User Guide

LAST UPDATE MAY 2026

EYEMED CLIENT PORTAL
eyemanage

Welcome

The EyeManage User Guide is a digital resource that offers valuable tips and information on how to navigate the site and find exactly what you're looking for.

What is EyeManage?

EyeManage is the benefit management tool that helps our clients work smarter, not harder. It's your one-stop shop for all your benefit information, including:

- Smart search for viewing benefits
- Member management
- Billing and payment options
- Administrator management
- Enrollment reports
- Centralized reporting hub
- Resource center

How to use this guide

This document includes interactive elements. We encourage users to use Firefox or Chrome. When troubleshooting a problem, try clearing cache and cookies first.

Warning indicates key information that relates to the section

Click on home to easily return to table of contents

Lightbulb indicates a helpful tip or consideration

Check-mark indicates a general comment

Table of contents

Admin management

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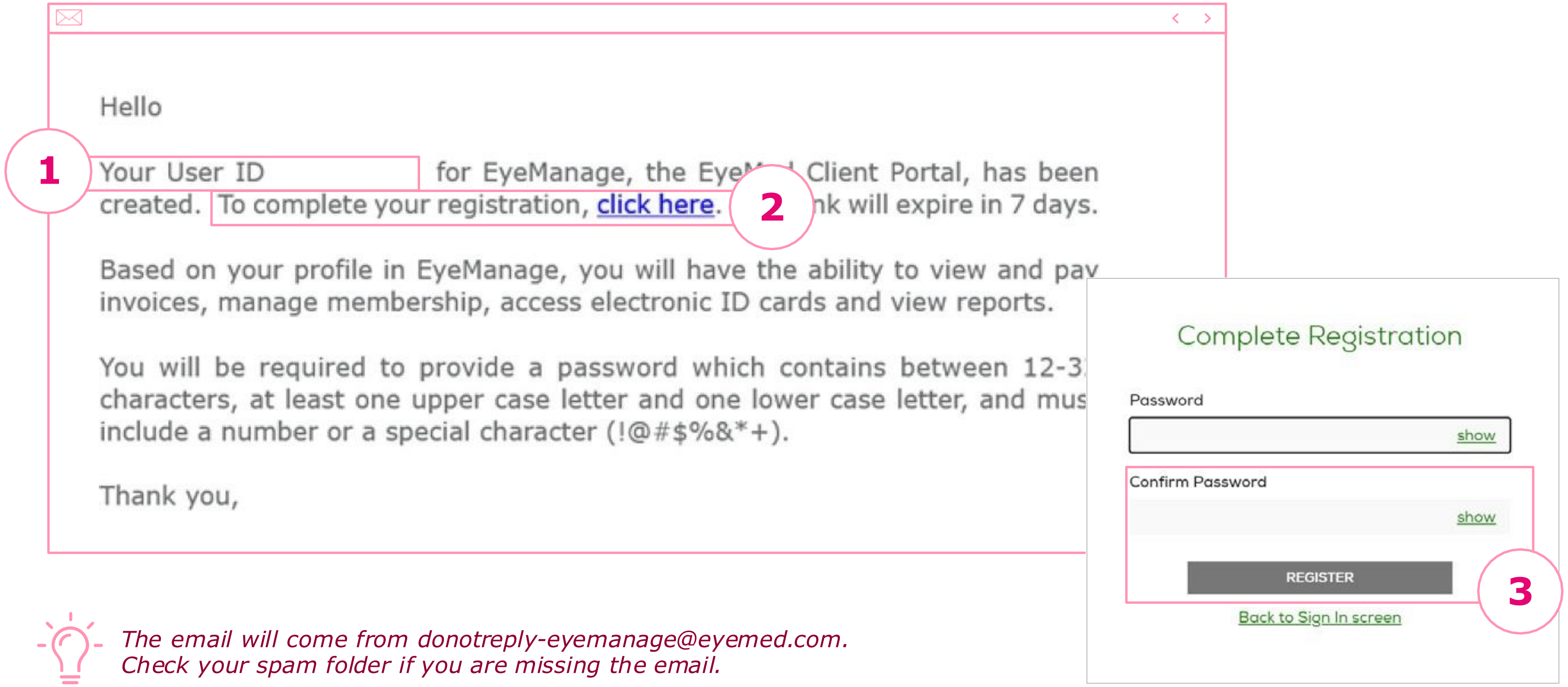
Navigate directly to a topic by clicking on the topic title

Resend registration email

When you first receive your EyeManage account information, you will get a system generated User ID.

1. A registration email will be sent to the email address associated with your User ID.
2. Follow the hyperlink in the email. The link will expire after 7 days.
3. From the link you will confirm the password and click "Register".

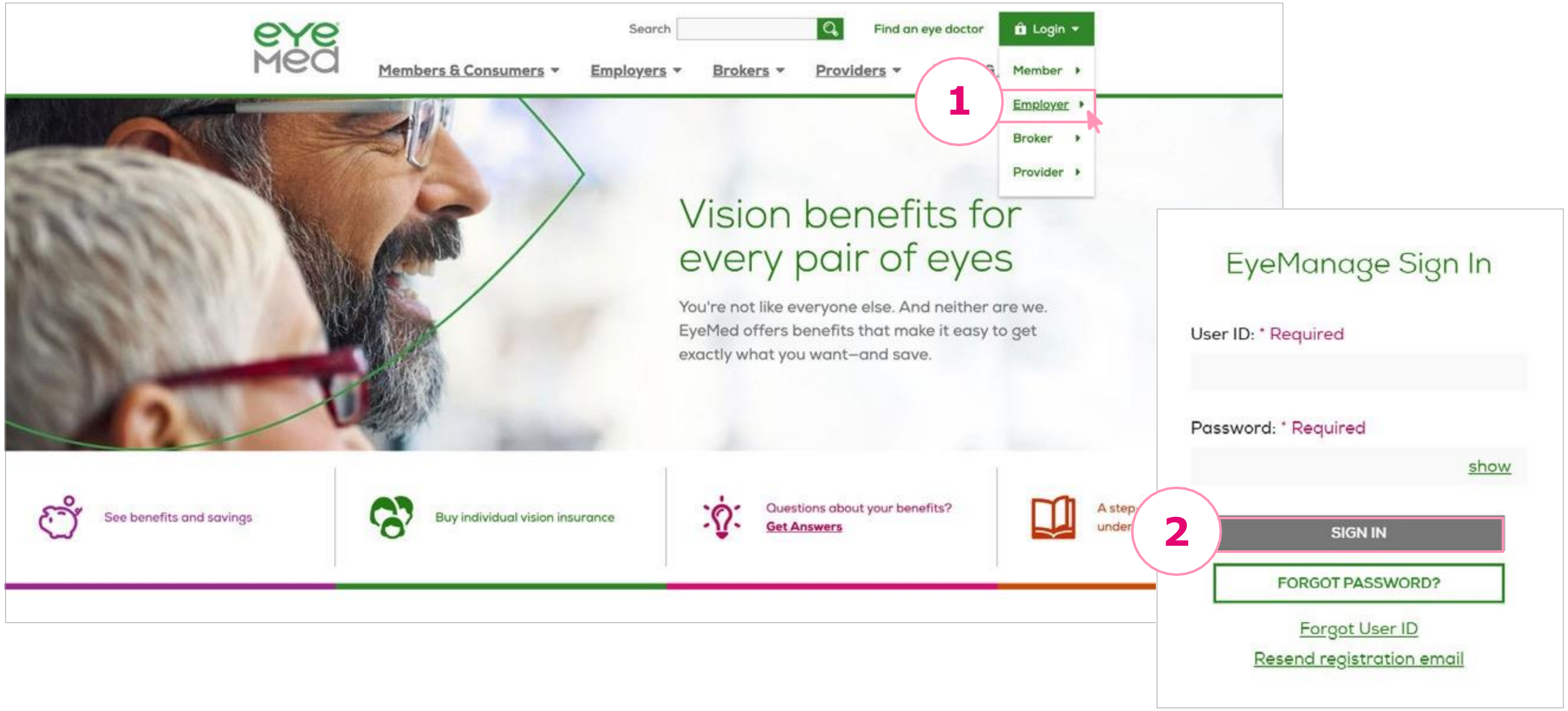


The email will come from donotreply-eyemanage@eyemed.com. Check your spam folder if you are missing the email.

How to sign in

1. Navigate to eyemed.com. Then, you can hover over the "Login" button and click on Employer.

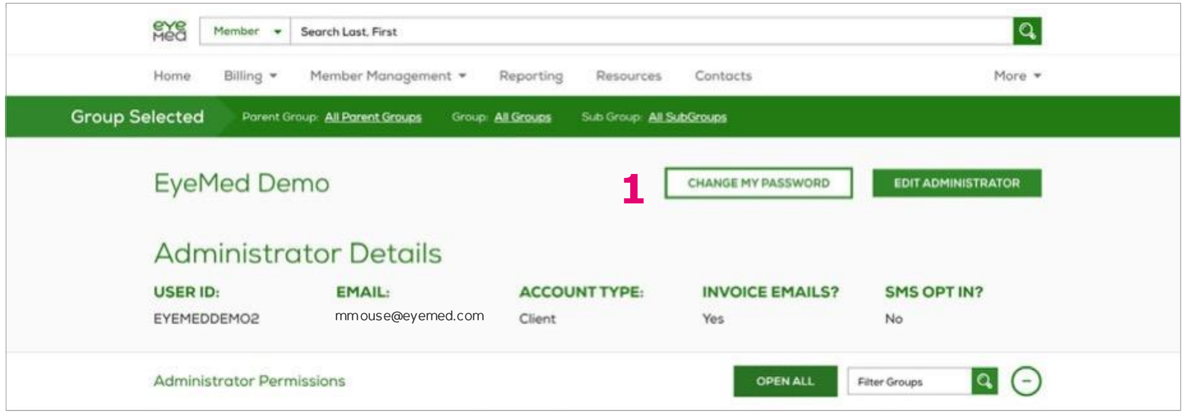
2. Then, enter your User ID and Password and click "Sign in".

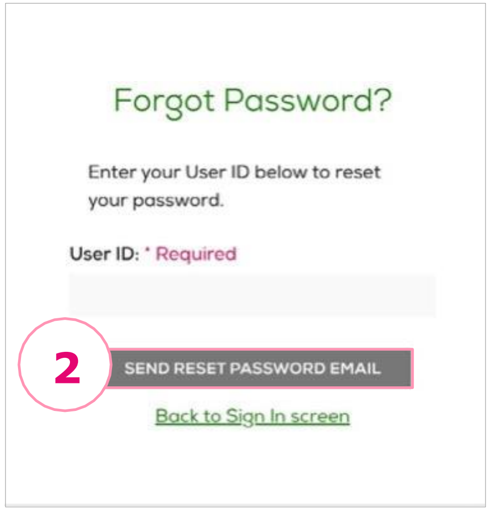


Help with password – how to reset

1. To reset your password, you can click on "Forgot Password" from the EyeManage homepage, or if you are already logged in you can click "Change Password" from the My Profile details.

2. When prompted, enter your User ID and click "Send Reset Password Email". An email will be sent to the email address associated with the account.

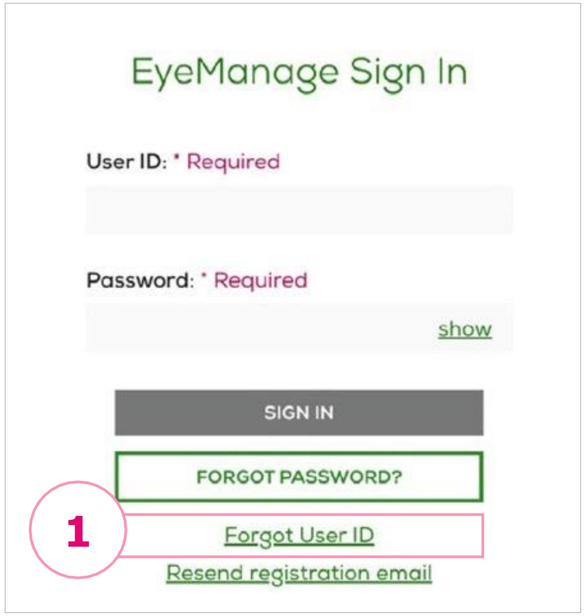


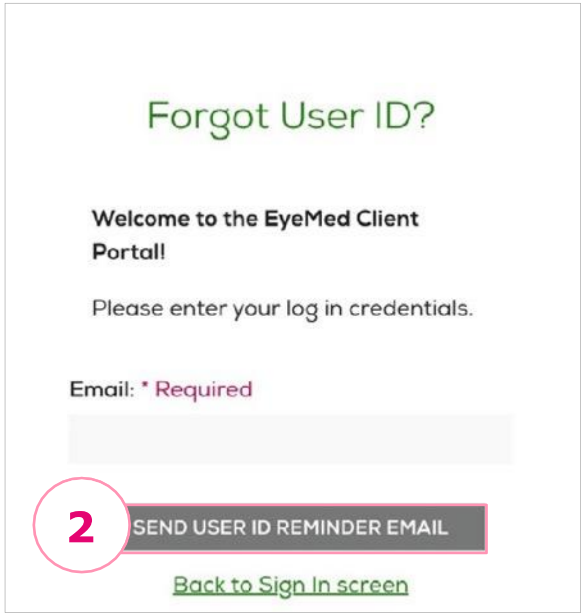


The EyeManage portal will require a password to be reset every 60 days for security purposes.

Help with username – forgot user ID

1. From the EyeManage homepage click on the "Forgot User ID" hyperlink.
2. Then, enter your email and click on the "Send User ID Reminder Email" button.



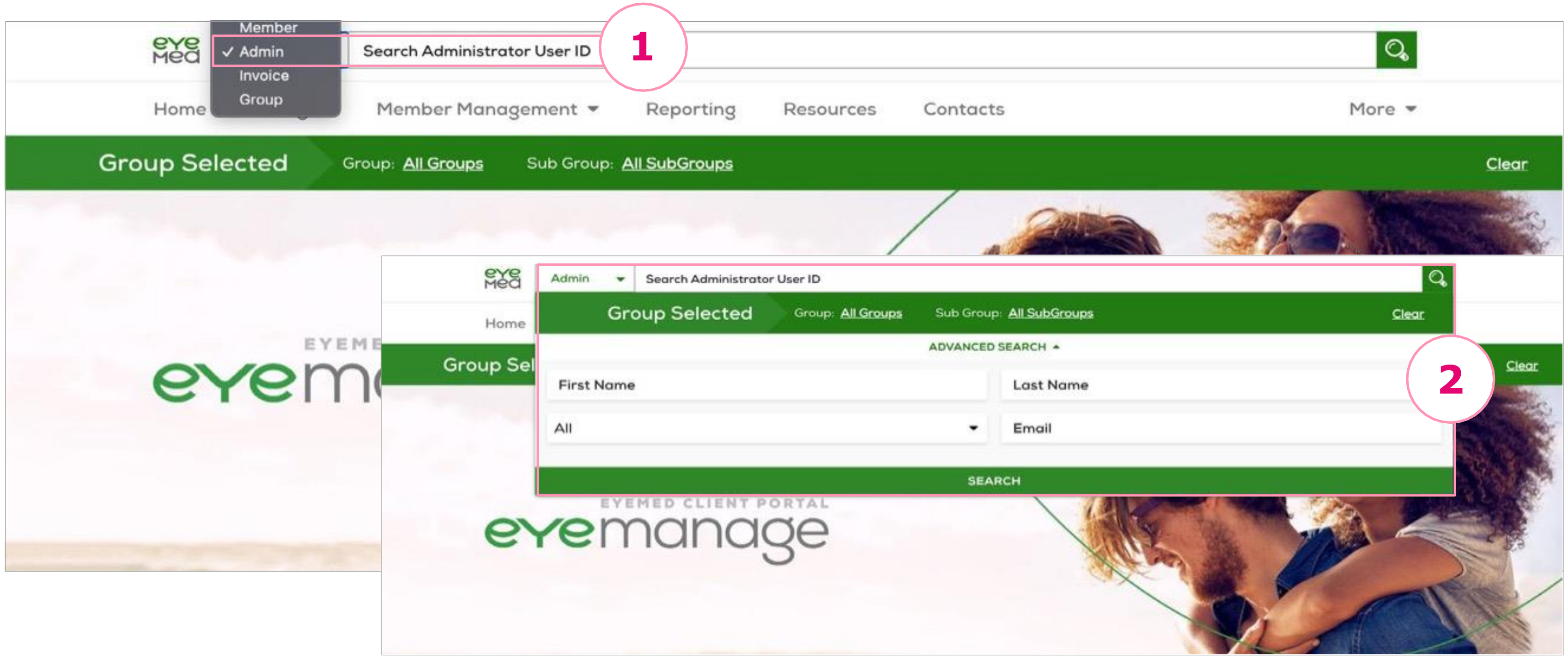


Clone an administrator

Part 1 of 3

1. Pull up the admin whose access you would like to clone. To do this, navigate to the search bar at the top of the screen and hover over the parameter filter that by default displays "Admin".

2. You can then enter the admin username in the search bar, or, select "Advanced Search" for more options.

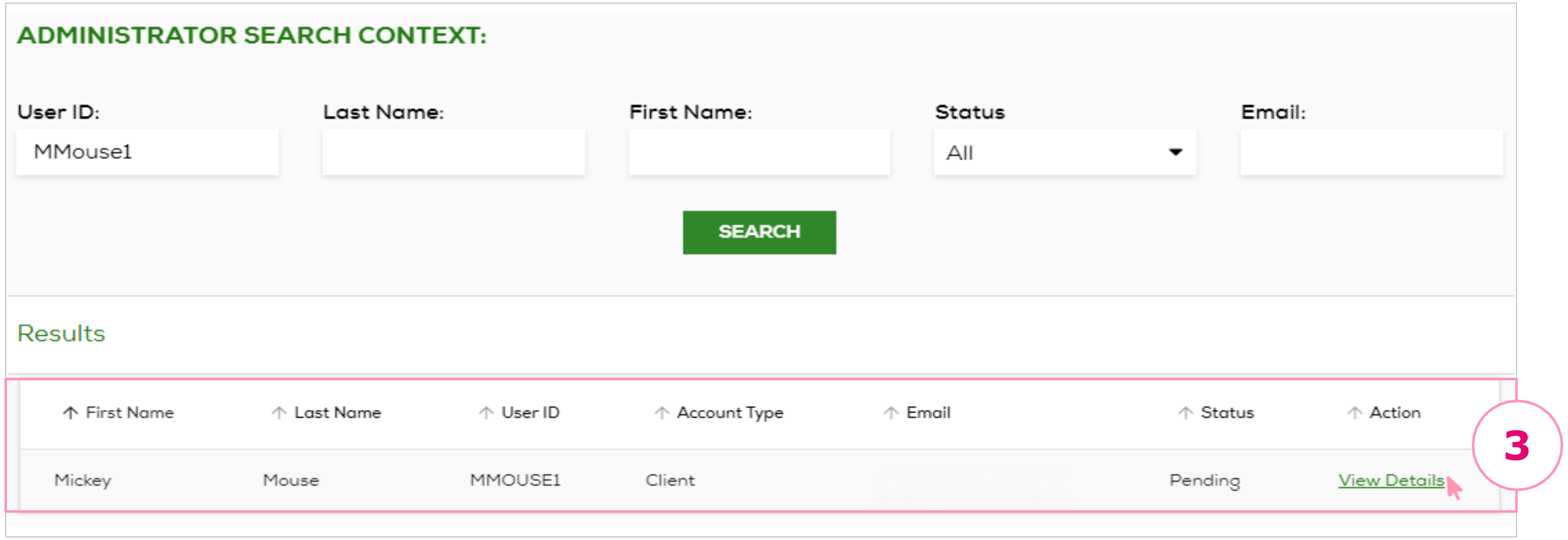


The additional options you can search by are First name, Last name, Email and Account status (Pending, Active, Inactive or All).

