

# Group Portal Tip Sheet



\*\*\* IMPORTANT NOTE: EyeMed has recently updated the security on their internet sites. Please ensure that you have the most recent version of the Internet Browser. Outdated browsers may lead to decreased functionality on the Portal.

## Managing Your Personal Profile

1. Click on the Manage My Profile button on the left-hand navigation bar.

The screenshot shows the EyeMed Client Group Portal home page. The left-hand navigation bar includes links for Home, Create New User, Manage Users, Search & ID Cards, Member Maintenance, Enrollment Reports, Invoices, **Manage My Profile** (highlighted with a red box), Provider Locator, Contact Us, User Resources, Resources, Training, Latest News, and Wellness 101. The main content area displays a welcome message and a table of groups associated with the user account.

| Group ID | Group Name           | Effective Date | Term Date |
|----------|----------------------|----------------|-----------|
| Q888000  | Test subgroup for GP | 01/01/1999     |           |
| Q888000  | Test subgroup for GP | 01/01/1999     |           |

2. Update the necessary information (i.e. name, address, phone number, email). You cannot change your User ID. If you would like to request your user ID, please contact your account manager.

The screenshot shows the 'Manage My Profile' page. The profile information form is highlighted with a red box. The form includes fields for User ID, Account Type, First Name, Last Name, Email, Business Name, and Phone. There is also a checkbox for 'Opt-in to Automatic Invoice Email Notification' and a 'Change Password' link.

**Manage My Profile**

To update your profile information, edit any of the fields below.

[Clear Fields](#)

User ID: EYEMEDTESTUSER [Change Password](#)

Account Type: Client

First Name: TEST

Last Name: USER

Email: client@eyemed.com

Business Name: TEST USER

Phone: 5135555555 Ext:

Opt-in to Automatic Invoice Email Notification

\* Required Fields



3. **Note:** All registered users will receive an email to notify them that their monthly invoice is ready. You can opt out of that email notification by clicking on the Opt-in checkbox.
4. The invoice email will come from [donotreply@eyemed.com](mailto:donotreply@eyemed.com). If you do not receive the email the first week of the month, please check your spam / blocked emails. The email will contain the name and ID numbers of the groups that you have been given permission to view.

## How to Change Password

1. Click on the Change Password hyperlink on the Manager My Profile menu option and follow the prompts to reset your password. Enter your existing password, then enter your new password and confirm.
2. Once you have entered the new password, click the Save button.
3. **Note:** It may take 10 minutes for the password to update in the system.

**eyeMed** Hello, TEST USER | Logout

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

**User Resources**

- Resources
- Training
- Latest News
- Wellness 101

**Change Password** ?

Complete the fields below to change your password. Passwords must be a minimum of eight characters with at least one upper case letter, one lower case letter and one number.

[Clear Fields](#)

User ID: EYEMEDTESTUSER

Current Password:

New Password:

Reenter New Password:

Save

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## Add a Subscriber

1. Select Member Maintenance on the left hand navigation User Tools.

eyeMed Hello, TEST USER | Logout

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance**
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

Welcome to the EyeMed Client Group Portal

Welcome to EyeMed's Online Group Management System. As a registered user, you can easily manage your vision account. You have the ability to maintain your enrollee information, manage your invoices and download real-time enrollment reports. You also have access to additional EyeMed group management tools, including reporting, training and forms.

Below are the groups associated with your user account. You can view information about your groups by clicking on the Group ID. You can also view your account manager's contact information by clicking Contact Us from the left navigation bar. To get started, select an option from the navigation bar on the left.

Nothing found to display.

2 item(s) found

| Group ID | Group Name           | Effective Date | Term Date |
|----------|----------------------|----------------|-----------|
| Q888000  | Test subgroup for GP | 01/01/1999     |           |
| Q888000  | Test subgroup for GP | 01/01/1999     |           |

**User Resources**

- Resources
- Training
- Latest News
- Wellness 101

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2. Choose the correct Group and Subgroup from the drop down

eyeMed Hello, TEST USER | Logout

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance**
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

**Member Maintenance**

To being member maintenance, please choose the correct group from the dropdown box and click the Next button.

Select a Plan/Group: Q888000 - 1001 - Test Group for GP - Test subgroup for GP

Cancel Next >>

**Hold Transactions**

To see all submitted transactions, see the [Transactions History](#).

No hold transactions.

**Pending SubGroup Transfer**

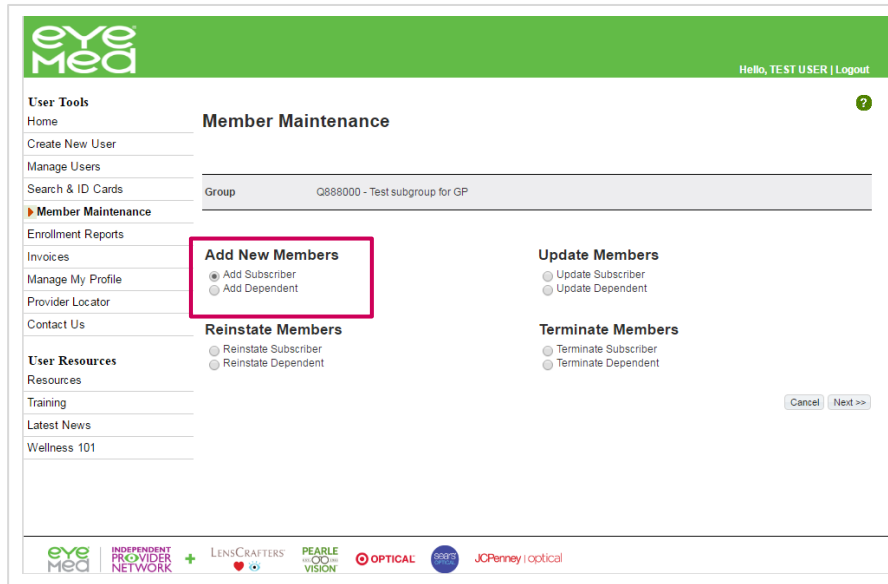
No pending subgroup transfer(divisional) requests.

