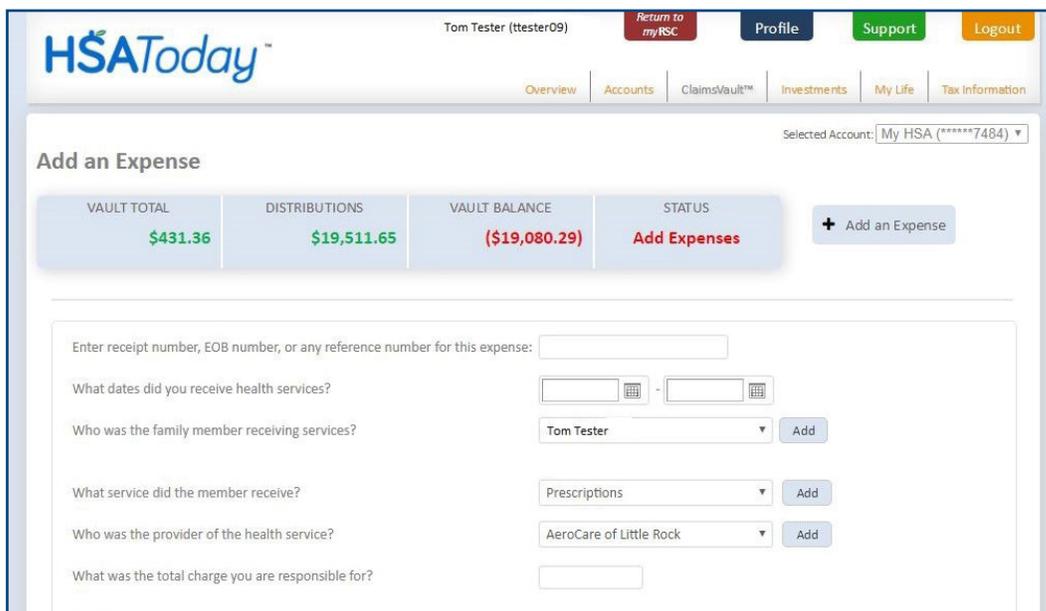




HSA Today® ClaimsVault® User's Guide

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

1. Visit **hsatoday.com** and log in to your account
2. Click on **ClaimsVault®** (upper right). A menu displays.



The screenshot shows the HSA Today ClaimsVault interface. At the top, the user is logged in as Tom Tester (ttester09). The interface includes a navigation bar with links for Overview, Accounts, ClaimsVault™, Investments, My Life, and Tax Information. The ClaimsVault section displays the following account balances:

| VAULT TOTAL | DISTRIBUTIONS | VAULT BALANCE | STATUS |
|-------------|---------------|---------------|--------------|
| \$431.36 | \$19,511.65 | (\$19,080.29) | Add Expenses |

Below the balances is a form titled "Add an Expense" with the following fields:

- Enter receipt number, EOB number, or any reference number for this expense:
- What dates did you receive health services?: -
- Who was the family member receiving services?: Tom Tester (dropdown) + Add
- What service did the member receive?: Prescriptions (dropdown) + Add
- Who was the provider of the health service?: AeroCare of Little Rock (dropdown) + Add
- What was the total charge you are responsible for?:

- a. Click the **'View Claims/Payments'** link to view all claims and payment information.
- b. Click **Add an Expense** to add a new expense. The 'Add an Expense' page displays.

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Add an Expense to ClaimsVault

From the **'Add an Expense'** page:

1. Enter the receipt number, EOB number or any reference number for the expense
2. Enter the date you received the service/ made a purchase
3. Select or Add the name of the family member who received the service
4. Select or Add the service provided
5. Select or Add the service provider
6. Enter total amount of the charge
7. Choose either self-attest or PSP certify
 - **Self-attest:** HSA owner attests that this is a qualified expense and does not require certification from the PSP
 - **PSP certified:** HSA owner requests certification from the PSP
8. Upload receipt by clicking **Browse** to locate receipt image file (PDF)
9. Click **Save & Add** Another Expense (if necessary), or Click Save & Continue

NOTE: If you need to fax in your receipts, on the Add an Expense – Summary page, click Print Fax Cover Page.

Take a Withdrawal from ClaimsVault

1. Click the **ClaimsVault tab**, then click **Distributions**
2. Click **Reimburse Myself**
3. Choose Qualified or Non-Qualified Withdrawal
4. Select the Method of Distribution (Check or Direct Deposit)
 - If you choose Direct Deposit, Select the Account to Reimburse
5. Enter the Distribution Amount
6. Click **Submit**
7. View/Print Confirmation

Pay a Health Provider

1. Click the **ClaimsVault tab**, then click Distributions
2. Click **Pay a Health Provider**
3. Select a Provider to Pay
4. Enter Provider's contact information
5. Click Update, then click Continue
6. Choose an account number from the list or add a new one
7. Enter how much to Pay the Provider
8. Select a Method of Payment
9. Click **Submit**
10. View/Print Confirmation



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