Clone an administrator

Part 2 of 3

3. Click "View Details" to view all of the admin information.

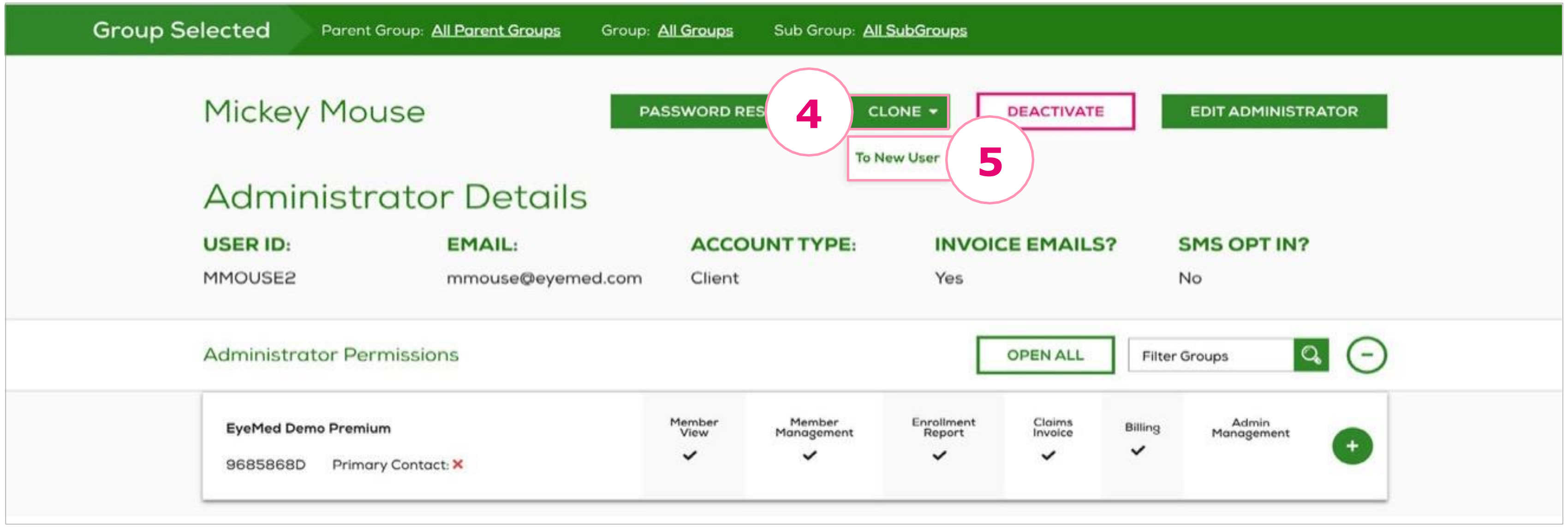


Clone an administrator

Part 3 of 3

4. Click on the "Clone" button at the top of the webpage. A dropdown will appear, allowing you to choose "To New User".

5. When you click "To New User", this creates a blank admin page where you can enter all the admin details for a completely new User ID. Once on this page, you can follow the steps outlined in the "Add an Administrator" section.

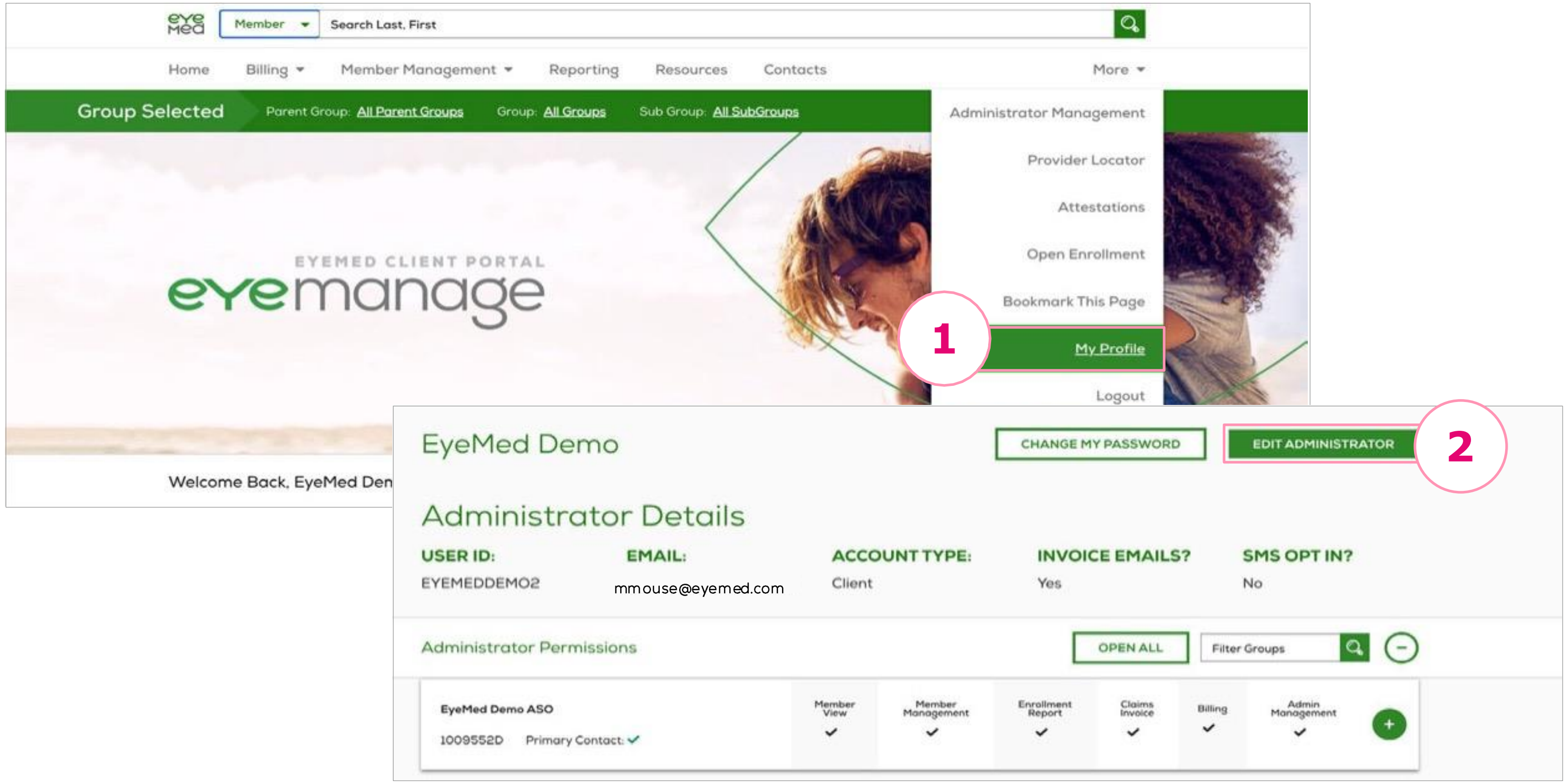


My profile

Part 1 of 2

1. You can view your admin account details by clicking on the "More" dropdown on the top right hand of the screen and then clicking on the "My Profile" option.

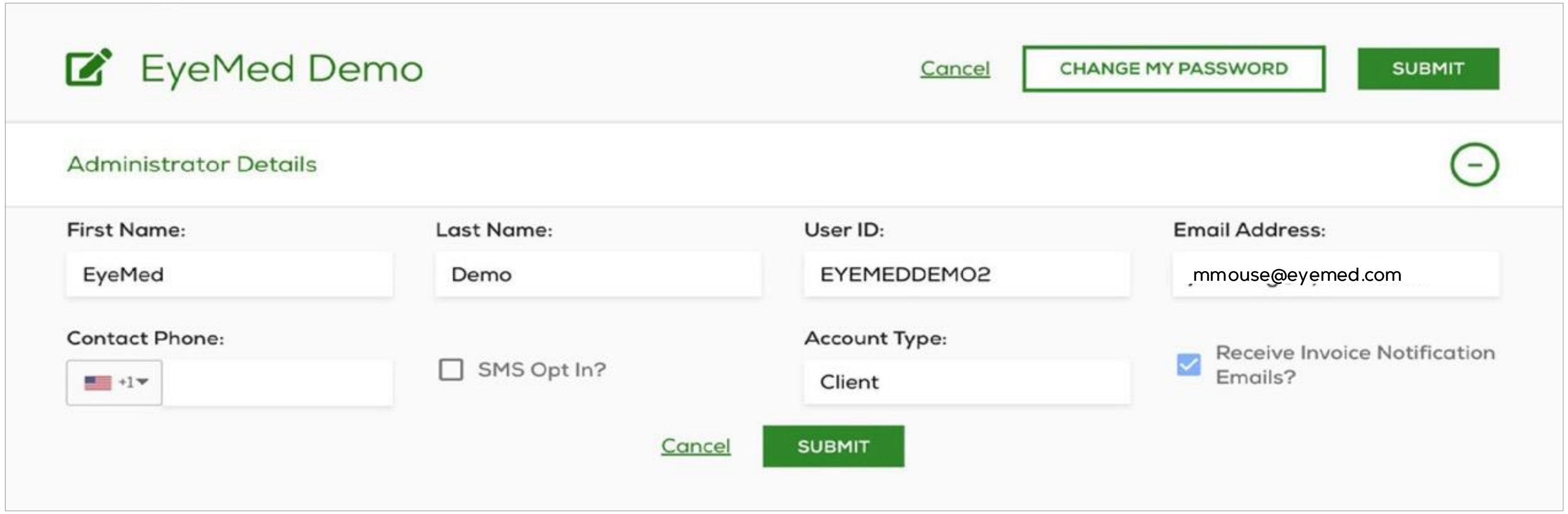
2. This page will show the name, email, User ID and group permissions associated with your account. From this webpage you can change your password or edit your admin account details by clicking "Edit Administrator".



My profile

Part 2 of 2

Clicking the "Edit Administrator" option will only give you the option to edit the details associated with your account.

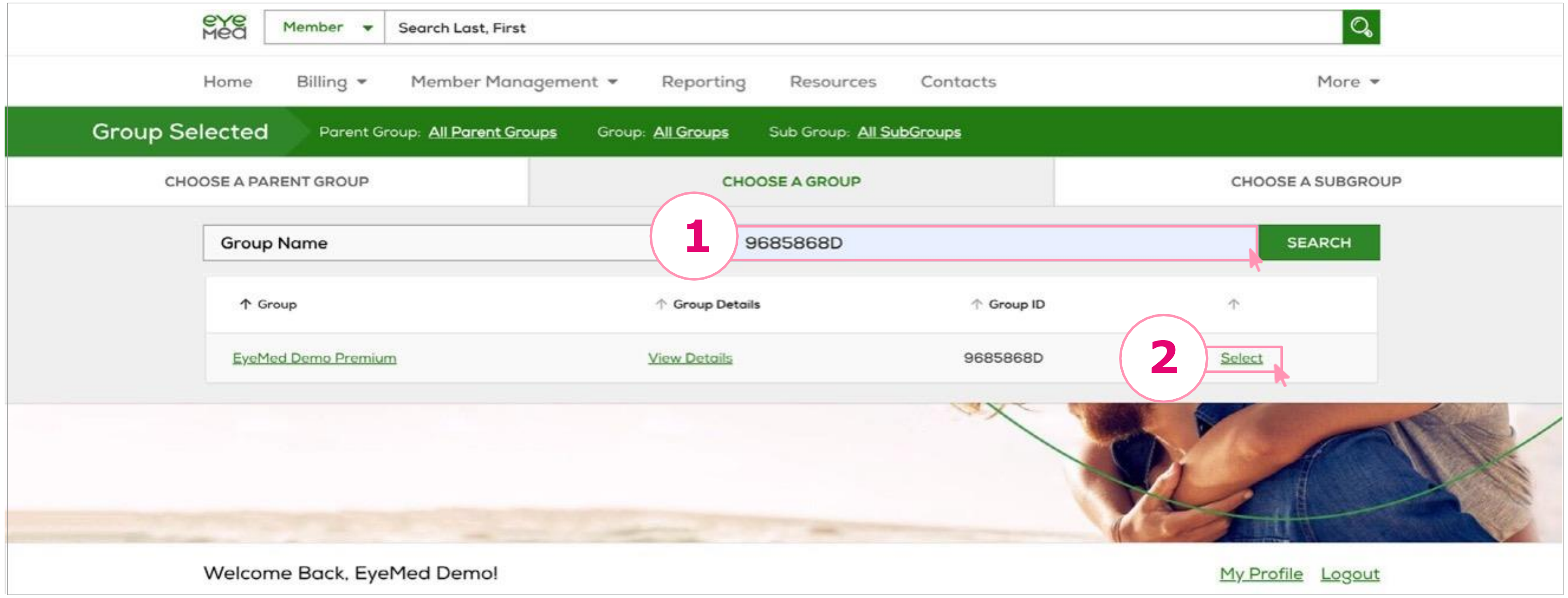


Smart search – member search

Part 1 of 3

We recommend entering the group information in the green context bar prior to searching by member name to ensure the most accurate results.

1. Enter the group ID number in the search bar before searching by member name.
2. Once the correct group information appears in the search results, click the green "Select" button.



The smart search bar at the top of the EyeManage homepage can be used to search for members, administrators, groups and invoices.

For best results use the group ID number versus the group name.

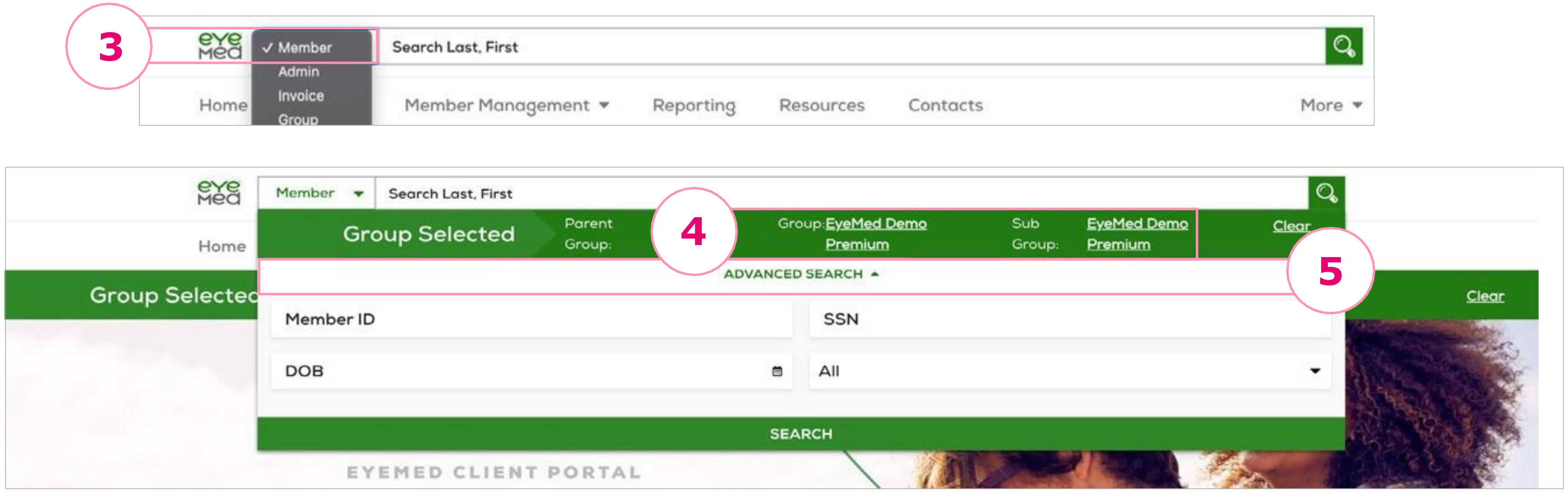
Smart search – member search

Part 2 of 3

3. Select Member in the smart search bar at the top of the homepage to verify that the parameter filter displays the "Member option".

4. Verify the group's name is displayed in the green bar.

5. Click inside the search bar to expand the "Advanced Search" options. This allows you to search by member ID, social security number and date of birth.

