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Well-being Benefits Administration



Streamlined
Administration with Mobile
App and
Debit Card

Benefits that promote employee physical, mental, and financial well-being are important tools for employer goals to better support the workforce. Summit's cloud-based solution simplifies the administration of these post-tax accounts.

- ✓ Able to accommodate nearly any account-based reimbursement plan
- ✓ Full-featured mobile app for account access via smartphones and tablets
- ✓ Account-linked debit card with card behavior settings per employer plan

Fuel your growth with Summit by offering popular, post-tax well-being benefits.





LSAs

Versatile Accounts that Support Employee Well-being



Medicare Solutions

Healthcare Cost Savings for Older Employees and Retirees



COMPASS™ Card

Highly Customizable to Support Nearly Any Benefit Program

Well-being Benefits Administration > [LSA](#)

Lifestyle Spending Accounts Administration Software

Versatile Accounts that Support

Versatile Accounts that Support Employee Well-being



Physical Activity Expenses



Non-Traditional Health Expenses







Educational and Work-Related Expenses



Household Expenses

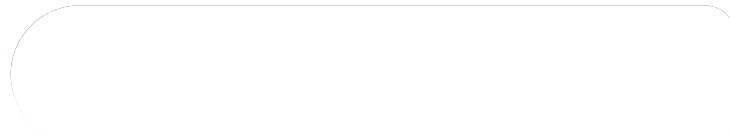
LSAs are post-tax, employer-funded reimbursement accounts that assist employees in accessing products, services, or activities to improve their overall sense of well-being.

Employers can make just about anything eligible for LSA reimbursement. No other benefits account provides companies with so much flexibility to address employee needs and interests. Although nearly unlimited in scope, LSAs are one of the simplest accounts to administer due to the lack of

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|  <p>PHYSICAL ACTIVITY</p> <ul style="list-style-type: none"> At-home fitness equipment Athletic wear Fitness apps Fitness classes Fitness trackers Gym memberships Passes for golf, swimming, skiing Personal trainers Sports equipment |  <p>NON-TRADITIONAL HEALTH EXPENSES</p> <ul style="list-style-type: none"> Cookbooks and cooking classes Food supplements Leadership and spiritual retreats Life coaching Marital counseling Meditation classes Nutrition counseling Parenting classes Yoga classes |  <p>EDUCATION/WORK-RELATED EXPENSES</p> <ul style="list-style-type: none"> Adult education Ergonomic chair/cushions High-speed internet Office supplies Standing desks Student loan reimbursements Tech accessories Transit expenses Wrist pads and supports |  <p>HOUSEHOLD EXPENSES</p> <ul style="list-style-type: none"> Cell phone bills Child and pet care Estate planning Financial advisory services Financial seminars/classes Groceries Home purchase or remodeling costs Rent/mortgage Utilities |
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to administer due to the lack of regulation. Plus, LSAs can be started at any time during the calendar year. They do not have to align with traditional annual enrollment dates.

What better way to get where you want to grow?





Healthcare Cost Savings for Older Employees and Retirees



Medicare
Advantage
EGWP
Waiver
Plans



ICHRAs
for All
Employers



QSEHRAs
for
Companies
Employing
50 or
Fewer



Reimburse
Premiums
and/or
Qualified
Expenses



Provide
Debit
Card and
Mobile
App
Support

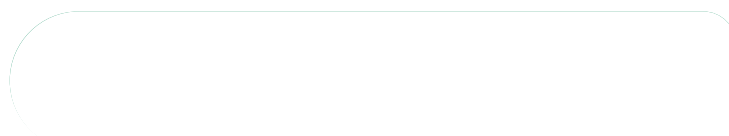
Medicare is often the best option for employees and retirees older than 65, but federal regulations prohibit employers from making direct premium payments for Medicare or Medicare-related coverages. Fortunately, TPAs using Summit can offer employers options that do meet federal guidelines.

- ✓ Employer-sponsored Medicare Advantage Employer Group Waiver Plans (EGWPs) for retirees that provide coverage under Medicare Parts C and D (a/k/a Parts A, B, and D).
- ✓ Individual Coverage HRAs (ICHRAs) that reimburse active or retired employees for healthcare premium costs and/or

qualified medical costs for Medicare Parts B and D, Medicare Advantage (Part C), Medigap/Medicare Supplement, and private health insurance coverage.

- ✓ Qualified Small Employer HRAs (QSEHRA), similar to ICHRAs but for employers of 50 or fewer full-time employees.

Grow your business by using Summit to provide Medicare Solutions.



Well-being Benefits Administration > **COMPASS™ Card**

COMPASS™ Card

Highly Customizable to Support Nearly Any Benefit Program



Lifestyle
Spending
Accounts



Employee
Bonuses
and
Perks



Employee
Support
Programs



Section
139
Disaster
Relief



Medicare
and
Medigap
Solutions

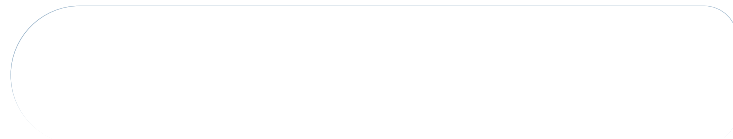
In today's rapidly diversifying benefits market, TPAs need the ability to adapt and innovate. DataPath's COMPASS™ card enables TPAs to offer a highly customizable debit card that can support almost any benefits program.

- ✓ Address employers' specific needs, parameters, usage restrictions, and supported benefits accounts while delivering a first-class customer experience.
- ✓ Accommodate purchases by setting up requirements directly in Summit. Set MCC code restrictions

Summit. Set MCC code restrictions at the employer plan level without any need for technical support.

- ✓ Unique plan parameters are also supported by Summit's full-featured mobile app.

Enjoy a smoother trip to where you want to grow by taking DataPath along for the journey.





“

SECURE
BENEFITS
SYSTEMS

*DataPath
has
helped
us
streamline
our
office
and
our
workflow.*

**Vrenae
Daly**
Comptroller

Well-Being Benefits Brochures



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Growth Solutions

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COBRA and Billing

Well-Being Benefits

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