



# summit

## online Claims Entry Quick Start Guide

The following guide provides step-by-step instructions on how to enter an online claim in Summit. Go to <https://member.midwestbenefits.com>

- Step 1:** Log in to your Summit account.
- Step 2:** From the Home page, click the **Transactions** heading and select **Transactions** from the drop-down menu. (Figure 1)
- Step 3:** From the Transactions page, click the blue **Add Transaction** button (Figure 2).  
*The Add A Transaction pop-up window will display.*
- Step 4:** In the Add A Transaction pop-up window, select Online Claim from the **Transaction Type** drop-down menu. (See Figure 3)  
*Additional claims fields will display.*
- Step 5:** **Upload Receipt/EOB** using the blue upload a file button.
- Step 6:** Select payment type (**Pay Me**) radio button.
- Step 7:** Choose **Claimant** from the drop-down menu (*if no dependents are listed, select your name*)
- Step 8:** Select the **Start and End dates**. You may enter directly into text box or use the Calendar tool.



fig. 1

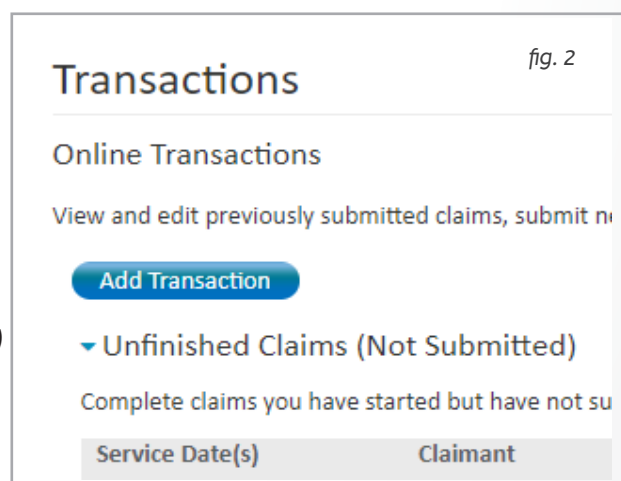


fig. 2

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- Step 9:** Enter the **Amount** of the claim.
- Step 10:** Enter the **Provider** name.
- Step 11:** Select a **Service Category** and **Service Code** using the drop-down menus.\*\*
- Step 12:** Enter a **Description of Service** in the text box.
- Step 13:** Select the **Plan** from the drop-down menu.
- Step 14:** Select a **Reimbursement** type (Direct Deposit or Check) using the radio buttons.
- Step 15:** Enter **Notes** (if necessary).
- Step 16:** Select the "I have read and agree to the **Terms and Conditions**" check box.
- Step 17:** Click the blue **Add Line Item** & blue **Submit**. (See Figure 4)

\*\* for a medical FSA plan, make sure to select a **Service Category** beginning with "Flex Plan". Failure to do so may cause a delay in your claim processing & reimbursement.

The screenshot shows the 'Add A Transaction' form. At the top, it says 'Add A Transaction' and provides instructions: 'Enter and submit your claim information below. 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**. If you don't have all of the details for your claim, click **Finish Later** to save what you have entered then come back later to finish and submit your claim.'

The form includes the following fields and options:

- Transaction Type:** A dropdown menu with 'Online Claim' selected.
- Upload Receipt/EOB:** A text box with a 'Select files...' button. Below it, it says 'Max Size: 100mb. Supported formats: pdf, bmp, gif, jpg, eps, tif, or png.'
- Payment Method:** Radio buttons for 'Pay Me' (selected) and 'Pay Provider'.
- Claimant:** A dropdown menu with 'Claimant Name' selected.
- Start Date:** A date picker with a calendar icon.
- End Date:** A date picker with a calendar icon.
- Amount:** A text box.
- Provider:** A text box.
- Service Category:** A dropdown menu with '--Select Category--' selected.
- Service Code:** A dropdown menu with '--Select Code--' selected.
- Description of Service:** A text box.
- Plan:** A dropdown menu.
- Reimbursement:** Radio buttons for 'Direct Deposit' and 'Check'.
- Notes:** A large text area.
- Terms and Conditions:** A checkbox labeled 'I have read and agree to the Terms and Conditions'.

The form is labeled 'fig. 3' in the bottom right corner.

This screenshot shows the bottom section of the form. It includes:

- A large empty text box for notes.
- A checkbox labeled 'I have read and agree to the Terms and Conditions'.
- A blue button labeled 'Add Line Item'.
- At the bottom right, there are links for 'Clear Form', 'Cancel', 'Finish Later', and a blue button labeled 'Submit'.

This section is labeled 'fig. 4' in the top right corner.