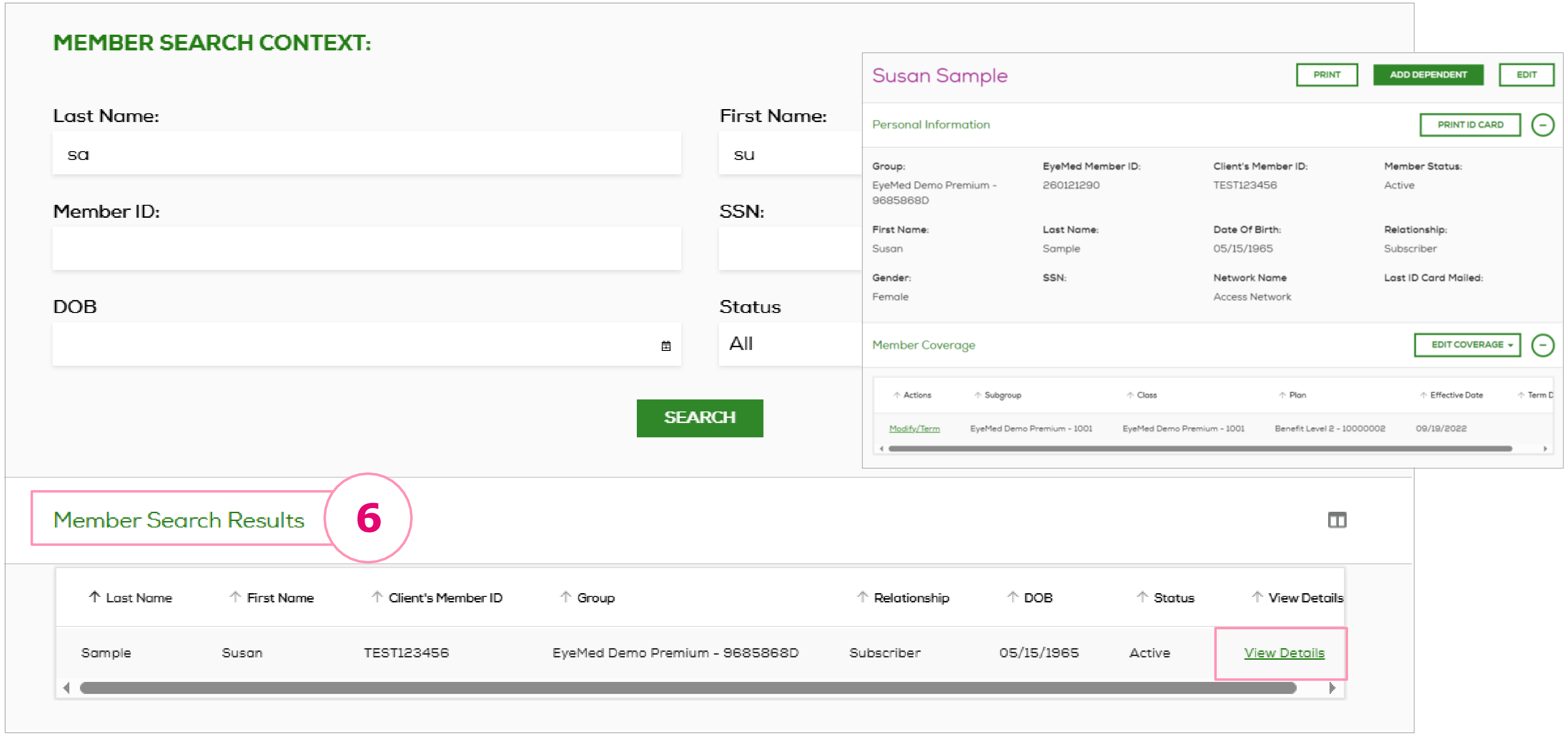


The smart search bar always utilizes the format: last name, followed by first name. The comma is the separator between the first and last name entries. Partial name will work when looking up a member.

Smart search – member search

Part 3 of 3

6. The results will display the members that match the criteria specified. Click anywhere on the member's name or move the side scrolling bar at the bottom and click on the "View Details" button to load the member details page.



Smart search – invoice search

1. From the EyeManage homepage, you can change the smart search bar filter to "Invoice" to search for a specific invoice. This function will only allow you to search using the exact invoice number.

If you would like to find all invoices associated with this account, please reference the billing section.

EyeManage only retains the last 18 months of invoices

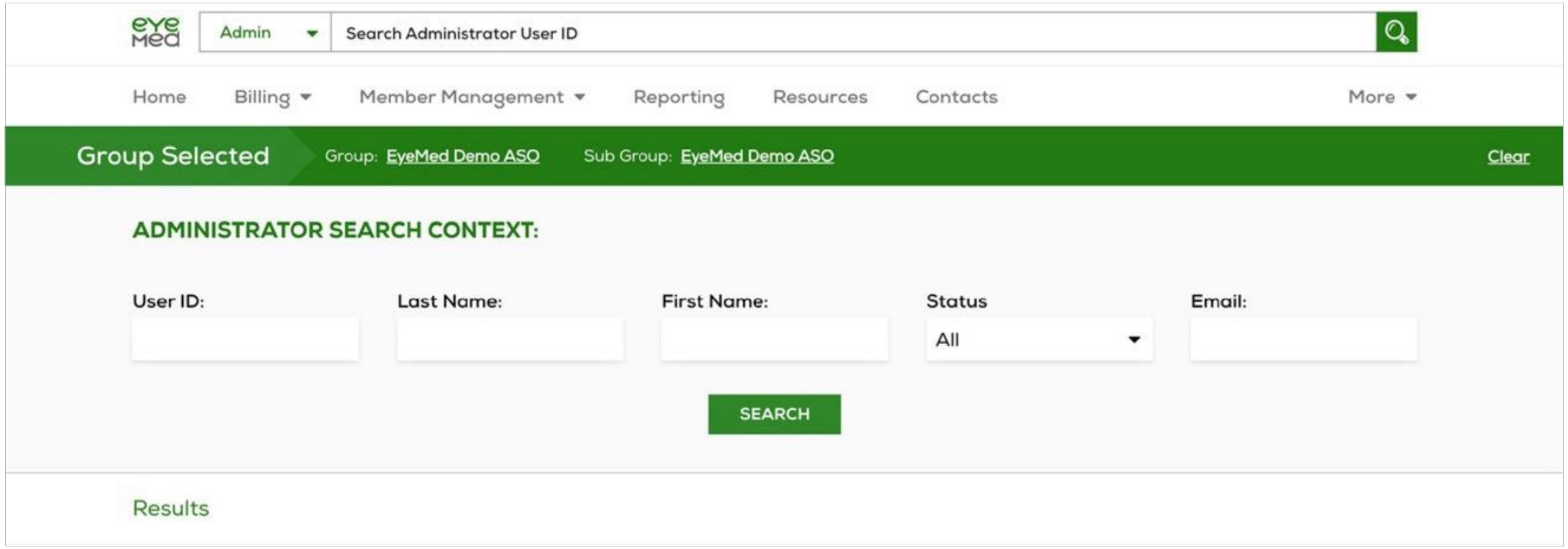
Smart search – admin search

Part 1 of 2

You can use the smart search bar at the top of the EyeManage homepage to locate specific administrator accounts.

We recommend using the green context bar across the top of the screen to search for administrators associated with a specific group.

If you only enter the group information, using the admin search feature, EyeManage will load all administrator accounts associated with this group ID.

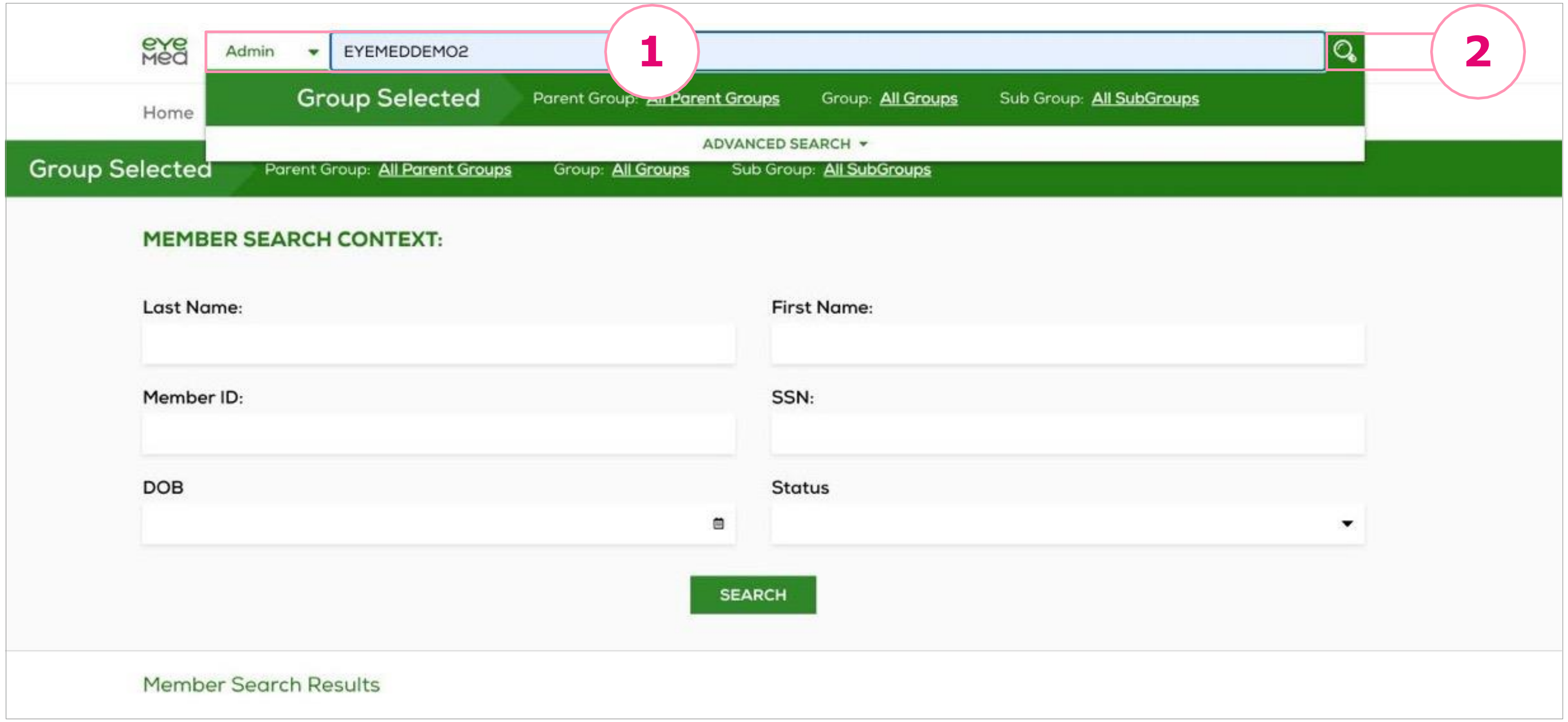


Smart search – admin search

Part 2 of 2

1. If you would prefer to search across multiple groups, you can leave the green bar blank and enter the admin information in the Smart Search bar. You can enter the Admin User ID in the bar or click on the "Advanced Search" button to expand the search options.

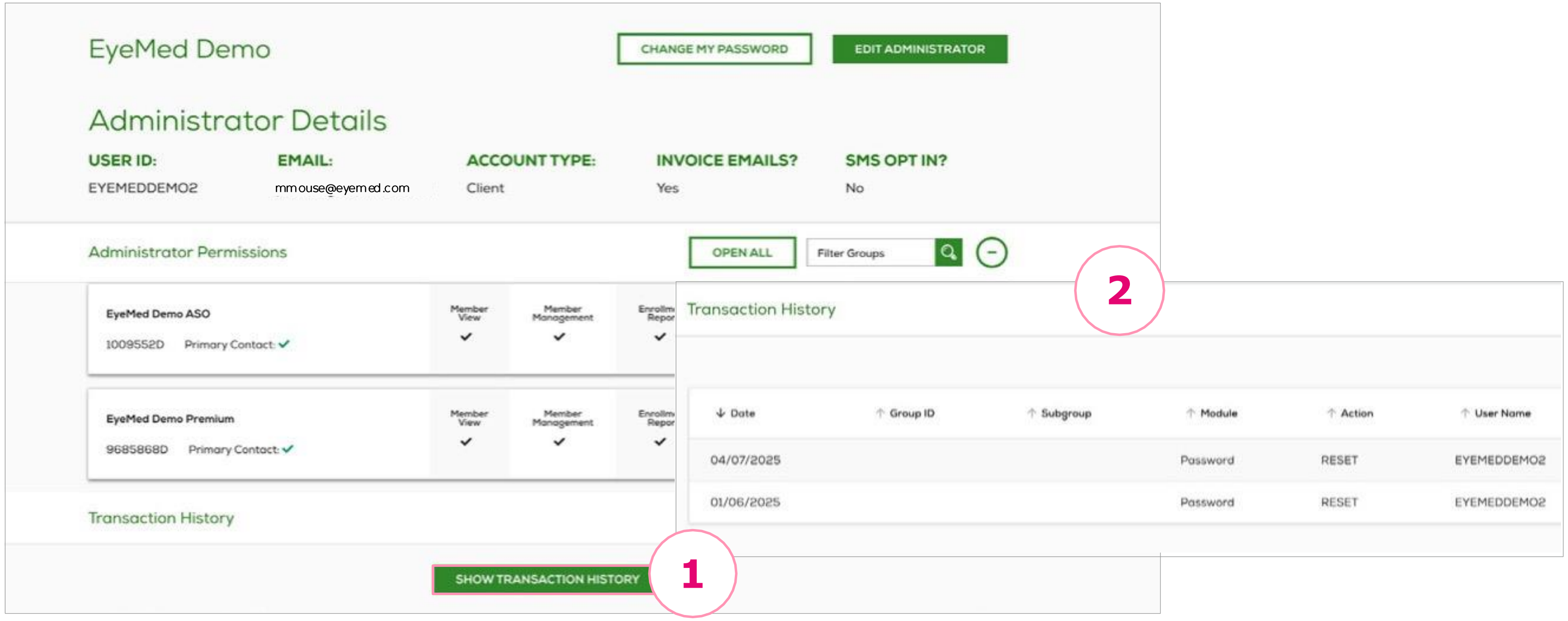
2. If you wish to see all users that currently have access to your group, leave the search bar blank and select the magnify glass.



Transaction history

1. Go to "My Profile" to under the "More" dropdown menu on the homepage to see the Admin details. Then, scroll down and click on the green "Transaction History" button.

2. This will show the recent changes that have been made to this admin's permissions.



From this example you can view that the user EYEMEDDEMO reset Manage users access to this admin's permissions on 01/06/2025 and 04/07/2025.

Text multi-factor authentication

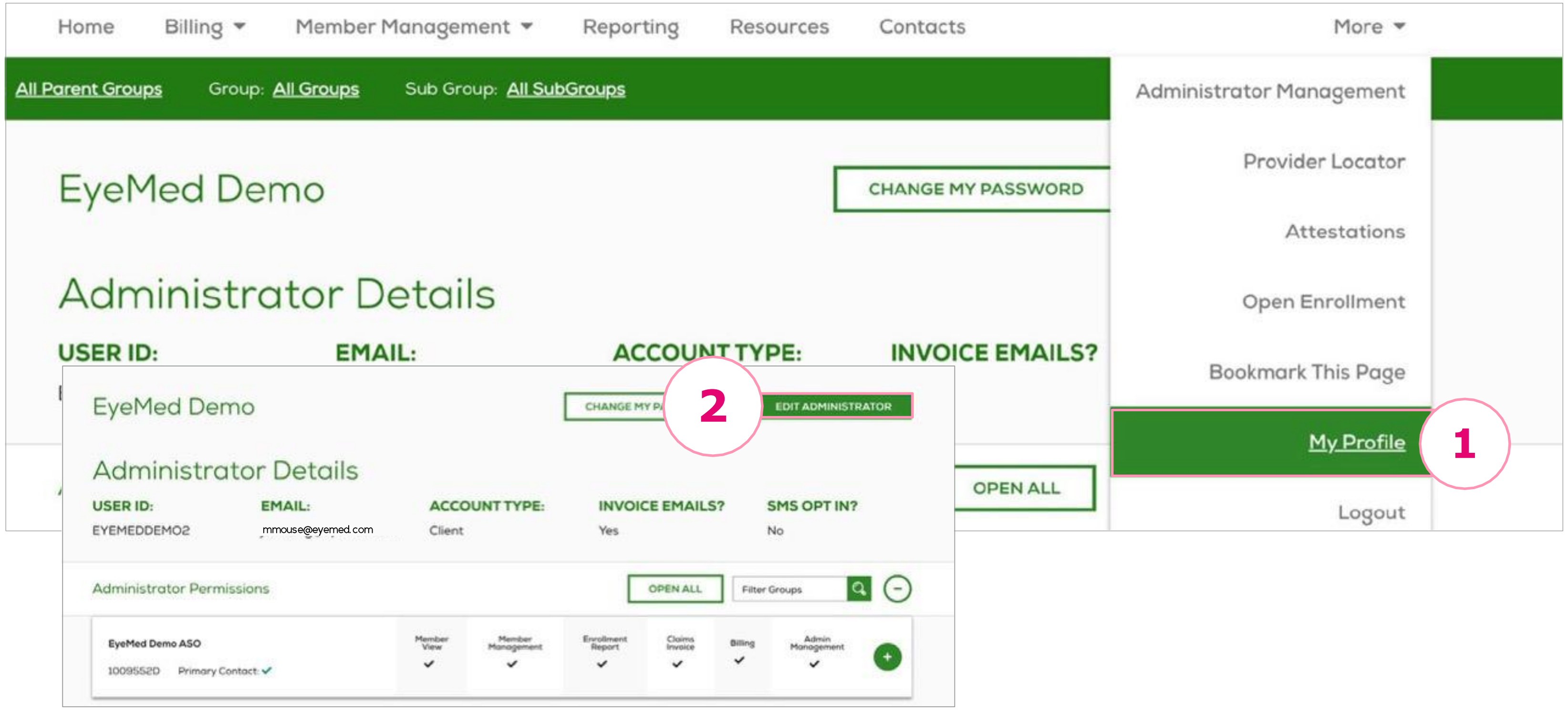
Part 1 of 2

As part of EyeMed's ongoing commitment to the security of your account, admins are automatically enrolled in **email** verification for multi-factor authentication.

However, you can opt for **text message** verification instead.

1. Hover your cursor over the "More" dropdown menu at the top right corner of the EyeManage homepage and click "My Profile".

2. This will display your account information and current permissions. Click on the "Edit Administrator" button in the top right-hand corner of the screen.

