# avēsis

# Benefits Manager Manual

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**Dear Benefits Managers:**

Welcome to Avēsis and to the Benefits Manager portal, where you can manage every aspect of your company's vision insurance administration.

Our website was designed to be intuitive, but just in case you have questions about the many things you can do from www.avesis.com, this manual has all the answers. It's divided into two parts: Getting Started and Benefits Manager Tools. In each section, you'll learn how to do everything from setting security questions to terminating members. Screen grabs show everything you'll see.

Benefits management with Avēsis truly is a breeze.

Thank you for bringing our vision to your employees.

# Getting
# Started

## Sign Up for Online Billing

1. Navigate to https://www.avesis.com/Commercial/BenefitsManagers/index.aspx.
2. Scroll down to the following, and click **Sign up to Manage Group**.



3. Fill in the fields highlighted below:

    a. Select the date that you would like to begin services.

    b. Click **Submit**.

Your request is then delivered to the Account Management Team. Please allow up to 72 hours for activation. Within that time, your account manager will send an email similar to the one below:



4. Log in at https://www.avesis.com/Commercial/BenefitsManagers/index.aspx.
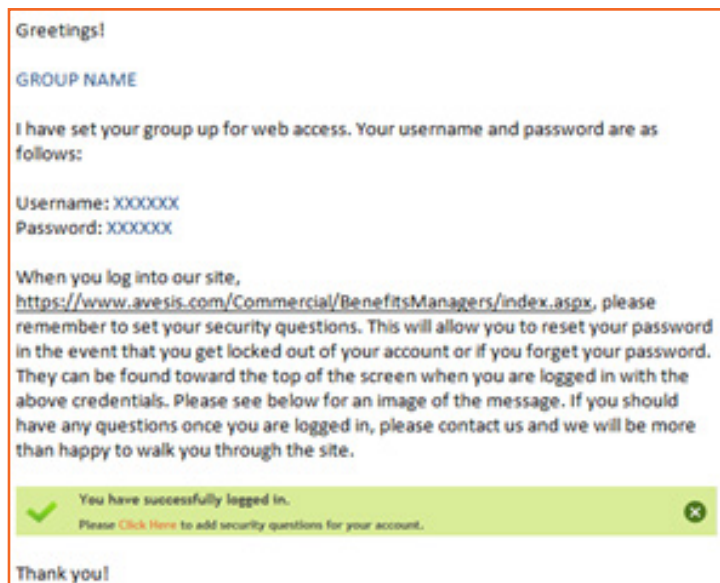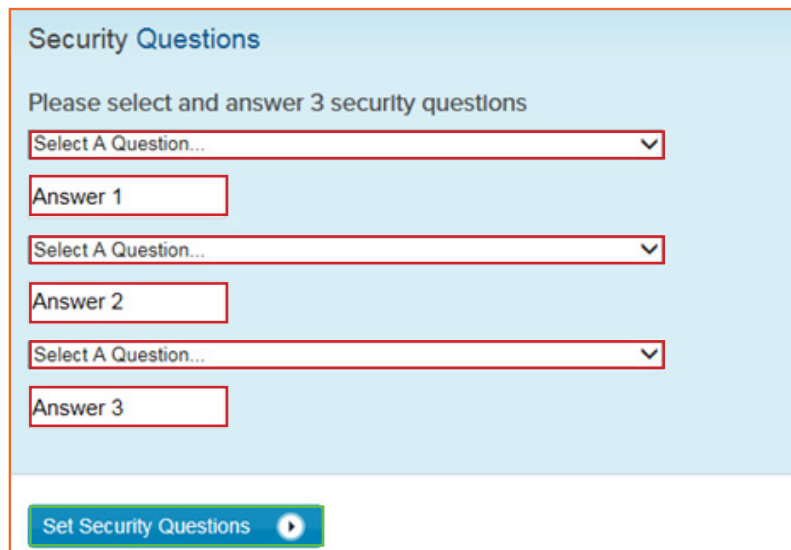
## Set Security Questions

Setting security questions will allow us to reset your password in the event that you forget it or are locked out of your account.

