

REACH FOR summit



HRA | HSA | VEBA | FSA | COBRA
RETIREE BILLING | TRANSIT AND MORE

DataPath 

Only one SaaS platform elevates your account administration to a higher level. DataPath Summit lets you conquer the business challenges you face today – as well as those you will face tomorrow.

Rather than limiting you to a ‘flex system,’ DataPath Summit was created to be a cloud-based ‘everything you could need’ administrative solution. Summit integrates account administration with streamlined financial processes, including debit cards, electronic payments, custodial banking, and investment services. Built from the ground up with cutting-edge system architecture, state-of-the-art security, modular design and ultimate flexibility, Summit makes it easier and more affordable to enhance client and broker relationships, gain a competitive advantage, increase profits, and grow your business.

When should you reach for Summit? **When you're ready to conquer problems like these:**

Even when setting up the same plan you've used many times before, you have to set it up like it's a new plan.

Setting up similar employers and benefit plans as if each has completely unique characteristics is time-consuming and inefficient.

Summit's streamlined, wizard-driven processes will save you countless hours of time and thousands of keystrokes. Use Summit's default settings for the most popular plan designs, contribution schedules, reimbursement schedules, and other repetitive tasks, or alter them to create your own. Keep on track with Summit's easy-to-follow progress bar.

Consolidation and outsourcing is such a nightmare that you've had to pass on opportunities to grow your business.

Data integration during outsourcing and consolidation can be so difficult that growth opportunities must be set aside until integration is complete.

Summit was built to meet head-on the reality that consolidation and outsourcing are becoming more prevalent. Summit includes a Master-Sub relationship that is unparalleled in this industry. Roll new books of business under your existing master portfolio and gain comprehensive search and reporting capability while maintaining the unique business rules and customization of each book of business. No other solution offers you such power to seek partnerships or acquisitions without fear of a difficult and costly integration process.

You need an easy way to provide information to referring brokers on your shared clients.

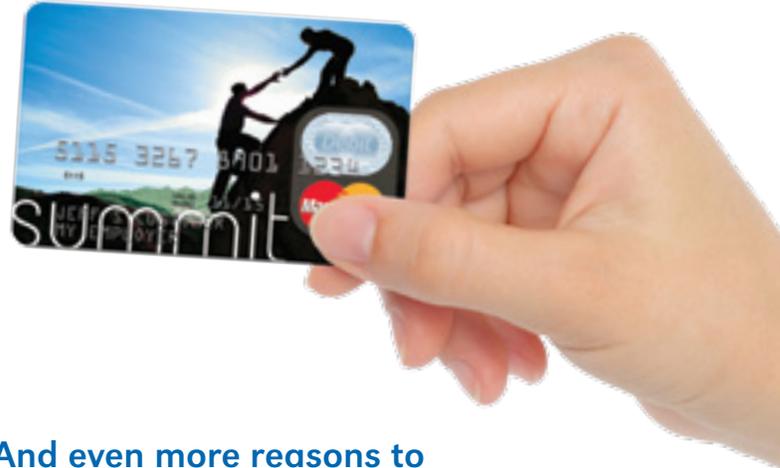
Brokers need access to certain data on shared clients. You need a simple way to give it to them without risking privacy issues.

Summit is the only platform that lets you provide brokers with secure, online access to specified data on shared clients. You control access rights, data segregation, report creation, and more. With Summit, you can form closer relationships with referring brokers to grow your business.

You can't completely brand your admin system and participant portal.

True white-label capability can vastly improve efforts to market your brand. Having another company's brand visible to your customers distracts from your business.

Summit is your private platform, branded to fit your business needs. You have complete freedom to customize your login page and even your web URL address for both the admin system and the participant portal. In fact, DataPath does not appear on any public-facing page or feature. That's reserved for you.



And even more reasons to reach for Summit:

Global Navigation and Search

Summit learns your most frequent daily functions and automatically pushes them to you as you navigate, eliminating endless clicking to find the information you use most. No other web-based solution is designed specifically to allow multiple windows to be open simultaneously.

Top-Notch Reporting Capabilities

Summit's unique drag-and-drop report writer lets you create custom reports within minutes. Management-level dashboards, statistical analysis, and data modeling tools provide 'big data' when you need it.

Data Migration Beyond the Boundaries

Summit makes normal import/export restrictions a relic of the past. Rather than limiting you to a few pre-defined file formats, Summit enables you to specify the format in which you will be providing the data and how Summit can expect it to arrive. From payroll imports to carrier feeds and beyond, importing and exporting doesn't get any easier.

Reach for a higher level of account administration.

Reach for DataPath Summit.

For more information, contact:
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DataPath 

Let's work together.

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