approved
Service Code Description:

Service Start: 1/1/2019
Service End: 1/1/2019
Approved Amount: \$350.00
Denied Amount: \$0.00
Claim Number: 152

Reimbursement Details

Reimbursement Date: N/A
Reimbursement Method: N/A
Reimbursement Amount: \$0.00
Reimbursement Start To: N/A

Type: Communication Date: Communication Type: Communication Method: Email Address: Re-send Date:

Plan Details

Affected Plans: Plan Amount:

Plan Type: FSA
Plan ID: 739
Plan Start: 1/1/2019
Run-out Date: 12/31/2019

Plan Description: FSA
Plan End: 12/31/2019
Grace Period: N/A

- c. If you need to find a specific transaction, just **click the Show button** by transaction search⁷, and you can search for a transaction by check or claim number, or by any of the options listed here⁸.

You can also go directly to the transaction history page from the blue navigation bar at the top of your screen⁹.

Transaction Search

Check Number: OR Claimant: Card Number:

Claim Number: Plan: Start Date:

Transaction Type: End Date:

Submission Method:

Reimbursement Method:

If you have further questions, please contact your benefits representative.

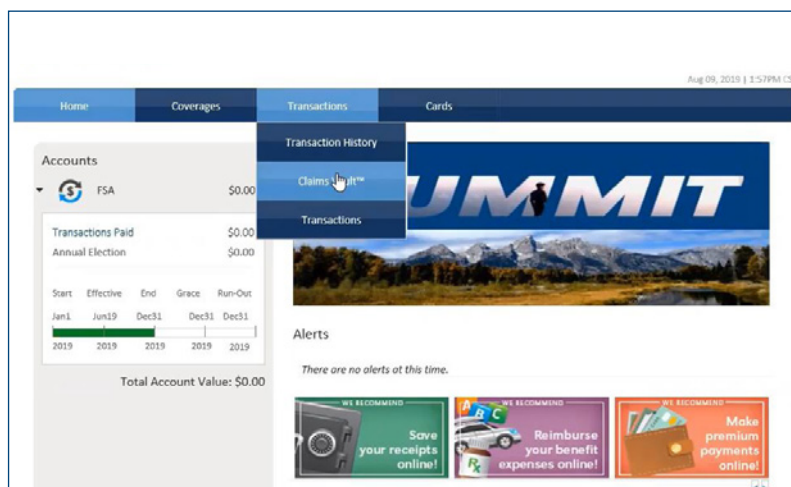
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How to File a Claim

STEP 1

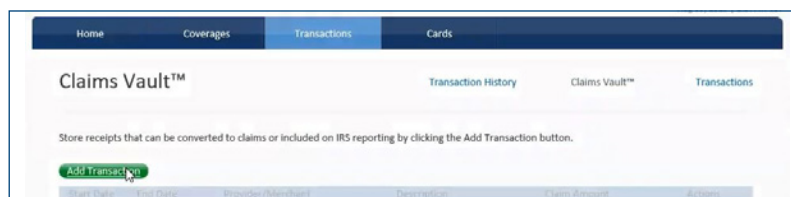
Log in to your account*

- In the navigation bar at the top of the screen, hover over transactions, and **click on ClaimsVault™**.



* Your home page and accounts may look different from what you see here, but the information will be in the same places.

- Click the **Add Transaction** button.



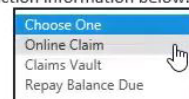
STEP 2

Choose **Online Claim** from the **Transaction Type Dropdown List** to file for reimbursement or payment now on a claim

Add A Transaction

Enter and submit your transaction information below.

Transaction Type :



Online Claim

A claim you want to file for reimbursement now.

ClaimsVault®

Submit a claim to electronic storage for later reimbursement. You will need to submit this at a later time.

Repay Balance Due

Allows you to return funds to your benefit account for denied or ineligible transactions.

STEP 3

Click the **Select files** button to upload a receipt or Explanation of Benefits.

- Choose **Pay Me** if you are being reimbursed.
- Complete the form, and check the appropriate **service category** and **Service Code***.
- Add a **description of service**, choose the **bene it plan you are using**, and choose whether you are using **Direct Deposit** or **check** (if you have the option). Write in any notes that you may want for future reference.

Add A Transaction

Enter and submit your claim information below. 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**.
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.

Transaction Type : Online Claim Required Information

Upload Receipt/EOB : Receipt.pdf Select files...

