datapath summit

2024 Partner Marketing Catalog & Client Rewards Program Guide

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Helping You Get Where You Want to Grow

One of the ways in which DataPath Summit helps our clients get where they want to grow is through our constantly-expanding Partner Marketing and Client Rewards program. Clients have access to a wide variety of prepared materials and professional services to help with sales, marketing and educational efforts to brokers, employers, and employee participants.

- **Client Rewards –** Our unique incentive program for all clients recognizes factors such as tenure, volume, and number of products licensed. Rewards tiers are achieved through points accumulation. Each tier comes with a set amount of DataPath Dollars™ that can be redeemed year-round for products, services, and activities through the Marketing Portal.
- **Enrollment Forms and Educational Materials –** Our Marketing Portal store contains hundreds of print and video resources, ranging from simple fact sheets and quick-start guides to comprehensive educational and training booklets. Each is immediately downloadable "as-is" or can be branded to you (or co-branded to you and a broker partner or employer client).
- **The Adventures of Captain Contributor™ –** We created this innovative, year-round, brandable employee education and engagement program exclusively for use by our clients and their customers. Winner of over a dozen national awards, Captain Contributor includes an extensive website, comic books and coordinated videos, explainer videos, an active blog, continuous social media presence, and selected support items.
- **Marketing Support Hotline –** Call **1-833-FOR-TPAS** for direct access to the DataPath marketing department when you have a question or otherwise need immediate assistance.

DataPath Client Rewards

Our Client Rewards program is unique within the benefits administration technology industry. Upon registration, your company is placed in one of four earned rewards tiers, determined by criteria including:

- Tenure (in years) as a DataPath client
- Number of lives you are administering on our platforms
- Activities that positively reflect and promote the close relationship between your business and DataPath Summit, such as providing a testimonial or referral

The four tier levels are as follows:

Platinum: 150,001+ Client Rewards points

Gold: 75,001 - 150,000 Client Rewards points

Silver: 25,001 - 75,000 Client Rewards points

Bronze: 0 - 25,000 Client Rewards points

Program Registration

Registering for Client Rewards and access to the Marketing Portal is simple:

- Visit **https://marketing.dpath.net** and select the "**Click here to register**" link
- Fill out the required information fields – **User Name, Name, Company, Address, Email, Telephone**
- Click **Register**

You will receive notification by email that your registration has been approved, typically within 24 hours.

Your company can have multiple registered users. Client Rewards points and DataPath Dollars are rewarded annually per company, not per user, so points redemptions made by all registered company users will come out of the same company account.

Points System and Tiers

Here's how you earn Client Rewards points:

Number of lives:	1 point per life being administered on our platform
Longevity:	1,000 points per year as a DataPath client
Growth bonuses:	1,000 points for each 1% growth in life count, quarter over quarter
Testimonial:	3,000 points for a client testimonial used in our sales and marketing efforts
Demo Referral:	3,000 points for a referral that results in a demo for a new line of service
New LOS:	10,000 points for adding a new line of service category (CDH, HSA, or Billing)
New Client Referral:	20,000 points for a successful referral resulting in a new DataPath Summit client

Points accrue over a rolling 24-month period. At month 25, points from month 1 are removed from the cumulative total and points from month 25 are added in, and so on.

Redeeming Your Points: DataPath Dollars™

DataPath Dollars can be spent just like regular money to purchase print and video marketing materials, conference attendance, and other products, services, and activities available from time to time. Each purchase is deducted from your current DataPath Dollars balance.

Each calendar year, Client Rewards participants are assigned to the tier level they have earned based on accumulated point totals for the prior calendar year. The annual reward is determined by tier level:

Tiers:

Bronze

$2,500 DATAPATH DOLLARS (annually)

Cumulative 0-25,000 points

Silver

$7,500 DATAPATH DOLLARS (annually)

Cumulative 25,001-75,000 points

Gold

$15,000 DATAPATH DOLLARS (annually)

Cumulative 75,001-150,000 points

Platinum

$25,000 DATAPATH DOLLARS (annually)

Cumulative 150,001 + points

Each client has a unique DataPath Dollars code. When this coupon code is entered during checkout from the Marketing Portal store, the order cost for eligible purchases is zeroed out and the purchase is deducted from your current DataPath Dollars balance.

