



Benefit manager (CVX) **User manual**

Summer 2016

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Introduction

The purpose of this document is to support you in using Benefit Manager to manage enrollment information and add, change, reinstate, and terminate member records according to your Group's needs. We intend to provide an introduction to the Benefit Manager interface and give you the tools you need to use the interface to perform your enrollment work quickly and securely.

Depending upon your needs as a user, we assume you have sufficient security clearance to use Benefit Manager according to your Group's needs. We also assume that you have access to the Benefit Manager application and that you have been given a valid user name and password to access the Benefit Manager application. We recommend you use Internet Explorer 9.0 or later to run Benefit Manager. You can also work with other browsers, however your results may vary

We are using standard Windows terminology to familiarize you with the Benefit Manager interface, so if anything is unclear to you, please ask our friendly Client Manager team!

If you have specific feedback about this user guide, please contact our Technical Writer, [Nancy Lindsay](#).

Let's get started!

Chapter 1: getting to know Benefit Manager

This section explains how to access Benefit Manager using the Davis Vision web site and familiarizes you with the Benefit Manager application. When you have completed your work, you can logout to protect member security and ensure data integrity. If you have any trouble logging in or you need different permissions to use the Benefit Manager application, contact technical support at **1 (888) 343-3460**.

Note: If you need to change your access rights or some other aspect of your Benefit Manager experience, contact your Davis Vision Client Manager for assistance.

Accessing Benefit Manager

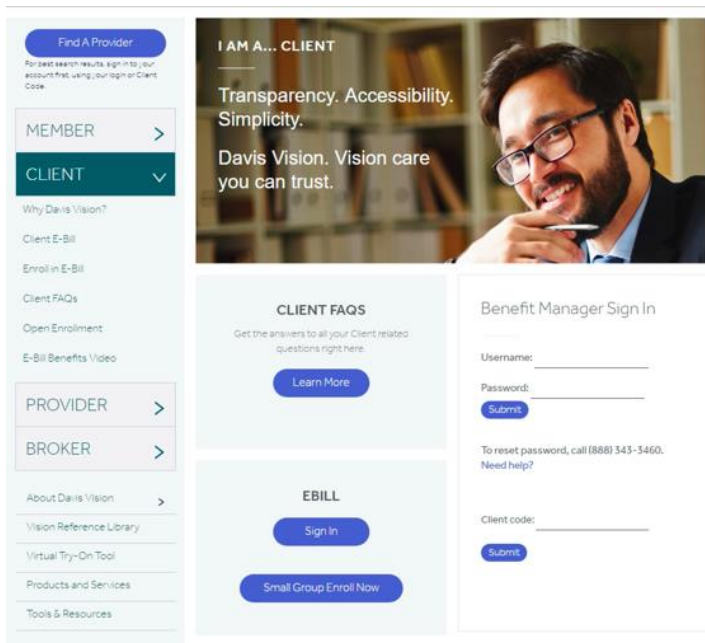
To access Benefit Manager:

1. Access the Davis Vision web site at <https://www.davisvision.com/client/>

The client web site page displays.

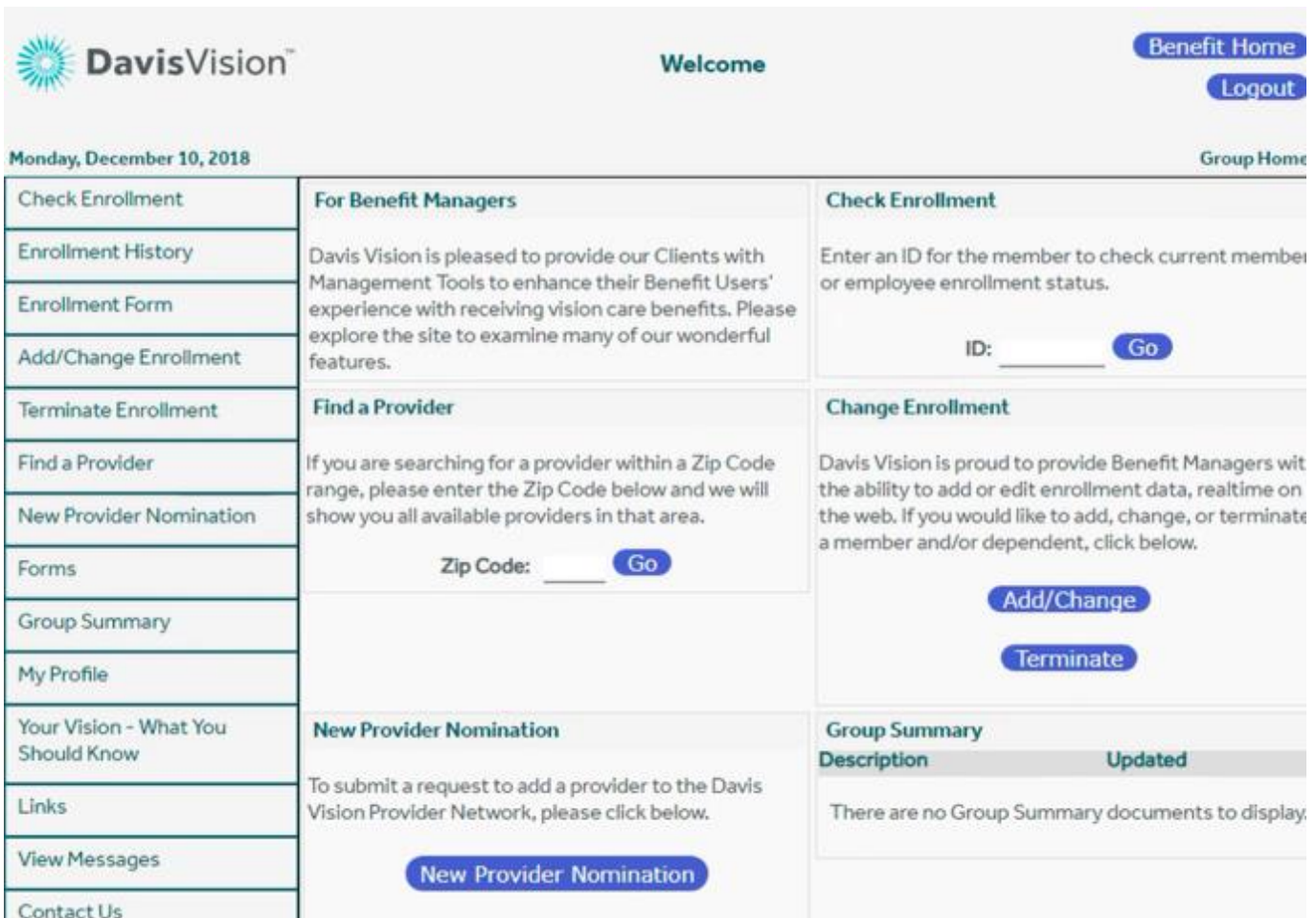
2. Look for the **client sign in** section.

Note: This may display slightly differently for different groups, but the input fields are the same.



