



Summit HSA

Summit provides comprehensive Health Savings Account (HSA) features for administrators, employers, and participants. TPAs can offer the hands-on, professional account management services with built-in investment options. It's a level of service that many banks won't offer.



One-stop Shop

Summit is a 'one stop shop' for full HSA management with integrated account administration, banking, and investments. DataPath owns the custodial banking relationship.



Hand-off Administration

TPAs can do as much or as little administration as they like. Choose to turn off MCC restrictions and allow your participants to self-adjudicate their purchases, or be more hands on and offer your expertise to account owners.



Online Enrollment and Elections for Participants

Participants can use Summit's online portal to enroll in their HSA and make elections in just a few quick steps.



Easy HSA Rollovers

At any time, account owners may roll over an HSA from a different custodian. Once we receive the transfer form, it takes between 2-4 weeks for the funds to appear in their balance.



Fully Integrated Banking

Summit is fully integrated with DataPath's custodial bank – giving full visibility into the accounts and reporting.



Investing Made Easy

Summit features integrated investing, with investment options and educational materials available right in the portal. DataPath's certified investment advisor selects and maintains investment options and model portfolios to help participants maximize their investment earnings.



Higher Level of Service

Summit provides compliant plan document templates that TPAs can customize, or you can upload and share your own. You can also perform nondiscrimination testing in the portal.



Convenient Mobile App

HSA owners can use the Summit mobile app to view and edit their profile, see account balances and purchases, upload receipts and file claims, and manage investments.