To see all accepted, retracted or denied subgroup transfer requests, see the [Subgroup Transfer Archive](#).

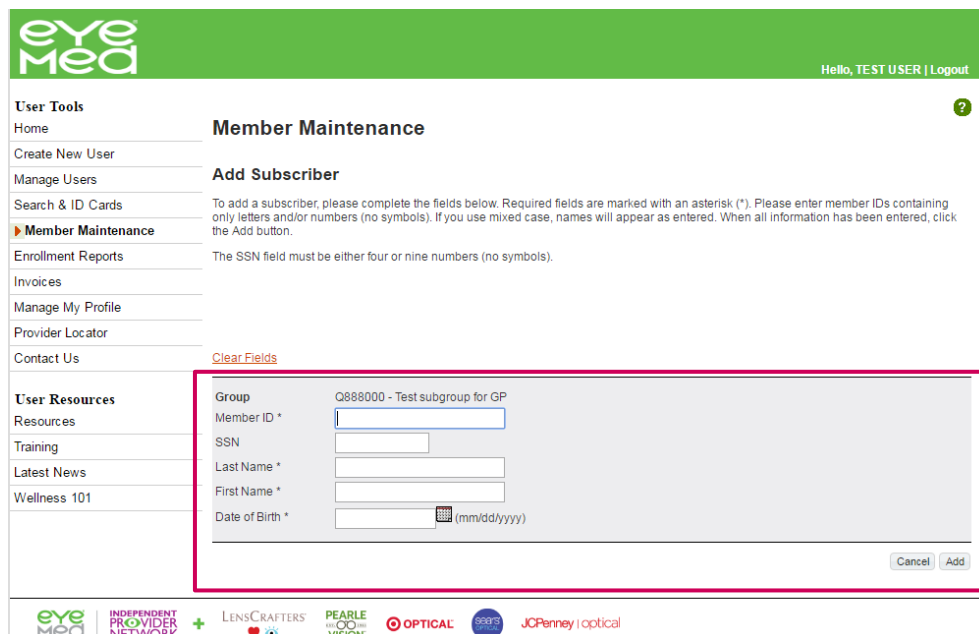
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3. Click the button next to Add Subscriber and the appropriate fields will appear.



4. Everything denoted with an asterisk will need to be completed. The social security number is an optional field and you can use the full nine digits or just the last four digits. Also, if EyeMed generates your ID Number, then you are not required to enter it in this screen.





5. Once the information is added, click the Add button.

**eye Med** Hello, TEST USER | Logout

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance**
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

**User Resources**

- Resources
- Training
- Latest News
- Wellness 101

### Member Maintenance

#### Add Subscriber

To add a subscriber, please complete the fields below. Required fields are marked with an asterisk (\*). Please enter member IDs containing only letters and/or numbers (no symbols). If you use mixed case, names will appear as entered. When all information has been entered, click the Add button.

The SSN field must be either four or nine numbers (no symbols).

[Clear Fields](#)

|                 |   |                      |              |
|-----------------|---|----------------------|--------------|
| Group           | Q888000 - Test subgroup for GP          |                      |              |
| Member ID *     | <input type="text" value="1234567"/>    |                      |              |
| SSN             | <input type="text"/>                    |                      |              |
| Last Name *     | <input type="text" value="Doe"/>        |                      |              |
| First Name *    | <input type="text" value="John"/>       |                      |              |
| Date of Birth * | <input type="text" value="01/01/1980"/> | <input type="text"/> | (mm/dd/yyyy) |

**Partners:** eye Med, INDEPENDENT PROVIDER NETWORK, LENS CRAFTERS, PEARLE VISION, OPTICAL, JCPenney | optical

6. Enter the additional information for the member. Anything denoted with an asterisk is required to enter the member into our system. Click Submit when completed.

Member ID \*

First Name \*  Middle Initial

Last Name \*  Suffix

Date of Birth \*  (mm/dd/yyyy) SSN

Relationship \*

Gender \*

Phone  Email

#### Primary Address

Address Line 1 \*

Address Line 2  City \*

Address Line 3  State \*

Zip \*  County

#### Coverage

Enter the effective date as the first day of coverage. If entering a term date, enter the last day of coverage. If making a coverage change that requires a new effective date, the new effective date field will appear.

Effective Date \*  (mm/dd/yyyy) SubGroup Test subgroup for GP

Term Date  (mm/dd/yyyy) Class Test Class

Plan Desc. Benefit Level 1

Reporting Codes

Updating the reporting code for any member of the family will update the reporting codes for the entire family. Reporting codes are not date-effective.

Additional Reporting Codes

Updating the reporting code for any member of the family will update the reporting codes for the entire family. Reporting codes are not date-effective.

Privacy Address

Language Assistance

\* Required Fields

# Group Portal Tip Sheet



**NOTE:** Once you click submit, the information will be sent to EyeMed's system. No additional steps are needed. The member will be added immediately.

7. You will receive a summary page to confirm the information entered into our system. You can click **Add Dependent** to have dependents added to the member. You can also print the confirmation by selecting the **Print** button.

### Member Maintenance

#### Add Subscriber Summary

We have received and processed the request to add a subscriber. As always, we appreciate your partnership.

[Add Dependent](#) [Edit Member](#) [Return Home](#) [Print](#)

|               |                      |
|---------------|----------------------|
| Group ID      | Q888000              |
| Group Name    | Test Group for GP    |
| SubGroup Name | Test subgroup for GP |

#### Member Details

|               |            |                |      |
|---------------|------------|----------------|------|
| Member ID     | 1234567    |                |      |
| First Name    | John       | Middle Initial |      |
| Last Name     | Doe        | Suffix         |      |
| Date of Birth | 01/01/1980 | SSN            |      |
| Relationship  | Subscriber | Gender         | Male |
| Phone         |            | Email          |      |

## Add a Dependent

1. The Dependent Member ID is automatically completed. You will also see the Last Name and Effective Date are auto-filled for you but editable.