The screenshot shows the Davis Vision Client website. On the left is a navigation menu with links for Find A Provider, MEMBER, CLIENT (selected), Why Davis Vision?, Client E-Bill, Enroll in E-Bill, Client FAQs, Open Enrollment, E-Bill Benefits Video, PROVIDER, BROKER, About Davis Vision, Vision Reference Library, Virtual Try-On Tool, Products and Services, and Tools & Resources. The main content area features a header with the text 'I AM A... CLIENT' and 'Transparency. Accessibility. Simplicity. Davis Vision. Vision care you can trust.' Below this is a 'CLIENT FAQs' section with a 'Learn More' button. To the right is a 'Benefit Manager Sign In' section with fields for Username, Password, and Client code, each with a 'Submit' button. There is also a 'Small Group Enroll Now' button at the bottom.

3. In the **username** field, enter your username and click **tab**.
4. In the **password** field, enter your password and click **submit**.
 - If you cannot log into the web site the first time, contact Davis Vision support at **1(888) 343-3460**. Explain to technical support who you are and the login credentials you have been given.
 - If you need to re-set your password, click the **reset password** link and follow the directions to receive a new password. You will need to enter a valid e-mail address to accomplish this task.
 - If your username and password are valid, the Benefit Manager home page displays as shown in the next figure.



The screenshot shows the DavisVision Benefit Manager home page. At the top, there is a header with the DavisVision logo, a "Welcome" message, and links for "Benefit Home", "Logout", and "Group Home". Below the header, the date "Monday, December 10, 2018" is displayed. The main content area is divided into three columns. The left column contains a sidebar with links: Check Enrollment, Enrollment History, Enrollment Form, Add/Change Enrollment, Terminate Enrollment, Find a Provider, New Provider Nomination, Forms, Group Summary, My Profile, Your Vision - What You Should Know, Links, View Messages, and Contact Us. The middle column is titled "For Benefit Managers" and contains sections for "Check Enrollment" (with a text input for ID and a "Go" button), "Find a Provider" (with a text input for Zip Code and a "Go" button), and "New Provider Nomination" (with a "New Provider Nomination" button). The right column contains sections for "Check Enrollment" (with a text input for ID and a "Go" button), "Change Enrollment" (with "Add/Change" and "Terminate" buttons), and "Group Summary" (with a "Description" and "Updated" header, and a message "There are no Group Summary documents to display").

From this home page, you can access all of the Benefit Manager operations, including adding a new member, changing a member's benefits, terminating or reinstating a member, finding a provider, checking the enrollment of a current member, and sending ID cards to current members.

Understanding the enrollment transaction rules

Before you get started, it is important to understand the enrollment transaction rules when adding new members, changing existing member records, terminating member records, and reinstating terminated members to prevent duplicate entries and ensure appropriate coverage. Duplicate records could mean that your group is double-billed unnecessarily.

Changing the effective date or subscriber category for a current enrollment record

When you need to change the effective date (date that benefits are set to begin) for a member or a family, due to a change in subscriber category (usually due to a location code change), follow this process:

1. Make a note of the subscriber ID and/or social security numbers for the enrollment records you need to change.
2. Follow the instructions for terminating the existing enrollment record as explained in [Terminating an enrollment record](#).
3. Follow the instructions for adding an enrollment record using the same subscriber ID/SSN information (if applicable) as explained in [Adding an enrollment record](#) using the new Effective Date and category code.

After you submit this change, Benefit Manager creates a new Subscriber record with the same ID as before.

Changing the subscriber's member category (but not the contract or effective date)

To change the subscriber's member category but not the benefit contract or the effective date, follow the instructions in [Modifying an existing enrollment record](#) to change the member category only. Benefit Manager terminates the original record automatically and updates the member's eligibilities with the new member category.

Adding the first dependent(s) to a subscriber & spouse record

When a subscriber and spouse have enrollment records and they add one or more dependents:

1. Make a note of the subscriber's member ID and social security number, if applicable.

2. Terminate the subscriber and spouse enrollment record, following the instructions explained in [Terminating an enrollment record](#). Make a note of the **termination date**.
3. Add a new family record, including the subscriber, the spouse, and any new dependents. Set the **effective date** for the day after the **termination date** you entered in the previous step. Use the instructions in [Adding an enrollment record](#) to complete the process.

Removing a spouse from a family record

To remove a Spouse from a family enrollment record:

1. Make a note of the subscriber's member ID and social security number, if applicable.
2. Terminate the family enrollment record, following the instructions explained in [Terminating an enrollment record](#). Enter the spouses last day of coverage in the **termination date** field.
3. Add a new family record, including the subscriber and any remaining dependents. Set the **effective date** for the day after the **termination date** you entered in the previous step. Use the instructions in [Adding an enrollment record](#) to complete the process.

Changing from family to employee only coverage within a benefit period

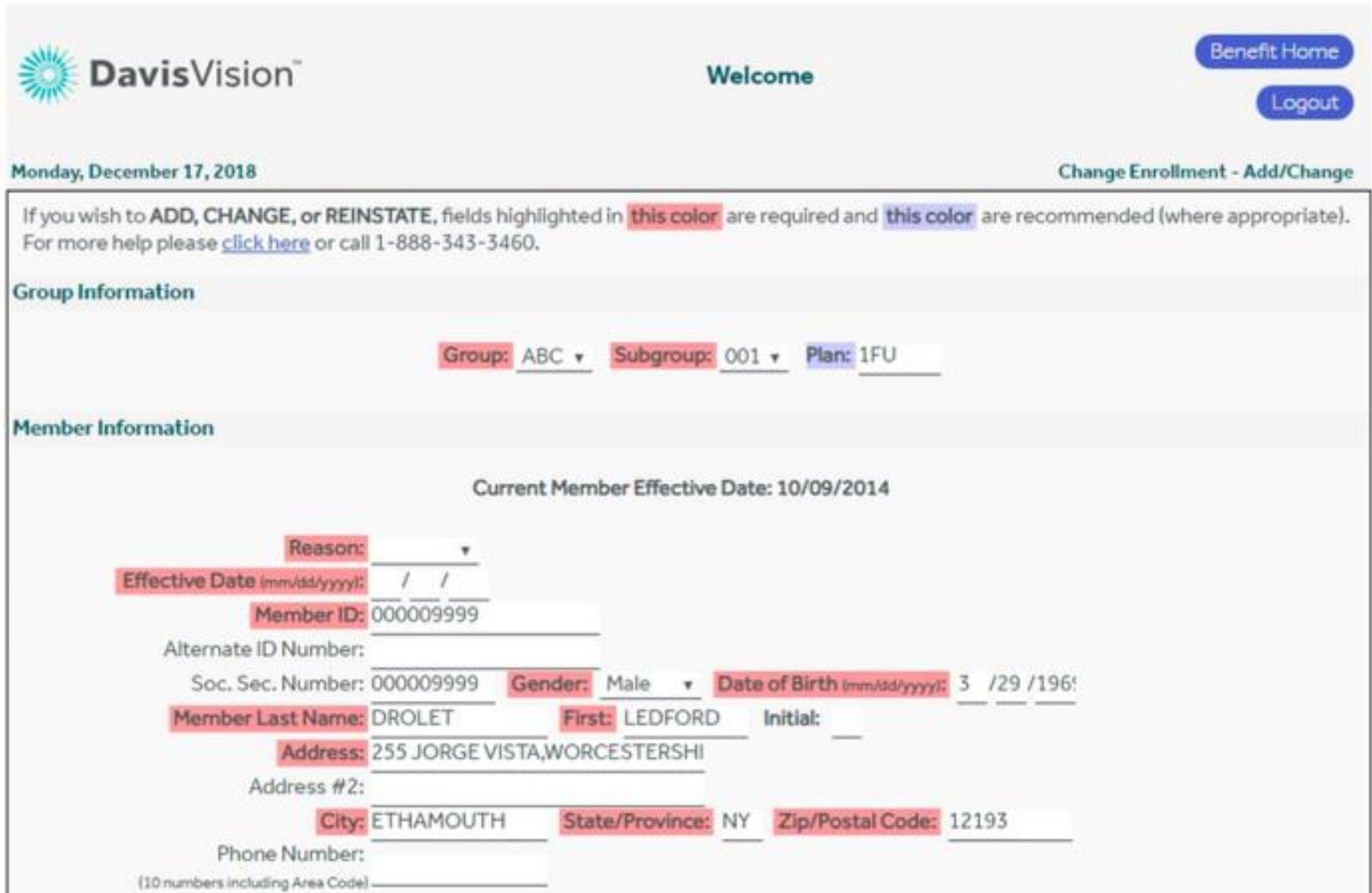
To terminate a family record and add the employee only coverage:

