

datapath. summit

HSA (Health Savings Account)



Summit HSA provides comprehensive features for administrators, employers, and participants alike. With Summit, you can offer hands-on, professional account management services with built-in investment options – a level of service that competitors such as banks don't offer.



No Need for Multiple Vendors

Summit is a 'one-stop shop' for full HSA management with integrated account administration, banking, and investments. DataPath is also the non-bank HSA custodian.



Hand-off Administration

You can provide as much or as little management as you like. For example, you can turn off MCC restrictions and allow participants to self-adjudicate purchases. Or be more hands-on and offer your expertise to account owners.



Online Enrollment and Elections

Participants can use Summit's online portal to enroll in their HSA and make elections in just a few quick steps.



Easy HSA Rollovers

At any time, account owners may roll over an HSA from a different custodian. Funds will show in their account balance within 2-4 weeks after DataPath receives the transfer form.



Fully Integrated Banking

Summit is fully integrated with DataPath as the non-bank HSA custodian – providing full visibility into the accounts and reporting.



Investing Made Easy

Summit features integrated investing, with investment options and educational materials available right in the portal. Our in-house Registered Investment Advisor selects and maintains investment options and model portfolios to help participants maximize their investment earnings.



Plan Document Templates

Summit includes compliant plan document templates that you can customize, or upload and share your own. You can also perform nondiscrimination testing in the portal.



Debit Card, Participant Portal, Mobile App

Every Summit HSA account comes with a convenient debit card, user-friendly participant portal, and full-featured mobile app that can be used to update information, check balances, upload receipts, manage investments and more.

WHERE DO YOU
WANT TO
grow?

