DAVIS VISION DIRECT (X06)

BENEFIT MANAGER

USER MANUAL

Version: 1
August 15, 2012

DAVIS VISION

BENEFIT MANAGER

711 Troy Schenectady Road
Latham, NY 12110
Phone: 518-220-6000

CONTENTS

Introduction

Benefit Manager to enter Enrollment records

The instructions in this document detail the method to add, change, reinstate, or terminate Subscriber(s) Enrollment Records via Benefit Manager.

Assumptions

The intent of this manual is as follows:

- To provide a general introduction to Benefit Manager.
- To provide instructions on entering enrollment records into Benefit Manager.

This manual assumes:

- You have access to appropriate browsers such as Internet Explorer (IE) and Mozilla Firefox on your Desktop. We recommend Microsoft Internet Explorer Version 5 or higher.
- You have access to the Benefit Manager application on your desktop.
- You have a valid username and password to access the Benefit Manager application.
- You have appropriate permissions to add enrollment records into Benefit Manager.

Access Benefit Manager

The following section describes the method to access Benefit Manager via the Davis Vision website. To access Benefit Manager:

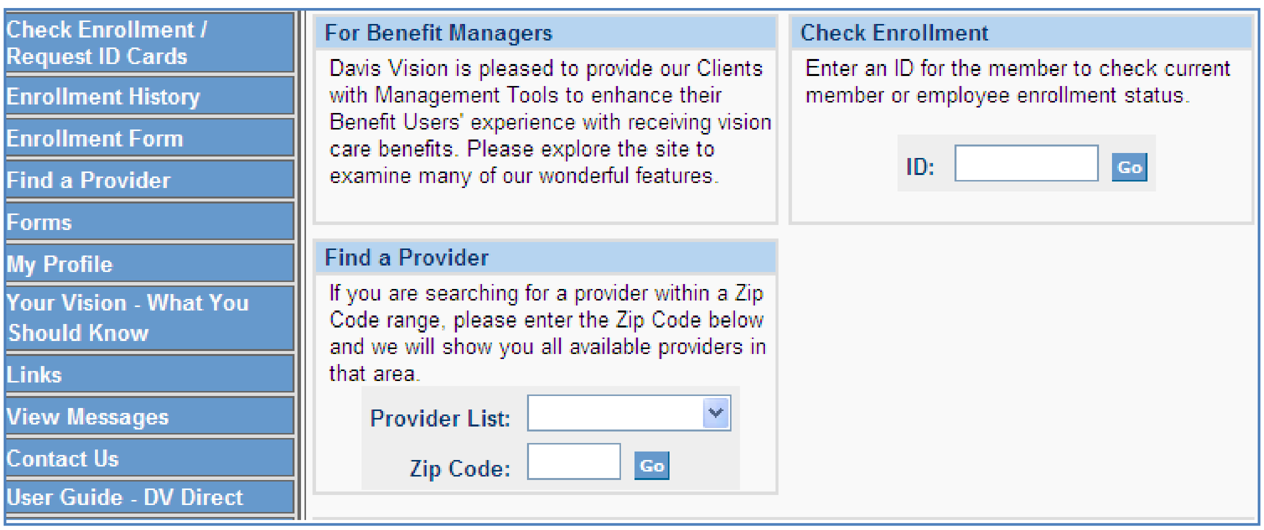
1. Access Davis Vision at www.davisvision.com and click the **Clients** link.
2. Enter the assigned Username and Password and click the button.

Note: Contact Technical Support at 1-888-343-3460 for Username/Password or other Benefit Manager assistance.

IMPORTANT

Upon first login, the Terms of Service and Agreement screen is displayed. Press the Accept button to proceed. Decline button will disallow access to the Benefit Manager application.

After clicking the Accept button, the Benefit Manager home page is displayed.



Using Benefit Manager

This section details the process to check, add, change, reinstate, or terminate Subscriber(s) Enrollment records via Benefit Manager.

> **Note:** References to Employee and Subscriber are used interchangeably and refer to the main Policy holder.