### Member Maintenance

#### Add Dependent

[Clear Fields](#)

|            |                      |
|------------|----------------------|
| Group ID   | Q888000              |
| Group Name | Test subgroup for GP |

| Member Name | Member ID | DOB        | Relationship | Effective Date | Term Date |
|-------------|-----------|------------|--------------|----------------|-----------|
| DOE, JOHN   | 123456700 | 01/01/1980 | Subscriber   | 01/01/2017     |           |

|                 |  |                |                      |
|-----------------|--|----------------|----------------------|
| Member ID *     | <input type="text" value="1234567"/>                 | Middle Initial | <input type="text"/> |
| First Name *    | <input type="text"/>                                 | Suffix         | <input type="text"/> |
| Last Name *     | <input type="text" value="DOE"/>                     | SSN            | <input type="text"/> |
| Date of Birth * | <input type="text" value="01/01/1980"/> (mm/dd/yyyy) |                |                      |
| Relationship *  | <input type="text"/>                                 |                |                      |
| Gender *        | <input type="text"/>                                 |                |                      |
| Phone           | <input type="text" value="xxxxxxxxxx"/>              | Email          | <input type="text"/> |

#### Primary Address

|                  |  |         |                                       |
|------------------|--|---------|---------------------------------------|
| Address Line 1 * | <input type="text" value="123 Main ST"/> | City *  | <input type="text" value="New York"/> |
| Address Line 2   | <input type="text"/>                     | State * | <input type="text" value="NY"/>       |
| Address Line 3   | <input type="text"/>                     | County  | <input type="text" value="New York"/> |
| Zip *            | <input type="text" value="10116"/>       |         |                                       |

#### Coverage

Enter the effective date as the first day of coverage. If entering a term date, enter the last day of coverage. If making a coverage change that requires a new effective date, the new effective date field will appear.

|                  |  |          |                      |
|------------------|--|----------|----------------------|
| Effective Date * | <input type="text" value="01/01/2017"/> (mm/dd/yyyy) | SubGroup | Test subgroup for GP |
| Term Date        | <input type="text"/> (mm/dd/yyyy)                    |          |                      |



- If you don't have the information required to submit the member, you can click the Hold button and we will keep this member in a pending status for up to three (3) calendar days. You can access the member through the Member Maintenance screen at the Hold Transactions segment.

**Member Maintenance**

To being member maintenance, please choose the correct group from the dropdown box and click the Next button.

Select a Plan/Group: Q888000 - 1001 - Test Group for GP - Test subgroup for GP

**Hold Transactions**

To see all submitted transactions, see the [Transactions History](#).

These transactions have not been submitted and will be deleted at the end of the expiration date.

| Member Name | Member ID | DOB | Group                       | Expiration Date |
|-------------|-----------|-----|-----------------------------|-----------------|
| DOE         | 1234567   |     | Q888000 - Test Group for GP | 06/17/2017      |

Showing 1 Hold Transaction

**Pending SubGroup Transfer**

No pending subgroup transfer(divisional) requests.

To see all accepted, retracted or denied subgroup transfer requests, see the [Subgroup Transfer Archive](#).

- Click Submit button and the dependent will be added to our system as well. You can continue with all of the dependent additions through the process until completed. Then click Return Home Button

**Member Maintenance**

**Add Dependent Summary**

We have received and processed the request to add a dependent. As always, we appreciate your partnership

[Add Dependent](#) [Edit Member](#) [Return Home](#) [Print](#)

Group ID: Q888000  
 Group Name: Test Group for GP  
 SubGroup Name: Test subgroup for GP

**Member Details**

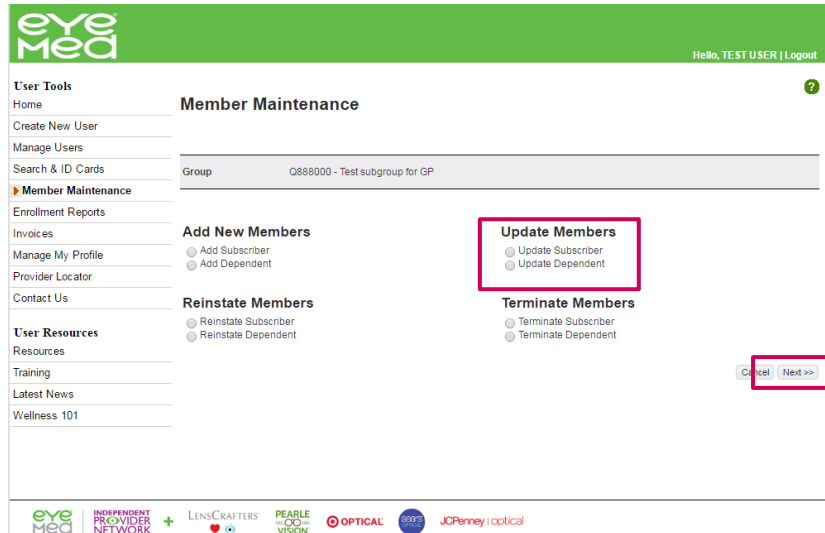
Member ID: 1234567  
 First Name: JANE  
 Last Name: DOE  
 Date of Birth: 06/01/1980  
 Relationship: Wife  
 Phone:   
 Middle Initial:   
 Suffix:   
 SSN:   
 Gender: Female  
 Email:   
 Primary Address

Address Line 1: 123 Main ST  
 Address Line 2:   
 Address Line 3:   
 Zip: 10116  
 City:   
 State: NY  
 County: New York



## Updating Existing Members

1. Click the Update Subscriber or Update Dependent radio button and click Next.



2. You will receive the searchable fields to locate the member to be updated. All fields are not required. To receive more results, provide wider search criteria such as the first few letters of a last name.