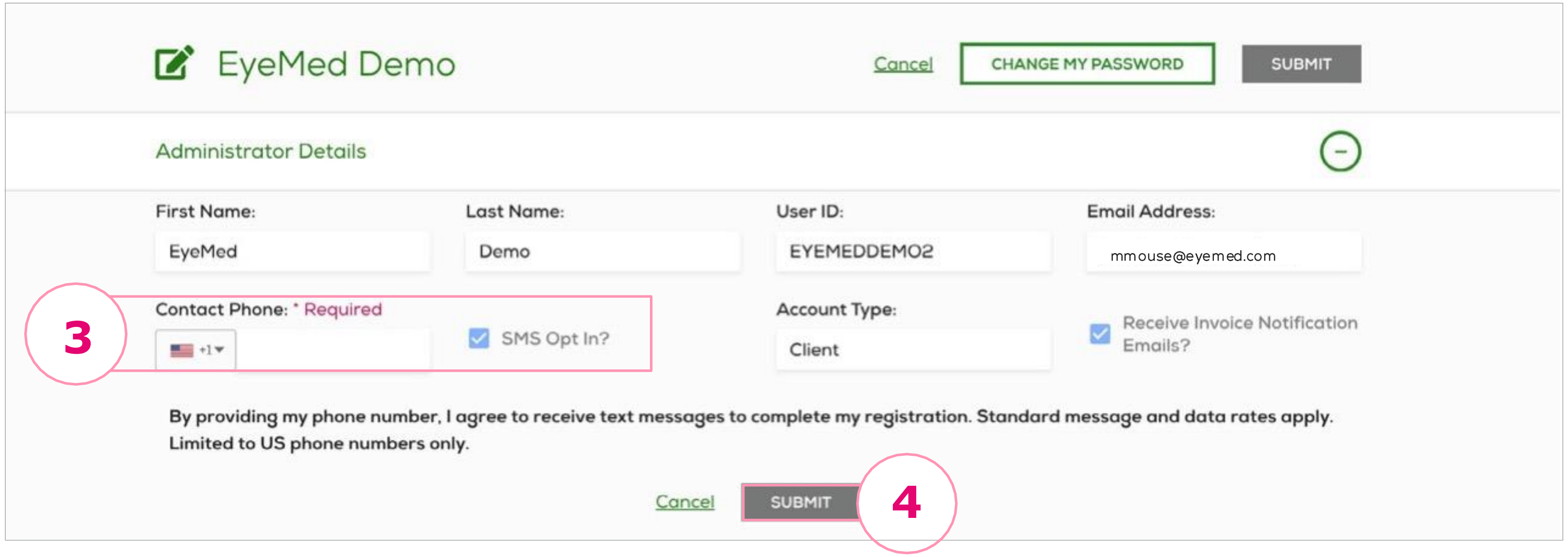


Text multi-factor authentication

Part 2 of 2

3. Enter your phone number in the "Contact Phone:" box and make sure to check the "SMS Opt In?" box.

4. Once all required fields are filled out, the gray submit button will turn green. Hit the "Submit" button to save your changes. This will enroll your MFA preference to text message instead of email.



Make sure that the number you provide is a mobile phone number so you can receive the text messages.

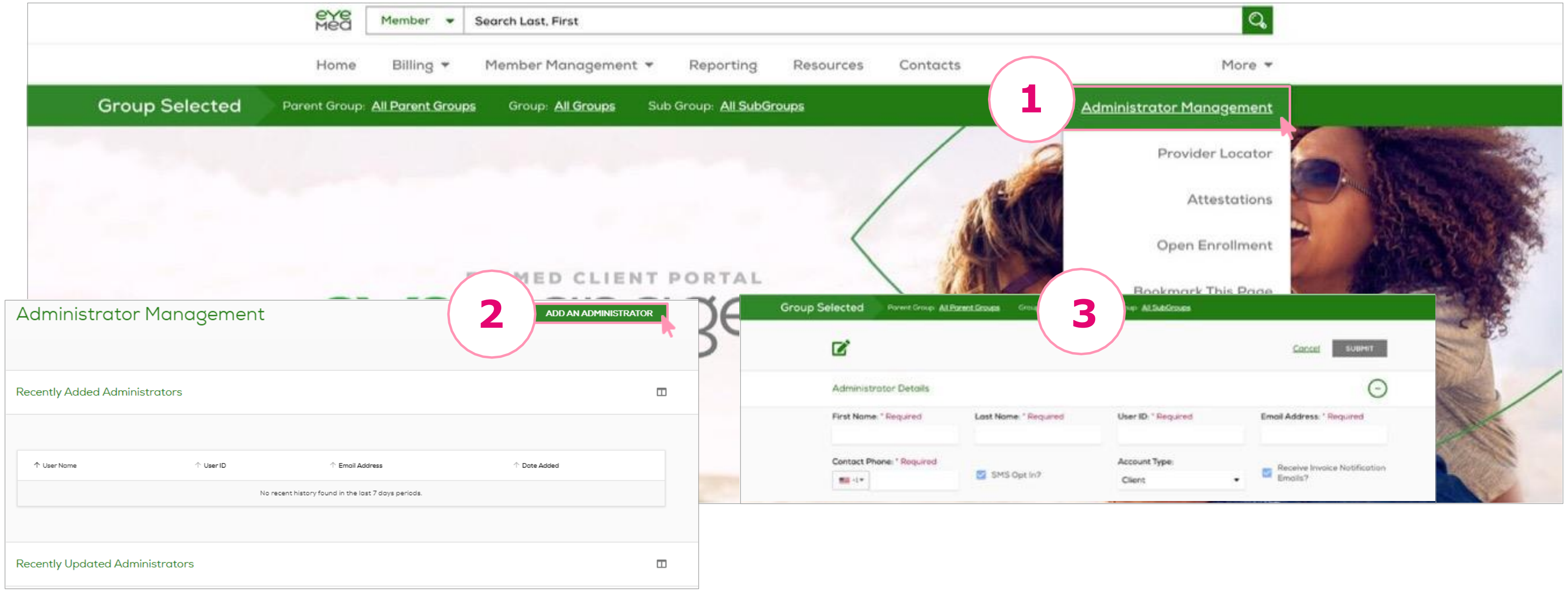
Add an administrator

Part 1 of 2

1. From the EyeManage homepage, go to the "More" dropdown menu in the top right corner and click on "Administrator Management".

2. Next, click on the green "Add an Administrator" button in the top right-hand corner.

3. Enter the admin's first name, last name and email address. EyeManage will create a User ID based on the first name, last name or pre-existing accounts.



EyeManage will automatically create a User ID based on the first and last name or pre-existing accounts to avoid duplicate User ID's.

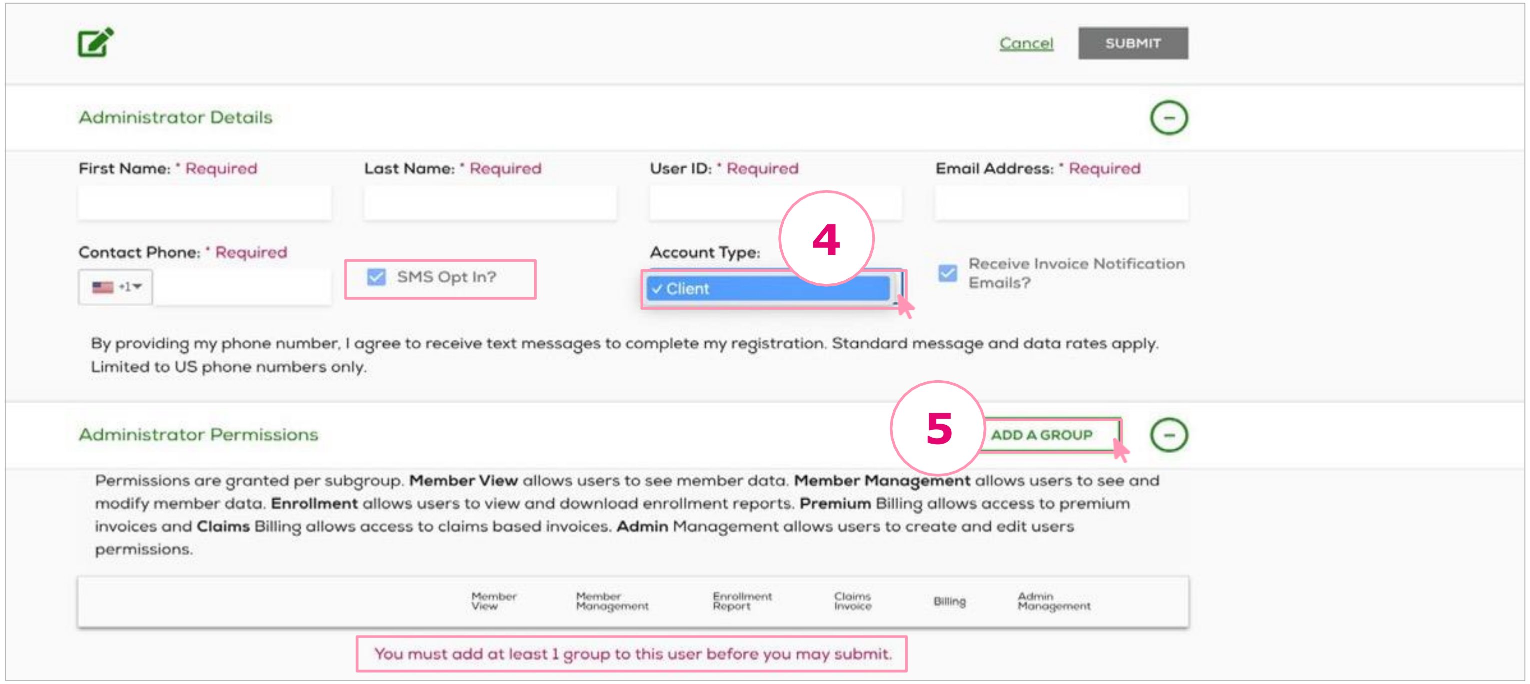
Add an administrator

Part 2 of 5

Admins are automatically enrolled in multi-factor authentication. This setting is defaulted to email verification, however, the "SMS Opt In?" box listed on the admin details page allows the user to set text message verification as their preferred method. Be sure to add all group ID's the new administrator should have access to.

4. Select the account type from the dropdown.

5. Our system requires at least one group to be associated with the admin user account. To add a group, you can click on "Add a Group" towards the bottom of the page.

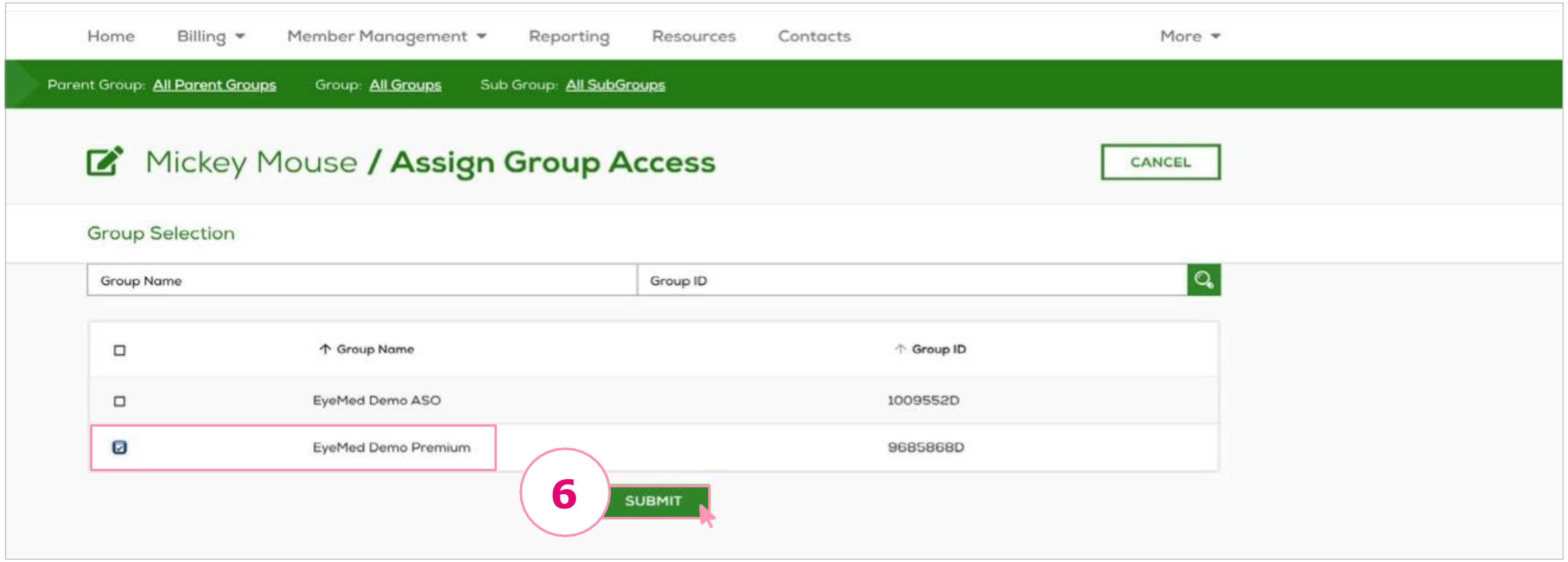


You will be required to add the group to the admin account even if you already have the group information selected in the green context bar at the top of the screen.

Add an administrator

Part 3 of 5

6. Once you've located the correct group name, check the box to the left of the group name and click on the green "Submit" button.



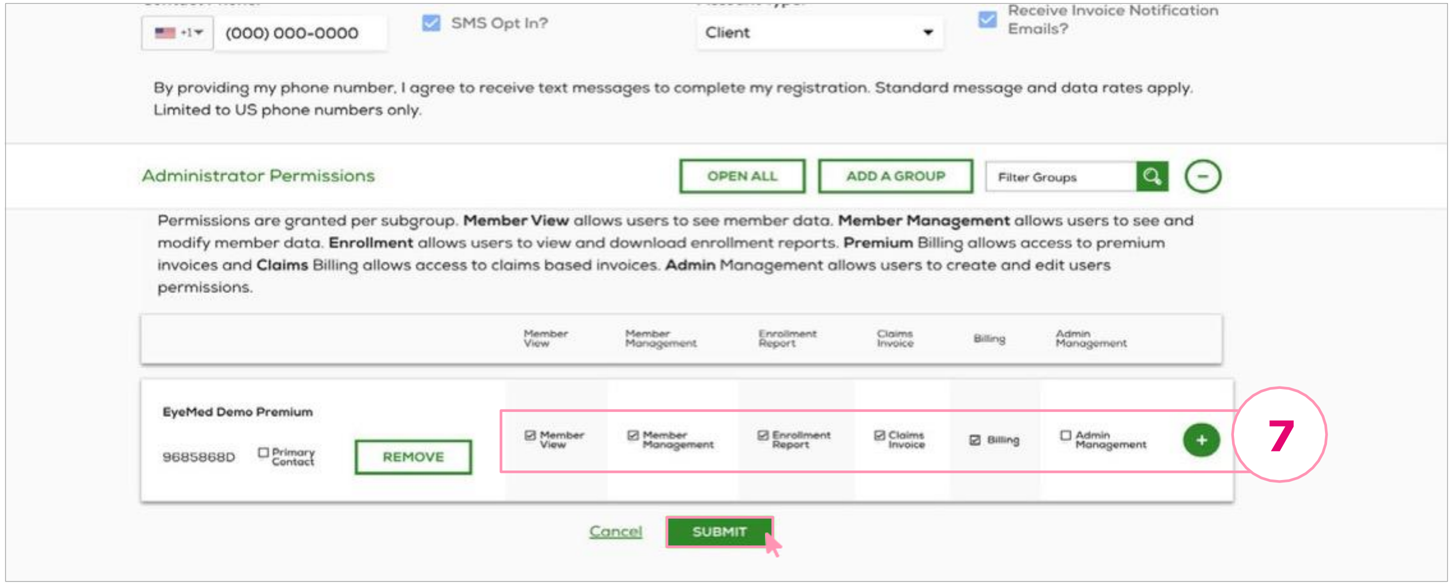
You can search by either group name or group ID number.

Add an administrator

Part 4 of 5

7. You can edit the administrator's access by reviewing the 6 check boxes listed by the group name.
   - Member View
   - Member Management
   - Enrollment permissions
   - Billing permissions
   - Claims permissions
   - Admin Management permissions
   - Primary Contact

Only client users can have access to Admin Management permissions as this is used to approve attestation requests from broker/TPA users to access the client information.



Once you have added all the groups and completed the admin information details click on the green submit button to complete the process.

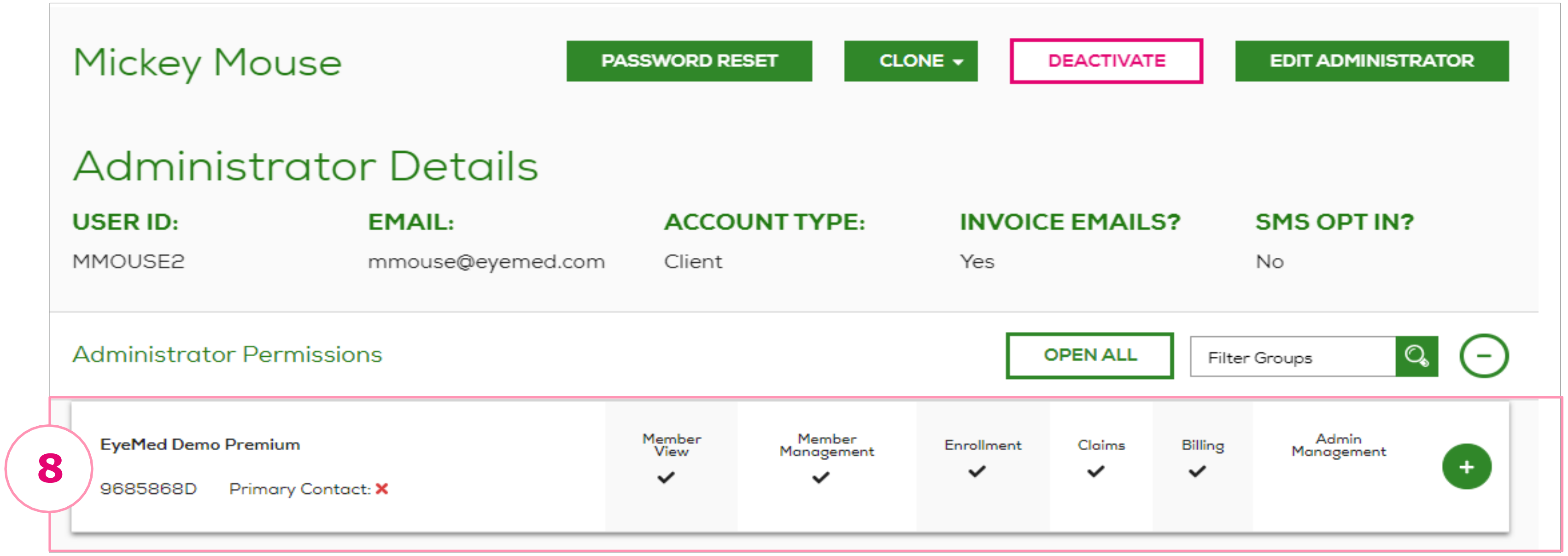
You will see a plus sign (+) to indicate subgroup access.

Add an administrator

Part 5 of 5

8. Once completed, the finished admin details will appear in the window.

At least one client admin needs to have Admin Management access to be able to approve attestations for TPA’s and brokers.



