



# summit ClaimsVault® User's Guide

DataPath's patented ClaimsVault® is an online 'shoebox' that allows Summit users to store their documents and receipts online for qualified expenses. The following guide provides an overview on how to use ClaimsVault:

1. Log in to the **Summit portal**.
2. Hover over Transactions, then click **ClaimsVault®**. (fig. 1)

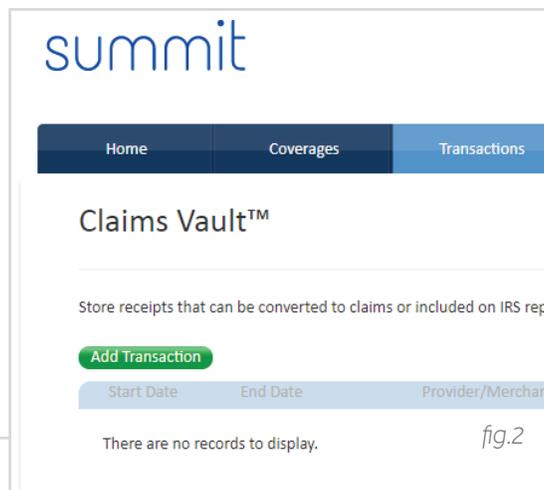
The screenshot shows the Summit portal interface. At the top, the Summit logo is on the left, and the user name 'AaronDPTest' with a profile icon, 'Support', 'Documents', and 'Logout' links are on the right. The date and time 'Oct 09, 2017 | 9:39AM CST' are displayed. A navigation bar contains 'Home', 'Coverages', 'Transactions', 'Cards', and 'Investments'. The 'Transactions' tab is active, showing a sub-menu with 'Transaction History', 'Claims Vault™', and 'Transactions'. The 'Claims Vault™' option is selected. On the left, there are account summaries for FSA (\$3,472.94) and HRA (\$331.13), each with a 'Claims Paid' section. The main content area displays a list of alerts, all dated 'Oct 06, 2017', with a red triangle icon and the message: 'Your password has just been changed. If you didn't make this change, you should change your password immediately or contact Customer Support if you are unable to do so.' One alert dated 'May 26, 2017' says 'This is just a test'. At the bottom right of the alerts, it says 'Showing 5 of 7 Alerts | Show All'.

fig.1

## Add a Transaction to ClaimsVault

From the 'ClaimsVault' page:

1. Click **Add Transaction** button. (fig. 2) A pop-up window displays. (fig. 3)
2. Select the **Transaction Type**.
3. Click **Browse** button to **Upload Receipt/EOB**.
4. Ensure **Add to ClaimsVault** is selected.



### Add A Transaction

Upload your receipts to the Claims Vault to keep them easily accessible for filing your taxes or to later submit as a reimbursable claim. 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**.

**Transaction Type :**  **Required Information**

**Upload Receipt/EOB :**

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

**Add to ClaimsVault™**

**Claimant:**

**Start Date:**  **End Date:**

**Amount:**

**Provider:**

**Description of Service:**

**Notes:**

Line Item Claims

Clear Form | Cancel |

fig.3

5. Select **Claimant**.
6. Enter a **Start and End Date**.
7. Enter total **Amount** of the charge.
8. Enter the **Provider name**.

9. Enter the **Description of Service**.
10. Enter **Notes**.
11. Click **Add Line Item**.
12. Repeat **steps 7–9** for additional line items on the EOB.
13. Click **Submit** if you are done with claims for that receipt/EOB. Repeat **steps 1–11** for additional line items.

## Submit a Claim for Reimbursement

Once a receipt has been submitted to ClaimsVault, it will appear on the ClaimsVault page. To submit a claim for reimbursement:

1. Go to the **ClaimsVault** page.
2. Choose the claim from the menu and click the **Submit for Reimbursement** link next to it. A pop-up window displays. (fig. 4)
3. **Review** the information in the claim.

### Edit Claim

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.

*Required Information*

Upload Receipt/EOB :  Browse [View Receipt](#)

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

Pay Me       Pay Provider

Claimant:

Start Date:       End Date:

Amount:

Provider:

Service Category:       Service Code:       *Select Service Category*

Description of Service:

Plan:

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

Notes: 

Needed to see the doctor for annual checkup

fig.4

4. Select a **Service Category and Service Code**.
5. Select a **Plan**.
6. Choose the **Method of Reimbursement**, Direct Deposit or Check. If you need to review your banking information, click the View Banking Details link.
7. Check the box for I have read and agree to the **Terms and Conditions** (click the link to read the Terms and Conditions).
8. Click **Submit**.



**Midwest Group Benefits, Inc.**  
PO Box 408 | Decorah, IA 52101  
www.midwestbenefits.com | (800) 344-3766