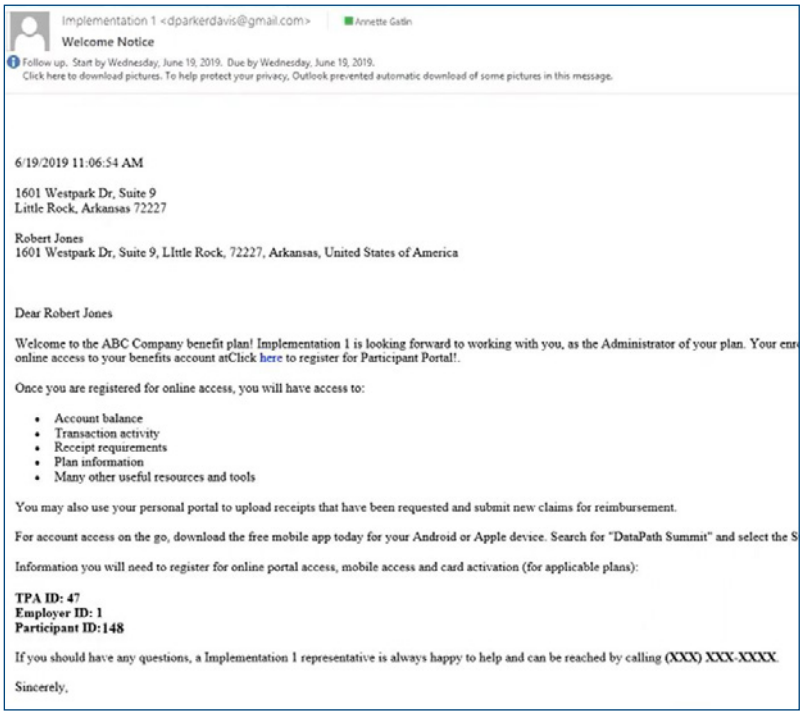
# Registering a
# New Employee Account

## 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.***



Implementation 1 <dparkerdavis@gmail.com> Annette Gatlin

**Welcome Notice**

Follow up. Start by Wednesday, June 19, 2019. Due by Wednesday, June 19, 2019.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

6/19/2019 11:06:54 AM

1601 Westpark Dr, Suite 9
Little Rock, Arkansas 72227

Robert Jones
1601 Westpark Dr, Suite 9, LIttle Rock, 72227, Arkansas, United States of America

Dear Robert Jones

Welcome to the ABC Company benefit plan! Implementation 1 is looking forward to working with you, as the Administrator of your plan. Your ent
online access to your benefits account atClick here to register for Participant Portal!.

Once you are registered for online access, you will have access to:

- Account balance
- Transaction activity
- Receipt requirements
- Plan information
- Many other useful resources and tools

You may also use your personal portal to upload receipts that have been requested and submit new claims for reimbursement.

For account access on the go, download the free mobile app today for your Android or Apple device. Search for "DataPath Summit" and select the S

Information you will need to register for online portal access, mobile access and card activation (for applicable plans):

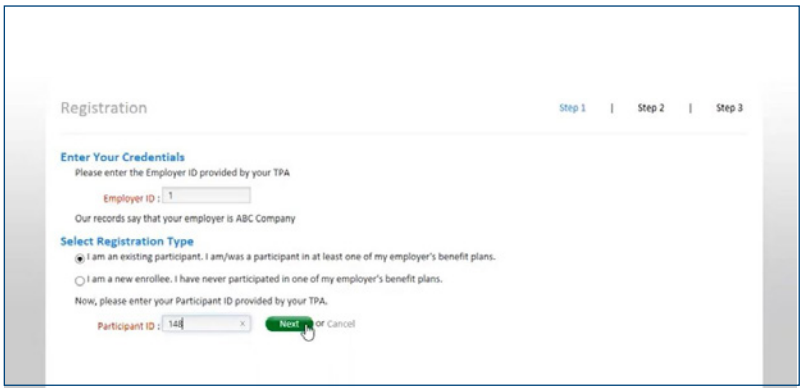
**TPA ID: 47**
**Employer ID: 1**
**Participant ID:148**

If you should have any questions, a Implementation 1 representative is always happy to help and can be reached by calling (XXX) XXX-XXXX.