Membership

p.28–39

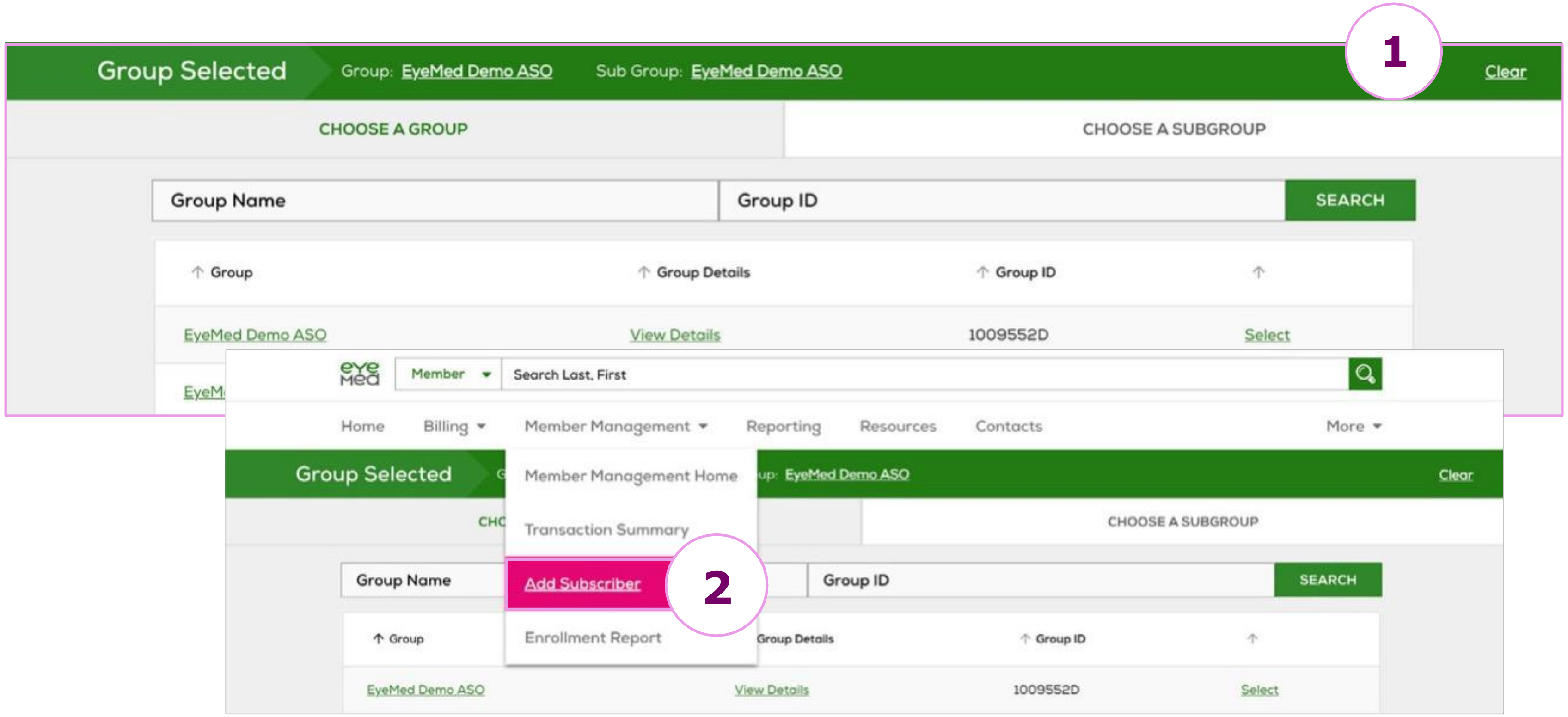
Navigate directly to a topic by clicking on the topic title

Adding a new subscriber

Part 1 of 2

1. To add a new subscriber, ensure that the group information is loaded in the green context bar across the top of the screen.
   This confirms that you are adding the subscriber to the correct plan.

2. Hover your cursor over the member management dropdown menu at the top of the homepage. Select "Add Subscriber" from the menu.



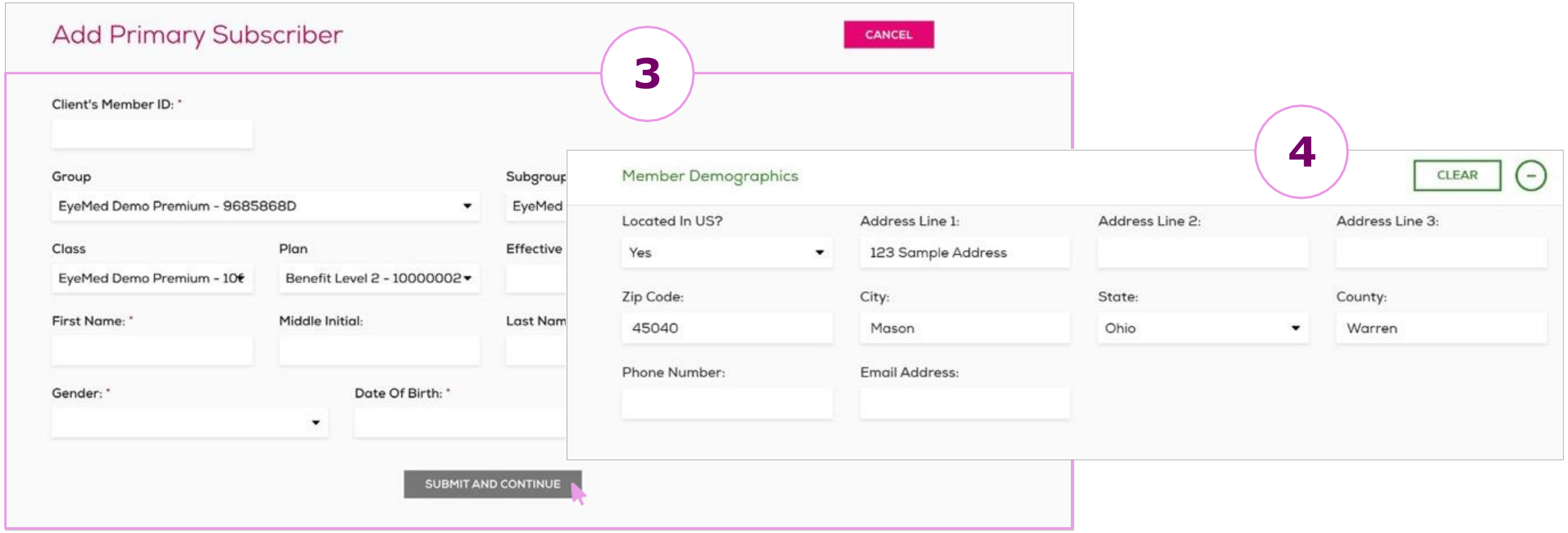
Adding a new subscriber

Part 2 of 2

Since you entered the group details in the green bar this information will auto populate for you on the enrollment screen.

3. You can enter the subscriber's information, such as first and last name, date of birth, etc. Then click "Submit and Continue" to enter the member's address, email address and phone number.

4. Once all required fields are filled in, click the green "Continue" button to finish the enrollment.



An indicator that the client ID number is required is the red asterisk accompanying the field on the enrollment page. Some clients can opt-in to requiring a client member ID number when enrolling members. If this is required, and you have not entered the information, the "Submit and Continue" button will remain grayed out, and not allow you to move further. Unlike the social security number, there are no dashes for client member ID. You cannot use periods in the middle initial spot. Only fields with red asterisks are required.

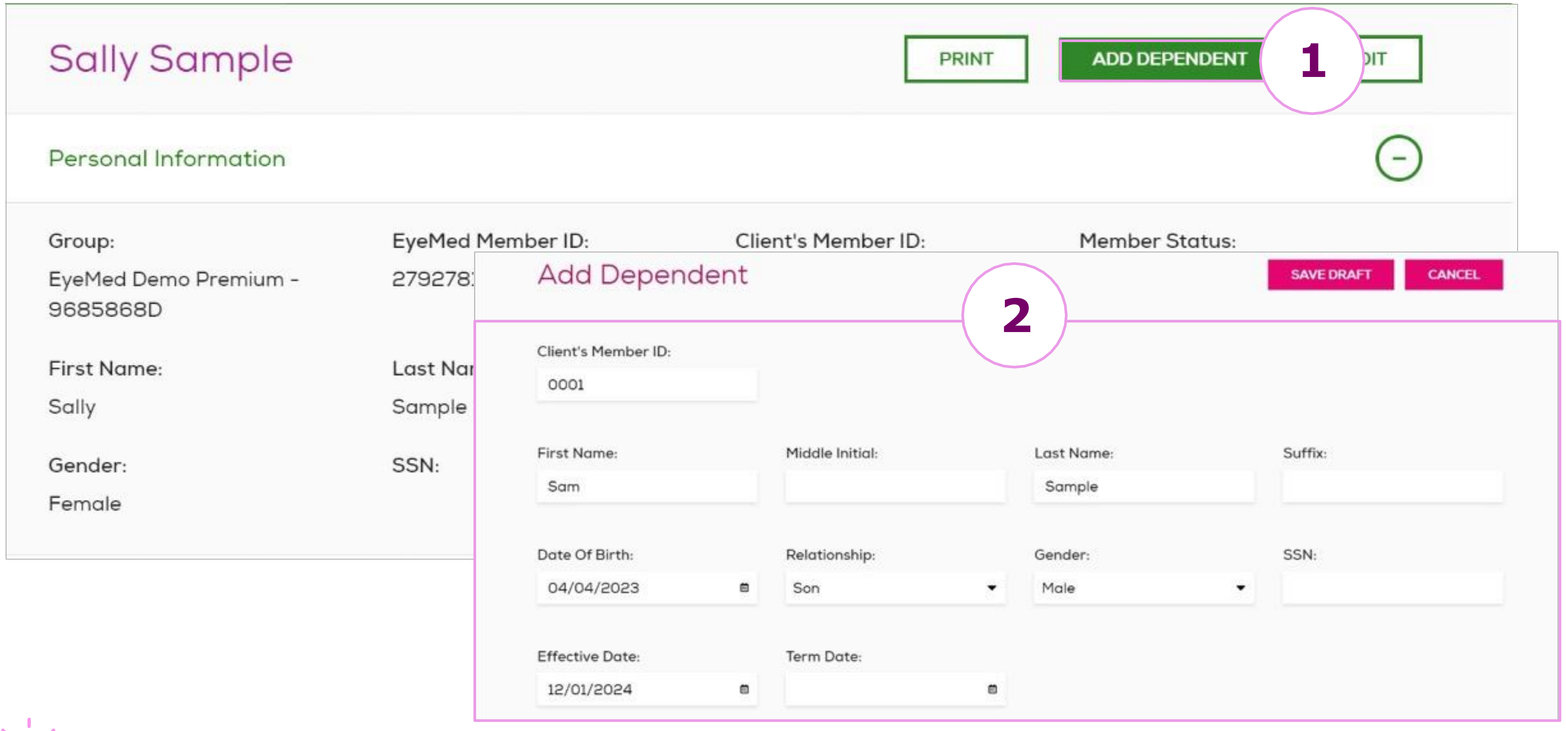
Adding a dependent

Part 1 of 2

1. Once you complete the subscriber information form and hit submit, you will see the green "Add Dependent" button at the top of the screen.

2. Enter the dependent information. Effective dates for dependents will default to the effective date that the subscriber has listed.

If the dependent should have a different effective date, you can simply edit the effective date box on this screen. The dependents address details will default to match the subscriber's information.

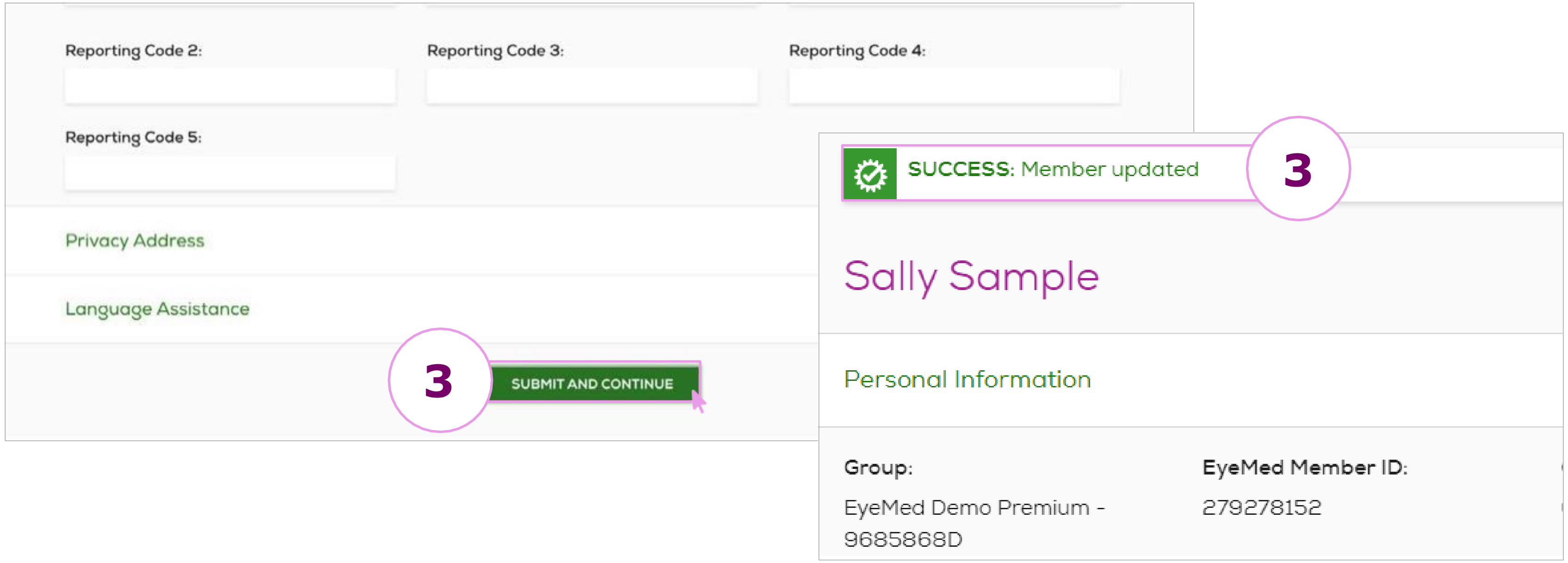


Only fields with asterisks are required.

Adding a dependent

Part 2 of 2

3. Once the member's information is completed, press "Submit and Continue" to complete the enrollment. A confirmation will display to verify that the change has been submitted. All changes are reflected on the member account in real time.

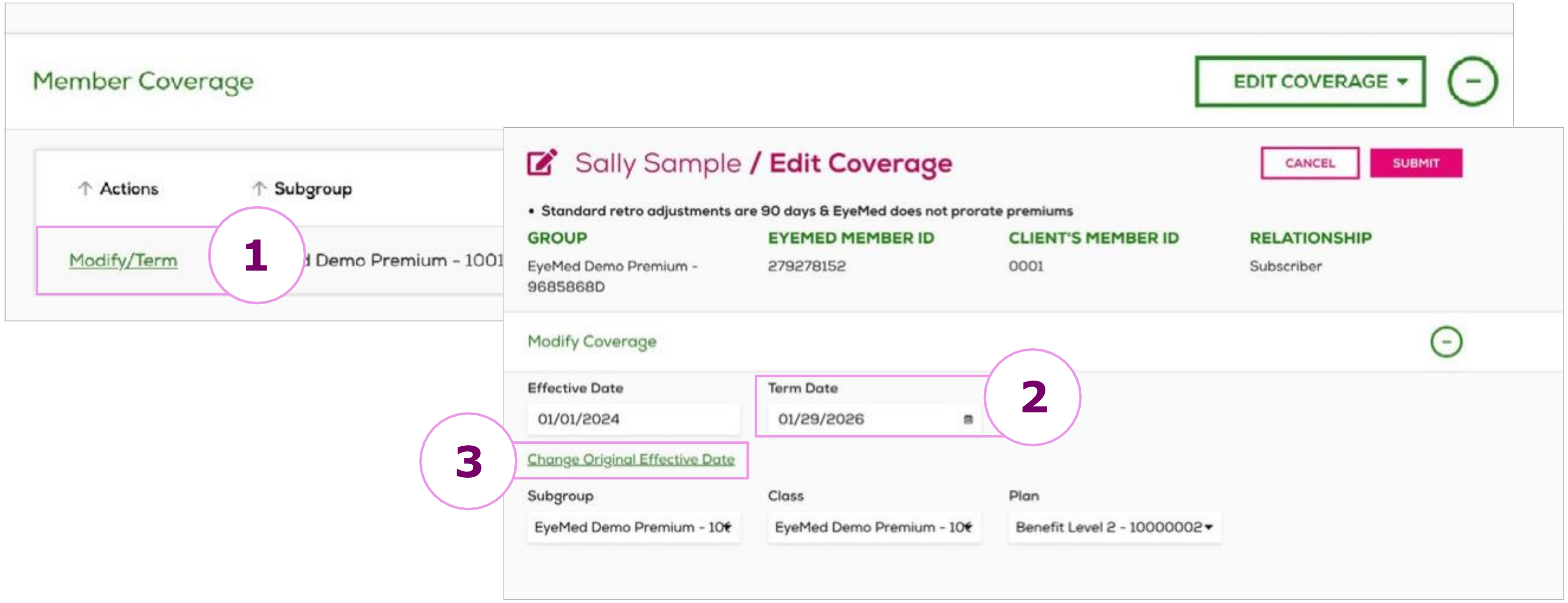


Please note that if the group sends a file feed, the file feed will override any manual changes submitted in the EyeManage portal.

Modify/term coverage

To modify a member's coverage, first, locate the member's detail page in EyeManage. This can be performed by using the smart search function.

1. Then click on the green "Modify/Term" hyperlink.
2. Enter a termination date to end a member's benefits.
3. You can also click "Change Original Effective Date" if the original date of coverage needs to be adjusted.