1. Log into the benefits manager portal.
2. Find the green box at the top of the page, and click the **Click Here** link, which will take you to the Security Questions page.
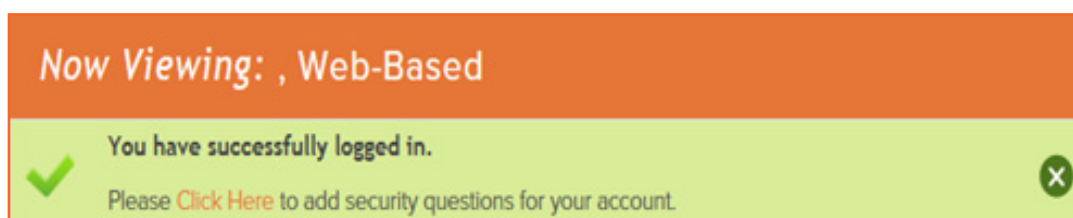
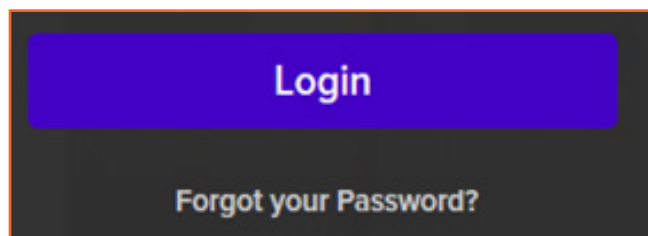3. Select your three questions and fill in their corresponding answers.



4. Click **Set Security Questions**. A popup message will thank you for setting them.
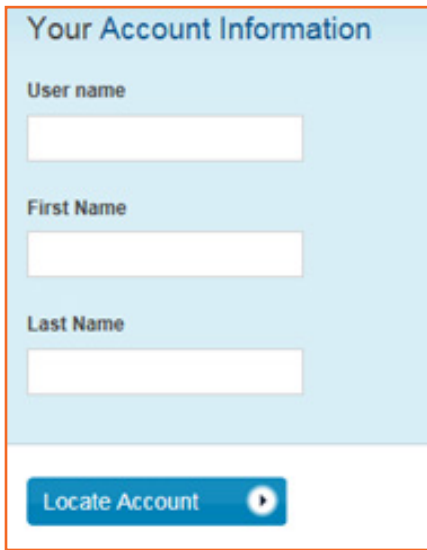5. Click **Continue to Dashboard**.

## Recover Lost Password

1. Navigate to https://www.avesis.com/Commercial/BenefitsManagers/index.aspx.
2. Click **Forgot your Password**, directly below the **Login** button.

3.  Enter the username that is normally used to log into the benefits manager portal and the first and last names of the web administrator.
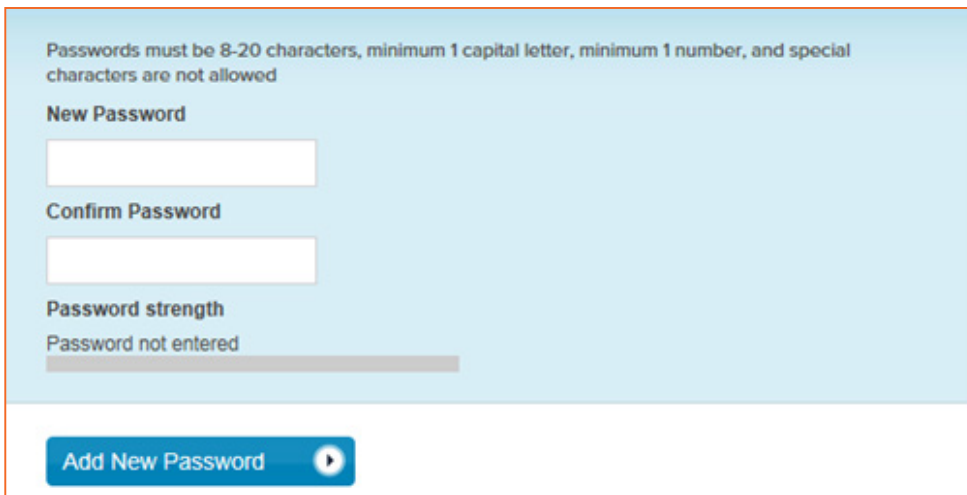


4.  Click **Locate Account**. You will then be directed to your security questions.

5. Fill in all three answers and click **Check Answers**.
6. Create a new password.

Passwords must be 8-20 characters, minimum 1 capital letter, minimum 1 number, and special characters are not allowed

**New Password**

**Confirm Password**

**Password strength**
Password not entered

Add New Password

   a. Passwords must be between 8 and 20 characters and include at least one capital letter and one number. Special characters are not allowed.

   b. Fill in the new password and confirm it.

   c. Click **Add New Password**.

