

File a Claim in ClaimsVault®

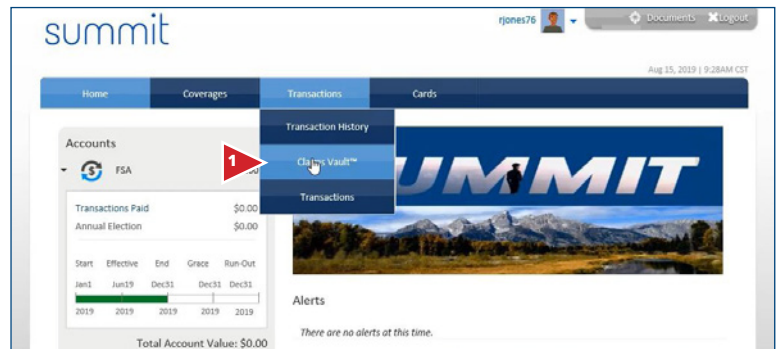
ClaimsVault® may be used as a type of “electronic shoebox” to store medical receipts or Explanation of Benefits. *Saved receipts will remain available to you as long as you have an account in Summit.*

*Another way **ClaimsVault®** may be used is to defer reimbursement. For example, with HSAs you can save your receipts and file a claim for reimbursement any time you want, as long as you had an HSA at the time the purchase was made.*

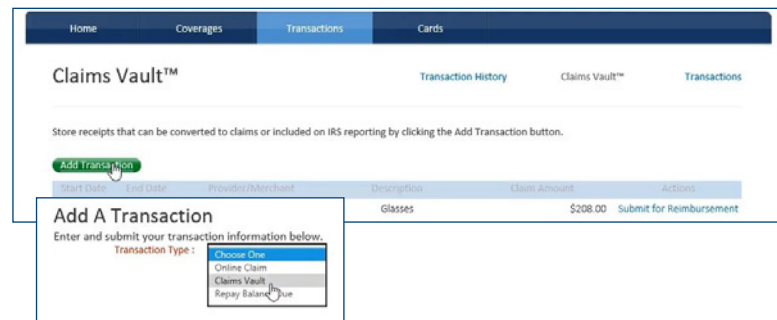
How to File a Claim in ClaimsVault®

Log in to your account*. In the navigation bar at the top of the screen, hover over **Transactions**, and **click on ClaimsVault®**¹.

- Click the *Add Transaction* button.** Choose ClaimsVault® from the dropdown list.
- Click *Browse*** to upload a receipt or EOB.
- Make sure the claimant is correct, then fill in your **start date, amount of service,** and the **description of service.** *If you have several claims you are making, **click Add line item**, to add more claims. **Once you are finished, click the Submit button** to file your claim.*



* Your home page and accounts may look different from what you see here, but the information will be in the same places.



Add A Transaction

Upload your receipts to the Claims Vault to keep them easily accessible for filling 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, jpeg, eps, tif, or png.

Add to ClaimsVault™

Claimant:

Start Date: End Date:

Amount:

Provider:

Description of Service:

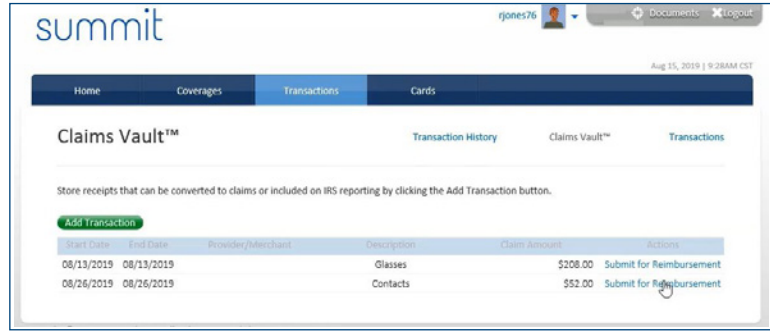
Notes:

Line Item Claims

Service Date	Claimant	Amount	Provider	
<input type="button" value="Calendar"/>	08/25/2019	Robert T Jones	\$52.00	<input type="button" value="X"/>

How to Submit a Claim for Reimbursement in ClaimsVault®

To be reimbursed, once you log in, go to **Transactions**, and click on **ClaimsVault®**. On the transaction you want to be reimbursed, **Click Submit for Reimbursement.**”



a. Select the **Service Category**², and the **Service Code**³. These drop down menus vary by administrator, so be sure to read the choices carefully. Choose the benefit plan you are using, and choose whether you are using Direct Deposit or check, if you have the option. Write in any notes that you may want for future reference, and click the check box next to “I have read and agree to the Terms and Conditions.”

b. Click the **Submit** button to complete your **Claim for Reimbursement.**

The screenshot shows the 'Submit for Reimbursement' form. The form is titled 'Edit Claim' and includes a 'Required Information' section. The form fields are as follows:

- Upload Receipt/EOB: receipt.pdf (with a 'Browse' button and 'View Receipt' link)
- Max Size: 100mb. Supported formats: pdf, bmp, gif, jpg, eps, tif, or png.
- Payment Method: Pay Me, Pay Provider
- Claimant: Robert T Jones
- Start Date: 08/26/2019, End Date: 08/26/2019
- Amount: \$52.00
- Provider: (empty field)
- Service Category: Vision (with a red arrow pointing to it)
- Service Code: Glasses (with a red arrow pointing to it)
- Description of Service: Contacts
- Plan: FSA - FSAMed [01-Jan-2019 to ...]
- Reimbursement: Direct Deposit, Check (with a 'View Banking Details' link)
- Notes: (empty text area)
- Checkbox: I have read and agree to the Terms and Conditions
- Buttons: Cancel, Delete, Submit

If you have further questions, please contact your benefits representative.