1. Make a note of the subscriber's member ID and social security number, if applicable.
2. Terminate the family enrollment record, following the instructions explained in [Terminating an enrollment record](#). Enter the last day of coverage in the **termination date** field.
3. Add a new subscriber only record, setting the **effective date** for the day after the **termination date** you entered in the previous step. Use the instructions in [Adding an enrollment record](#) to complete the process.

Getting help on a specific page

On each of the Change Enrollment entry pages, there is a link called **click here** that provides specific help for the fields on that page.

If you click this link, a page like this, displays:



DavisVision™ **Welcome** [Benefit Home](#) [Logout](#)

Monday, December 17, 2018 [Change Enrollment - Add/Change](#)

If you wish to **ADD, CHANGE, or REINSTATE**, fields highlighted in **this color** are required and **this color** are recommended (where appropriate). For more help please [click here](#) or call 1-888-343-3460.

Group Information

Group: ABC ▾ **Subgroup:** 001 ▾ **Plan:** 1FU

Member Information

Current Member Effective Date: 10/09/2014

Reason: ▾

Effective Date (mm/dd/yyyy): / /

Member ID: 000009999

Alternate ID Number:

Soc. Sec. Number: 000009999 **Gender:** Male ▾ **Date of Birth (mm/dd/yyyy):** 3 /29 /1961

Member Last Name: DROLET **First:** LEDFORD **Initial:** _____

Address: 255 JORGE VISTA, WORCESTERSHI

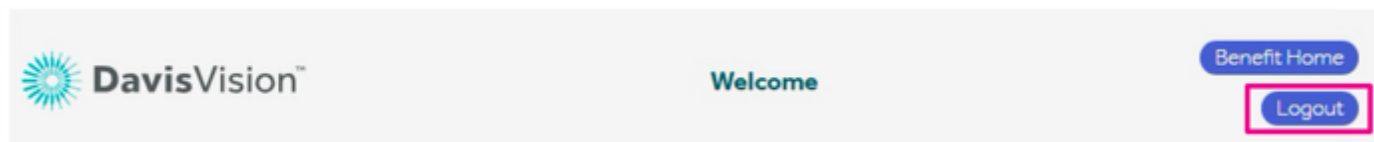
Address #2:

City: ETHAMOUTH **State/Province:** NY **Zip/Postal Code:** 12193

Phone Number: _____
(10 numbers including Area Code)

Logging out of Benefit Manager

When you have completed your Benefit Manager tasks, log out to prevent unauthorized access. To log out of Benefit Manager, click the **logout** button in the upper right corner.



DavisVision™ **Welcome** [Benefit Home](#) [Logout](#)

Chapter 2: Using Benefit Manager

This section explains how to use Benefit Manager to check a member's enrollment information, add a new member, edit a member's enrollment information, reinstate a terminated member record, and terminate a member's benefits. Not all features may be available to all users, so some of these features may not be available to you. Your permissions determine the type of access you have to Benefit Manager.

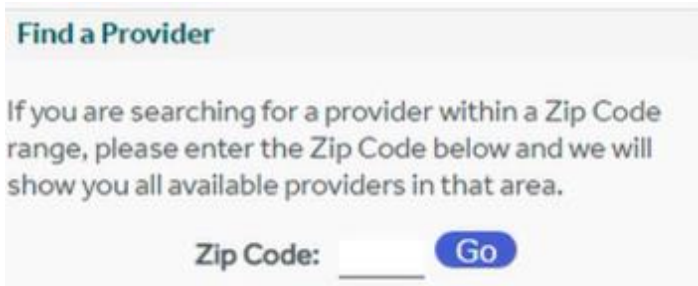
Note: All of the member information shown in this user guide is made up. We use fake names, IDs, and addresses to make it easier to see how the application works.

Important: If you need more access to do your job than you have, please contact **1 (888) 343-3460** and ask that your permissions be changed. If your group has a separate phone number for support (indicated in your version of the Benefit Manager interface), use that phone number instead.

Finding a provider for a member

If you direct members to providers, you can use Benefit Manager to perform that type of provider search:

1. Follow the instructions in [Logging into the Benefit Manager](#) to access the Benefit Manager application.
2. From the Benefit Manager home page, locate the find a provider box.




The screenshot shows a light gray rectangular box with the title "Find a Provider" in bold teal text at the top left. Below the title, there is a paragraph of text: "If you are searching for a provider within a Zip Code range, please enter the Zip Code below and we will show you all available providers in that area." At the bottom of the box, there is a label "Zip Code:" followed by a white text input field with a light gray border. To the right of the input field is a blue rounded rectangular button with the word "Go" in white text.

3. In the **zip code** field, enter the zip code the member gives you and click **go** to display the results.
- Note:** If your find a provider box contains a provider list, choose the

appropriate **provider list** for the member you are working with. If you do not choose a provider list, all providers in the selected zip code display.

- When you have completed your entries and selections, click **go**.


DavisVision™

Welcome

[Benefit Home](#)

[Logout](#)

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[Find a Provider](#)

[Check Enrollment](#)
[Enrollment History](#)
[Enrollment Form](#)
[Add/Change Enrollment](#)
[Terminate Enrollment](#)
[Find a Provider](#)
[New Provider Nomination](#)
[Forms](#)
[Group Summary](#)
[My Profile](#)
[Your Vision - What You Should Know](#)
[Links](#)
[View Messages](#)
[Contact Us](#)
[User Guide - CompuVision®](#)
[User Guide - CVX](#)
[News](#) | [more...](#)
[No Current Articles](#)

Please enter a ZIP code and radius (defaults to 20 miles) or select a state with a city or county to search for vision providers.

Required

ZIP code: 17011 - OR - State: Please choose a state ▼
Radius (Miles): 20 County: ▼
City: ▼

Optional

Provider or Business Name:




[Search Now](#) [Clear Form](#)

[New Provider Nomination](#) - Click here to submit a request to add a provider to the Davis Vision Network.

188 providers were found. **Scroll Down** to view these providers.

Our provider listing is current as of the time it is created. We encourage you to confirm participation of the doctor and office prior to scheduling your appointment.

