



HSAToday® ClaimsVault® User's Guide

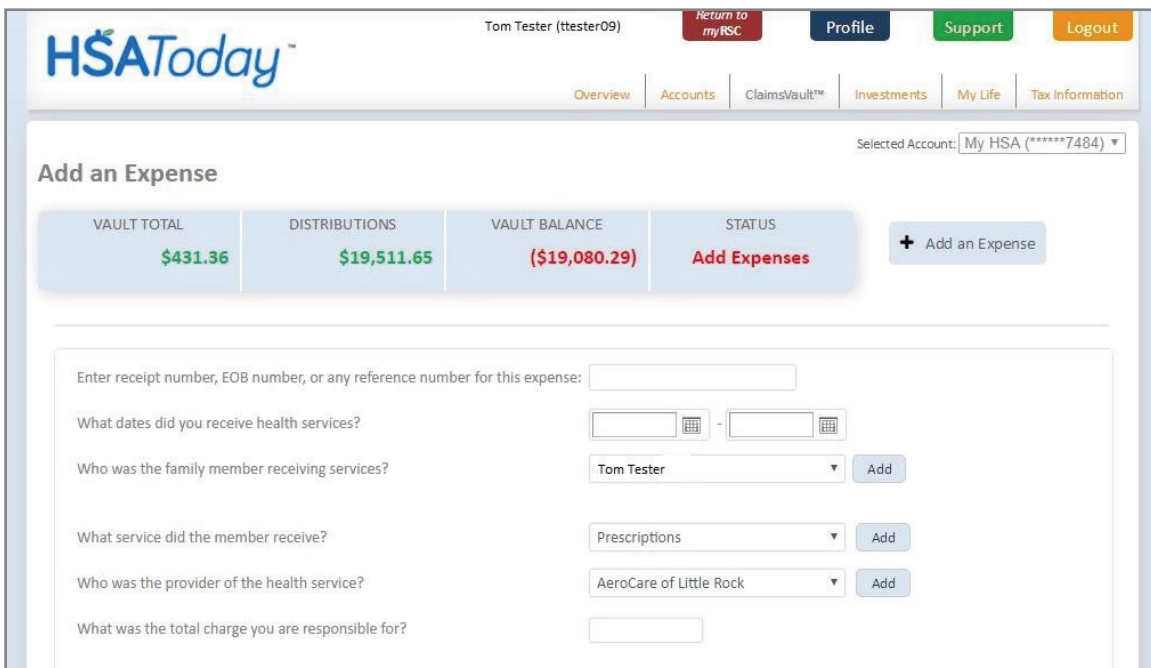
DataPath's patented ClaimsVault® is an online 'shoebox' that allows HSAToday® users to store their documents and receipts online for qualified HSA expenses. The following guide provides an overview on how to use ClaimsVault:

1. Visit **myhsatoday.com** and log in to your account
2. Click on ClaimsVault® (upper right). A menu displays.
 - a. Click the 'View Claims/Payments' link to view all claims and payment information.
 - b. Click Add an Expense to add a new expense. The 'Add an Expense' page displays.

Add an Expense to ClaimsVault

From the 'Add an Expense' page:

1. Enter the receipt number, EOB number or any reference number for the expense
2. Enter the date you received the service/made a purchase



The screenshot shows the HSAToday ClaimsVault interface. At the top, the user is logged in as Tom Tester (ttester09) with links for Return to myRSC, Profile, Support, and Logout. A navigation bar includes Overview, Accounts, ClaimsVault™, Investments, My Life, and Tax Information. The 'Add an Expense' page is displayed for the selected account 'My HSA (*****7484)'. A summary table shows the Vault Total (\$431.36), Distributions (\$19,511.65), and Vault Balance (\$19,080.29). Below this is a form to add a new expense with fields for receipt number, dates, family member, service type, provider, and total charge.

VAULT TOTAL	DISTRIBUTIONS	VAULT BALANCE	STATUS
\$431.36	\$19,511.65	(\$19,080.29)	Add Expenses

Selected Account: My HSA (*****7484)

Add an Expense

Enter receipt number, EOB number, or any reference number for this expense:

What dates did you receive health services? -

Who was the family member receiving services?

What service did the member receive?

Who was the provider of the health service?

What was the total charge you are responsible for?

3. Select or Add the name of the family member who received the service
4. Select or Add the service provided
5. Select or Add the service provider
6. Enter total amount of the charge
7. Choose either self-attest or PSP certify
 - Self-attest: HSA owner attests that this is a qualified expense and does not require certification from the PSP
 - PSP certified: HSA owner requests certification from the PSP
8. Upload receipt by clicking Browse to locate receipt image file (PDF)
9. Click Save & Add Another Expense (if necessary), or Click Save & Continue

NOTE: If you need to fax in your receipts, on the Add an Expense – Summary page, click Print Fax Cover Page.

Take a Withdrawal from ClaimsVault

1. Click the ClaimsVault tab, then click Distributions
2. Click Reimburse Myself
3. Choose Qualified or Non-Qualified Withdrawal
4. Select the Method of Distribution (Check or Direct Deposit)
 - If you choose Direct Deposit, Select the Account to Reimburse
5. Enter the Distribution Amount
6. Click Submit
7. View/Print Confirmation

Pay a Health Provider

1. Click the ClaimsVault tab, then click Distributions
2. Click Pay a Health Provider
3. Select a Provider to Pay
4. Enter Provider's contact information
5. Click Update, then click Continue
6. Choose an account number from the list or add a new one
7. Enter how much to Pay the Provider
8. Select a Method of Payment
9. Click Submit
10. View/Print Confirmation