### Member Maintenance

#### Update Subscriber Member Search

Please select a subscriber below to update their information. Complete one or more of the fields to narrow your search.  
The SSN field must be either four or nine numbers (no symbols).

[Clear Fields](#)

|               |                                   |
|---------------|-----------------------------------|
| Group         | Q888000 - Test subgroup for GP    |
| Member ID     | <input type="text"/>              |
| SSN           | <input type="text"/>              |
| Last Name     | <input type="text" value="doe"/>  |
| First Name    | <input type="text"/>              |
| Date of Birth | <input type="text"/> (mm/dd/yyyy) |



# Group Portal Tip Sheet



Click on the appropriate subscriber or dependent name.

Please select a dependent record from the results below to continue with member maintenance.

| Subscriber Name | Member Name | Member ID | DOB        | Group                          | Status |
|-----------------|-------------|-----------|------------|--------------------------------|--------|
| DOE,JOHN        | DOE, JANE   | 1234567-1 | 06/01/1980 | Q888000 - Test subgroup for GP | Active |

Showing 1 Result

- Update the information and click Submit. Please note that all changes in green are date effective. All other changes are immediate.

[Clear Fields](#)

Group ID: Q888000  
Group Name: Test subgroup for GP

| Member Name | Member ID | DOB        | Relationship | Effective Date | Term Date |
|-------------|-----------|------------|--------------|----------------|-----------|
| DOE, JOHN   | 123456700 | 01/01/1980 | Subscriber   | 01/01/2017     |           |
| DOE, JANE   | 123456701 | 06/01/1980 | Wife         | 01/01/2017     |           |

Member ID \*

First Name \*  Middle Initial

Last Name \*  Suffix

Date of Birth \*  (mm/dd/yyyy) SSN

Relationship \*

Gender \*

Phone  (xxxxxxxx) Email

**Primary Address**

Address Line 1 \*  City \*

Address Line 2  State \*

Address Line 3  County

Zip \*

**Coverage**

If making a coverage change that requires a new effective date, like a Subgroup or Class change, the new effective date field will appear. If reinstating a terminated member, enter the effective date of the reinstated coverage. We are not able to make updates in terminated subgroups. For those changes, please contact your Account Manager.

Effective Date  (mm/dd/yyyy) SubGroup: Test subgroup for GP

Term Date  (mm/dd/yyyy)

**Reporting Codes**

Updating the reporting code for any member of the family will update the reporting codes for the entire family. Reporting codes are not date-effective.

**Additional Reporting Codes**

Updating the reporting code for any member of the family will update the reporting codes for the entire family. Reporting codes are not date-effective.

**Privacy Address**

**Language Assistance**



## Terminate a Member

1. Click on the Terminate Subscriber or Terminate Dependent radio button and click Next.

The screenshot shows the EyeMed Member Maintenance interface. On the left is a navigation menu with categories like 'User Tools', 'User Resources', and 'Member Maintenance'. The main content area is titled 'Member Maintenance' and shows a group selection of 'Q888000 - Test subgroup for GP'. There are three main sections: 'Add New Members', 'Update Members', and 'Terminate Members'. The 'Terminate Members' section is highlighted with a red box and contains two radio buttons: 'Terminate Subscriber' and 'Terminate Dependent'. To the right of this section, the 'Next >>' button is also highlighted with a red box.

2. You will receive the searchable fields to locate the member to be updated. All fields are not required. To receive more results, provide wider search criteria such as the first few letters of a last name.

The screenshot shows the 'Terminate Subscriber Member Search' form. It includes a search instruction: 'Please select an active subscriber below to be terminated from benefits. Complete one or more fields to narrow your search.' Below this is a 'Clear Fields' link and a search form with fields for Group, Member ID, SSN, Last Name (containing 'doe'), First Name, and Date of Birth. At the bottom right are 'Clear Search', 'Cancel', and 'Search' buttons. Below the search form is a table of results with the following data:

| Member Name | Member ID | DOB        | Group                          | Status |
|-------------|-----------|------------|--------------------------------|--------|
| DOE, JOHN   | 1234567-0 | 01/01/1980 | Q888000 - Test subgroup for GP | Active |

The 'Member Name' column in the table is highlighted with a red box.



- Provide a termination date. Please note that when terming a subscriber, all dependents will be termed as well. You can edit additional information as well. To void a member, please enter the term date equal to the effective date.

### Member Maintenance

#### Terminate Subscriber

Please provide a termination date for the subscriber below. Please note this will also terminate any associated dependents on the attached grid. You can also update any open fields.

[Clear Fields](#)

|            |                      |  |  |  |  |
|------------|----------------------|--|--|--|--|
| Group ID   | Q888000              |  |  |  |  |
| Group Name | Test subgroup for GP |  |  |  |  |

| Member Name | Member ID | DOB        | Relationship | Effective Date | Term Date |
|-------------|-----------|------------|--------------|----------------|-----------|
| DOE, JOHN   | 123456700 | 01/01/1980 | Subscriber   | 01/01/2017     |           |
| DOE, JANE   | 123456701 | 06/01/1980 | Wife         | 01/01/2017     |           |

#### Coverage

If making a coverage change that requires a new effective date, like a Subgroup or Class change, the new effective date field will appear. If reinstating a terminated member, enter the effective date of the reinstated coverage. We are not able to make updates in terminated subgroups. For those changes, please contact your Account Manager.

|                |  |              |            |                      |
|----------------|--|--------------|------------|----------------------|
| Effective Date | 01/01/2017 <input type="text" value=""/> | (mm/dd/yyyy) | SubGroup   | Test subgroup for GP |
| Term Date *    | <input type="text" value=""/>            | (mm/dd/yyyy) | Class      | Test Class           |
|                |  |              | Plan Desc. | Benefit Level 1      |

## Reinstate a Member

- Click on Reinstate Subscriber or Reinstate Dependent radio button and click Next.