Tier levels are recalculated each calendar quarter. If your earnings raise your tier level during the year, the difference in DataPath Dollars between the new and previous tier levels will be added to your account. However, if your tier level decreases, you will maintain the previous earned amount of DataPath Dollars through the end of the current year (in other words, your earnings will not reset until the following February 1).

DataPath Dollars for each calendar year expire on January 31 of the year following the one in which they were received. New allocations are made each February 1.

**One DataPath Dollar equals one U.S. dollar in Partner Marketing value. DataPath Dollars have no actual cash value. Each allocation of DataPath Dollars is valid through 1/31 of the year after the one in which the allocation was received.*

Marketing Portal Store

Inside the Marketing Portal, you can check your Client Rewards balance, access the marketing materials store, view the monthly Client Digest articles and client alerts, and much more.

Use DataPath Dollars to purchase digital downloads of marketing materials, branding of those materials, discounts on conference registrations, and more.

Printing, shipping, and merchandise items are available for purchase through the store using a standard credit or debit card via Paypal. DataPath Dollars cannot be used to pay for these items.

Materials and Purchasing

Inventory in the Marketing Portal store (**http://marketing.dpath.net**) includes:

- Sales, educational, and enrollment support print and video materials for all lines of service
- Captain Contributor employee education and engagement materials including comic books, fact sheets, and videos
- TPA staff training materials that you can download at no charge

DataPath is the only technology solutions provider in our industry to offer enrollment and educational materials in multiple, coordinated design themes.

Adventures (ADV)

Our 'Adventures' line is a themed set featuring images of people in outdoor settings. It includes materials and FAQs for all lines of service: FSA, DCAP/DCFSA, HRA, ICHRA, QSEHRA, EBHRA, HSA, LSA, SLRA, COBRA, Direct and Retiree Billing, Transit and more.

Around the Office (ATO)

'Around the Office' is a themed set of materials featuring images of people in office-based work settings. It includes enrollment materials and FAQs for all lines of service: FSA, DCAP/DCFSA, HRA, ICHRA, QSEHRA, EBHRA, HSA, LSA, SLRA, COBRA, Direct and Retiree Billing, Transit and more.

Around the Shop (ATS)

Our 'Around the Shop' line is a themed set featuring images of people in 'blue collar' work settings. It includes materials and FAQs for all lines of service: FSA, DCAP/DCFSA, HRA, ICHRA, QSEHRA, EBHRA, HSA, LSA, SLRA, COBRA, Direct and Retiree Billing, Transit and more.

The Adventures of Captain Contributor (CC)

Captain Contributor includes coordinated comic books, fact sheets, and videos for FSAs, DCAPs, HSAs, Commuter/Transit accounts, Benefits Debit Cards, and COBRA; and fact sheets for LPFSAs, HRAs, ICHRAs, EBHRAs, QSEHRAs, and LSAs.

Adventures / Around the Office / Around the Shop

COBRA and Billing

- COBRA Compliance
- COBRA FAQs
- Direct and Retiree Billing Administration
- How to make a COBRA Payment in Summit
- Summit COBRA Employer Training Guide

FSA

- Claims Documentation/Substantiation Requirements
- FSA Carryover for Employees
- FSA Carryover for Employers
- FSA-DCAP Enrollment Booklet – myRSC℠
- FSA-DCAP Enrollment Booklet – myRSC℠ (Spanish)
- FSA-DCAP Enrollment Booklet – Summit
- FSA-DCAP Enrollment Booklet – Summit (Spanish)
- FSA Eligible Expenses
- FSA/Section 125 Cafeteria Plan Overview and FAQs
- Health FSA Need-to-Knows
- How to Submit/Substantiate an FSA Claim
- Limited Purpose FSA Frequently Asked Questions
- Limited Purpose FSA Need-to-Knows
- Online Claims Entry: Receipt Upload
- Section 125 Plan with FSA (Buckets)
- Summit HSA Employer Training Guide
- Summit HSA Investing How-To Guide
- Time to Enroll in HSA Benefits (Summit Card)
- Time to Enroll in Flex Benefits – mySourceCard®
- Time to Enroll in Flex Benefits – Summit