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

☒ **Pay Me** ☐ **Pay Provider**

Claimant: Robert T Jones

Start Date: 08/09/2019 **End Date:** 08/09/2019

Amount: \$52.00

Provider:

Service Category: Medical **Service Code:** Preventive Care

Description of Service:

Plan: Select Plan

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

Notes:

☐ I have read and agree to the [Terms and Conditions](#)

Add Line Item

Line Item Claims

[Clear Form](#) | [Cancel](#) | [Finish Later](#) Submit

* These drop down menus vary by administrator, so be sure to read the choices carefully.

- Click the check box next to "I have read and agree to the Terms and Conditions." If you have several claims you are making, **click Add line item** to add more claims. Once you are finished, **click the Submit button**.

You have now submitted a claim. If you have further questions, please contact your benefits representative.

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Benefits at Your Fingertips

Access your employee benefits account information on your mobile device with the Mobile Summit app for Apple and Android.

What You Can Do with Mobile Summit

- ✓ **View Accounts** – Access detailed balance and account information, including alerts.
- ✓ **Card Activity** – Review transaction information, including whether receipts are needed.
- ✓ **SnapClaim™** – Our integrated SnapClaim technology allows claims filing using your smartphone or mobile device! Just open a claim using the app, fill in some details onscreen, take a photo of the receipt with your smartphone camera, and upload. Claims filing couldn't be easier!



Locating and Loading the App



Search for “Mobile Summit” on the App Store for Apple products or in the Google Play Store for Android products, and load as you would any other app.

Logging in

Mobile Summit uses the same login credentials as the online participant portal. Once you have registered online, log in to Mobile Summit using the same username, password, and TPA code.* After logging in to the app, you will be on the home page which lists your navigation options.

**Login credentials include username, password, and the TPA Code provided by your plan administrator. If the TPA Code is not available, you can use the URL for your online Summit account portal instead. Just enter the URL in the TPA Code field (URL example: www.MySummitTPA.com).*

Getting Help



Click the Contact icon at the bottom of the home page to access contact information for your administrator, who will be able to provide assistance.

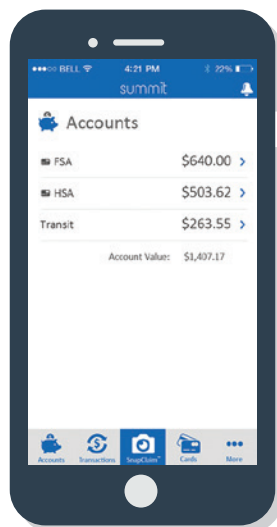
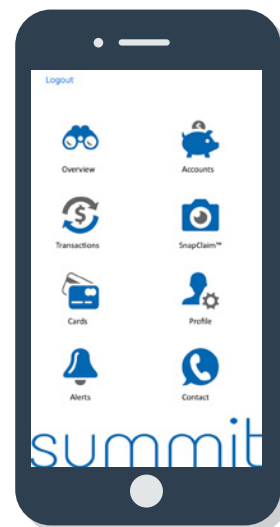
Mobile App Quick Start Guide

Logging In

Open the Mobile Summit app. Use the same username and password to log in that you use to log in to the full Summit portal online.

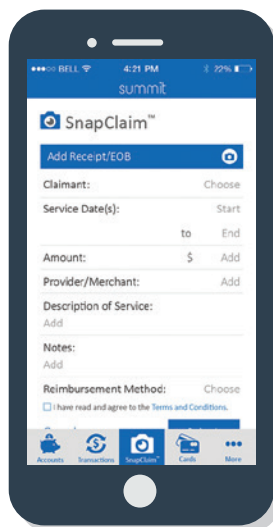
What You Can Do with Mobile Summit

Once you log in, the Home page displays on the screen. Tap the icons to access the available features:



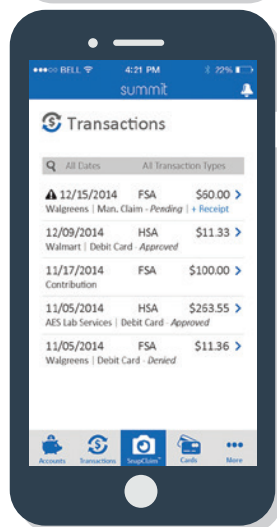
Accounts –

View a list of all your accounts (FSA, HRA, HSA, Transit) and available funds. Select an account to view Annual Elections, Reimbursements, Available Balance, and Contributions. You may even access the transaction history from the account screen. Dependents who are linked to the account are listed.