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance**
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

**User Resources**

- Resources
- Training
- Latest News
- Wellness 101

### Member Maintenance

Group: Q888000 - Test subgroup for GP

**Add New Members**

- Add Subscriber
- Add Dependent

**Update Members**

- Update Subscriber
- Update Dependent

**Reinstate Members**

- Reinstate Subscriber
- Reinstate Dependent

**Terminate Members**

- Terminate Subscriber
- Terminate Dependent



- You will receive the searchable fields to locate the currently termed members. All fields are not required. To receive more results, provide wider search criteria such as the first few letters of the last name.

**Member Maintenance**

**Reinstate Subscriber Member Search**

Please select a terminated subscriber below to be reinstated. Complete one or more of the fields to narrow your search. The SSN field must be either four or nine numbers (no symbols).

[Clear Fields](#)

Group: Q888000 - Test subgroup for GP

Member ID:

SSN:

Last Name:

First Name:

Date of Birth:  (mm/dd/yyyy)

Please select a subscriber record from the results below to continue with member maintenance.

| Member Name | Member ID | DOB        | Group                          | Status   |
|-------------|-----------|------------|--------------------------------|----------|
| DOE, JOHN   | 1234567-0 | 01/01/1980 | Q888000 - Test subgroup for GP | inactive |

Showing 1 Result.

- Provide the updated effective date. It can be in the future or in the past. You can also choose any dependents that should be reinstated with the subscriber

Please note: For any members that are reinstated and also moved to a new subgroup, there is a processing time of approximately 90 minutes.

**Reinstate Subscriber**

Please provide the date to reinstate the subscriber. You can also select any dependents on the grid to be reinstated as well. You can also update any open fields.

[Clear Fields](#)

Group ID: Q888000  
Group Name: Test subgroup for GP

| Select for Reinstate                | Member Name | Member ID | DOB        | Relationship | Effective Date | Term Date  |
|-------------------------------------|-------------|-----------|------------|--------------|----------------|------------|
| <input checked="" type="checkbox"/> | DOE, JOHN   | 123456700 | 01/01/1980 | Subscriber   | 01/01/2017     | 05/01/2017 |
| <input checked="" type="checkbox"/> | DOE, JANE   | 123456701 | 06/01/1980 | Wife         | 01/01/2017     | 05/01/2017 |

Reinstate Effective Date \*  (mm/dd/yyyy)

Reinstate Term Date  (mm/dd/yyyy)



## Accessing & Using the Invoices

1. Click on Invoices on the Left Hand Menu Bar and Choose the group from the dropdown list (if you have access to more than one plan) and click "Search".

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance
- Enrollment
- Invoices**
- Manage My Profile
- Provider Locator
- Contact Us

**User Resources**

- Resources
- Training
- Latest News
- Wellness 101

**Invoices**

**Invoice Search**

Choose a plan from the drop-down and select Search to view invoices from the last 12 months.

Select a group:

2. *Note: the layout could contain up to three separate grids. The newest invoices will appear on the first grid. The second grid will contain invoices for previous months. These two grids will contain up to 13 months of invoices information. The bottom grid lists our new "Statement of Account" for your review, listing up to five months of Statements of Account.*

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance
- Enrollment Reports
- Utilization Reports
- Invoices**
- Batch History
- Manage My Profile
- Provider Locator
- Contact Us

**User Resources**

- Forms
- Training
- Latest News
- Wellness 101

**Invoices**

**Invoice Details**

A summary of invoice is displayed below. To view the roster and retroactive adjustments (if any). Click the Download Roster/Retro link at the bottom of the page. To download the invoice, select the download invoice link.

**eye Med**

**SUMMARY INVOICE FOR:** Premium Data Company  
**GROUP ID:** 9000008  
**SUBGROUP ID:** 1001  
**INVOICE NUMBER:** 160540000

**BILLING PERIOD: DEC, 2015**

| COVERAGE TIER           | COUNT | RATE    | TOTAL           |
|-------------------------|-------|---------|-----------------|
| Employee Only           | 29    | \$6.38  | \$185.02        |
| Employee + Spouse       | 20    | \$12.11 | \$242.20        |
| Employee + Children     | 11    | \$12.75 | \$140.25        |
| Employee + Family       | 8     | \$18.74 | \$149.92        |
| <b>FULL MONTH TOTAL</b> |       |         | <b>\$717.39</b> |

| RETRO ACTIVE ADJUSTMENTS | TOTAL    |
|--------------------------|----------|
| Retro 9/2015             | (\$7.02) |
| Retro 10/2015            | (\$5.64) |

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# Group Portal Tip Sheet



Click on any Invoice Number to open the invoice and see the details. When you click to open the invoice or roster, it might provide a link at the bottom of the screen or the top on the menu bar, depending on your browser settings.

| SUMMARY INVOICE FOR: Premium Data Company |       |         |                 |
|---|-------|---------|-----------------|
| GROUP ID: 9000008                         |       |         |                 |
| SUBGROUP ID: 1001                         |       |         |                 |
| INVOICE NUMBER: 160540000                 |       |         |                 |
| BILLING PERIOD: DEC, 2015                 |       |         |                 |
| <b>FULL MONTH</b>                         |       |         |                 |
| COVERAGE TIER                             | COUNT | RATE    | TOTAL           |
| Employee Only                             | 29    | \$6.38  | \$185.02        |
| Employee + Spouse                         | 20    | \$12.11 | \$242.20        |
| Employee + Children                       | 11    | \$12.75 | \$140.25        |
| Employee + Family                         | 8     | \$18.74 | \$149.92        |
| <b>FULL MONTH TOTAL</b>                   |       |         | <b>\$717.39</b> |
| <b>RETRO ACTIVE ADJUSTMENTS</b>           |       |         |                 |
|   |       |         | <b>TOTAL</b>    |
| Retro 9/2015                              |       |         | (\$7.02)        |
| Retro 10/2015                             |       |         | (\$5.64)        |
| Retro 11/2015                             |       |         | \$12.11         |
| <b>RETRO ADJUSTMENT TOTAL</b>             |       |         | <b>\$4.45</b>   |
| <b>CURRENT BILLING PERIOD TOTAL</b>       |       |         | <b>\$721.84</b> |