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*.**



Registration

Step 1 | Step 2 | Step 3

**Enter Your Credentials**

Please enter the Employer ID provided by your TPA

Employer ID : 1

Our records say that your employer is ABC Company

**Select Registration Type**

I am an existing participant. I am/was a participant in at least one of my employer's benefit plans.

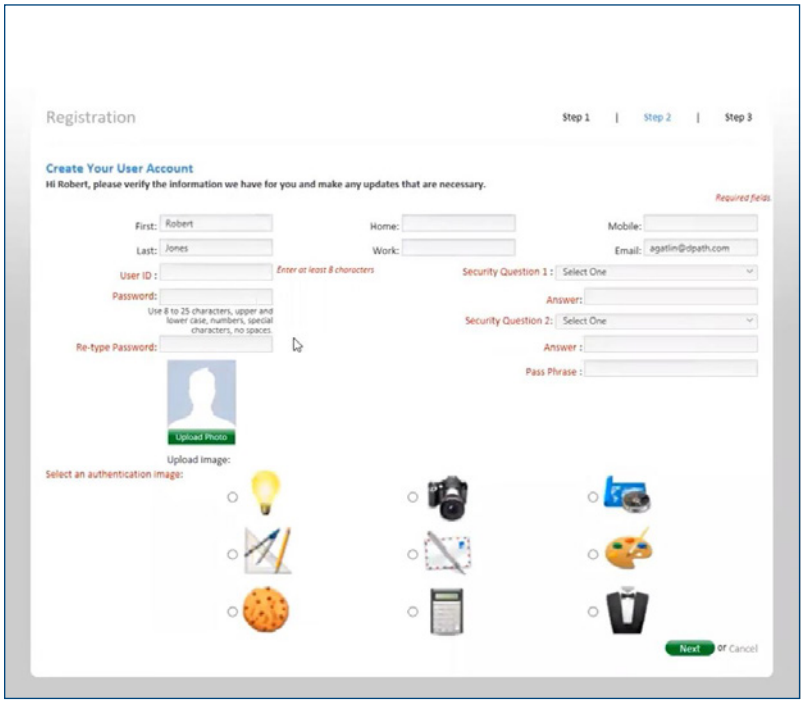
I am a new enrollee. I have never participated in one of my employer's benefit plans.

Now, please enter your Participant ID provided by your TPA.

Participant ID : 148 Next or Cancel

## 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.**



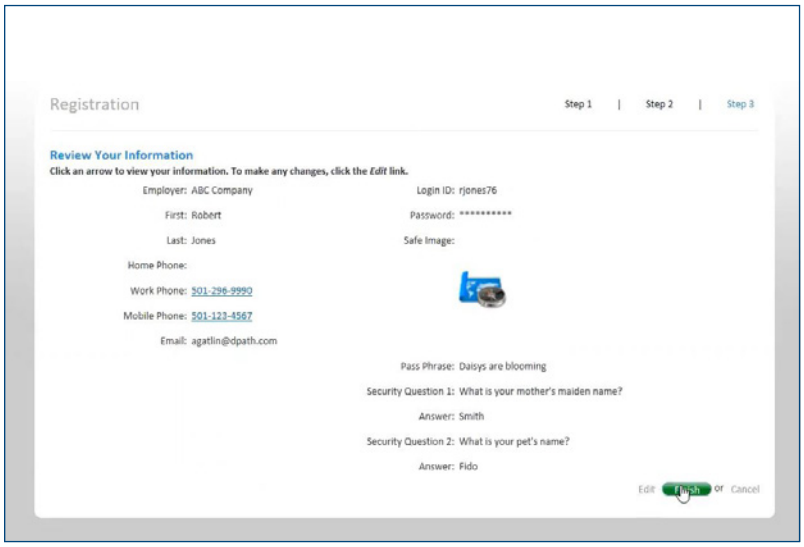

a. To personalize your portal, you may upload a photo, but it is optional. Image should be a **jpeg**, **gif**, or **png** that is 100px by 100px.

b. Enter **home**, **work**, and **mobile numbers**, and verify that the email is correct.

c. 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.

d. Choose an image and **click next**.

e. **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***.