You will then be redirected.
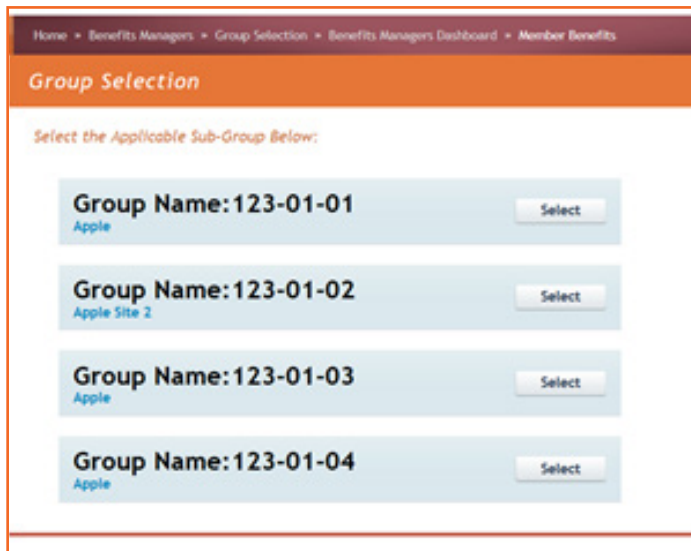
## Create Subgroups

When companies have large numbers of members, subgroups play an important role. They allow for separate billing for different locations and for there to be multiple benefits managers maintaining the groups' eligibility updates.

If your organization has been implemented with subgroups, you will notice  subtle differences in your benefits management.
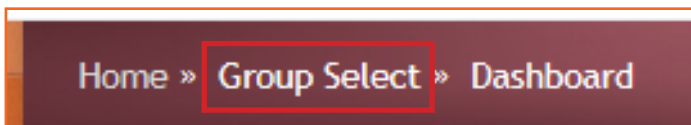
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Once you log in, you'll see the subgroup selection page, shown below, where you can select the subgroup that you would like to view or modify.



Give your subgroup any name you wish, using location, store number, or other identifying detail. After selecting one subgroup, you will have the ability to view the current bill, see member information, or modify member information within that subgroup.

To return to the subgroup selection page, click **Group Select**, as shown below. Then select the next subgroup you'd like to view or modify.

# Benefits Manager
## Tools

## Manage Plan Members

**Add a New Member**

As new employees are hired or open enrollment attracts new vision plan members, it will be necessary to add them to the Avēsis eligibility database. This is the first option listed on the Electronic Billing and Eligibility menu. The steps for adding a new member follow:

1.  Select **Manage Plan Members**.
2.  Select **Add a New Member**.



3.  Enter the member's information, including effective date (date coverage will begin) and primary address.

4. If a member has dependents, enter the information for each, one at a time.

   a. After selecting the **Add Dependent** button, you will be able to add another.

   b. You must select **Add Dependent** before hitting **Submit**.

   c. Select the dependent type from the drop-down menu.

   d. Complete the dependent information form.

   e. Select **Add Dependent**, and you will see the name you just entered in the box below it.

   f. Add another dependent, if necessary.



