



DAVIS VISION DIRECT (X06)
BENEFIT MANAGER

USER MANUAL

DAVIS VISION

BENEFIT MANAGER

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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.
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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.

Check Enrollment / Request ID Cards	For Benefit Managers Davis Vision is pleased to provide our Clients with Management Tools to enhance their Benefit Users' experience with receiving vision care benefits. Please explore the site to examine many of our wonderful features.	Check Enrollment Enter an ID for the member to check current member or employee enrollment status. ID: <input type="text"/> <input type="button" value="Go"/>
Enrollment History	Find a Provider 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. Provider List: <input type="text"/> <input type="button" value="v"/> Zip Code: <input type="text"/> <input type="button" value="Go"/>	
Enrollment Form		
Find a Provider		
Forms		
My Profile		
Your Vision - What You Should Know		
Links		
View Messages		
Contact Us		
User Guide - DV Direct		

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 a member has a future "eligibility date", this means they have utilized their benefits or a portion thereof.

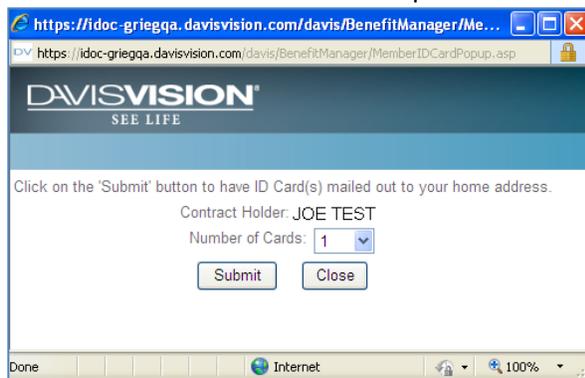
Request ID Cards

This section illustrates the method to request an 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.

<ul style="list-style-type: none"> Check Enrollment / Request ID Cards Enrollment History Enrollment Form Find a Provider Forms My Profile Your Vision - What You Should Know Links View Messages Contact Us User Guide - DV Direct 	<p>Group : Davis Vision Small Group Product Subgroup : 001 Member Name : JOE TEST (1234587890) Order Member ID Cards</p> <p style="text-align: center;">Member Eligibility</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship</th> <th>Eligibility Status</th> <th>Services</th> <th>Effective Date</th> <th>Termination Date</th> </tr> </thead> <tbody> <tr> <td>JOE TEST</td> <td>MEMBER</td> <td>Currently Eligible</td> <td>Examination, Contact Lens Evaluation and Fitting, 1 pair eyeglasses or contacts</td> <td>6/1/2012</td> <td></td> </tr> </tbody> </table> <p>Member Forms</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Vision Plan Benefit Description</td> <td>Adobe (.pdf)</td> <td>View Form</td> </tr> <tr> <td>Out of Network Claim Form</td> <td>Adobe (.pdf)</td> <td>View Form</td> </tr> <tr> <td>Warranty Information</td> <td>Adobe (.pdf)</td> <td>View Form</td> </tr> <tr> <td>Membership Card</td> <td>Adobe (.pdf)</td> <td>View Form</td> </tr> </tbody> </table>	Name	Relationship	Eligibility Status	Services	Effective Date	Termination Date	JOE TEST	MEMBER	Currently Eligible	Examination, Contact Lens Evaluation and Fitting, 1 pair eyeglasses or contacts	6/1/2012		Name	Type	Action	Vision Plan Benefit Description	Adobe (.pdf)	View Form	Out of Network Claim Form	Adobe (.pdf)	View Form	Warranty Information	Adobe (.pdf)	View Form	Membership Card	Adobe (.pdf)	View Form
Name	Relationship	Eligibility Status	Services	Effective Date	Termination Date																							
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Warranty Information	Adobe (.pdf)	View Form																										
Membership Card	Adobe (.pdf)	View Form																										

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



Print or Save Temp ID Cards

This section illustrates the method to request an 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

Links																
View Messages																
Contact Us																
User Guide - DV Direct																
Views more...																
<i>No Current Articles</i>																
	Member Forms															
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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.