**You are now registered in Summit. If you have questions, please contact your benefits representative.**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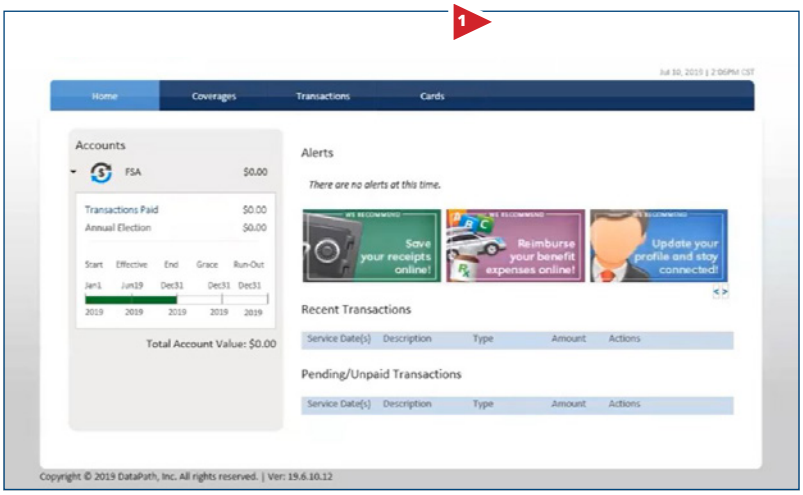
# Updating
# Your Employee Profile

## 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 **arrow**[1] at the top of the screen.

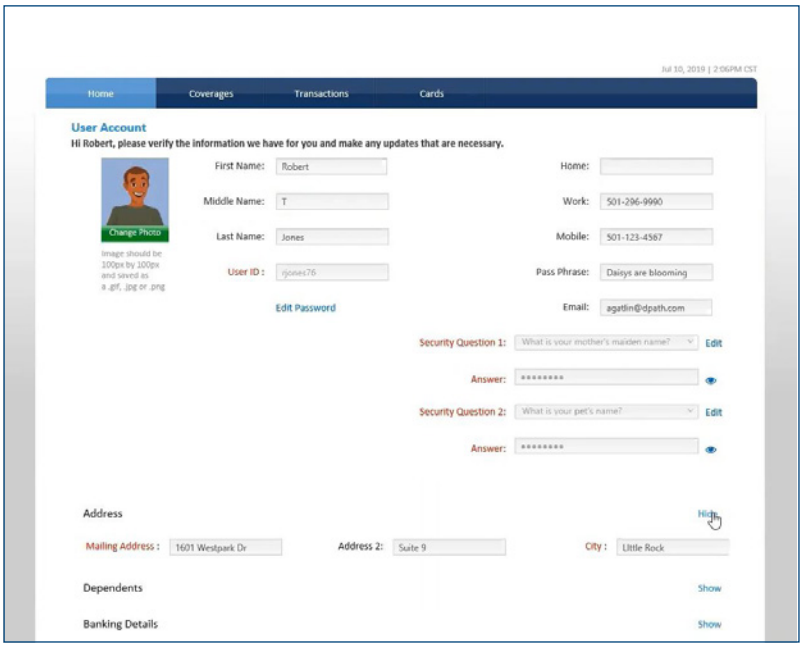



** Your home page and accounts may look different from what you see here, but the information will be in the same places.*