5. When finished adding dependents, select **Submit**.

6. Select **Close** or **Add Another Member** to continue.



## Edit an Existing Member/Dependent

Editing a member or dependent is required when some aspect of that member's information has changed. It could be for a new address or a name change, or the member may have changed coverage, or perhaps you are correcting an error. Two options for editing an existing member or dependent follow:

### Option 1

1. Select **Manage Plan Members**.
2. In the **Member Search**, search for the member you wish to edit (by one or all fields)



3. Select **Locate Member**.
4. Select **Edit**.

5. Make changes to the member in the form.



6. Select **Save**.

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## Option 2

1. Select **Manage Plan Members**.

2. Scroll through the list of members at the bottom to find the member you wish to edit.



3. Select the check box next to the member's name.



4. Select **View Selected**, located above the list of members.

5.  Select **Edit**.



6.  Make your changes.

7.  Select **Save**.



**Terminate an Existing Member/Dependent**

When a member's employment is terminated, or the member has decided to no longer participate in the vision plan, you can remove him or her from the Avēsis eligibility database. Termination of a cardholder will automatically terminate the dependents attached to that cardholder, too. A member may also elect to no longer cover dependents but keep individual coverage. The two options for terminating a member or a dependent follow:

Option 1

1.  Select **Manage Plan Members**.

2.  In the **Member Search**, search by one or all fields for the member you wish to term.

3. Select **Locate Member**.

4. Select **Term**.



5. Complete the term screen with the termination date and reason. The date entered will be the last date of coverage.



6. Select **Terminate Member**.

## Option 2

1. Select **Manage Plan Members**.

2. Scroll through the list of members at the bottom to find the member you wish to term.



3. Select the check box next to the member's name.



4. Select **View Selected**, located above the list of members.

5. Select **Term**.



6. Enter termination information—the date and reason.
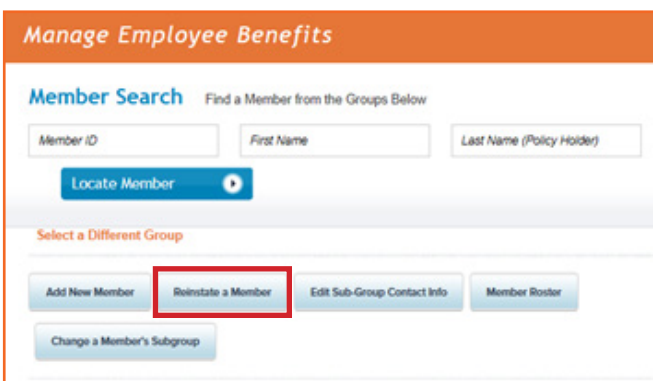


7. Close the window.

8. Select **Manage Employee Benefits** from the top menu to return to the dashboard.
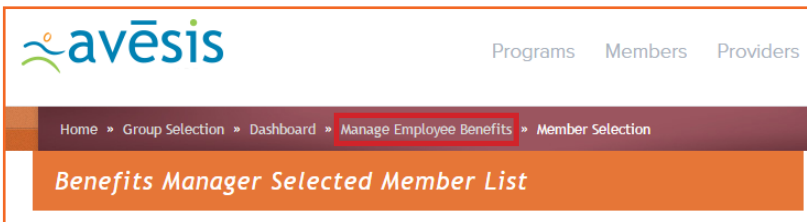


**Reinstate a Terminated Member**

If a former employee is re-hired, or a former member wishes to participate in the Avēsis program again, it may be necessary to reinstate the member's status in the Avēsis eligibility database. The process of reinstating a member is as follows:

1. Select **Manage Plan Members**.
2. Select **Reinstate a Member**.

3.  Search for the member, and select **Search**.



4.  Select **Reinstate Member**.



5.  Enter the new effective date and coverage code.

6.   Select **Submit**.



6.   Select **Close**.

## Add a New Dependent

Adding a new dependent allows you to attach a dependent to a cardholder already in the Avēsis eligibility database. Here are the steps for adding a new dependent:

1. Select **Manage Plan Members**.
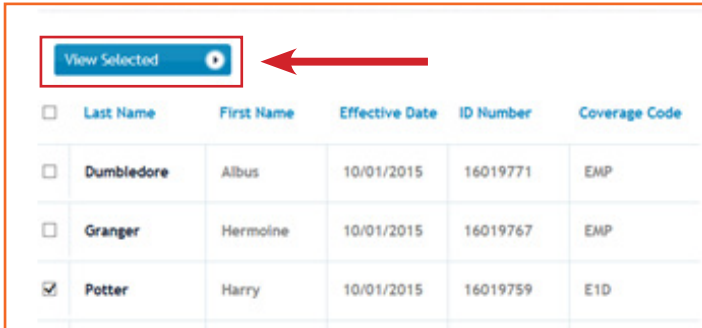2. Scroll through the list at the bottom to find the member.