Page 1 of 8 First Page Previous Page [Next Page](#) [Last Page](#)

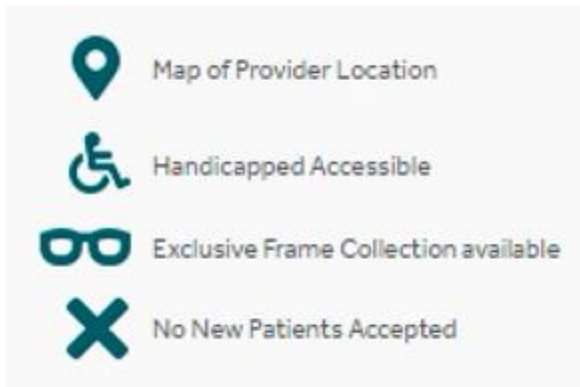
Name	Address	Telephone	Services	View Map	Alternate Languages Spoken
VISIONWORKS	3401 HARTZDALE DR CAMP HILL, PA 17011	(717) 975-0501	Full Service	  	None

From this page you can change the search radius to restrict the number of records that display or choose other search options and click **search now** to get different results.

If you selected a provider list, you can switch to another provider list using the **select provider list** drop-down.

If you enter a provider name in the **provider** or **business name** field, you can search for a specific practitioner using this page.

At the bottom of this page, there is a key that describes the icons we use in this screen.

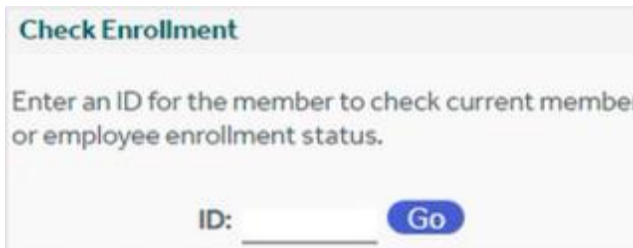


Checking a member's enrollment information

You can check a member's enrollment information from the Benefit Manager application, if you have the appropriate permissions. You might have to do this if a member calls to request more information about their benefits. You can also order member ID cards from the enrollment status page.

To check a member's enrollment benefits:

1. Follow the instructions in [Accessing Benefit Manager](#) to access the Benefit Manager application.
2. From the Benefit Manager home page, locate the check enrollment box.

A screenshot of a web form titled "Check Enrollment". Below the title is a text prompt: "Enter an ID for the member to check current member or employee enrollment status." At the bottom of the form, there is a label "ID:" followed by a text input field and a blue button labeled "Go".

3. In the **ID** field, enter the member's alternate ID or social security number and click **go** if more than one record matched the record ID you entered, a selection list, displays.

Please select the group for which you would like to check enrollment.

Group Name	Status	Effective Date	Termination Date	Click to Select
Voxx International Corporation	Termed	12/1/2010	4/30/2016	Select
Voxx International Corporation	Active	5/1/2016		Select

- Review the list of options and choose the **select** button for the active record. The member enrollment status information displays.

Group : ABC COMPANY
 Subgroup : 001
 Member Name : LEDFORD DROLET (000009999)


[Order Member ID Cards](#)

Member Eligibility

Name	Relationship	Eligibility Status	Currently Eligible Services	Effective Date	Termination Date
LEDFORD DROLET	MEMBER	Open Authorization		10/9/2014	
DYLAN DROLET	SPOUSE	Open Authorization		10/9/2014	
TEEL DROLET	CHILD	Currently Eligible	Examination, 1 pair eyeglasses or contacts	10/9/2014	

- From this page, you can order member ID cards by clicking the **order member ID cards** link. The member ID cards popup box display.

https://idoc-nyqa4.davisvision.com/DavisVision.BenefitManag...
 https://idoc-nyqa4.davisvision.com/DavisVision.BenefitManager/Memb...

 **DavisVision™**

Click on the 'Submit' button to have ID Card(s) mailed out to your home address.

Contract Holder: LEDFORD DROLET

Number of Cards:

[Submit](#) [Close](#)

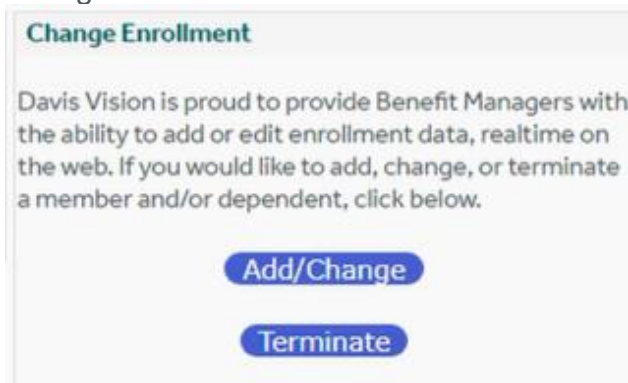
- In the **number of cards** box, select the number of ID cards the member needs and click **submit**. The ID cards are printed and shipped out the next business day.

Adding an enrollment record

When you add a new employee, you can add an enrollment record using Benefit Manager to ensure we can provide them with vision benefits.

To add a new member to your group's enrollment record:

1. Follow the instructions in [Accessing Benefit Manager](#) to access the Benefit Manager application.
2. Follow the instructions in [Checking a member's enrollment information](#) to ensure that the member's record does not already exist.
3. From the Benefit Manager home page, locate the change enrollment box.



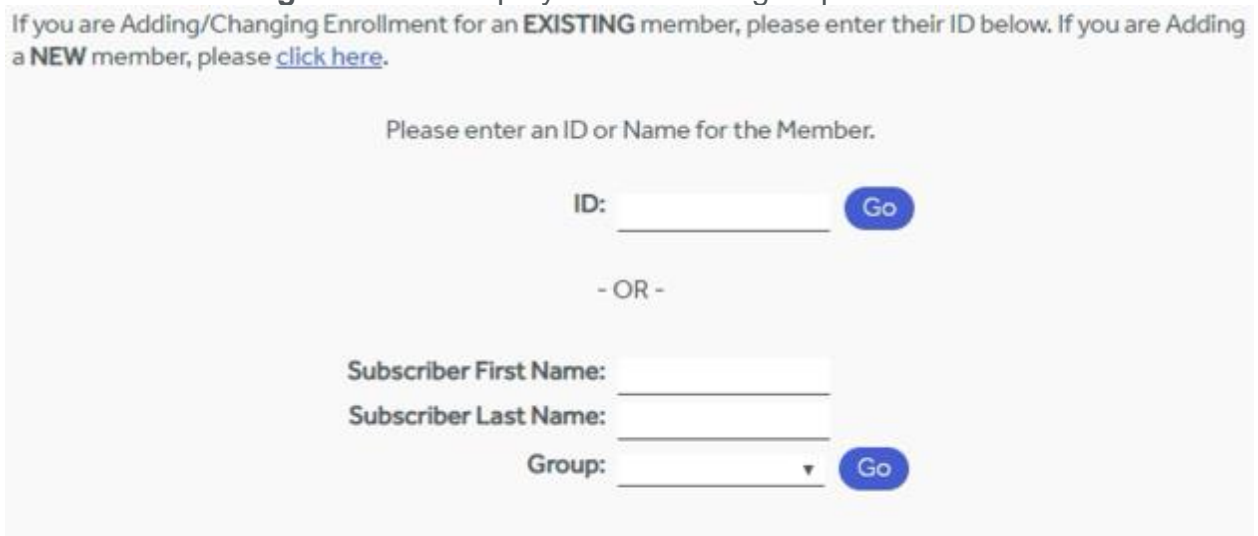
Change Enrollment

Davis Vision is proud to provide Benefit Managers with the ability to add or edit enrollment data, realtime on the web. If you would like to add, change, or terminate a member and/or dependent, click below.