PAYMENT IS DUE IN FULL UPON RECEIPT  
THE INVOICE CALCULATION IS BASED ON MEMBERSHIP AS OF 11/15/2015  
PLEASE DETACH AND RETURN

Remit To: Bank XYZ  
1 First Street  
New York, NY 12345

Here's an example of a downloaded invoice!

- Our roster provides the employee name, tier and the billing month. If you want to view the dependents, you can request an enrollment report on our Group Portal to see all members.

See the "Request & Download Enrollment Report" tip sheet for more information.

| ROSTER REPORT          |            |                |                   |                 |         |               |               |              |
|------------------------|------------|----------------|-------------------|-----------------|---------|---------------|---------------|--------------|
| <b>FULL ROSTER</b>     |            |                |                   |                 |         |               |               |              |
| ROSTER LISTING FOR:    |            | Great Savings  |                   |                 |         |               |               |              |
| BILLING PERIOD:        |            | December, 2015 |                   |                 |         |               |               |              |
| INVOICE NUMBER:        |            | 160540000      |                   |                 |         |               |               |              |
| <b>FULL MONTH LIST</b> |            |                |                   |                 |         |               |               |              |
| EM Subscriber ID       | Last Name  | First Name     | Billing Tier      | Plan            | Rate    | Division Code | Location Code | Company Code |
| 1008880699             | BARNHART   | ALEXA          | Employee + Spouse | Benefit Level 2 | \$12.11 |               |               |              |
| 10088844123            | BEACHY     | JAMES          | Employee + Spouse | Benefit Level 2 | \$12.11 |               |               |              |
| 10088845234            | BEACHY     | MATTHEW        | Employee Only     | Benefit Level 2 | \$6.38  |               |               |              |
| 10088845356            | BIRD       | ASHLEY         | Employee Only     | Benefit Level 2 | \$6.38  |               |               |              |
| 10088849412            | BURKHOLDER | DAVID          | Employee Only     | Benefit Level 2 | \$6.38  |               |               |              |
| 10088849978            | BYLER      | JEREMY         | Employee Only     | Benefit Level 2 | \$6.38  |               |               |              |
| 10088844766            | BYLER      | JOANNA         | Employee Only     | Benefit Level 2 | \$6.38  |               |               |              |
| 10088844222            | CHUPP      | JOANN          | Employee Only     | Benefit Level 2 | \$6.38  |               |               |              |
| 10088844833            | CLARK      | WANDA          | Employee Only     | Benefit Level 2 | \$6.38  |               |               |              |
| 10088845444            | DALTON     | DANIEL         | Employee + Spouse | Benefit Level 2 | \$12.11 |               |               |              |
| 10088847566            | ERVIN III  | ROBERT         | Employee + Family | Benefit Level 2 | \$18.74 |               |               |              |
| 10088845544            | EISK       | EAMME          | Employee + Family | Benefit Level 2 | \$18.74 |               |               |              |

To view dependent members, please see the Enrollment Report at [www.eyemedvisioncare.com/groupmanagement](http://www.eyemedvisioncare.com/groupmanagement)



- We are able to provide online credit card payments for some clients. If this is available, you will see the radio button and click "Pay Invoice" and you will be able to follow the prompts to pay online:

Click on the Invoice Number to view an invoice.

One Invoice found.

| Invoice Number          | Billing Month | Division | Invoice Amount | Select an Invoice     |
|-------------------------|---------------|----------|----------------|-----------------------|
| <a href="#">5024866</a> | 06/2016       |          | \$1,360.10     | <input type="radio"/> |

[Pay Invoice](#)

- The Statement of Account provides an overall view of the billing. For printed invoices, this is the front page of the packet. Click on the Billing Date to view it.

## Invoices

### Invoice Search

Below is a list of statements of account. They are a consolidated view of all outstanding balances for the group. Click on the invoice number to view the details or download the invoice.

**Invoices for Group** 87654321 - Great Savings

Below is a list of available invoices. In the grids below, you can access up to 13 months of invoice information. Click on any invoice number to view details or download the invoice. You may also select an invoice to pay by credit card, if available.  
*Note: Credit card payment option is not available to all clients at this time.*

Click on an invoice number to view details or select an invoice to pay by credit card.

*Note: Credit card option may not be available for all clients.*

| Invoice Number            | Invoice Type    | Billing Month | Subgroup      | Invoice Amount |
|---------------------------|-----------------|---------------|---------------|----------------|
| <a href="#">160540000</a> | Premium Summary | April 1, 2016 | Great Savings | \$5,289.62     |

Showing 1 Invoice

| Billing Period                 | Statement of Acct Amt |
|--------------------------------|-----------------------|
| <a href="#">March 20, 2016</a> | \$281.55              |

Showing 1 Invoice

[Return](#)



- This will provide an overview of the current invoice, combined totals for various subgroups under one client and open balances that are due:

**eye Med** STATEMENT OF ACCOUNT

Client: Premium Data Company  
Group: 9000008  
Subgroups: 1001, 1002, 1003

Open Balance as of 10/21/15 **\$900.00**  
Payments received thru 11/21/15 **(\$835.00)**  
Adjustments To Account **\$0.00**