**Manage Employee Benefits**

**Member Search** Find a Member from the Groups Below

| Member ID | First Name | Last Name (Policy Holder) |

Locate Member

Select a Different Group

Add New Member | Reinstate a Member | Member Roster | Change a Member's Subgroup

View Selected

| | Last Name | First Name | Effective Date | ID Number | Cov. | ID Card |
|---|---|---|---|---|---|---|
| ☐ | Bueller | Ferris | 10/01/2015 | 16019754 | EMP | ID Card |
| ☐ | Gruber | Hans | 10/01/2015 | 16019764 | EMP | ID Card |
| ☐ | Hammond | John | 10/01/2015 | 16019755 | EMP | ID Card |
| ☐ | Ketivich | Sloan | 10/01/2015 | 16019750 | EMP | ID Card |
| ☐ | McClain | John | 10/01/2015 | 16019761 | EMP | ID Card |
| ☐ | Quinn | Harley | 10/01/2015 | 16019760 | EMP | ID Card |
| ☐ | Tester | Test | 10/01/2015 | 16023540 | EMP | ID Card |
| ☐ | Wayne | Bruce | 10/01/2015 | 16019756 | E1D | ID Card |

3. Select the check box next to the member's name.

| | Last Name | First Name | Effective Date | ID Number | Cov. | ID Card |
|---|---|---|---|---|---|---|
| ☐ | Quinn | Harley | 10/01/2015 | 16019760 | EMP | ID Card |
| ☐ | Tester | Test | 10/01/2015 | 16023540 | EMP | ID Card |
| ☑ | Wayne | Bruce | 10/01/2015 | 16019756 | E1D | ID Card |
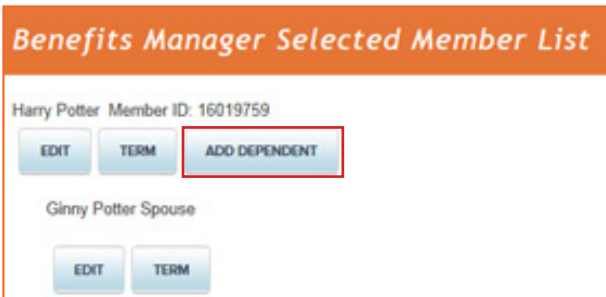
4. Select **View Selected** from above the list.



5. Select **Add a Dependent**.



6. Complete the form.

7. Select **Save**.

8. Close the window.



9. Select **Manage Employee Benefits** from the top menu to return

**Change a Member's Subgroup**

1. Select **Manage Plan Members**.
2. Select **Change a Member's Subgroup**.



3. Search for a member.



4. Select **Search**.
5. Select **Change Subgroup**.

6.  Select a **New Subgroup** from the dropdown menu.



7.  Select **Submit**.
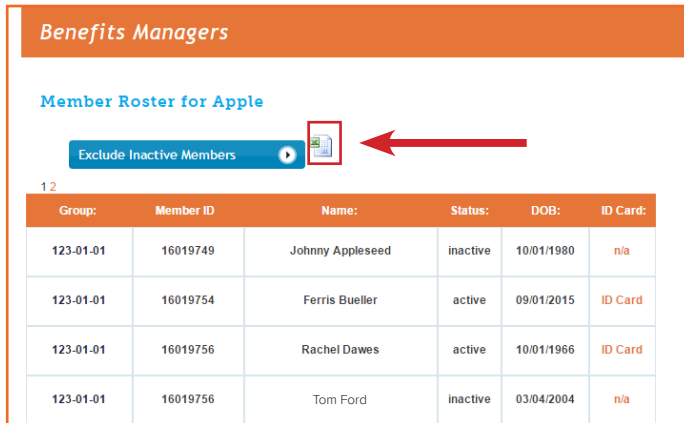
**View or Print Member Roster**

1.  Select **Manage Plan Members**.
2.  Select **Member Roster**.
3.  Active Members: Select **Exclude Inactive Members**. (Inactive members include future-dated active members or currently termed members.)