## STEP 2

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

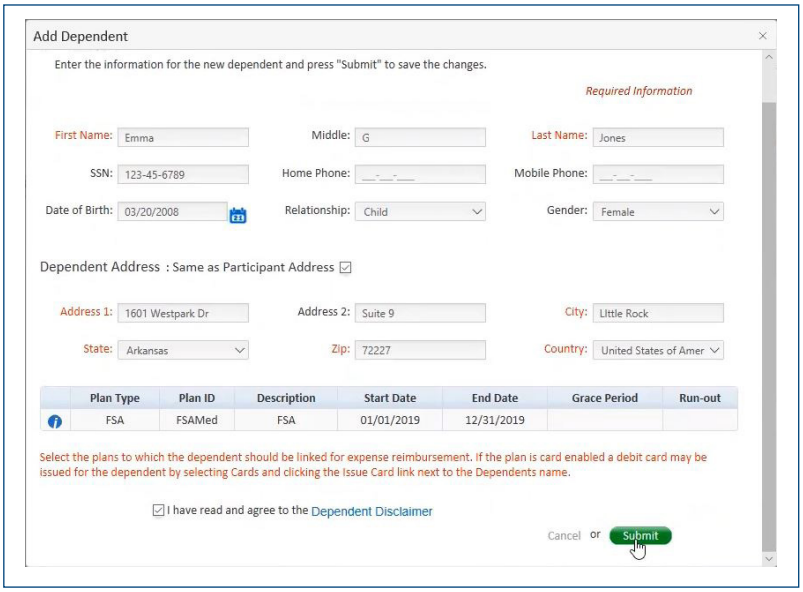
**Click *Show*** next to any of the sections you would like to edit. *In the address section, you can verify or change your address.*



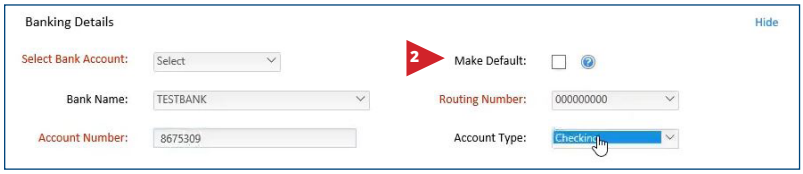
## Dependents and Banking Information Updates

**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***.




**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 reimbursements[2].*




## 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

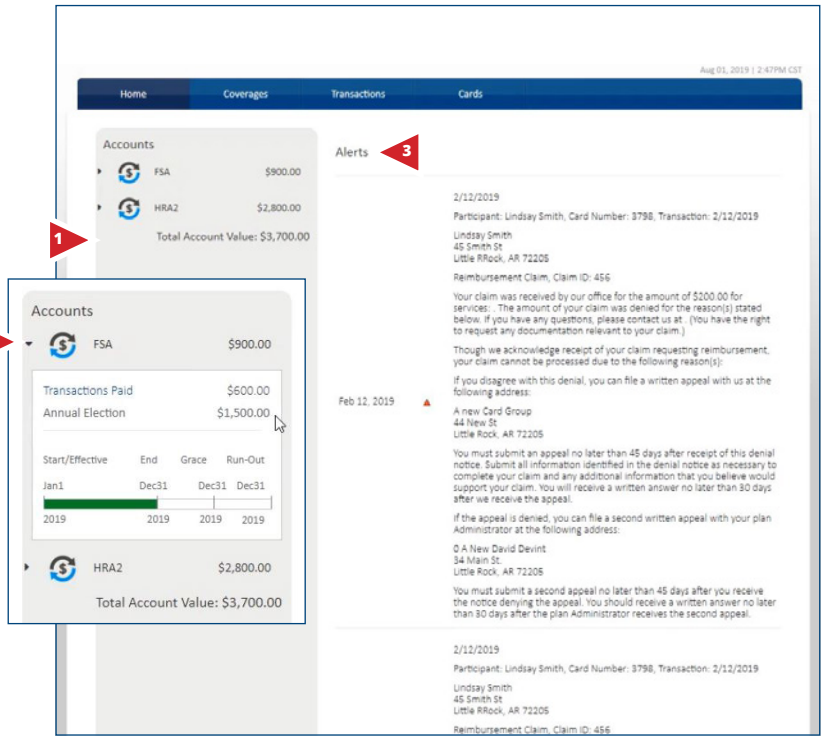
## STEP 1

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 right[1]. *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 elected[2].