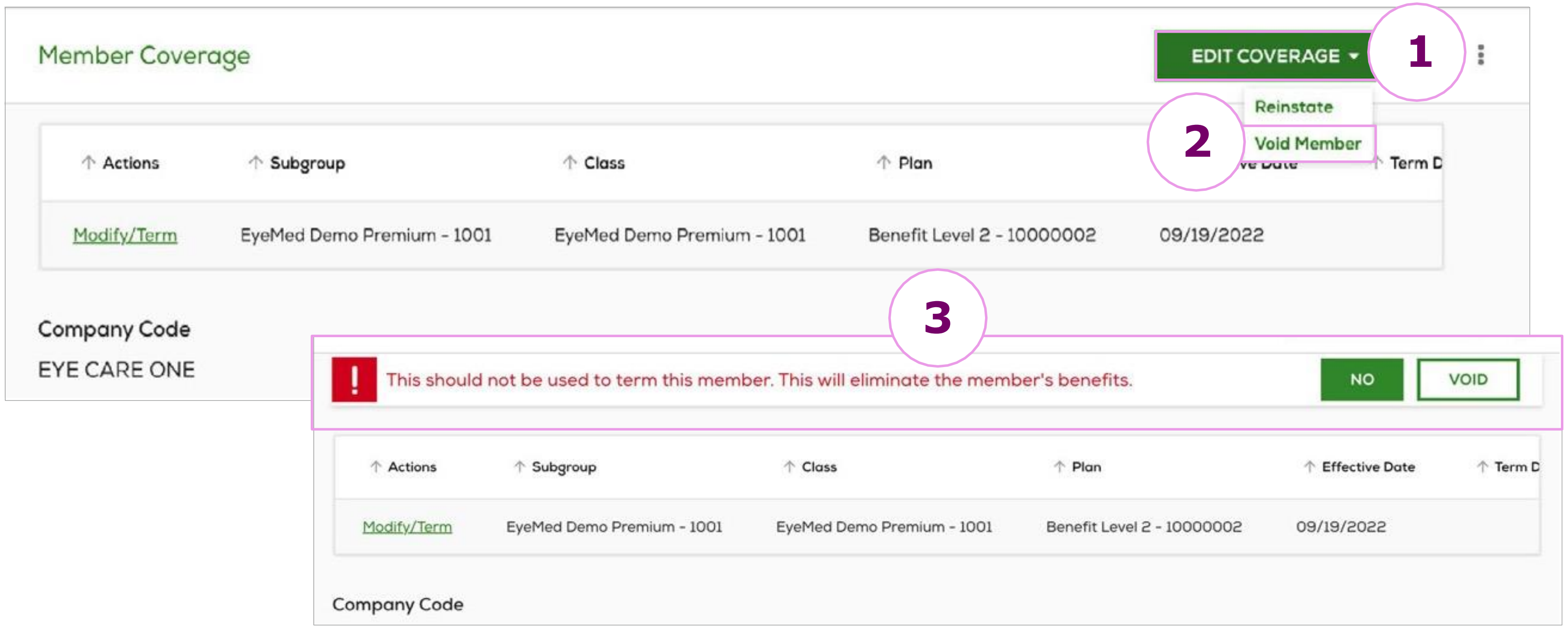
EyeMed provides up to 90 days retro credits/charges. EyeMed does not prorate premiums. Due to this, we recommend terming at the end of the month.

Void member

Voiding a member means changing the member's enrollment status to "Never Active". This can be used when a member was enrolled but changed their enrollment elections or was enrolled in error.

This option should not be used in place of terminating members

1. Navigate to the Member from the Client page. To void a member, go to the Member Coverage section and click on the green "Edit Coverage" button.
2. Select "Void Member" from the dropdown menu.
3. You will need to verify the void request.



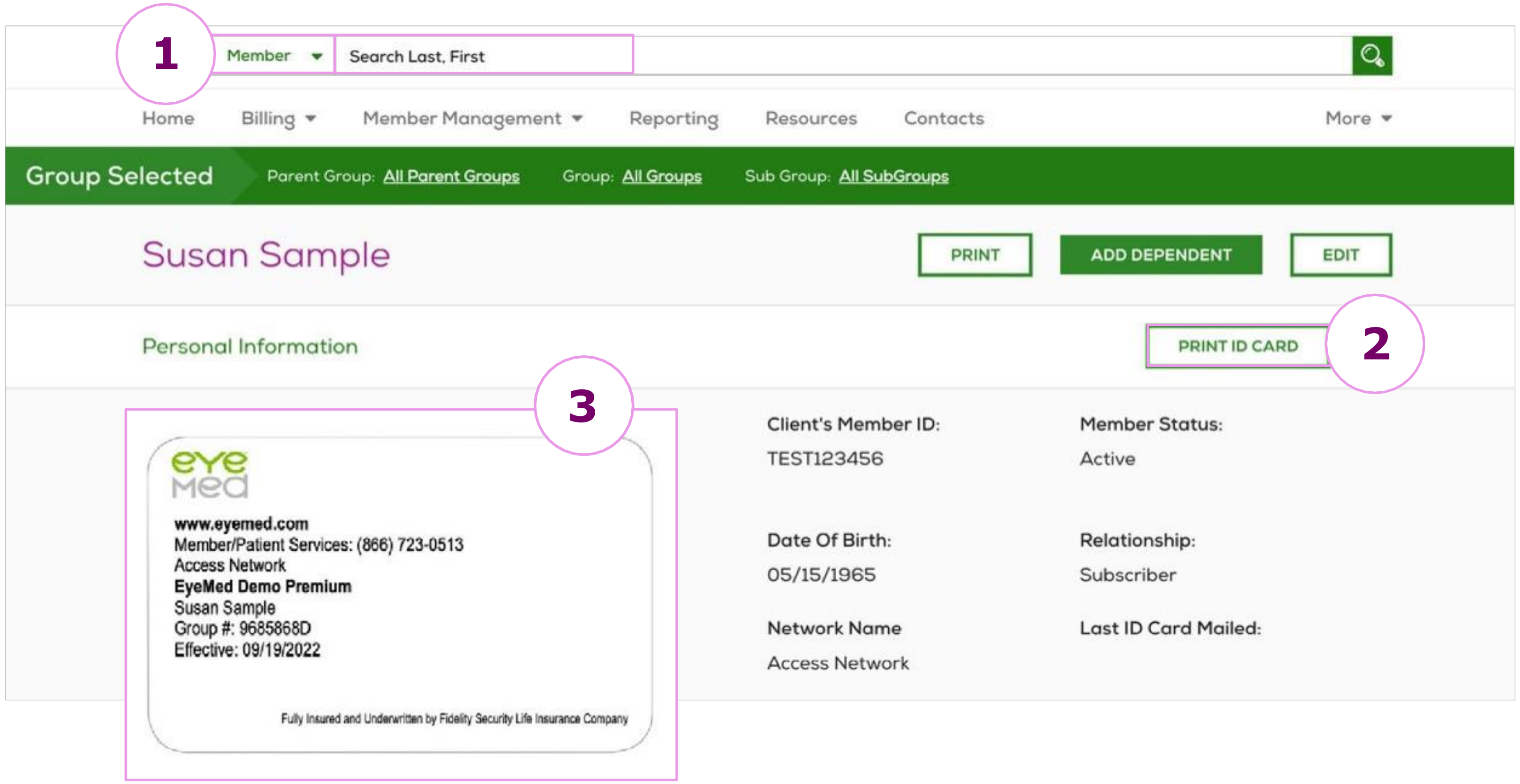
The void is complete when the member coverage box is empty.

Print ID card

1. You can access a PDF copy of the Member's ID card by navigating to the Member Details homepage.

2. In the top right corner of the member page there is a "Print ID Card" button

3. The PDF file will then be downloaded through the web browser.

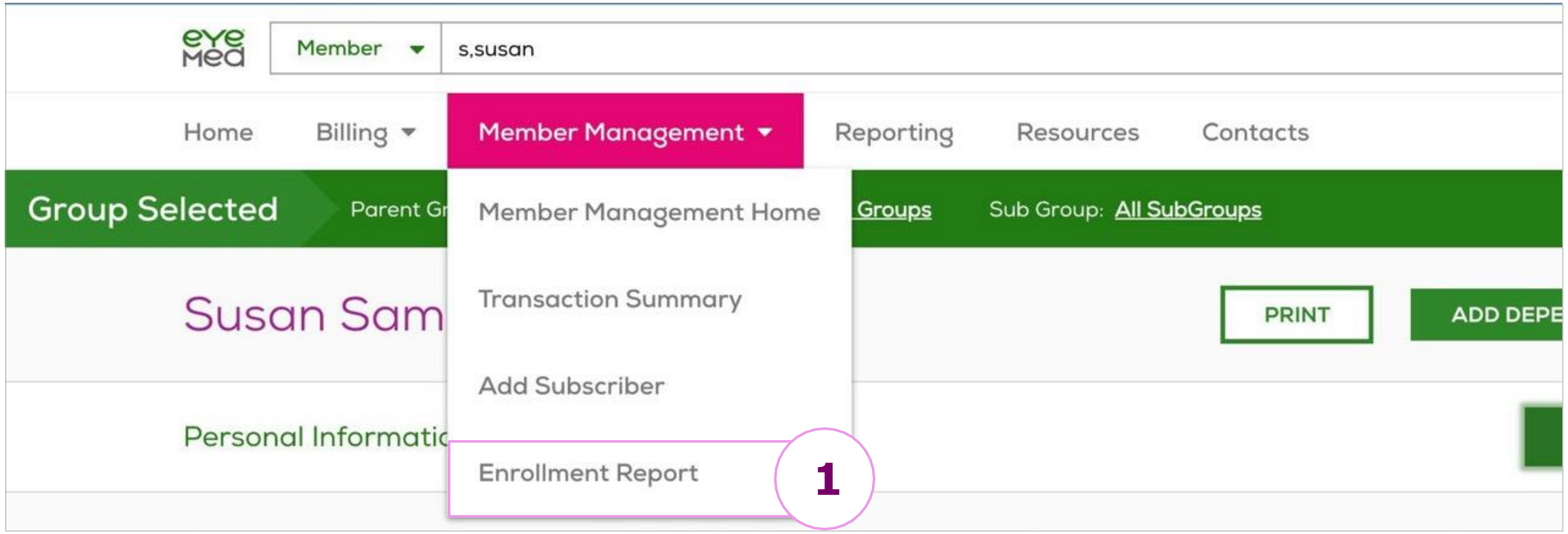


Run an enrollment report *(pull an active census)*

Part 1 of 2

Make sure that you have the group ID information listed in the green context bar at the top of the EyeManage home screen.

1. Go to the Member Management dropdown menu and click "Enrollment Report". The group and subgroup data will auto-populate based on the data that you previously selected in the Green Bar.

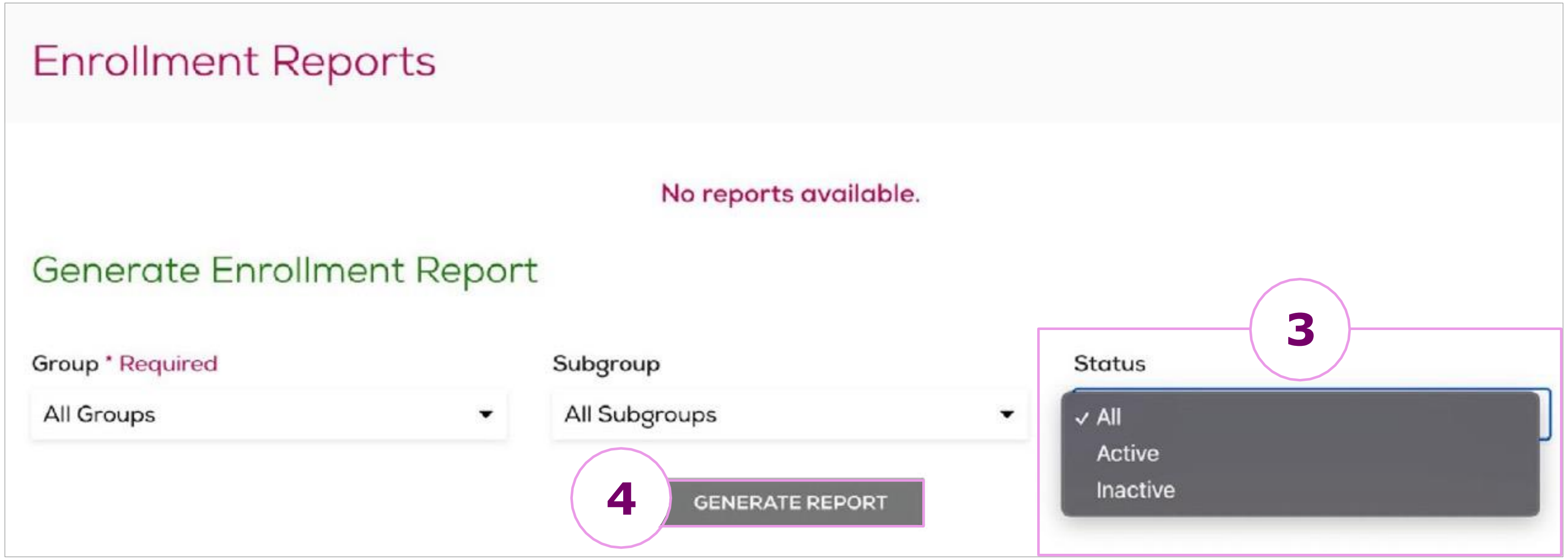


Run an enrollment report *(pull an active census)*

Part 2 of 2

3. You can change the status type to filter the results that you load in your report home screen.

4. Click "Generate Report", to download the excel file through your web browser.



All will pull both terminated and active employees listed on the group/ subgroup ID numbers specified.

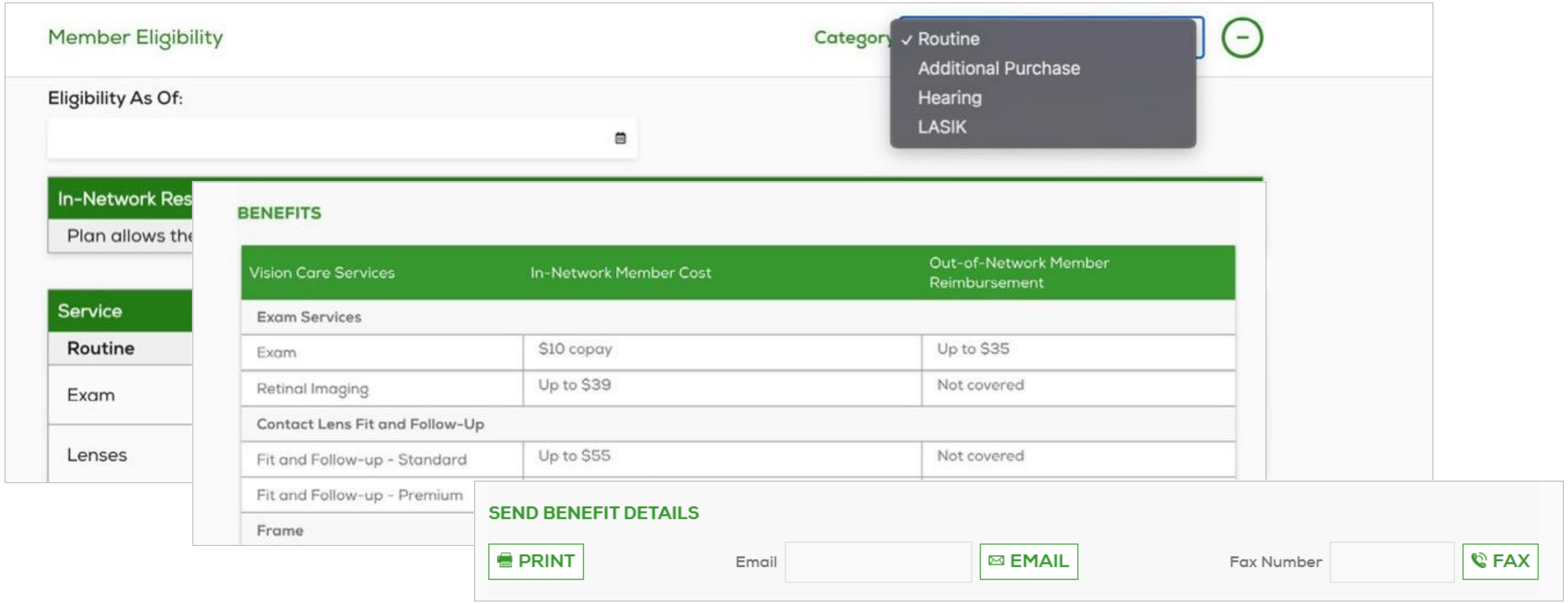
Inactive will pull both terminated and voided members listed on the Group/ Subgroup ID number.

Active will only pull active members listed on the Group/ Subgroup ID.

View benefit summary

Plan benefits are under the Member Eligibility section on the member details homepage. You can view routine vision benefits, additional purchase benefits, hearing benefits and LASIK Benefits.

You can also see in-network member costs and out-of-network reimbursement rates. Members can view their benefit details by registering on eyemed.com or requesting a benefit summary emailed to them by our service center.

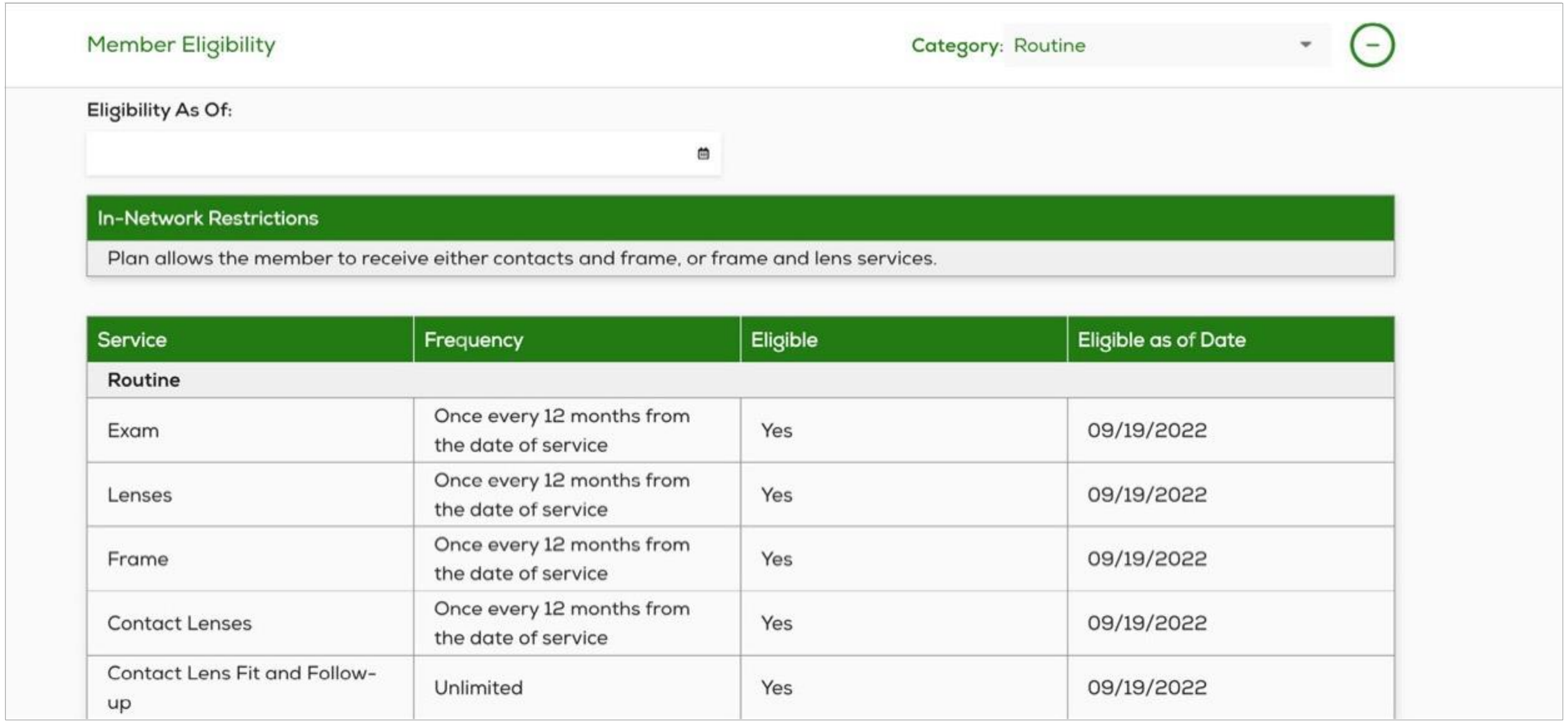


You can also email or fax the benefit details for the member by scrolling to the bottom of the web page.