[Add/Change](#)

[Terminate](#)

4. Click the **add/change** button to display the add/change options.



If you are Adding/Changing Enrollment for an **EXISTING** member, please enter their ID below. If you are Adding a **NEW** member, please [click here](#).

Please enter an ID or Name for the Member.

ID: [Go](#)

- OR -

Subscriber First Name:

Subscriber Last Name:

Group: [Go](#)

5. Click the **click here** link to display the select group page.

Select the Group to which you want to add a member:

Enter a GP Number:


- OR -

Group Name Search

(used to filter group/subgroup list below):

Select by Group/Subgroup:

6. Click the **select group/subgroup** drop-down list and select the appropriate group/subgroup option for the new member. Then, click **go** to display the add/change contract and subscriber options.


DavisVision™

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Benefit Home

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Change Enrollment - Add/Change

If you wish to **ADD, CHANGE, or REINSTATE**, fields highlighted in **this color** are required and **this color** are recommended (where appropriate). For more help please [click here](#) or call 1-888-343-3460.

Group Information

Group: *C ▾ Subgroup: P01 ▾ Plan: [Select New Group/Subgroup](#)

Member Information

Reason: Addition ▾
Member Effective Date (mm/dd/yyyy): / /
Member ID:
Alternate ID Number:
Soc. Sec. Number: Gender: ▾ Date of Birth (mm/dd/yyyy): / /
Member Last Name: First: Initial:
Address:
Address #2:
City: State/Province: Zip/Postal Code:
Phone Number:
(10 numbers including Area Code)

User Information

UserField1:
UserField2:

Dependent Information

Rel: S=Spouse C=Child O=Other P=Domestic Partner
Gender: M=Male F=Female
Override (O/R) Code: S=Student H=Disabled (only for children over 19 years old)
Terminated Dependents: Highlighted in red

Reason	First Name	MI	Last Name <small>(only if different)</small>	Rel.	Gender	Dependent SSN	Birthdate <small>(mm/dd/yyyy)</small>	O/R Code	Eligible Thru Date	Effective Date
--------	------------	----	---	------	--------	------------------	--	-------------	-----------------------	-------------------

Note: The fields highlighted in red are required and must be completed to save the page. The fields highlighted in blue are optional. If you need help completing these fields, click the **click here** link to get more information.

- Complete the fields in these sections with the information you have about the contract and the subscriber. Use the **tab** key to move from field to field. Most of these fields are self-explanatory.

- Rider**

Select the appropriate rider ID for this member, as specified by

your internal process.

Note: This option may not be required for every contract. If you do not see a **Rider** field, continue to the next field instead.

- **Reason**

Addition is already entered for you, based on your previous selection.

Note: You can only change this entry by returning to the previous page.

- **Subscriber effective date**

Enter the date the Subscriber's benefits are scheduled to begin.

- **Subscriber ID/alternate ID/social security number**

Enter the appropriate ID number in each field. If your company does not enter SSNs into Employee records, leave the **social security no.** field blank. The subscriber ID is required.

- **Gender**

Select **male** or **female** as appropriate.

- **Date of birth**

Enter the subscriber's birth date.

- **Subscriber Last Name, First Name, Initial**

Enter the member's last name (including suffix, if applicable) and first name carefully. The middle initial is optional, but really useful for common names.

- **Address, address2, city, state/province, ZIP/postal code**

Enter the member's address in the fields provided.

- **Phone number**

Enter this information if you have it.

- **Language**

Enter this information if you have it. This defaults to English.

8. Scroll down to the next section to add the dependent information and to complete the process. The **dependent information** fields display.

Note: If you do not need to enter dependents for this subscriber, skip to step **10**.

Dependent Information

Rel.: S=Spouse C=Child O=Other P=Domestic Partner

Gender: M=Male F=Female

Override (O/R) Code: S=Student H=Disabled (only for children over 19 years old)

Terminated Dependents: Highlighted in red

Reason	First Name	MI	Last Name (only if different)	Rel.	Gender	Dependent SSN	Birthdate (mm/dd/yyyy)	O/R Code	Eligible Thru Date	Effective Date
▼				▼	▼		/ /	▼	/ /	/ /
▼				▼	▼		/ /	▼	/ /	/ /
▼				▼	▼		/ /	▼	/ /	/ /
▼				▼	▼		/ /	▼	/ /	/ /

Note: The fields highlighted in red are required and must be completed to save the page. The fields highlighted in blue are optional.

The dependent options that display on your page may be slightly different from these. The **rider** column option depends upon the benefit contract associated with these members. Check these options carefully before you save them.

9. Complete one row of fields for each dependent associated with the subscriber. Use the **tab** key to move from field to field. Most of these fields are self-explanatory.

- **Reason**

Select **addition** for these entries.

- **First name, middle initial, last name**

Enter the appropriate information for each dependent, in age order. The **middle initial** is optional and the **last name** entry is only required if the dependent's last name is different from the subscriber's.

- **Rel (relationship code)**

Select the appropriate relationship code for each dependent:

Code	Description
S	Spouse
C	Child
O	Other
P	Domestic partner

- **Gender**

Select **F** for female or **M** for male.

- **Dependent SSN**

This field is not required.

- **Birthdate**

Enter the birthdate in month, date, year order using this format: **MM/DD/YYYY**.

- **O/R (override code)**

Use this field to indicate whether the dependent is a student or is handicapped.

Note: If the dependent is a student and you know the date of expiration of their benefits, enter that expiration date in the next field.

- **Eligible thru date**

If this member's benefits have an expiration date (as dictated by the contract rules) enter the expiration date in this field using this format: **MM/DD/YYYY**.

This might apply to students or adult children who may age out

of the benefits according to the contract.

Note: For members who are permanently disabled, enter the date **12/31/9999**.

- **Effective date**

Enter the date that the dependent's benefits begin.

- **Rider**

Select the appropriate rider for the dependent, if applicable.

Note: This field may be pre-set or may not display at all.

10. For some contracts, there is also a **category** entry required.

Enter the appropriate member category in this field.

11. In the **special instructions** field, enter any information that may be relevant to this enrollment record that is not captured in one of these fields.

12. When you have completed your entries, check them over to ensure they are correct and click **save changes**.

Important Benefit Manager processing information

When you complete a Benefit Manager request before 3:30 p.m. (eastern time) on a business day, it becomes effective the same day. When you complete Benefit Manager requests after this time or on a weekend or holiday, Davis Vision processes the changes on the next business day.

Benefit Manager sends a confirmation e-mail each time you submit a change through the interface. If you would prefer to receive fewer e-mails, Davis Vision can group these messages on a daily, weekly, or monthly basis. Contact your Davis Vision account representative to set up this change.

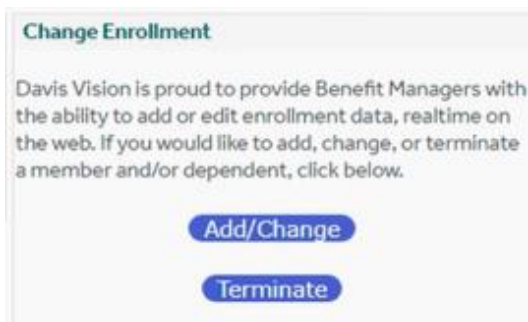
Adding a dependent to an existing enrollment record

As subscribers add new members to their families you can to add these members to the enrollment record to ensure we provide them with vision benefits. This section explains how to add a dependent to an existing family enrollment record.