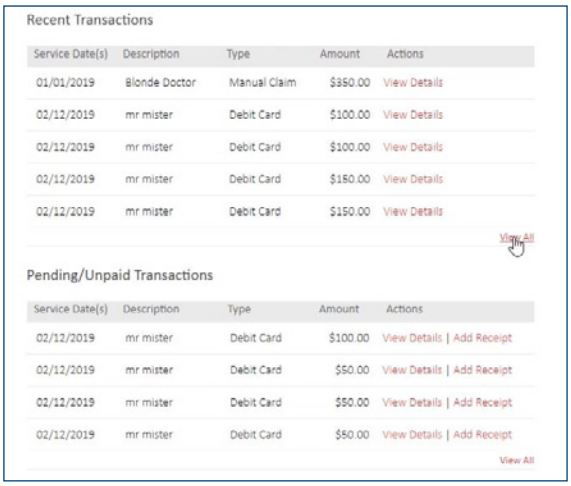
b. On the right side of the screen is where you'll find any alerts that you need to know[3]. *Examples of the information you would find here are claims denials, or a request for a receipt.*




** 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

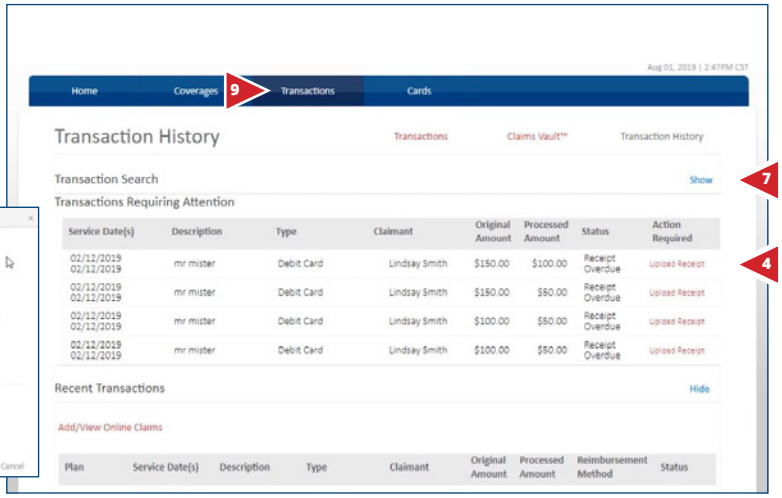
Pending/Unpaid Transactions

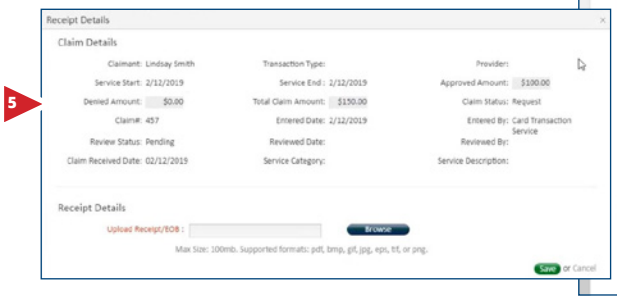
| Service Date(s) | Description | Type | Amount | Actions |
|---|---|---|---|---|
| 02/12/2019 | mr mister | Debit Card | $100.00 | View Details \| Add Receipt |
| 02/12/2019 | mr mister | Debit Card | $50.00 | View Details \| Add Receipt |
| 02/12/2019 | mr mister | Debit Card | $50.00 | View Details \| Add Receipt |
| 02/12/2019 | mr mister | Debit Card | $50.00 | View Details \| Add Receipt |