Current Month Activity

| Invoice        | Invoice Type | Subgroup Name                 | Billing Period | Amount          |
|----------------|--------------|-------------------------------|----------------|-----------------|
| 160540000      | Premium      | Premium Data Company          | Dec 2015       | \$721.84        |
| 160540001      | Premium      | Premium Data Company Cobra    | Dec 2015       | \$25.52         |
| 160540002      | Premium      | Premium Data Company Disabled | Dec 2015       | \$38.28         |
| Premium Total: |              |                               |                | <b>\$785.64</b> |

**Current Month Invoice Total** **\$785.64**

**Total Amount Due** **\$850.64**

Open Balance

| 0-30 Days | 31-60 Days | 61-90 Days | 91-120 Days | >120 Days |
|-----------|------------|------------|-------------|-----------|
| \$785.64  | \$0.00     | \$65.00    | \$0.00      | \$0.00    |

PAYMENT IS DUE IN FULL UPON RECEIPT  
PLEASE DETACH AND RETURN

Invoice Numbers: 160540000, 160540001, 160540002      Remit to: Bank XYZ  
1 First Street  
New York, NY 12345

Here's an example of a Statement of Account.

## Request and Download an Enrollment Report

- Click on Enrollment Report on the Menu Bar

**eye Med** Hello, TEST USER | Logout

**User Tools**

- Home
- Create New User
- Manage Users
- Search & ID Cards
- Member Maintenance
  - Enrollment Reports**
  - Invoices
  - Manage My Profile
  - Provider Locator
  - Contact Us
- User Resources
  - Resources
  - Training
  - Latest News
  - Wellness 101

### Enrollment Reports

Enrollment Details

Select the group from the drop-down to access the enrollment report for that group. You can also filter the report by the subgroup as well as members' status. Your enrollment report will be available shortly. You will receive an email notification.

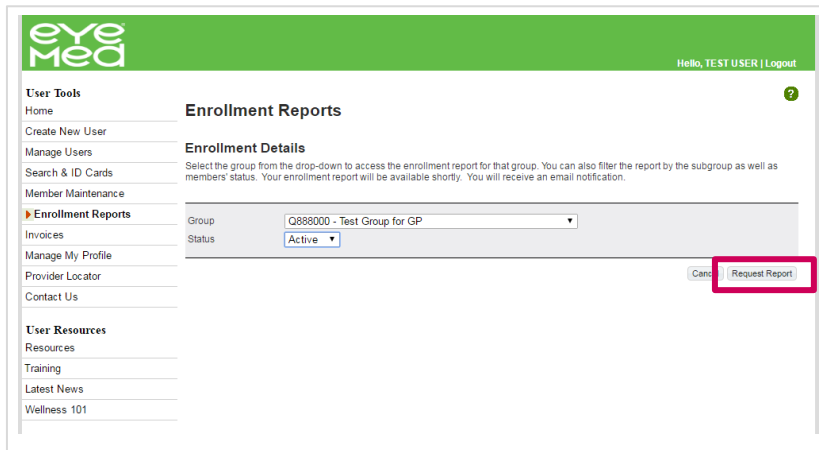
Group: Q888000 - Test Group for GP  
Status: All

Cancel Request Report

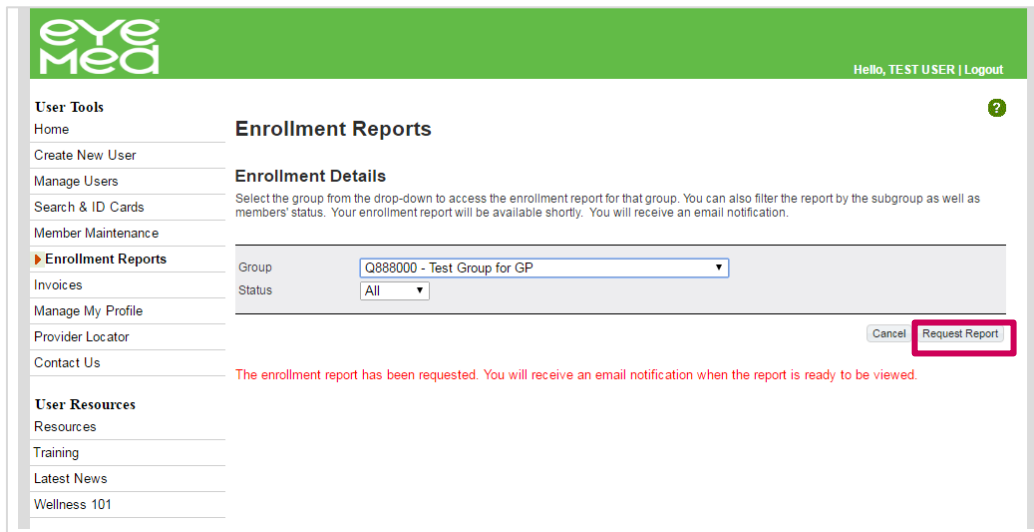




2. Select the Group or Subgroup from the drop down menu and Click "Request Report". There is also the Status option that allows the report to be pulled for Active, Inactive or All members.



3. You will receive a message that it is requested and you will receive an email when it is available.





- The report will be available on the website on .csv or converted to Excel when opened. Note: Completed reports will remain in queue for 5 business days.

## Create New Users

- Select Create New User from the left navigation. Note: if you have not been given permission to Create / Update users, you will not see this option.

| Group ID | Group Name                  | Search & ID Cards        | Member Maint.            | Enroll Reports           | View Invoices            | Create Users             |
|----------|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Q888000  | Test Group for GP           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|          | 1001 - Test subgroup for GP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|          | 1002 - Test subgroup for GP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



- Enter all the information into the required fields. Note: required fields are indicated with an asterisk. Clicking All Access will give the user access to all the features of the Group Portal. Otherwise, you can assign specific Subgroups and Permissions by checking only those boxes that the User needs.