Important note: See [Understanding the enrollment transaction rules](#) for detailed instructions about rules that affect changes to existing enrollment records. Changes to family records have specific caveats that could cause billing issues.

To add a new dependent to an existing family enrollment record:

1. Follow the instructions in [Accessing Benefit Manager](#) to access the Benefit Manager application.
2. From the Benefit Manager home page, locate the **change enrollment** box.



3. Click the **add/change** button to display the add/change options.

If you are Adding/Changing Enrollment for an **EXISTING** member, please enter their ID below. If you are Adding a **NEW** member, please [click here](#).

Please enter an ID or Name for the Member.

ID:

- OR -

Subscriber First Name:

Subscriber Last Name:

Group:

4. Depending upon the information you know, enter the member ID or the subscriber's name in the fields provided and click the appropriate **go** button.
Note: We use the member ID because fewer records are likely to come up. If more than one member matches your entries, a selection box displays allowing you to choose the correct member.

If no other members match the criteria you entered, the member enrollment record displays.

5. Scroll down to the dependent section and go to the first available line.
Note: The instructions for completing the fields in this section are described in [Adding an enrollment record](#).
6. Complete one row of fields for each new dependent associated with the subscriber. Use the **tab** key to move from field to field. Most of these fields are self-explanatory.

Dependent Information

Rel.: S=Spouse C=Child O=Other P=Domestic Partner

Gender: M=Male F=Female

Override (O/R) Code: S=Student H=Disabled (only for children over 19 years old)

Terminated Dependents: Highlighted in red

Reason	First Name	MI	Last Name (only if different)	Rel.	Gender	Dependent SSN	Birthdate (mm/dd/yyyy)	O/R Code	Eligible Thru Date	Effective Date
▼				▼	▼		/ /	▼	/ /	/ /
▼				▼	▼		/ /	▼	/ /	/ /
▼				▼	▼		/ /	▼	/ /	/ /
▼				▼	▼		/ /	▼	/ /	/ /

Note: The fields highlighted in red are required and must be completed to save the page. The fields highlighted in blue are optional.

The dependent options that display on your page may be slightly different from these. The **rider** column option depends upon the benefit contract associated with these members. Check these options carefully before you save them.

- **Reason**
Select **change** for this entry.
- **First name, middle initial, last name**
Enter the appropriate information for each dependent, in age order. The **middle initial** is optional and the **last name** entry is only required if the dependent's last name is different from the subscriber's.
- **Rel (relationship code)**
Select the appropriate relationship code for each dependent:

Code	Description
S	Spouse
C	Child
O	Other
P	Domestic partner

- **Gender**
Select **F** for female or **M** for male.
- **Dependent SSN**
Enter this information if you know it. This field is not required.
- **Birthdate**
Enter the dependents birthdate in this format: **MM/DD/YYYY**.
- **O/R (override code)**
Use this field to indicate whether the dependent is a student or is handicapped.
Note: If the dependent is a student and you know the date of expiration of student benefits, enter that expiration date of the student's eligibility, in the next field, if known.
- **Eligible thru date**
If this member's benefits have an expiration date (as dictated by the contract rules) enter the date in this field using this format: **MM/DD/YYYY**.
This might apply to students or adult children who may age out of the benefits according to the contract.
Note: For members with permanent disabilities, enter the date **12/31/9999**.
- **Effective date**
Enter the date that the dependent's benefits begin.

- **Rider**

Select the appropriate rider for the dependent, if applicable.

Note: This field may be pre-set or may not display at all.

7. In the **special instructions** field, enter any information that may be relevant to this enrollment record that is not captured in one of these fields.
8. When you have completed your entries, check them over to ensure they are correct and click **save changes** to submit your entries.

Note: See [Important Benefit Manager processing information](#) for more information.

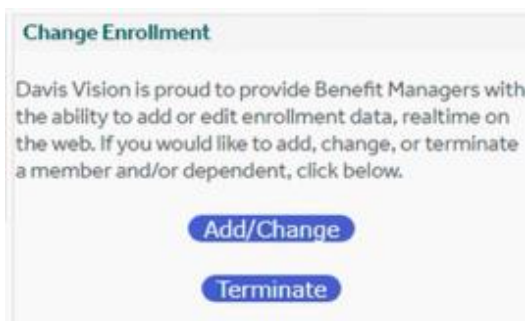
Changing an existing enrollment record

Sometimes, when employees change locations, move, or change jobs, we need to update their enrollment record to reflect this change. This section explains how to change the enrollment information for an existing member.

Very important: If you need to change the member category or effective date on a member's enrollment record, or you are moving to or from a family record, see [Understanding the enrollment transaction rules](#) to avoid major problems and duplicate eligibilities!

To modify the enrollment record of an existing subscriber or dependent:

1. Follow the instructions in [Accessing Benefit Manager](#) to access the Benefit Manager application.
2. From the Benefit Manager home page, locate the **change enrollment** box.



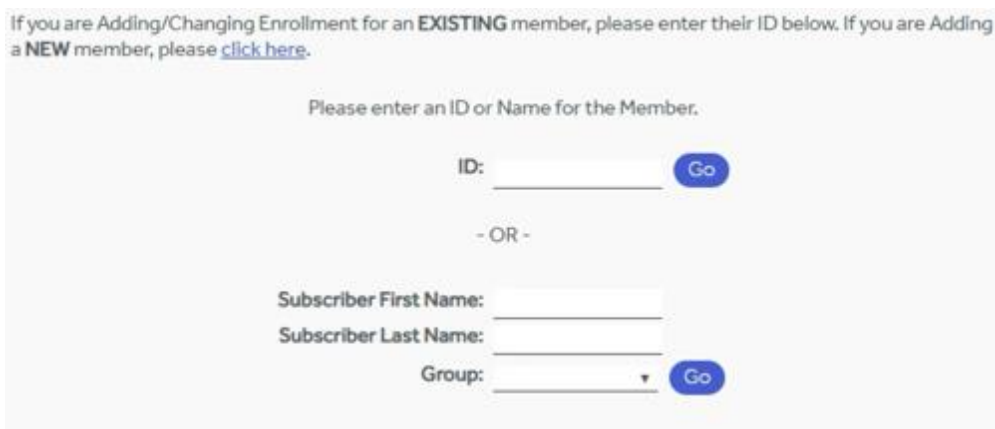
Change Enrollment

Davis Vision is proud to provide Benefit Managers with the ability to add or edit enrollment data, realtime on the web. If you would like to add, change, or terminate a member and/or dependent, click below.

[Add/Change](#)

[Terminate](#)

3. Click the **add/change** button to display the add/change options.



If you are Adding/Changing Enrollment for an **EXISTING** member, please enter their ID below. If you are Adding a **NEW** member, please [click here](#).

Please enter an ID or Name for the Member.