View member eligibility

On the Member Details page, you can scroll down to view the member eligibility section.

This page shows either Yes/ No for the eligibility status, the benefits frequency and the date that the member will become eligible for this service. It also shows the plan's service restriction.


Member Eligibility

Category: Routine

Eligibility As Of:

In-Network Restrictions

Plan allows the member to receive either contacts and frame, or frame and lens services.

Service	Frequency	Eligible	Eligible as of Date
Routine			
Exam	Once every 12 months from the date of service	Yes	09/19/2022
Lenses	Once every 12 months from the date of service	Yes	09/19/2022
Frame	Once every 12 months from the date of service	Yes	09/19/2022
Contact Lenses	Once every 12 months from the date of service	Yes	09/19/2022
Contact Lens Fit and Follow-up	Unlimited	Yes	09/19/2022

Billing

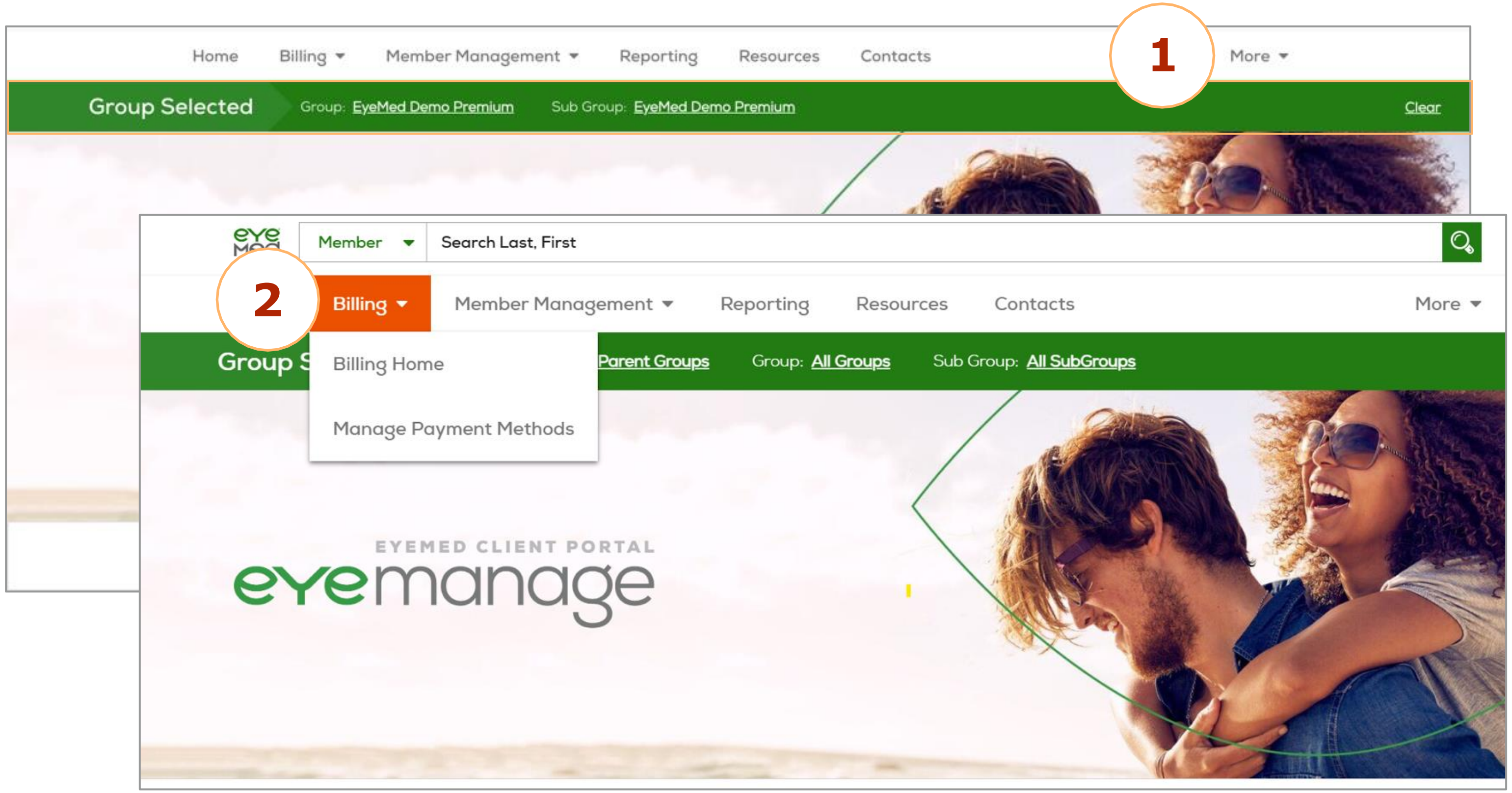
p.40-50

Navigate directly to a topic by clicking on the topic title

Billing homepage

1. Enter the group information in the green context bar at the top of the EyeManage home screen.
2. Then hover your cursor over the billing dropdown menu and click on the "Billing Home" button.

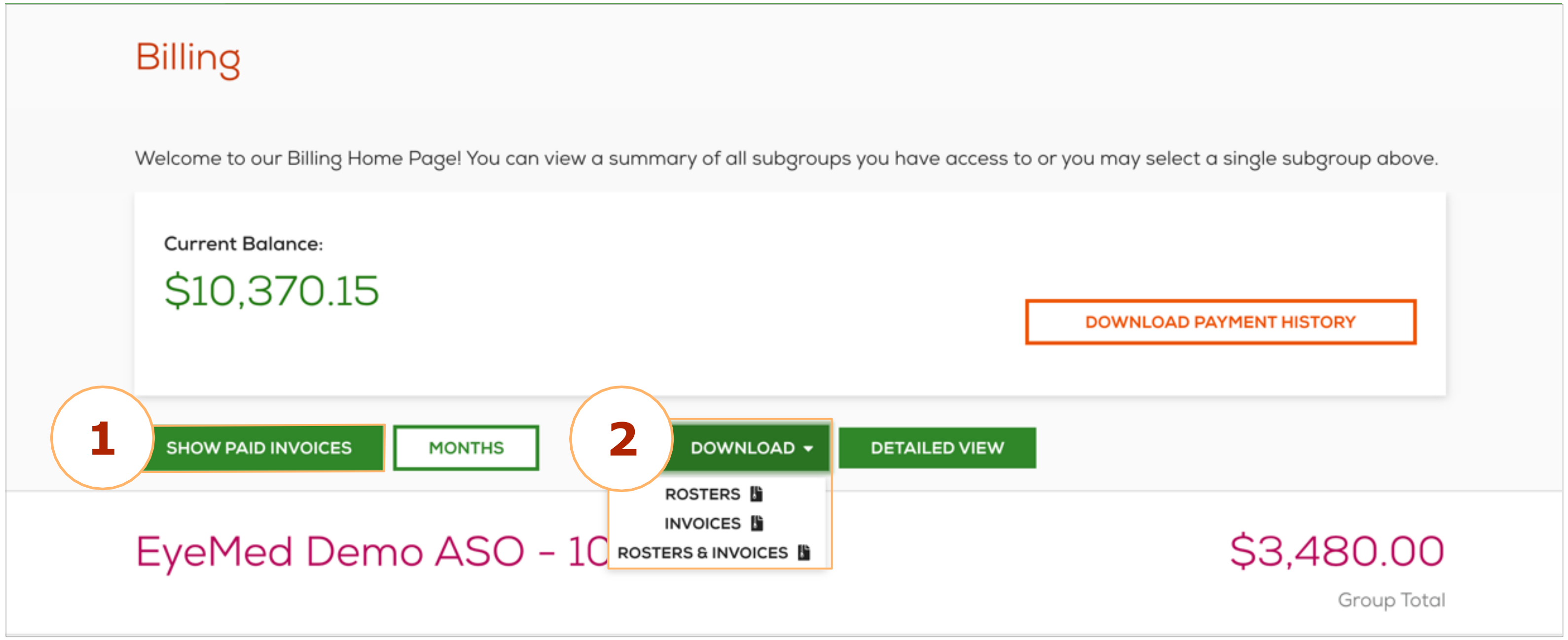
By default, this homepage will only display the open invoices within the last 17 months. Open invoices include payment pending invoices, unpaid invoices or invoices that have issued a credit that has not yet been applied.



View/download invoices & rosters

Part 1 of 2

1. You can click on "Show Paid Invoices" to view all invoices for the last 17 months, rather than just open invoices.
2. Click "Download" to save an invoice summary, open rosters, open invoices or a compressed file with both rosters and invoices.

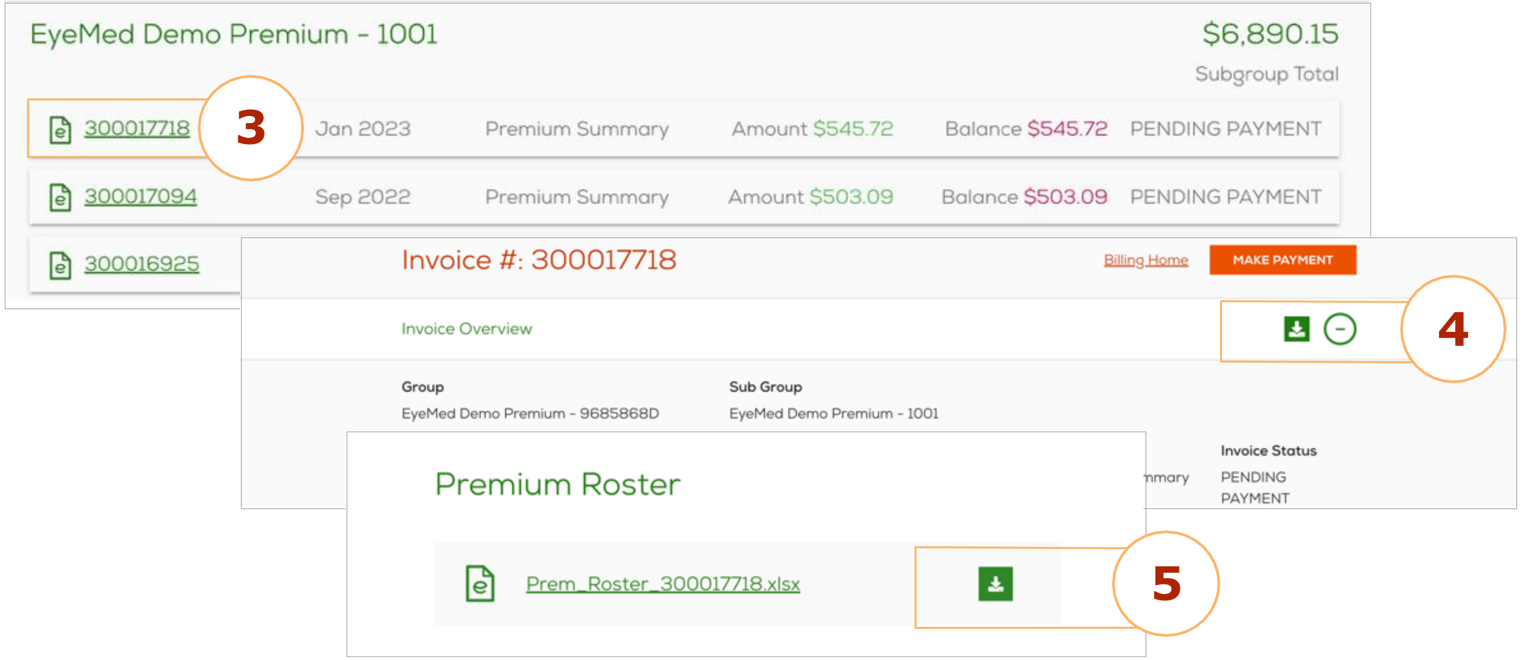


When you're viewing all invoices (not just open ones), the download button will save both invoices/rosters from the entire list.

View/download invoices & rosters

Part 2 of 2

3. To download a single invoice and roster click on the "green hyperlink" for the invoice you are trying to view.
4. After you click the selected invoice, you will be taken to the Invoice Overview page. The "green download button" towards the top right hand of the screen will download the invoice only.
5. The "green download button" next to the roster hyperlink will download the roster only.



When you're viewing all invoices (not just open ones), the download button will save both invoices and rosters from the entire list.

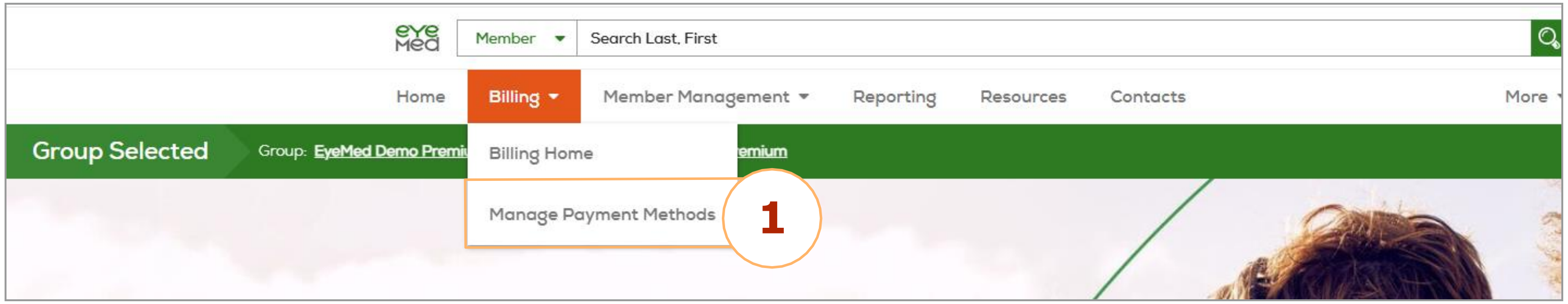
Set up payment methods (auto or one-time)

Part 1 of 3

Before making auto or one-time payments in EyeManage, a payment method must be set up.

1. From the EyeManage homepage, hover your cursor over the billing dropdown menu and select "Manage Payment Methods."

2. Review and agree to the terms and conditions by checking the checkbox and then click "Add Payment Method."

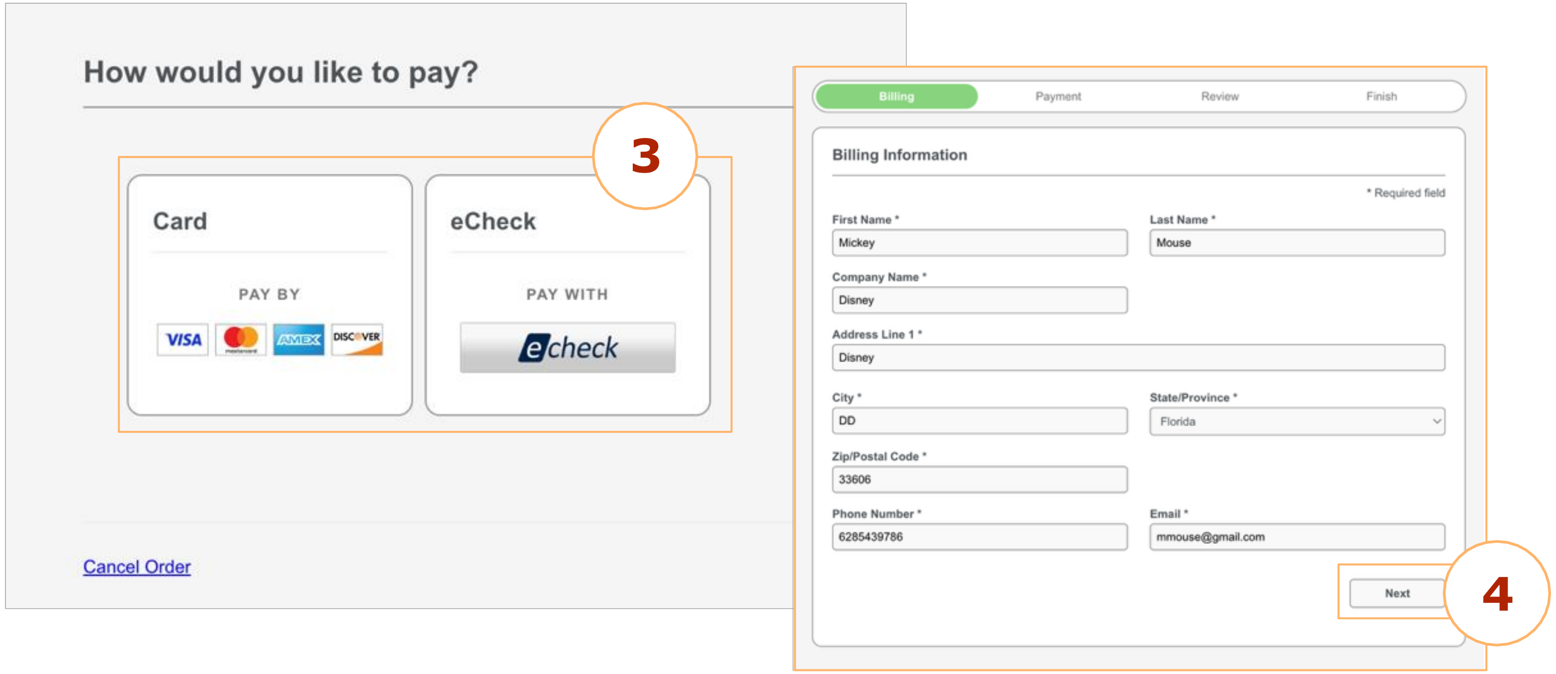


Set up payment methods (auto or one-time)

Part 2 of 3

3. Securely set up eCheck (ACH) or credit card for automatic monthly or one-time payments.

4. To pay with a Credit Card, enter the below information associated with the card being used. Click "Next" to proceed to the next page.



For security, payments are processed in a new browser tab when they choose a payment option.

