



summit Participant User Experiences

DataPath Summit vs. DataPath myRSCSM

Participant Action or Status	Summit User Experience	myRSC SM User Experience
Participant web portal layout	Modern, open 'dashboard' style; most important info displayed all on one page	Traditional, rigid-column style requiring multiple clicks to access information
Mobile app screen layout	Icon-driven menu	Text-based menu
Activate new card	Yes, via web portal or mobile app	Yes, via web portal or mobile app
Request participant/dependent card	Yes, via web portal or mobile app	Yes, via web portal or mobile app
Report card lost or stolen	Yes, via web portal or mobile app	Yes, via web portal or mobile app
Add/view/edit dependents	Yes, add/view/edit dependents is available via web portal	View only via web portal
Check available balance (purse value)	Yes, via web portal or mobile app	Yes, via web portal or mobile app
Make HSA investments	Make elections, choose portfolio, start/stop investments, move money via web portal and mobile app	Make elections and choose portfolio via web portal
Review claims status	Yes, via web portal or mobile app	Yes, via web portal or mobile app
Review transactions history	Yes, via web portal or mobile app	Yes, via web portal or mobile app
Submit claim via fax	Yes, via Zip-Line TM	Yes, via ClaimsFax
Submit claim via web portal (upload electronic copies of claims)	Yes	Yes

Participant Action or Status	Summit User Experience	myRSC SM User Experience
Submit claim via mobile app (upload electronic copies of claims, including photos of receipts)	Yes, using SnapClaim™	Yes, using SnapClaim™
Store electronic copies of receipts not yet claimed for reimbursement	Yes; ClaimsVault™ is available for all account types (FSAs, HRAs, HSAs, Transit/Commuter)	Yes, via ClaimsVault™ but only for HSAToday® accounts
Repay non-qualified transactions online	Yes	Yes
Respond to reimbursement claims or card transaction in pending/request status by uploading electronic copy of receipt directly to claim or card transaction	Yes, via web portal or mobile app	No
Enroll online, if employer group has requested	Yes, for all account types	Yes, for FSA and HSA accounts only
System response to card transaction (card swipe)	Automated push notification to mobile app (post-login); confirms transaction amount, vendor, remaining purse value	Automated email notification; confirms transaction amount, vendor, remaining purse value
System response to auto-substantiated card transaction	Automated notification via email, web portal and/or postal mail, as plan dictates	Automated email notification
System response to card transaction receipt required first notice	Automated notification via email, web portal and/or postal mail, as plan dictates	Automated email notification
System response to card transaction receipt required second notice	Automated notification via email, web portal and/or postal mail, as plan dictates	Automated email notification
System response to card transaction receipt required third notice/card blocked	Automated notification via email, web portal and/or postal mail, as plan dictates	None
Mobile app capabilities	Access account balances, view/make PB payments, manage standard HSA investment portfolio, view card and claims activity, report card as lost/stolen, submit new claims, upload requested documentation on pending/incomplete claims or non-substantiated card transactions, view alerts, view/edit personal information	Access account balances, view card activity, report card as lost/stolen, submit new claims, view/edit personal information, manage notification subscriptions
Minimum number of clicks required (following web login) to view available card purse value via web	0	2
Minimum number of clicks required (following web login) to view five most recent transactions via web	0	3



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