Check Enrollment

This section illustrates the method to check a Subscriber's enrollment status:

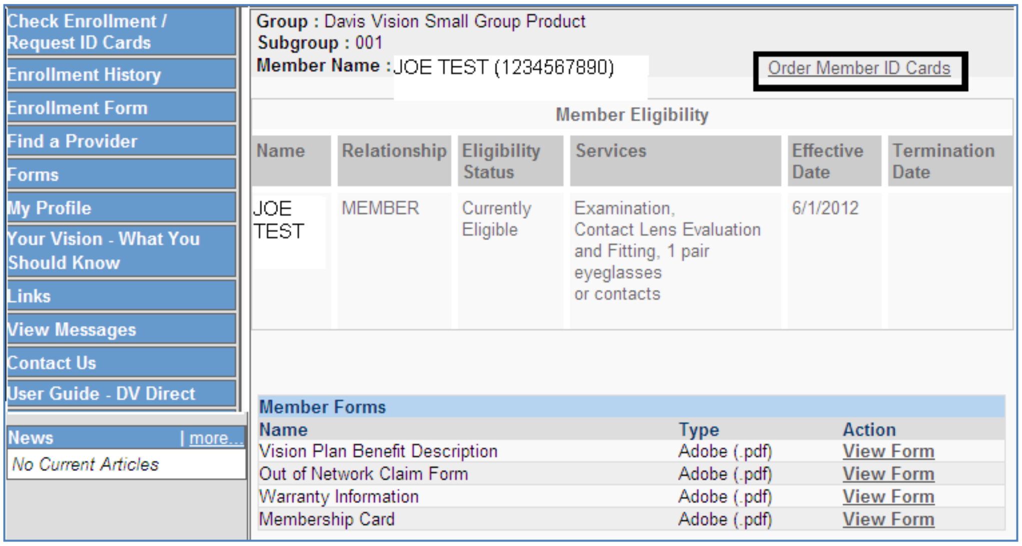
1. Click the Check Enrollment link on the left menu bar.
2. Enter the Social Security Number (SSN) in the ID field or enter the member's first and last name and press the Go button.
3. A list of all enrollment information for the selected Subscriber, including Dependent(s) covered, enrollment status and downloadable benefit-specific forms, is displayed.

Please note: The effective date is the date a member was enrolled in the plan. The eligibility date indicates the date they are eligible for benefits. If I member has a future "eligibility date", this means they have utilized their benefits or a portion thereof.

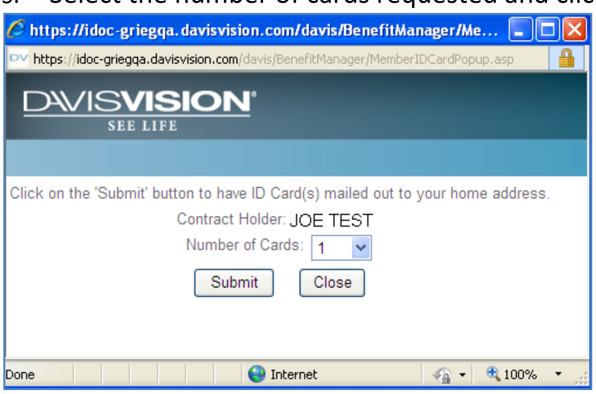
Request ID Cards

This section illustrates the method to request and ID card and/or print/save a temp ID card:

1. Click the Check Enrollment link on the left menu bar.
2. Enter the Social Security Number (SSN) in the ID field or enter the member's first and last name and press the Go button.
3. A list of all enrollment information for the selected Subscriber, including Dependent(s) covered, enrollment status is displayed.
4. Click on Order Member ID Cards.



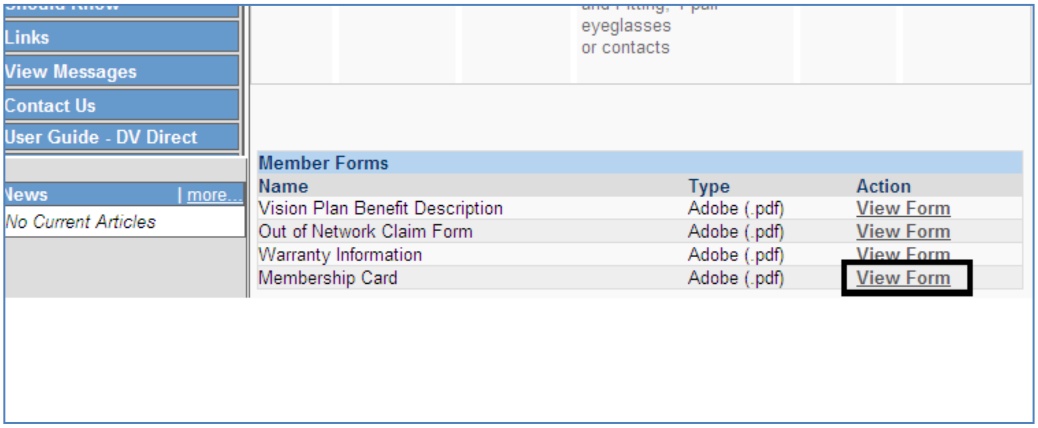
5. Select the number of cards requested and click on Submit.