ID: [Go](#)

- OR -

Subscriber First Name:

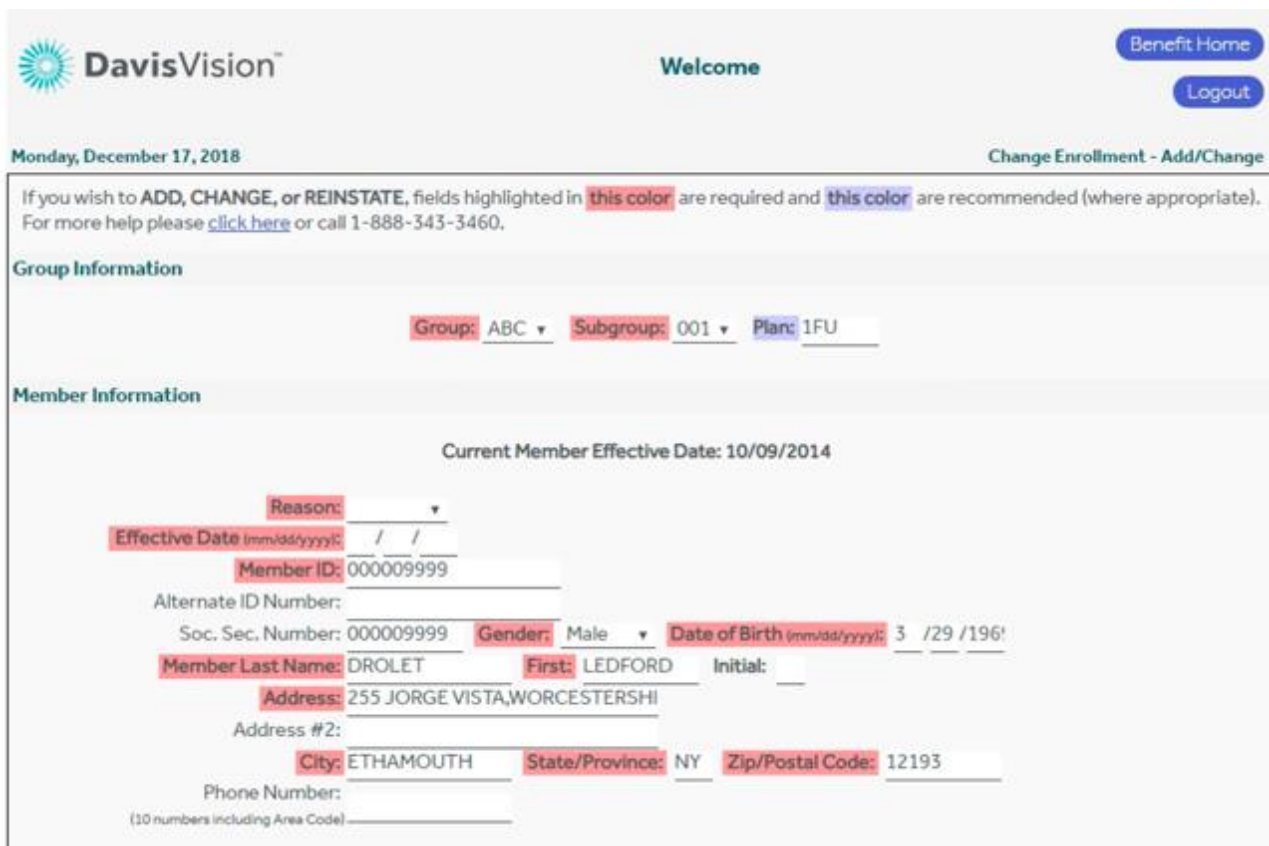
Subscriber Last Name:

Group: [Go](#)

Here, you can use either the member ID or the subscriber's name to search for the existing member's record.

- Depending upon the information you know, enter the member ID or the subscriber's name in the fields provided and click the appropriate **go** button.

Note: We use the member ID because fewer records are likely to come up. If more than one member matches your entries, a selection box displays allowing you to choose the correct member. If no other members match the criteria you entered, the member enrollment record displays.



Group Information

Group: ABC ▾ Subgroup: 001 ▾ Plan: 1FU

Member Information

Current Member Effective Date: 10/09/2014

Reason: ▾

Effective Date (mm/dd/yyyy): / /

Member ID: 000009999

Alternate ID Number:

Soc. Sec. Number: 000009999 Gender: Male ▾ Date of Birth (mm/dd/yyyy): 3 /29 /1961

Member Last Name: DROLET First: LEDFORD Initial: ▾

Address: 255 JORGE VISTA,WORCESTERSHI

Address #2:

City: ETHAMOUTH State/Province: NY Zip/Postal Code: 12193

Phone Number: (10 numbers including Area Code)

Note: The fields highlighted in red are required and must be completed to save the page. The fields highlighted in blue are optional.

- In the **reason** field, select **change**.
- In the **change effective date** field, enter the date this information should change in the system.
- Type over or re-select entries that have changed in the member's

or dependent's enrollment record.

Note: When you change a member's **category** field, it can affect billing cycles and other important system records. When you make this type of change, make sure you enter the effective date of the change in the **category effective date** field. This ensures that the member's eligibility and billing records are processed correctly.

8. In the **special instructions** section, you can leave a note that explains the change you made.
9. Click the save changes button to submit your changes.

Note: See [Important Benefit Manager processing information](#) for more information.

Terminating an enrollment record

You can terminate a Member's enrollment record using the instructions in this section. We do not remove termed enrollment records from the system, they just do not display in Benefit Manager when you terminate them.

To terminate the enrollment record of an existing subscriber or dependent:

1. Follow the instructions in [Accessing Benefit Manager](#) to access the Benefit Manager application.
2. From the Benefit Manager home page, locate the **change enrollment** box.



3. Click the **terminate** button to display the change enrollment – terminate options.

Please enter an ID or Name for the Member.

ID: [Go](#)

- OR -

Subscriber First Name:

Subscriber Last Name:


Group: [Go](#)

- Depending upon the information you know, enter the member ID or the subscriber's name in the fields provided and click the appropriate **go** button.
If more than one record matches your criteria, the change enrollment – terminate list displays.

Please select the group for which you would like to check enrollment.

Group Name	Status	Effective Date	Termination Date	Click to Select
Voxx International Corporation	Termed	12/1/2010	4/30/2016	Select
Voxx International Corporation	Active	5/1/2016		Select

- Click the **select** button for the record you want to terminate.
If no other members match the criteria you entered, the member termination record displays.



DavisVision™

Welcome

[Benefit Home](#)
[Logout](#)

Monday, December 17, 2018 Change Enrollment - Terminate

If you wish to terminate Member/Dependents, fields highlighted in this color are required.
For more help please [click here](#) or call 1-888-343-3460.

Group Information

Group: ABC Subgroup: 001 Plan: 1FU

Member/Dependent Information

Member ID: 000009999
Member Name: LEDFORD DROLET
Family Effective Date: 10/09/2014

Check to Terminate	Dependent Name	Relationship	Termination Date <small>(mm/dd/yyyy)</small>	Comments	User Field 1	User Field 2
<input type="checkbox"/>	ENTIRE FAMILY		_ / _ / _	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	LEDFORD DROLET	MEMBER	_ / _ / _	<input type="text"/>	<input type="text"/>	<input type="text"/>

Note: The fields highlighted in red are required and must be completed to save the page. The fields highlighted in blue are optional.

6. In the **check to terminate** column, place a check mark to the left of the member being terminated or, if all of the members on this enrollment record should be terminated, click the check mark indicating **entire family**.
7. In the **termination date** field you selected, enter the termination date in **MM/DD/YYYY** format.
8. In the **comments** field, enter any applicable comments.
9. When you are ready, click **save changes** to submit the termination record. A confirmation message displays.

idoc-nyqa4.davisvision.com says

You have selected the following termination options:

Terminate the Entire Family with a termination date of 12/19/2019

If this correct, click OK to submit this termination request. Otherwise, click Cancel to change the termination options you've selected.