HSA

- HSA Eligible Expenses
- HSA Enrollment Booklet – HSAToday®
- HSA Enrollment Booklet – Summit
- HSA Enrollment Booklet – Summit (Spanish)
- HSA Frequently Asked Questions
- HSA Medicare Quick Guide
- HSAs: Answers to Employer Questions
- HSAToday® ClaimsVault User Guide
- HSAToday® Investing How-To Guide
- HSAToday® Online Enrollment Guide
- HSA Investments – HSAToday®
- HSA Investments – Summit
- NATC Booklet – HSAToday®
- NATC Booklet – Summit
- NATC HSA Application/Beneficiary Designaton
- Top 10 Reasons You Should Have an HSA

HRA

- EBHRA Need-to-Knows
- How to Submit an HRA Reimbursement Claim
- HRA Need-to-Knows
- HRA Plan Type Summary
- HRA with Claims Crossover
- Individual Coverage HRAs
- ICHRA Need-to-Knows
- QSEHRA Need-to-Knows
- Qualified Small Employer HRAs

Lifestyle Spending Accounts

- Lifestyle Spending Account (LSA) Need-to-Know

Multiple Account Types

- COMPASS™ Card Sales Sheet
- Debit Card FAQs
- Debit Card Substantiation
- FSA/HRA/HSA Plans Comparison
- mySourceCard® FAQs
- mySourceCard® Replenishment FAQs
- mySourceCard® Sales Pitch for Employers
- Online Claims Entry: Receipt Upload
- Summit CDH Employer Training Guide
- Summit Card FAQs
- Summit Card Replenishment FAQs
- Summit Card Sales Sheet for Employers
- Summit Mobile Quick Start Guide
- Summit Quick Guide: CDH Reporting
- Summit Quick Guide: Checking Your Balance and Transactions
- Summit Quick Guide: ClaimsVault™
- Summit Quick Guide: Employer Portal
- Summit Quick Guide: How to File a Claim
- Summit Quick Guide: How to File a Claim Using Mobile Summit
- Summit Quick Guide: Participant Portal
- Welcome to Mobile myRSCSM
- Welcome to Mobile Summit

POP and ERISA

- ERISA: Does My Plan Need To Be Wrapped?
- Form 5500: Have You Filed?
- Simple Cafeteria Plans
- Understanding Plan Documents

Student Loan Repayment Assistance

- SLRA Need-to-Knows

Summit Transition Materials

- Summit Employer User Experience
- Summit Participant User Experience
- Summit CDH Transition Announcement Kit
- Summit COBRA Transition Announcement Kit

Transit

- Time to Enroll in Transit Benefits
- Transit/Commuter Account Need-to-Knows
- How to Submit/Substantiate a Transit Claim
- Transit Debit Card FAQs

Additional Partner Marketing Materials

Videos
- DCAP Overview for Employees
- FSA Overview for Employees
- FSA Carryover for Summit Card Groups
- FSA Carryover for mySourceCard Groups
- FSA Carryover for Non-Card Groups
- HSA Overview for Employees
- myRSCSM Mobile App Demo
- Online Claims Entry Demo
- What is an HSA? for Employees
- Summit: Checking Your Balance and Card Transactions
- Summit: How to File A Claim in ClaimsVault
- Summit: How to File A Claim Using the Mobile App
- Summit: How to File A Claim
- Summit: How to Make a COBRA Payment
- Summit: Mobile App Walkthrough
- Summit: Updating Your Employee Profile
- Summit: Registering a New Account in the Mobile App
- Summit: Registering A New Employee Account

Video Bundle for Employees
- Includes first 9 videos listed above as a packaged set

Custom Marketing Services
- Extensive revisions to existing materials

TPA Staff Training
- DPI Suite Video Training Series (CDH)
- DPI Suite Video Training Series (Premium Billing)
- DPI Suite Video Training Series (Premium Billing)
- Summit Basecamp 2022 Best Practices Recordings
- Summit Basecamp 2023 Best Practices Recordings
- DPI Suite Video Training Series (Premium Billing)
- Summit Best Practices: Enrollment
- Summit Best Practices: FSA and HRA Setup
- Summit Video Training Series (CDH)
- Summit Video Training Series (Premium Billing)