Print or Save Temp ID Cards

This section illustrates the method to request and ID card and/or print/save a temp ID card:

1. Click the Check Enrollment link on the left menu bar.
2. Enter the Social Security Number (SSN) in the ID field or enter the member's first and last name and press the Go button.
3. A list of all enrollment information for the selected Subscriber, including Dependent(s) covered, enrollment status is displayed.
4. In the forms section, click on the View Form link next for Membership Card

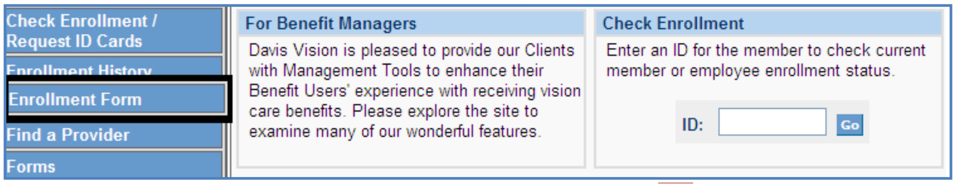


5. You can either print the ID card or save the file as a pdf to your computer.

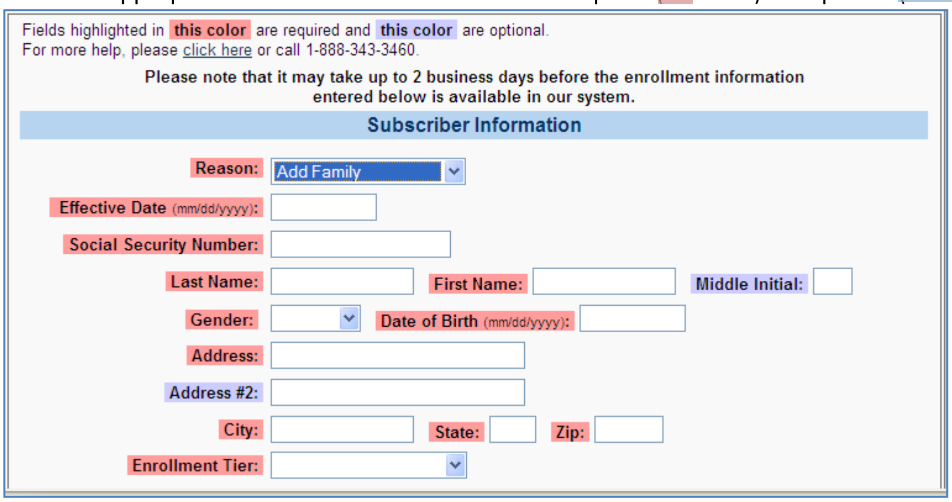
Add an Enrollment record

This section illustrates the method to add new Subscriber Enrollment records.

1. Before performing any enrollment transaction, use the Check Enrollment feature in section page 6 to verify current enrollment status.
2. Click the Enrollment Form link from the left navigation bar.



3. Utilize the appropriate Enrollment form to enter all the required (red fields) and optional (blue fields).



Note: All required fields must be completed to save changes; a prompt is displayed when a required field is blank.

- Select "Add Family" from the Reason drop-down menu.
- Enter the date coverage begins in the Effective Date field in mm/dd/yyyy (month/date/year) format.
- Enter the Subscriber/Employee's Social Security Number.
- Enter the Subscriber/Employee Last Name (including any suffix, i.e., Sr., Jr., etc.).
- Enter the Subscriber/Employee First Name.
- Enter the Subscriber/Employee Middle Initial (optional).
- Select Gender (Male or Female).
- Enter the Subscriber/Employee Date of Birth in mm/dd/yyyy (month/date/year) format.
- Enter the Subscriber/Employee Address, City, State, Zip and Phone Number (if applicable) in the appropriate fields. (Address #2 is optional.)
- Select the appropriate tier selects based on the employee's enrollment selection **and** your group's tier structure:
  - 2 tier groups: Employee Only or Employee + Family
  - 3 tier groups: Employee Only, Employee + 1 or Employee + Family
  - 4 tier groups: Employee Only, Employee + Spouse, Employee + Child(ren) or Employee + Family
- Select the appropriate system member category from the Category option(s). If there is more than one option, a drop-down menu will be provided.