Note: If you terminated the benefits of an individual, this prompt confirms the name of that person instead. If the selection is valid, continue to the next step. If it is not, click **cancel** and make another selection.

10. Click **ok** to continue.

Note: See [Important Benefit Manager processing information](#) for more about when your changes will be processed.

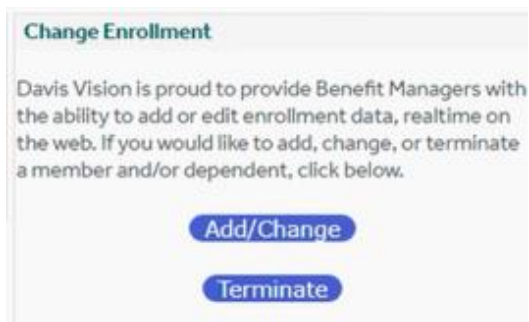
Reinstating a terminated enrollment record

When an enrollment record is terminated, we do not delete it from the system, in case a member returns to the employer and the member needs to be reinstated. When you reinstate an enrollment record, you re-establish the record with the original effective date, rather than add a whole new record. To accomplish this, the member must be returning to the same location and with the same dependents. Using this feature saves time. However, reinstating a member's enrollment record is a matter of policy for your group, so you should follow your group's rules about using this feature.

This process is largely the same as the [Modifying an existing enrollment record](#) section. In these instructions, we cover the differences in depth.


To reinstate a terminated member:

1. Follow the instructions in [Accessing Benefit Manager](#) to log into the Benefit Manager application.
Note: It may be useful to look up the member's enrollment record using the instructions in [Checking a member's enrollment information](#). This way you can find the member ID, ensuring that your records can be reinstated.
2. From the Benefit Manager home page, locate the **change enrollment** box.



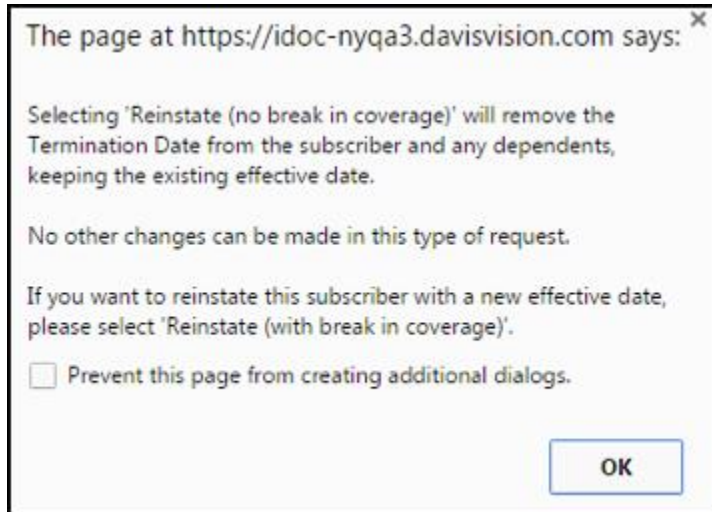
3. Click the **add/change** button to display the add/change options. The member search options display.
4. In the fields provided, enter the member search information you know and click go. The [Change enrollment – add/change options](#)

page displays.

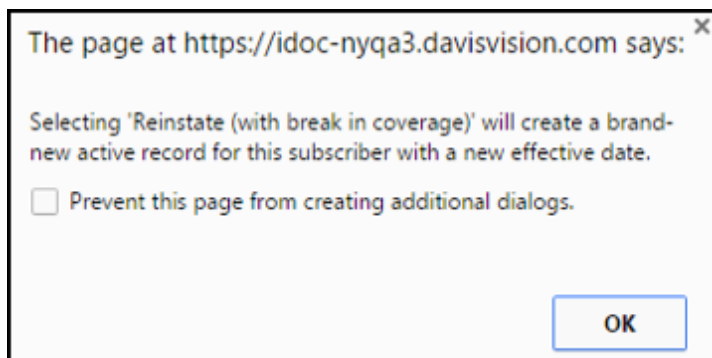


Note: The fields highlighted in red are required and must be completed to save the page. The fields highlighted in blue are optional.

5. From the drop-down lists provided, select the appropriate benefit contract and rider, if different from the current entries.
6. In the **reason** drop-down list, the following options display:
Reinstate (no break in coverage)
 Select this option to re-add the member and link them to their original benefits. Then continue to step 7.
Reinstate (with break in coverage)
 Select this option to re-add the member but do not link them to their original benefits. Then, continue to step 7.
7. Continue based on your **reason** field selection:
 - If you selected **Reinstate (no break in coverage)**, the following popup box displays:



- i. To reinstate with no break in coverage, select the **Prevent this page from creating additional dialogs** check box and click **ok**.
or
 - ii. To change your selection, click the **x** in the top right corner and return to step 6.
- If you selected **Reinstate (with break in coverage)**, the following popup box displays:



- i. To reinstate with no break in coverage, select the **Prevent this page from creating additional dialogs** check box and click **ok**.
or
 - ii. To change your selection, click the **x** in the top right corner and return to step 6.
8. In the remaining change enrollment page fields, enter any new information required to complete the enrollment record, including

any dependent field changes needed.

Note: Make sure the **reason** column for the Dependent record contains **change**.

9. When you are ready, click **save changes** to submit the record.
A confirmation message displays.
10. Click **ok** to continue.

Adding COBRA Coverage to a member's record

Adding COBRA coverage to a member's record requires that you term the original member record first. Then, you can add the COBRA benefit to the member's record.

To add COBRA coverage to an existing member's enrollment record:

1. Follow the instructions in [Accessing Benefit Manager](#) to log into the Benefit Manager application.
2. From the Benefit Manager home page, locate the change enrollment box.
3. Follow the instructions in [Terminating an enrollment record](#) to terminate the member's active enrollment record and make a note of their member ID.
4. Return to the member home page and click the **add/change** button to display the add/change search options. The member search options display.
5. In the **member ID** field provided, enter the member ID information and click **go**.
The [Change enrollment - add/change options](#) page displays.
6. From the **benefit contract** drop-down list, select the COBRA contract from the list.
7. From the **rider** drop-down list, select the appropriate rider ID, if applicable.
8. In the **effective date** field, enter the first date that the COBRA contract is in effect for this enrollment record.
9. Use the instructions in [Adding an enrollment record](#) to complete this Member's COBRA record.

Note: There may be a member category entry for this employment type, but that depends upon the Benefit Contract for your group. Also, in the **special instructions** section, add "**COBRA**".

10. When you have completed your entries, click **save changes** to submit them.

Benefit Manager terminology

Use this list and definitions to learn more about how we use a specific word.

Term	Definition
Dependent	Spouse, domestic partner, child or other member who receives benefits under a contract but who is not a subscriber
Member	A generic term that refers to both subscribers and dependents
Member category	Member categories further distinguish members with the same benefit contract that have different benefits. Examples of these categories are location code and employment status (active, retired, COBRA, etc.)
Subscriber	Policy holder employee who receives vision benefits as part of their employment agreement. These words are used interchangeably in this document.