View All

*Continued next page.*

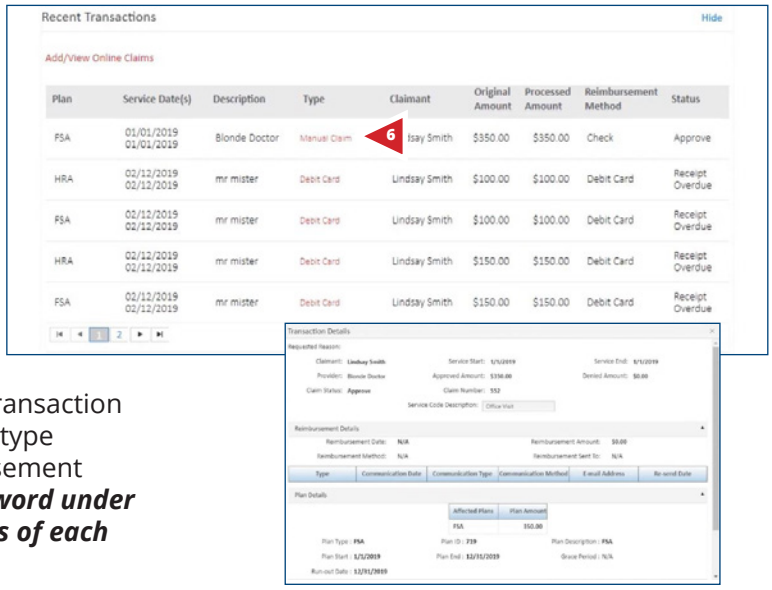
a. At the top, you see **Transactions Requiring Attention**. *This person needs to upload a receipt for a claim. They would just click* ***upload receipt***[4] *to* ***attach a scan or photo of the receipt to the claim***[5].




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

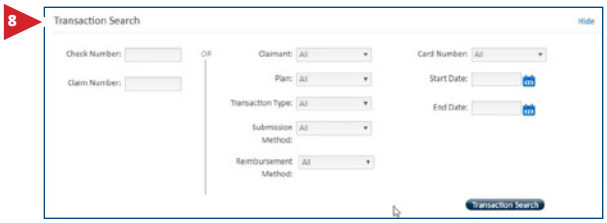
- *Card transactions*
- *Reimbursements*
- *Manual claims that have been submitted*




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 transaction***[6].

c. If you need to find a specific transaction, just **click the *Show* button** by transaction search[7], and you can search for a transaction by check or claim number, or by any of the options listed here[8].

*You can also go directly to the transaction history page from the blue navigation bar at the top of your screen*[9].

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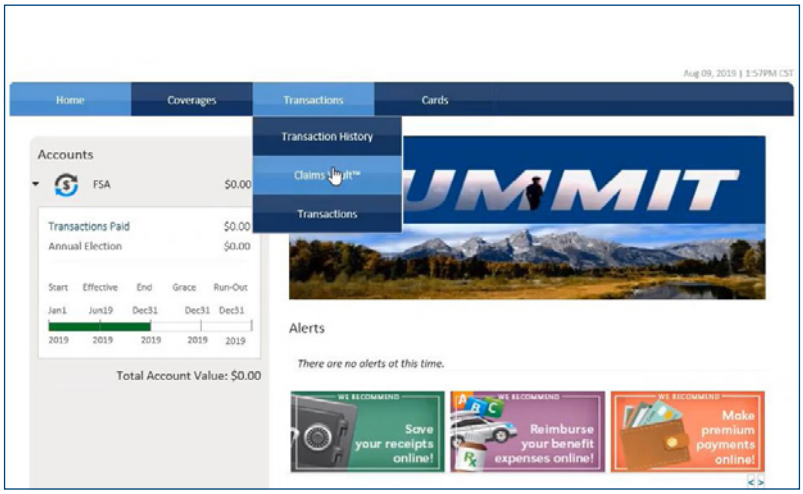
# How to
# File a Claim

