

DataPath<sup>®</sup>  summit

CDH | HSA & Investments | COBRA | BPO

*Where do you  
want to **grow**?*





For nearly 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 created innovative solutions and provided superior customer support since 1984.

**Gain the power to grow with  
DataPath Summit.  
Discover more at [dpath.com/summit](https://dpath.com/summit)**

# DataPath<sup>®</sup> Summit

## 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, COBRA and Billing. Its flexibility lets TPAs take advantage of the full suite of solutions or choose only the services specific to their business goals.

DataPath clients receive superior customer support from our responsive, knowledgeable U.S.-based service team. They also have extensive 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

With Summit, TPAs can offer the full suite of tax-advantaged CDH plans, including health and dependent care FSAs, HRAs, HSAs, 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 more!**

# HSA

With employers working to increase benefits program value by adding HDHPs coupled with HSAs, there is significant growth potential. Devenir predicts that the number of HSA accounts will exceed 36 million by the end of 2024. For current healthcare needs and long-term retirement savings, HSAs are changing how people manage their money.



Summit's powerful HSA capabilities with integrated investing gives TPAs the one-stop shop for account management and service delivery they 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 employees
- ▶ Account-linked benefits debit card
- ▶ Convenient mobile app
- ▶ Patented ClaimsVault® digital storage

*"DataPath's competitive pricing, quality products and services, and focus on client relationships can't be beat."*

Susan Luskin, President/CEO  
Diversified Administration, Inc.

# COBRA and Billing

Today's tumultuous labor market promises to impact the COBRA market. Be prepared with DataPath COBRA. Since 2002, we have helped COBRA administrators get where they want to grow with industry-leading COBRA and Billing solutions. Increase efficiency and reduce compliance headaches with cloud-based Summit COBRA's powerful automation tools.

## 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  
Senior Consultant, W.J. Alexander

# Well-Being Benefits

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

## Fuel your growth with popular benefits like Lifestyle Spending Accounts (LSAs).

- ▶ Use Summit to accommodate nearly any account-based reimbursement plan
- ▶ Full-featured mobile app for account access via smartphones and other mobile devices
- ▶ Account-linked debit card with card behavior settings per employer plan

# Operations BPO Services

With our highly affordable and accurate Operations Business Process Outsourcing (BPO) services, DataPath helps TPAs get where they want to grow by saving time, conserving resources, and creating more value for themselves, their brokers, clients, and participants. We have the technology to work with all administrative platforms, regardless of provider. Choose defined service packages, staff augmentation, ongoing projects, project-based tasks, or a la carte for enrollment and ongoing support.

## Our 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, Overbrook Technology Services, DataPath BPO has processed more than 3.4 million claims and over \$129 million in CDH contributions to date with an accuracy rate of 99% as reported by clients.





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Get your FREE Summit demo at [dpath.com/summit](https://dpath.com/summit)  
or call us today at **(800) 633-3841**



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