4.  Select the Excel icon to export to Excel.



## View Member Benefits

As a benefits manager, you will be able to view your employees' benefits. Once you have logged into your account, click on **View Member Benefits** on the home page.



To view an active member's eligibility:

1.  Enter the member's date of birth and either the member's ID or the member's full name.

a. When using the member's ID number, enter the information as shown.



| Member ID | Date of Birth (MM / DD / YYYY) |
| --- | --- |
| 16019730 | 10/01/2000 |

b. To select by member's full name, enter the information as shown.



| Full Name | | Date of Birth (MM / DD / YYYY) |
| --- | --- | --- |
| John | Doe | 10/01/2000 |

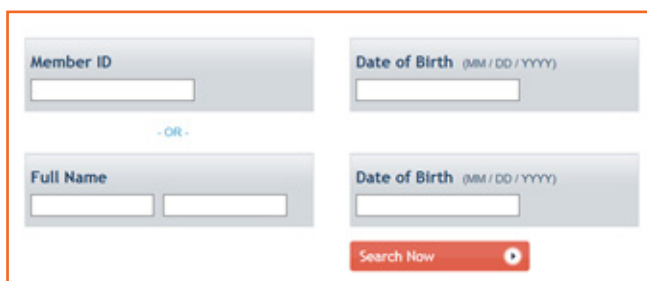2. Click **Search Now**, and you'll see the screen below.



**John Doe**
**View Detail**

DOB: 10/01/2000
Member No:16019730
Suffix:
Plan ID:976-Advantage Enhanced

3. Click on **View Detail** to view this member's benefits. You will then be able to view the following information: member's relationship to the employee, employer group, line of business, plan number, and effective date.



Benefits

| Relationship | Self |
| --- | --- |
| Group | Apple Site 2 |
| LOB | Vision |
| Plan Number | 976 |
| Plan Name | 976-Advantage Enhanced |
| Effective Date | 10/1/2015 12:00:00 AM |

You may also view any other members on this plan by selecting **View Members on this Plan**, which will then prompt some options.
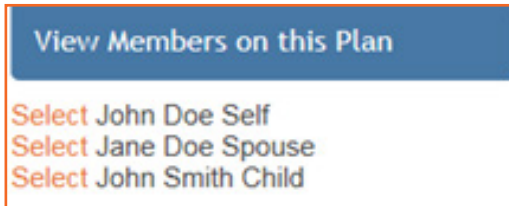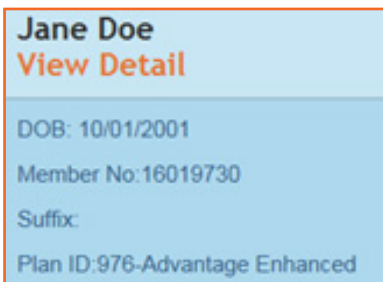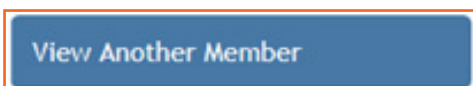


4.  Click **Select** to view the member of your choice. The member's profile will then appear.



5.  Search for another member by clicking on **View Another Member**, and you will be taken back to the original screen.

## Perform Other Management Tasks

**COBRA**
Our COBRA tool is in progress.

**Print ID Cards**
Our ID card printing tool is in progress.

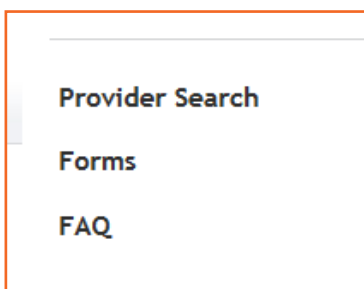**Download a Vision Claim Form**
Members who receive out-of-network care (from a non-participating provider) must file a claim form. The member is responsible for payment in full to the provider at the time of the visit and should complete the Out-of-Network Vision Claim form soon after services have been rendered. It must be mailed, along with a receipt from the provider, to:

**Avesis**
Vision Claims Department
P.O. Box 7777
Phoenix, AZ 85011-7777

To download the form, follow the instructions below.

1. Select **Forms** on the right side of the dashboard.

2.  Select **Download Form**.