## STEP 1

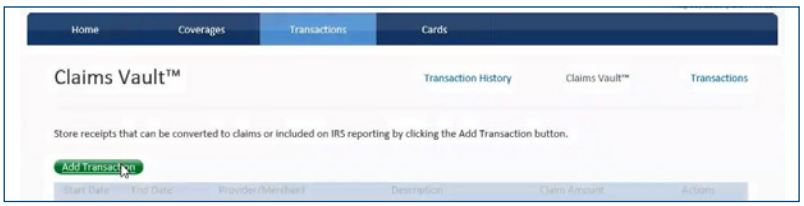
Log in to your account*

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



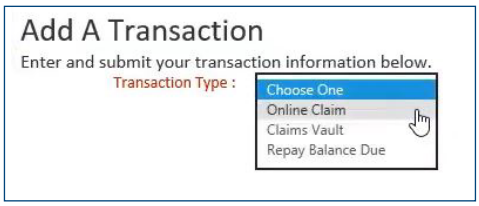

** Your home page and accounts may look different from what you see here, but the information will be in the same places.*

b. Click the ***Add Transaction*** button.




## STEP 2

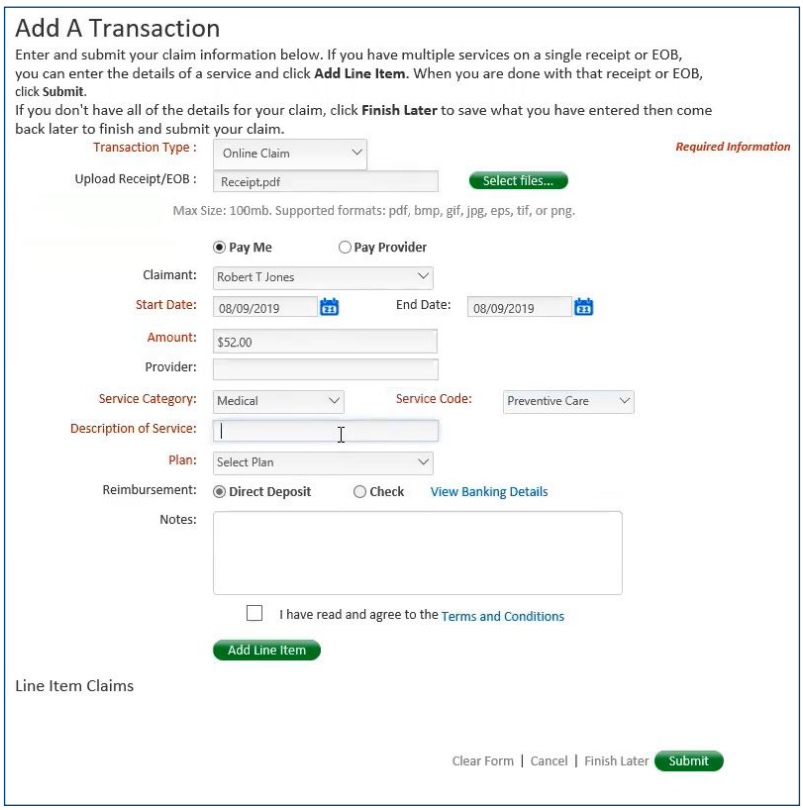
Choose ***Online Claim*** from the **Transaction Type Dropdown List** to file for reimbursement or payment now on a claim




| Online Claim | ClaimsVault® | Repay Balance Due |
|---|---|---|
| **A claim you want to file for reimbursement now.** | Submit a claim to electronic storage for later reimbursement. You will need to submit this at a later time. | 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.




a. Choose **Pay Me** if you are being reimbursed.

b. Complete the form, and check the appropriate **service category** and **Service Code***.

c. 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.

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

d. 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

Available on the App Store | Google Play

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

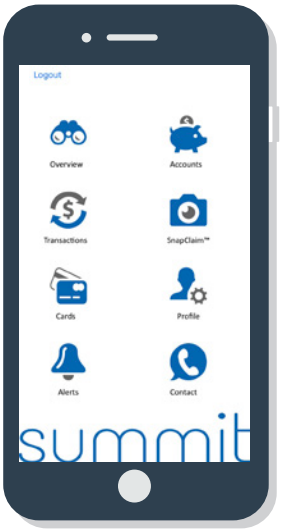
Mobile Summit uses the same login credentials as the online participant portal. Once you have registered online, log in to Mobile Summit using the same username, password, and TPA code.* After logging in to the app, you will be on the home page which lists your navigation options.