Forms
- Benefit Election Change Form
- DCAP/DCFSA Recurring Expense Form
- Debit Card Substantiation Form
- Employee Additional Cart Request Form
- Employee Direct Deposit Authorization
- Employee HIPAA Authorization
- Employer Bank Draft for Administrative Fees
- ER User Access Request/Removal Form
- FSA Medical Recurring Expense Form
- HSA Request for Distribution Form
- HSAToday Transfer Form
- Summit HSA Transfer Form

Captain Contributor

Videos
- Captain Contributor Benefits Debit Card Video
- Captain Contributor COBRA Video
- Captain Contributor DCAP Video
- Captain Contributor FSA Video – 1st and 2nd Edition
- Captain Contributor HRA Video
- Captain Contributor HSA Video – 1st and 2nd Edition
- Captain Contributor Introductory Video
- Captain Contributor Transit Video
- Captain Contributor Explains: Benefits Debit Cards
- Captain Contributor Explains: Benefits Mobile Apps
- Captain Contributor Explains: COBRA Insurance
- Captain Contributor Explains: Eligible Expenses
- Captain Contributor Explains: HDHPs and HSAs
- Captain Contributor Explains: How FSAs Work
- Captain Contributor Explains: HSA Funding
- Captain Contributor Explains: ICHRAs
- Captain Contributor Explains: LSAs
- Captain Contributor Explains: Planning for Expenses
- Captain Contributor Explains: Preparing for Enrollment
- Captain Contributor Explains: Tax Savings
- Captain Contributor Explains: The Uniform Coverage Rule

Comic Books
- Captain Contributor Benefits Debit Card Comic Book
- Captain Contributor COBRA Comic Book
- Captain Contributor DCAP Comic Book – 1st and 2nd Edition
- Captain Contributor FSA Comic Book – 1st and 2nd Edition
- Captain Contributor HSA Comic Book – 1st and 2nd Edition
- Captain Contributor HRA Comic Book

- Captain Contributor Introductory Comic Book
- Captain Contributor Transit Comic Book

Fact Sheets
- Benefits Debit Card Fact Sheet
- COBRA Fact Sheet
- DCAP/DCFSA Fact Sheet
- FSA Fact Sheets - 1st, 2nd and 3rd Edition
- HRA Fact Sheets (HRA, ICHRA, EBHRA, QSEHRA)
- HSA Fact Sheets - 1st and 2nd Edition
- LPFSA Fact Sheet
- LSA Fact Sheet
- Transit Fact Sheet

Posters
- Captain Contributor Posters – Blank Word Bubble
- Captain Contributor Posters – No Words or Bubble
- Captain Contributor Posters – Save on Taxes
- Captain Contributor Posters – Save on Taxes/Open Enrollment

Sales and Marketing Aids
- Captain Contributor Document Templates
- Captain Contributor Presentation Folder

THE ADVENTURES OF

CAPTAIN CONTRIBUTOR™ & BETTY THE BENEFACTRESS

CAPTAIN CONTRIBUTOR AND BETTY THE BENEFACTRESS

ARE ALWAYS ON CALL. THEY ARE HERE TO SHOW YOU HOW TO MAKE THE MOST OF YOUR EMPLOYER-SPONSORED BENEFITS, AND HELP SAVE YOU MONEY ON YOUR TAXES.

VISIT **CAPTAINCONTRIBUTOR.COM** FOR AWARD-WINNING VIDEOS, EDUCATIONAL CONTENT AND INFORMATIVE BLOGS. WHILE THERE, SIGN UP TO RECEIVE UPDATES SUCH AS BENEFITS NEWS AND VALUABLE INSIGHTS FROM THE WORLD'S ONLY BENEFITS-DEFENDING SUPER-DUO.

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GOLD WINNER, AVA DIGITAL AWARDS **(x2)**
WINNER, NATIONAL HEALTH INFORMATION AWARDS **(x3)**
GOLD WINNER, DIGITAL HEALTH AWARDS **(x4)**
WINNER, MARCOM AWARDS
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WHERE DO YOU WANT TO grow?

DataPath Summit | PO Box 55068 | Little Rock, AR 72215 | (800) 633-3841 | datapathsummit.com