- If there are no Dependents, proceed to **Step 3** below. Otherwise, complete the Dependent information section for each dependent:
    - Select "Addition" from the Reason drop-down menu.
    - Enter the Dependent's First Name.
    - Enter the Dependent's Middle Initial (optional).
    - Enter the Dependent's Last Name.
    - Select the Dependent's relationship from the drop-down menu.
    - Select Gender (Male or Female).
    - Enter the Dependent's Date of Birth in mm/dd/yyyy (month/date/year) format.
    - Enter the Dependent's Effective date of coverage in mm/dd/yyyy (month/date/year) format.
    - Repeat the above steps until all Dependents have been added. Then proceed to Step 3 below.

4. Press Save Changes button to submit the Enrollment data to Davis Vision.

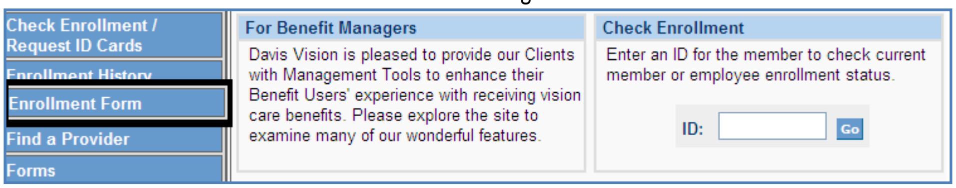
> Note: Benefit Manager requests will be completed within 3 Business Days.
>
> To confirm an enrollment has request has been processed, please log-in to the Benefit Manager and use the Check Enrollment feature.

.

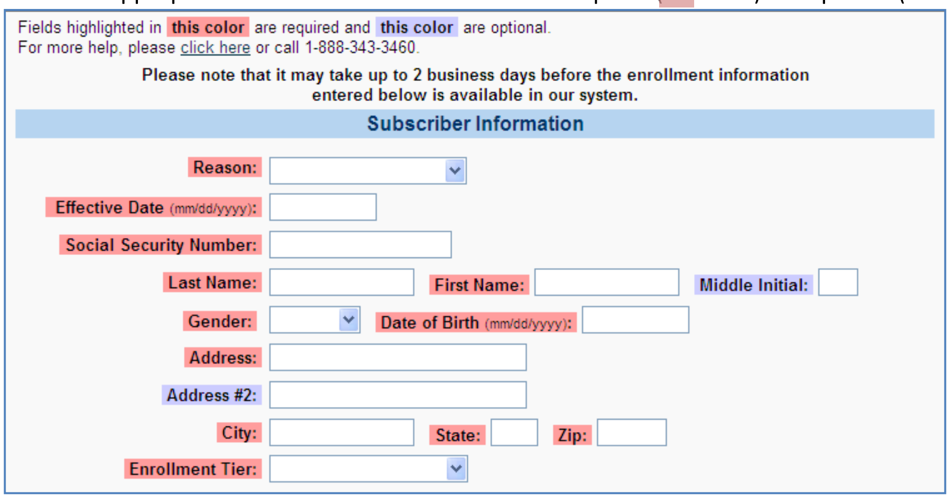
Modify Existing Enrollment record

This section illustrates the method to modify an existing Subscriber Enrollment record for e.g.: changes to address, date of birth, change in class code/subgroup, adding a dependent, reinstatement or termination of coverage.

1. Before performing any enrollment transactions, use the Check Enrollment feature in section page 6 to verify current enrollment status.
2. Click the Enrollment Form link from the left navigation bar.

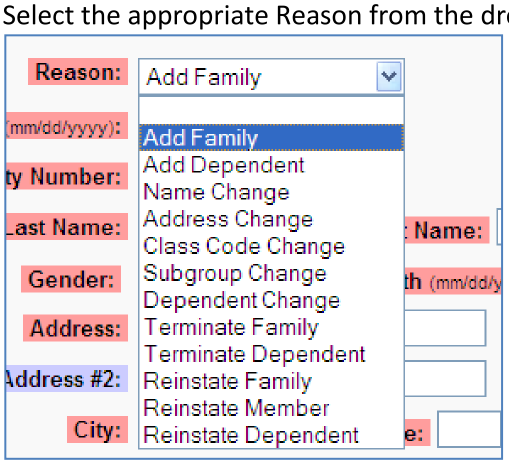


3. Utilize the appropriate Enrollment form to enter all the required (red fields) and optional (blue fields).



Note: All required fields must be completed to save changes; a prompt is displayed when a required field is blank.

- Select the appropriate Reason from the drop-down menu.