Check Enrollment / Request ID Cards	For Benefit Managers Davis Vision is pleased to provide our Clients with Management Tools to enhance their Benefit Users' experience with receiving vision care benefits. Please explore the site to examine many of our wonderful features.	Check Enrollment Enter an ID for the member to check current member or employee enrollment status. ID: <input type="text"/> <input type="button" value="Go"/>
Enrollment History		
Enrollment Form		
Find a Provider		
Forms		

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

Fields highlighted in **this color** are required and **this color** are optional.
For more help, please [click here](#) or call 1-888-343-3460.

Please note that it may take up to 2 business days before the enrollment information entered below is available in our system.

Subscriber Information

Reason:

Effective Date (mm/dd/yyyy):

Social Security Number:

Last Name: **First Name:** **Middle Initial:**

Gender: **Date of Birth (mm/dd/yyyy):**

Address:

Address #2:

City: **State:** **Zip:**

Enrollment Tier:



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.

The screenshot shows a navigation bar on the left with the following items: Check Enrollment / Request ID Cards, Enrollment History, Enrollment Form (highlighted with a black box), Find a Provider, and Forms. To the right, there are two panels. The first panel, titled 'For Benefit Managers', contains text about Davis Vision's services. The second panel, titled 'Check Enrollment', contains the text 'Enter an ID for the member to check current member or employee enrollment status.' and a form with an 'ID:' label, an input field, and a 'Go' button.

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

The screenshot shows the 'Subscriber Information' form. At the top, there is a note: 'Fields highlighted in this color are required and this color are optional. For more help, please click here or call 1-888-343-3460. Please note that it may take up to 2 business days before the enrollment information entered below is available in our system.' The form fields are: Reason (dropdown), Effective Date (mm/dd/yyyy) (text), Social Security Number (text), Last Name (text), First Name (text), Middle Initial (text), Gender (dropdown), Date of Birth (mm/dd/yyyy) (text), Address (text), Address #2 (text), City (text), State (text), Zip (text), and Enrollment Tier (dropdown). Red highlights indicate required fields, and blue highlights indicate optional 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.

The screenshot shows the 'Reason' dropdown menu open. The dropdown list contains the following options: Add Family, Add Family, Add Dependent, Name Change, Address Change, Class Code Change, Subgroup Change, Dependent Change, Terminate Family, Terminate Dependent, Reinstate Family, Reinstate Member, and Reinstate Dependent. The 'Add Family' option is currently selected.

- 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.

The screenshot shows the Davis Vision Benefit Manager interface. At the top left is the Davis Vision logo with the tagline "SEE LIFE". Below the logo, it says "Welcome (Web Admin)". In the top right corner, there are two buttons: "Benefit Home" and "Logout". Below the welcome message, the date "Friday, August 03, 2012" is displayed. On the left side, there is a navigation menu with items: "Check Enrollment / Request ID Cards", "Enrollment History", "Enrollment Form", "Find a Provider", "Forms", and "My Profile". The main content area is divided into three sections: "For Benefit Managers" with a welcome message, "Check Enrollment" with a form to enter an ID and a "Go" button, and "Find a Provider".

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

The screenshot shows the Davis Vision website homepage. At the top left is the Davis Vision logo with the tagline "SEE LIFE". Below the logo, there is a navigation menu with items: "Members", "Clients", "Brokers", "Providers", "Vision Wellness Library", and "Focus On America". Below the navigation menu, there is a "Welcome" section with a video player showing a woman in a field. To the right of the video player, there is a "Client Log In" section with a form to enter a username and password, and a "Submit" button. Below the "Client Log In" section, there is a "To Enroll" section with a video player showing a man and a woman. To the right of the "To Enroll" section, there is an "Announcements" section with a heading "Public Relations Society of America" and a paragraph of text.