**eyeMed** Hello, TEST USER | Logout

**User Tools**  
[Home](#)  
[Create New User](#)  
[Manage Users](#)  
[Search & ID Cards](#)  
[Member Maintenance](#)  
[Enrollment Reports](#)  
[Invoices](#)  
[Manage My Profile](#)  
[Provider Locator](#)  
[Contact Us](#)

**User Resources**  
[Resources](#)  
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[Latest News](#)  
[Wellness 101](#)

## Create New User

**User Summary**  
 To create a new user, complete the fields below. If you do not enter a User ID, the system will assign one for you using the user's last name and last four digits of the phone number.

**User Information** [Clear Fields](#)

User ID:   
 Email:   
 Account Type:   
 Business Name:   
 First Name:   
 Last Name:   
 Phone:  Ext:   
 \* Required Fields

**Setup Group Access**  
 Assign the required permissions for the user. Once all information has been entered, click the Save User button.

[Collapse All](#) [Expand All](#) [Check All](#) [Clear All](#)

| Group ID | Group Name                                 | Search & ID Cards        | Member Maint.                       | Enroll Reports           | View Invoices            | Create Users             |
|----------|--|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| Q888000  | <input type="checkbox"/> Test Group for GP |                          |                                     |                          |                          |                          |
|          | 1001 - Test subgroup for GP                | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|          | 1002 - Test subgroup for GP                | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

[Save User](#)

- If you need to add additional Groups to the User, click Add Groups, and you'll be taken to the initial Group Search screen. Repeat steps 2-5 from above. Then assign the permissions for the newly selected Group.
- Once all permissions have been selected, click Save User. Note: a system generated email will go to the User with instructions on how to complete the registration.



## Manage Existing Users

1. Select Manage Users from the left navigation.

**eyeMed** Hello, TEST USER | Logout

**User Tools**

- Home
- Create New User
- Manage Users**
- Search & ID Cards
- Member Maintenance
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

**Welcome to the EyeMed Client Group Portal**

Welcome to EyeMed's Online Group Management System. As a registered user, you can easily manage your vision account. You have the ability to maintain your enrollee information, manage your invoices and download real-time enrollment reports. You also have access to additional EyeMed group management tools, including reporting, training and forms.

Below are the groups associated with your user account. You can view information about your groups by clicking on the Group ID. You can also view your account manager's contact information by clicking Contact Us from the left navigation bar. To get started, select an option from the navigation bar on the left.

Nothing found to display.

2 item(s) found

| Group ID | Group Name           | Effective Date | Term Date |
|----------|----------------------|----------------|-----------|
| Q888000  | Test subgroup for GP | 01/01/1999     |           |
| Q888000  | Test subgroup for GP | 01/01/1999     |           |

**User Resources**

- Resources
- Training
- Latest News
- Wellness 101

2. Update the necessary fields in the User Information section. Note: The User ID cannot be modified – if a user wants a new User ID, a new account should be set-up. Then, update the permission in the “Setup Group Access” section.

**User Tools**

- Home
- Create New User**
- Manage Users
- Search & ID Cards
- Member Maintenance
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

**Create New User**

**User Summary**

To create a new user, complete the fields below. If you do not enter a User ID, the system will assign one for you using the user's last name and last four digits of the phone number.

**User Information** [Clear Fields](#)

User ID: TESTER123  
 Account Type: Client  
 First Name: TESTER  
 Last Name: TESTER  
 Email: client@eyemed.com  
 Business Name: Test Group  
 Phone: 5135550000

\* Required Fields

**Setup Group Access**

Assign the required permissions for the user. Once all information has been entered, click the Save User button.

| Group ID | Group Name                  | Search & ID Cards        | Member Maint.                       | Enroll Reports           | View Invoices            | Create Users             |
|----------|-----------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| Q888000  | Test Group for GP           | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|          | 1001 - Test subgroup for GP | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|          | 1002 - Test subgroup for GP | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

[Collapse All](#) [Expand All](#) [Check All](#) [Clear All](#)

Save User



3. **Removing User Access:** You cannot delete a user, but you can remove the user's access by clicking the Remove All Access button and click Save User. Note: the user can later be given updated access, if needed.

**User Tools**

- Home
- Create New User
- Manage Users**
- Search & ID Cards
- Member Maintenance
- Enrollment Reports
- Invoices
- Manage My Profile
- Provider Locator
- Contact Us

**User Resources**

- Resources
- Training
- Latest News
- Wellness 101

## Manage Users ?

### Edit User Information and Group Access

To edit the user's information, enter the new data into the fields below and select the Save User button. To remove the user's access, select the Remove All Access button.

Clear Fields

|              |  |               |  |
|--------------|--|---------------|--|
| User ID      | <input type="text" value="TESTER123"/> | Email         | <input type="text" value="client@eyemed.com"/>                   |
| Account Type | <input type="text" value="Client"/>    | Business Name | <input type="text" value="Test Group"/>                          |
| First Name   | <input type="text" value="TESTER"/>    | Phone         | <input type="text" value="5135550000"/> Ext <input type="text"/> |
| Last Name    | <input type="text" value="TESTER"/>    |               |  |

\* Required Fields

**Setup Group Access**

To edit the user's information, enter the new information into the appropriate fields and/or check or uncheck the appropriate access boxes below. To remove the user's access, click the Remove All Access button. Once all updates have been made, click the Save User button.

Collapse All     Expand All    [Check All](#)   [Clear All](#)

| Group ID | Group Name                                 | Search & ID Cards        | Member Maint.                       | Enroll Reports           | View Invoices            | Create Users             |
|----------|--|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| Q888000  | <input type="checkbox"/> Test Group for GP |                          | <input checked="" type="checkbox"/> |                          | <input type="checkbox"/> | <input type="checkbox"/> |
|          | Test subgroup for GP                       | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|          | Test subgroup for GP                       | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Remove All Access

Cancel

Cancel

Save User

Confidential, Proprietary, Trade Secret