- Enter the date of the requested change or termination in the Effective Date field in mm/dd/yyyy (month/date/year) format.
- Enter the Subscriber/Employee's Social Security Number.
- Enter the Subscriber/Employee Last Name (including any suffix, i.e., Sr., Jr., etc.).

- Enter the Subscriber/Employee First Name.
- Enter the Subscriber/Employee Middle Initial (optional).
- Select Gender (Male or Female).
- Enter the Subscriber/Employee Date of Birth in mm/dd/yyyy (month/date/year) format.
- Enter the Subscriber/Employee Address, City, State, Zip and Phone Number (if applicable) in the appropriate fields. (Address #2 is optional.)
- Select the appropriate tier selects based on the employee's enrollment selection **and** your group's tier structure:
  2 tier groups: Employee Only or Employee + Family
  3 tier groups: Employee Only, Employee + 1 or Employee + Family
  4 tier groups: Employee Only, Employee + Spouse, Employee + Child(ren) or Employee + Family
- Select the appropriate system member category from the Category option(s). If there is more than one option, a drop-down menu will be provided.
- For an changes to the subscriber information only such as an address change, class code/subgroup change, or family termination, you do not need to enter the dependent information. Otherwise, complete the Dependent information section for each dependent:
  - Select the appropriate Reason from the drop-down menu.
  - Enter the Dependent's First Name.
  - Enter the Dependent's Middle Initial (optional).
  - Enter the Dependent's Last Name.
  - Select the Dependent's relationship from the drop-down menu.
  - Select Gender (Male or Female).
  - Enter the Dependent's Date of Birth in mm/dd/yyyy (month/date/year) format.
  - Enter the Dependent's Effective date of change or termination in mm/dd/yyyy (month/date/year) format.
  - Repeat the above steps until all Dependents have been updated. Then proceed to Step 3 below.

3. Press Save Changes button to submit the Enrollment data to Davis Vision.

Note: Benefit Manager requests will be completed within 3 Business Days.

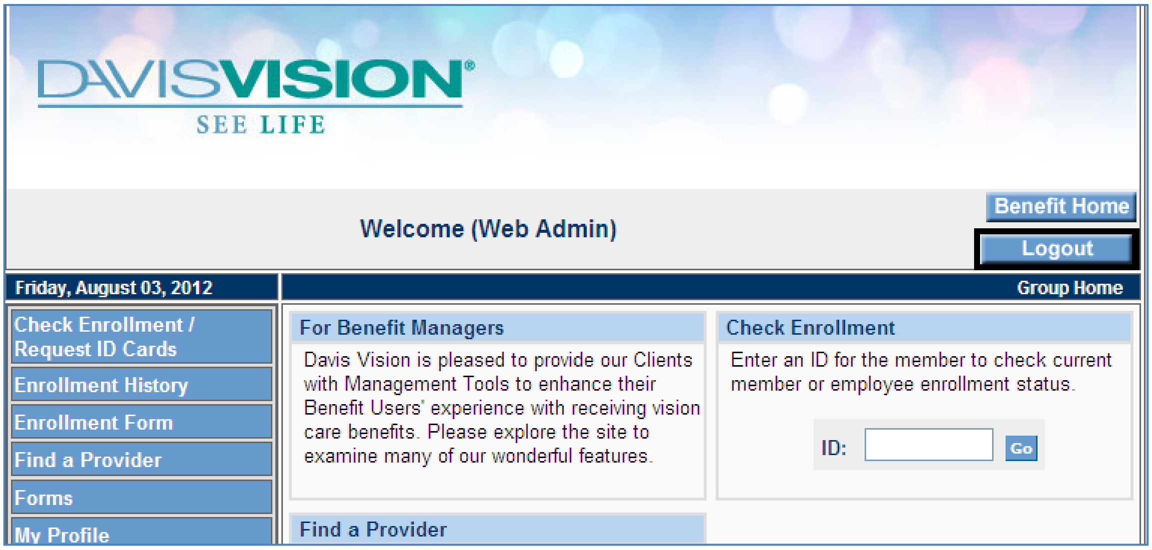
To confirm an enrollment has request has been processed, please log-in to the Benefit Manager and use the Check Enrollment feature.

Changing Social Security Number (SSN)

In order to eliminate the possibility of a duplicate enrollment, if a member's SSN appears incorrectly in our system, please call our customer service team for assistance at 1-877-328-4739. Do not change a member's SSN through the Benefit Manager System.

Logout of Benefit Manager

Log out at any time during your session by clicking on the Logout button located in the top right of your screen.



You will be taken to the Davis Vision website upon successfully logging out of Benefit Manager.