**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

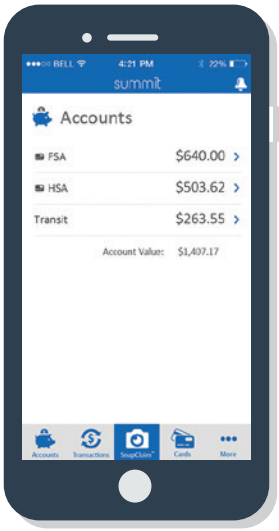



## Logging In

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.

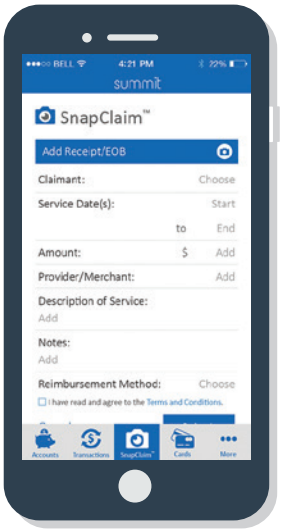
## What You Can Do with Mobile Summit

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



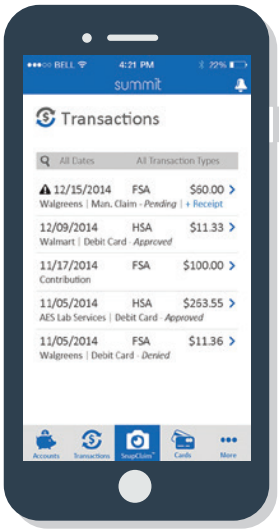

### Accounts –

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.



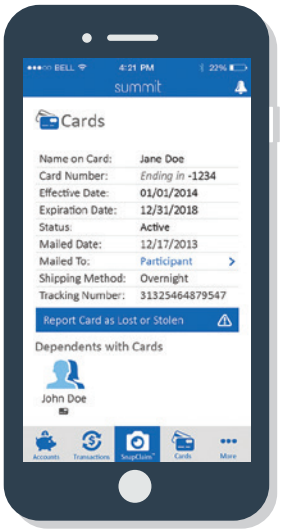

### SnapClaim™ –

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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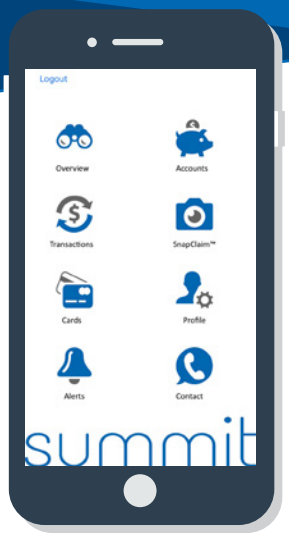
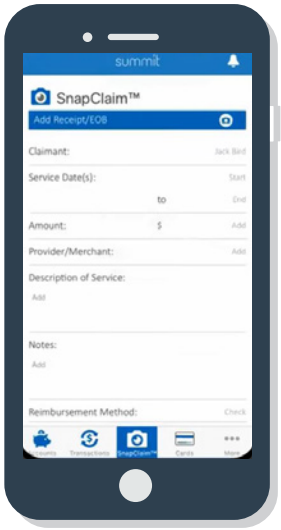
# File a Claim
## with SnapClaim™



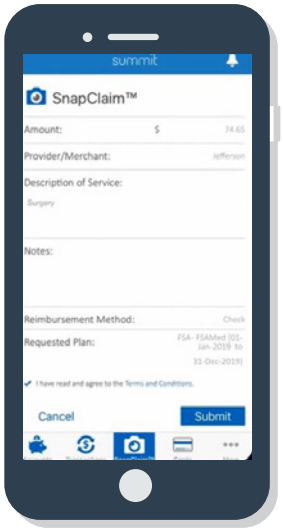

### Logging In
Open the Mobile Summit app. Use the same username and password to log in that you use to log in to the full Summit portal online.

### STEP 1
**Click on SnapClaim™**




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**




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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