datapath summit

WHERE DO YOU WANT TO grow?

CDH | HSA & Investments | COBRA | BPO

datapath® summit

WHERE DO YOU WANT TO *grow?*

For four decades, DataPath has been a pioneer in benefits administration technology, focused on helping our clients get where they want to grow.

With more than a century of industry experience on our senior leadership team, DataPath has been creating innovative solutions and providing superior customer support since 1984.

Gain the power to grow and succeed with DataPath Summit.

Discover more at datapathsummit.com

CDH | HSA & Investments | COBRA | BPO

As the industry's first true, all-in-one cloud-based platform, DataPath Summit provides TPAs with exactly what they need to get where they want to grow. Summit provides absolutely seamless administration of CDH Accounts, HSAs and Investments, Well-Being Benefits, COBRA and Billing. Its flexibility lets you take advantage of the full suite of solutions or choose only the services specific to your business goals.

DataPath Summit clients receive superior customer support from our responsive, knowledgeable U.S.-based service team. They also have access to extensive Operations BPO services and Partner Marketing benefits including a unique client rewards structure and award-winning employee education and engagement program.

Get where you want to grow with DataPath Summit.

WHERE DO YOU WANT TO *grow?*

"We were very impressed with DataPath. We were able to save a lot of money. Your training is spectacular!"

Bill Mann, President
The Compliance Office

CDH Administration

DataPath Summit empowers you to offer the full suite of tax-advantaged CDH plans, including health and dependent care FSAs, HRAs, and Commuter/Transit accounts. Create nearly unlimited plan types with must-have features such as benefits debit cards and a comprehensive mobile app. Get where you want to grow by offering clients an array of service options without having to juggle multiple vendors and systems.

Summit elevates your benefits administration with:

- ▶ Streamlined account setup with default settings and wizards
- ▶ Flexible HRA plan designs adjustable at the tier level
- ▶ Powerful data exchange to import participants, enrollments, claims, and contributions
- ▶ Nondiscrimination testing for confident compliance
- ▶ Secure broker access with full control over data and permissions
- ▶ Custom card settings per employer plan
- ▶ Fulfillment and claims processing services at competitive pricing
- ▶ And much more!

HSAs and Investments

For current healthcare needs and long-term retirement savings, HSAs are changing how people manage their money. Datos Insights predicts that the number of HSA accounts will exceed 42 million by the end of 2025, compared to 36 million at the end of 2023. With employers working to increase benefits program value by adding HDHPs coupled with HSAs, there is significant growth potential.

Summit's powerful HSA capabilities with integrated investing gives you the one-stop shop for account management and service delivery you need for generating more revenue without a lot more work.

Summit's all-in-one HSA functionality offers:

- Turnkey HSA management
- Integrated investments and educational materials
- Expense self-certification for employees
- Online enrollment and elections for account owners
- Account-linked benefits debit card
- Convenient mobile app
- Patented ClaimsVault® digital storage

> *"DataPath has given us a way to set ourselves apart from other brokers."*
>
> Rachel Thrash, Claims Manager
> Querbes & Nelson

COBRA and Billing

Today's tumultuous labor market promises to impact the demand for COBRA administration. Be prepared with Summit COBRA. Since 2002, we have helped TPAs like you get where they want to grow with industry-leading COBRA and Billing solutions. Summit COBRA's powerful automation tools will help you increase efficiency and reduce compliance headaches.

Summit's robust billing capabilities include:

- Event-based notice generation
- Action item alerts
- Timeframe tracking
- Multiple loss of coverage options
- Integrated cash management
- COBRA mobile app for participants
- Direct and Retiree Billing
- Integration with CDH accounts

> *"Summit COBRA is very intuitive and easy to use – I am especially impressed with the importing ability. DataPath really understands the nuances of administering COBRA."*
>
> Michael Alexander, CEO
> Zynera Benefits | Risk | HR

Well-Being Benefits

Benefits that support employee physical, mental, emotional, and financial well-being have become important to meeting employer goals. DataPath Summit's cloud-based solution simplifies the administration of these post-tax accounts.

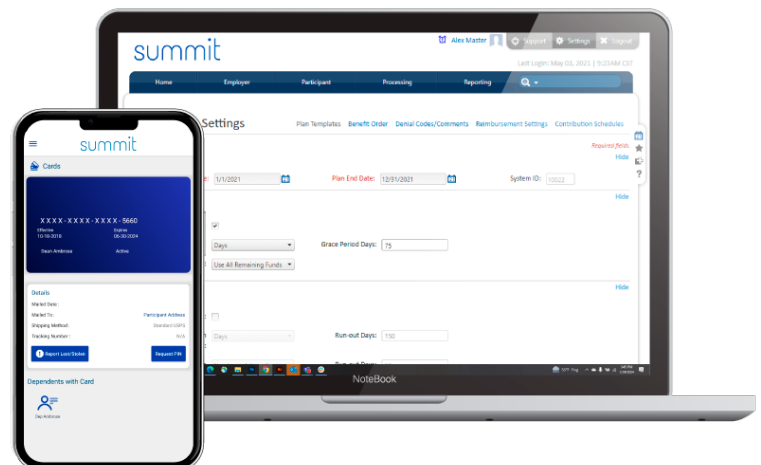**Summit fuels your growth with Lifestyle Spending Accounts (LSAs) and more.**

▶ Accommodate nearly any account-based reimbursement plan

▶ Highly customizable debit card with card behavior settings per employer plan

▶ Full-featured mobile app for account access via mobile devices

Operations BPO Services

With our highly affordable and accurate Business Process Outsourcing (BPO) services, DataPath Summit helps you get where you want to grow by saving time, conserving resources, and creating more value for your company, clients and participants as well as referring brokers. Choose defined service packages or a la carte projects for staff augmentation or services expansion, ongoing projects or project-based tasks, enrollment season only or year-round support.

Summit's Operations BPO program includes these services and more.

▶ Employer plan setup and renewal

▶ Participant enrollment and re-enrollment

▶ Participant demographics and status changes

▶ Contribution reconciliation

▶ Online/mobile claims adjudication

▶ Debit card claims adjudication

▶ Claims entry for faxed and emailed claims

▶ Printing and mailing fulfillment services

▶ Preparing raw data files for import processing

▶ Importing and processing carrier claims

▶ Generating employer invoices

▶ Developing custom data and report extracts

▶ Supplemental customer service and research

With the assistance of our BPO partner, Accelergent Growth Solutions, Summit's Operations BPO has processed more than 3.7 million claims and over $137 million in CDH contributions to date with an accuracy rate above 99% as reported by clients.

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Request a custom Summit demo at **datapathsummit.com**
or call us today at **(800) 633-3841**

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