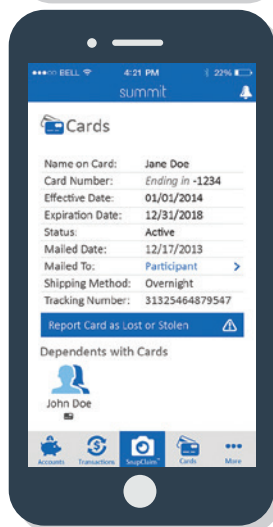
SnapClaim™ –

SnapClaim is a quick, convenient, and secure way to file claims using your smartphone's camera. On the SnapClaim screen, enter claim information including Claimant, Service Dates, Amount, Provider/Merchant, and Reimbursement Method, then upload a photo of the receipt or EOB, and submit for processing.



Transactions –

Access a list of transactions across all accounts, sorted by date. Click on any transaction to view specific details. For any debit card transactions requiring receipts, click the +Receipts link to upload photos of the associated receipts or EOBs from your smartphone's camera.



Cards –

View card details, including Name on Card, Card Number, Expiration Date, and Status. You may also view dependents who hold cards. If your card is lost or stolen, you may report it through this screen.



Overview – View account balances, last claim received, and last card transaction amounts.



Profile – Access your profile and view information. You may edit information from this screen.



Alerts – View all alerts for your accounts and cards.

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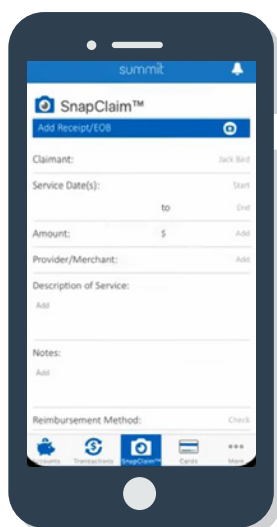
File a Claim with SnapClaim™

Logging In

Open the Mobile Summit app. Use the same username and password to log in that you use to log in to the full Summit portal online.

STEP 1

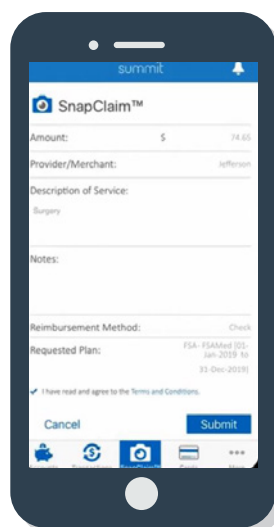
Click on SnapClaim™

A screenshot of the Mobile Summit app showing the SnapClaim™ form. The form includes fields for Claimant, Service Date(s), Amount, Provider/Merchant, Description of Service, Notes, and Reimbursement Method. A bottom navigation bar shows icons for Home, Transactions, SnapClaim™, Cards, and Alerts.

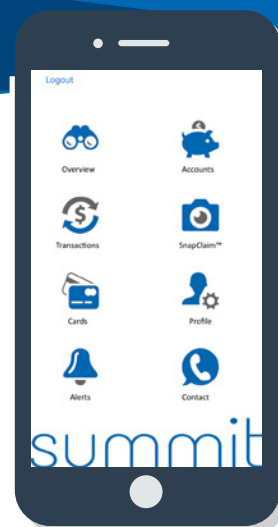
Make sure the claimant is correct, then fill in your start date. Enter the Amount of service, the provider or merchant, and a Description of service. Write in any notes that you may want for future reference, and choose your Reimbursement Method, if you have the option. Choose the plan type, then click the check box next to *"I have read and agree to the Terms and Conditions."*

STEP 2

Upload a Receipt

A screenshot of the Mobile Summit app showing the receipt upload screen. It includes fields for Amount, Provider/Merchant, Description of Service, Notes, Reimbursement Method, and Requested Plan. A checkbox for "I have read and agree to the Terms and Conditions" is checked. There are "Cancel" and "Submit" buttons at the bottom.

Click the button at the top to add a receipt or explanation of benefits. Choose the camera to take a picture of your receipt, or choose a photo of a receipt from your album. Once you are finished filling out all the information, *click the Submit button.*



You have now submitted a claim. If you have further questions, please contact your benefits representative.

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