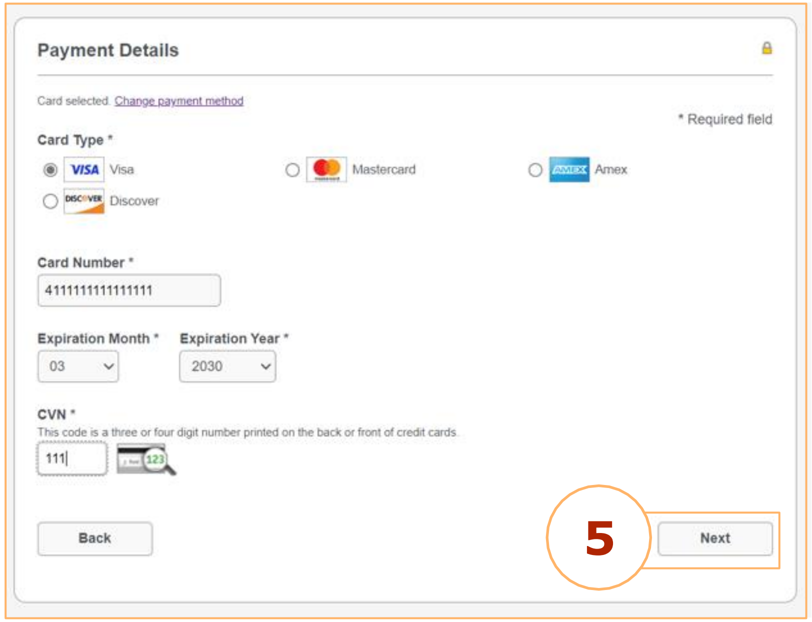
Set up payment methods (auto or one-time)

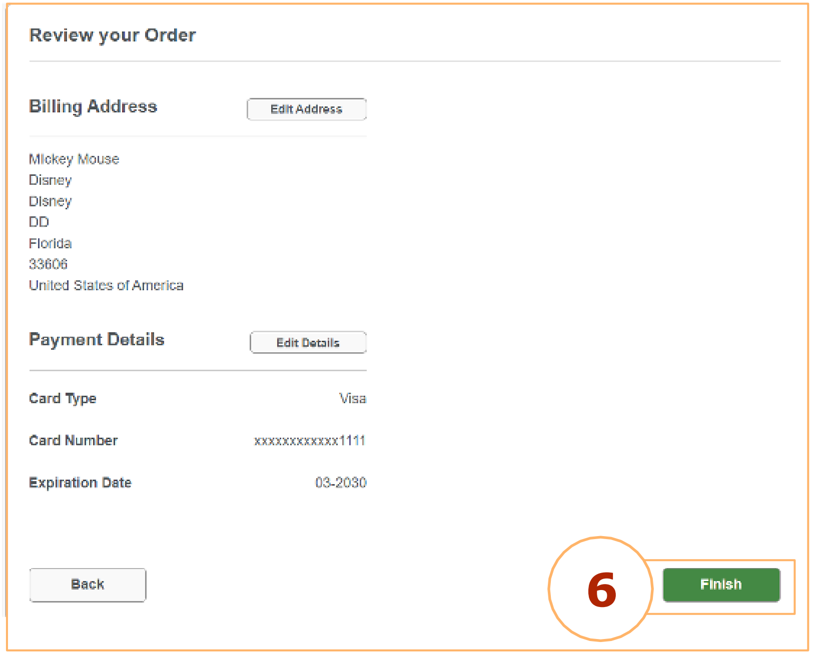
Part 3 of 3

You can set up to 5 payment methods

5. Then, enter the card information and click "Next" to proceed to the next page.

6. Review the details listed on the confirmation page and click "Finish" to complete adding the payment method to the account.





Users will get notified when a credit card on file is about to expire.

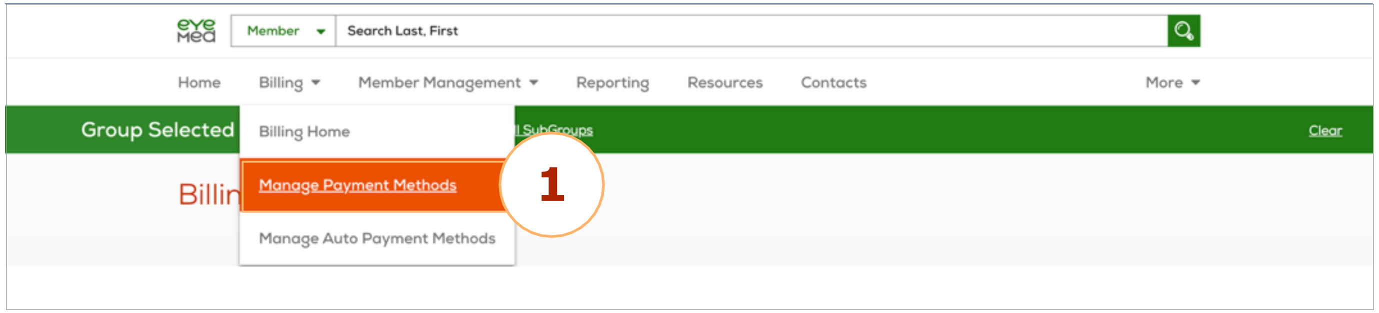
Auto pay & manage payment methods

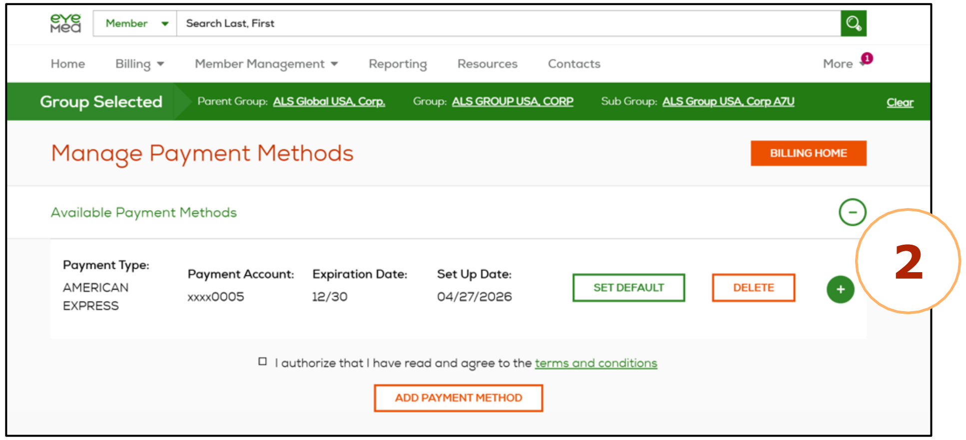
Part 1 of 2

Here you can update contact information for payment methods, set up auto-payments for multiple subgroups and add/delete payment methods.

1. From the EyeManage homepage, hover your cursor over the billing dropdown menu and select "Manage Payment Methods."

2. Click on the green plus sign to update the card information or setup auto-payments.





Auto pay & manage payment methods

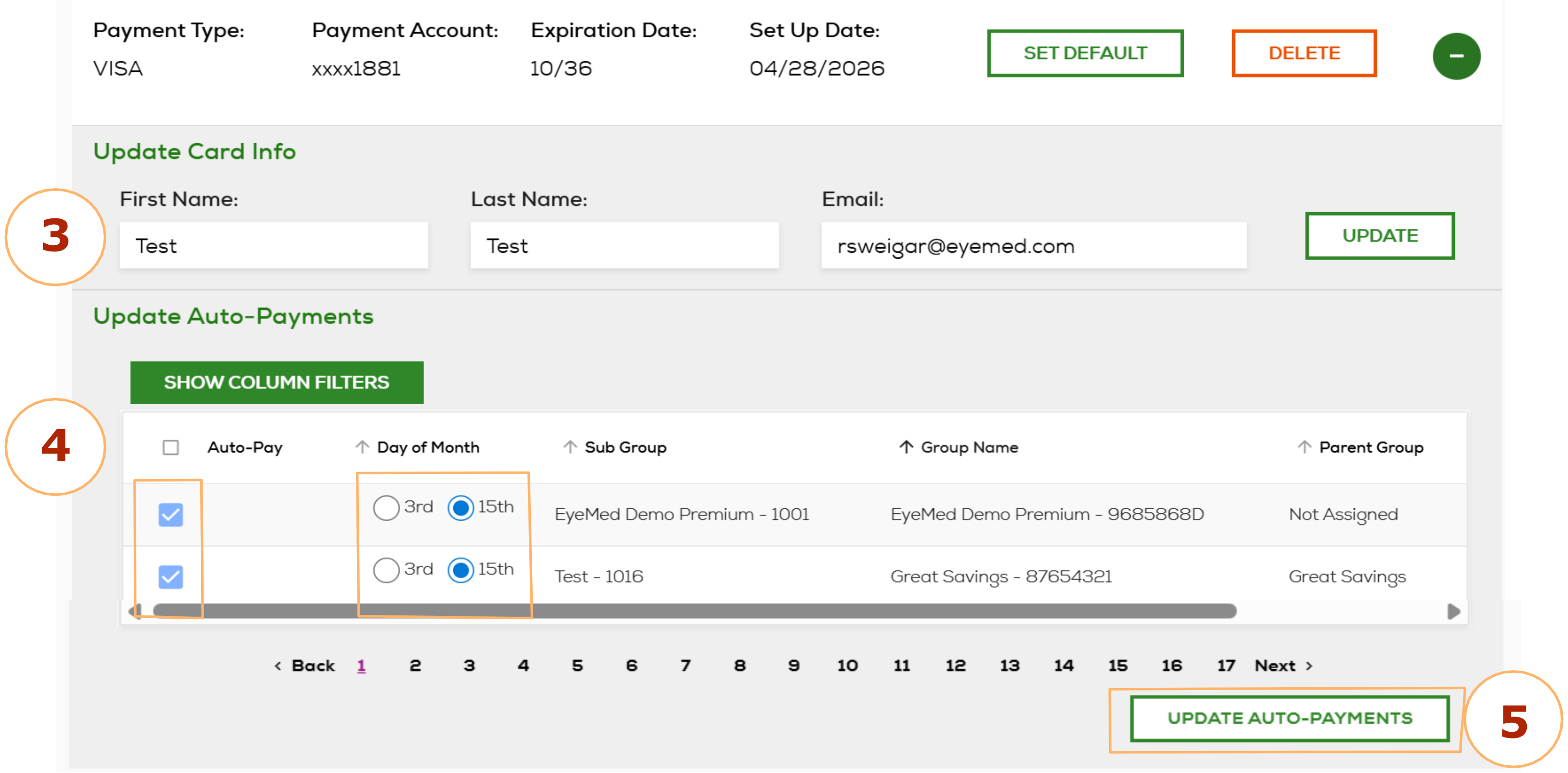
Part 2 of 2

You can set up recurring payments pre-invoice to avoid missing any payments.

3. The "Update Card Info" section is here if you need to update card contact.

4. To setup auto-payment, choose one or multiple groups and the preferred processing date.

5. When finished, click "Update Auto-Payments"



Setting up recurring payments is recommended. Payments will be processed on the 3rd or 15th of each month (not on setup day). You'll receive an email confirmation once processed.

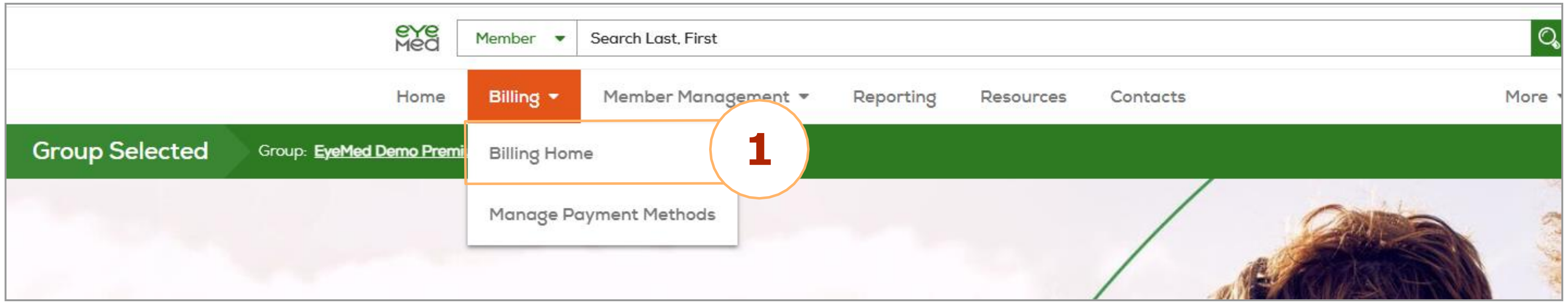
Make a one-time payment

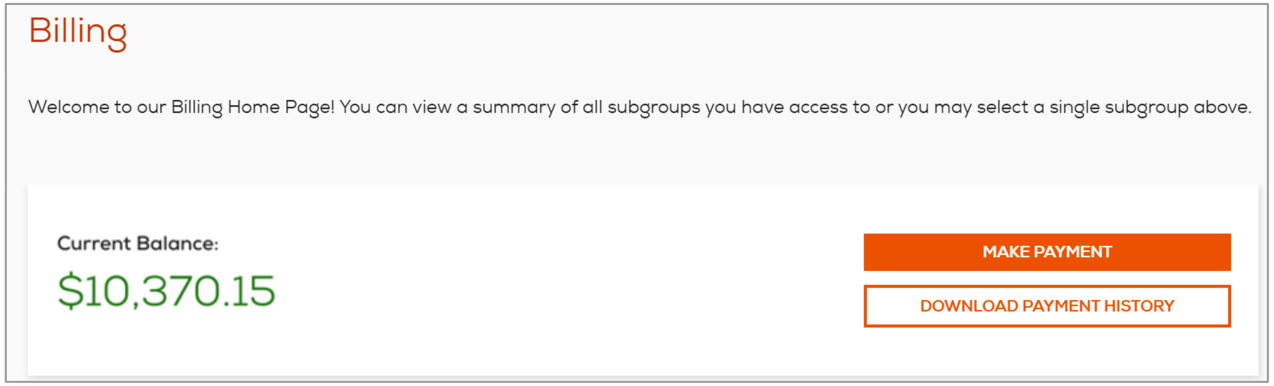
Part 1 of 2

On the billing homepage, adding a payment method is required before making a payment using the orange "Make Payment" button.

1. Hover your cursor over the billing dropdown menu and then click the "Billing Home" button.

2. Click "Make Payment"

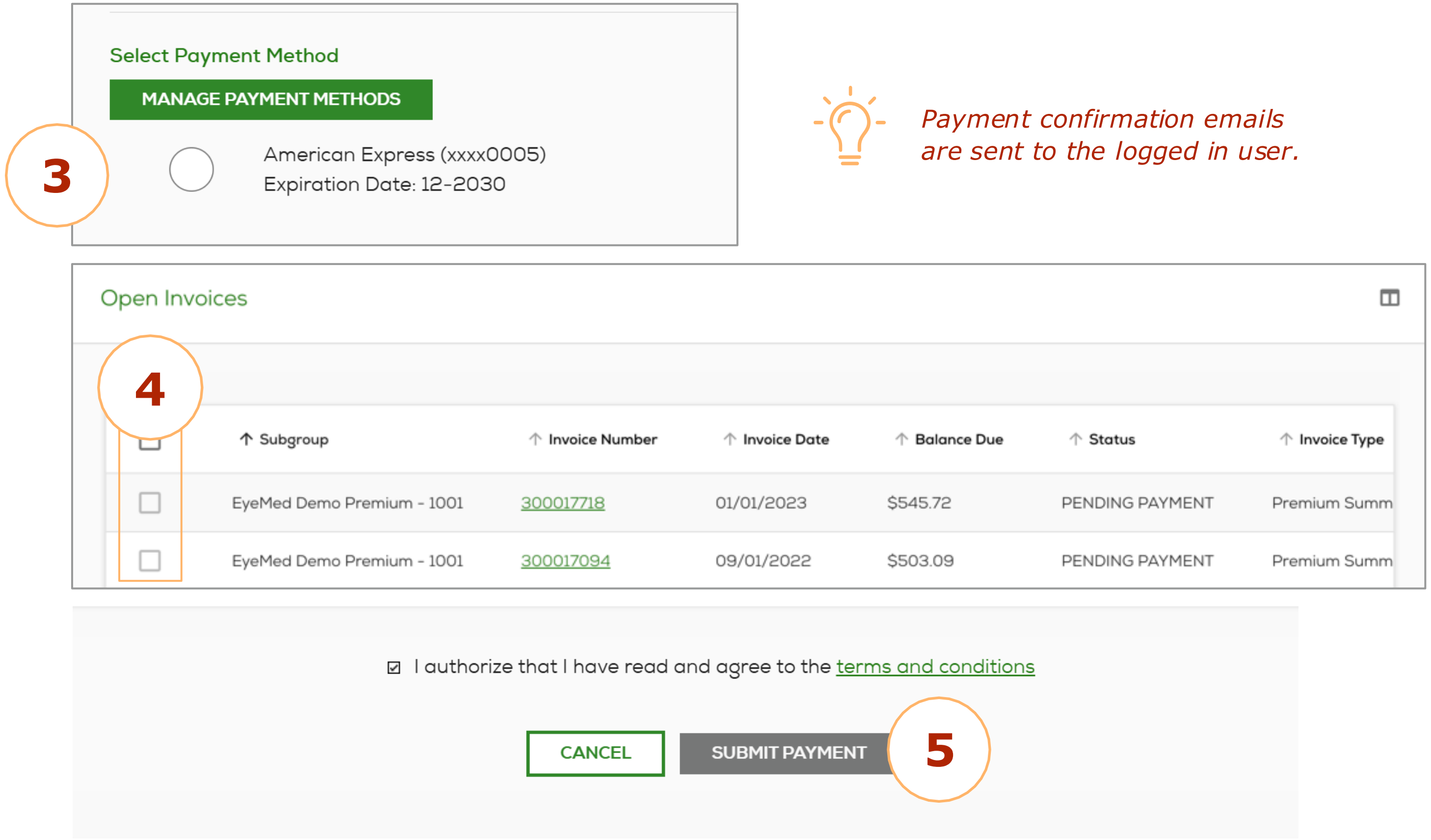




Make a one-time payment

Part 2 of 2

3. Select the payment method.
4. Select the invoices that you would like to pay using the check boxes on the left-hand side of the screen.
5. Review and check the terms and conditions box and then click "Submit payment." A payment confirmation window will display and the logged in user will receive an email.



Payment confirmation emails are sent to the logged in user.

Attestations

p.51-57

Navigate directly to a topic by clicking on the topic title

What are attestations

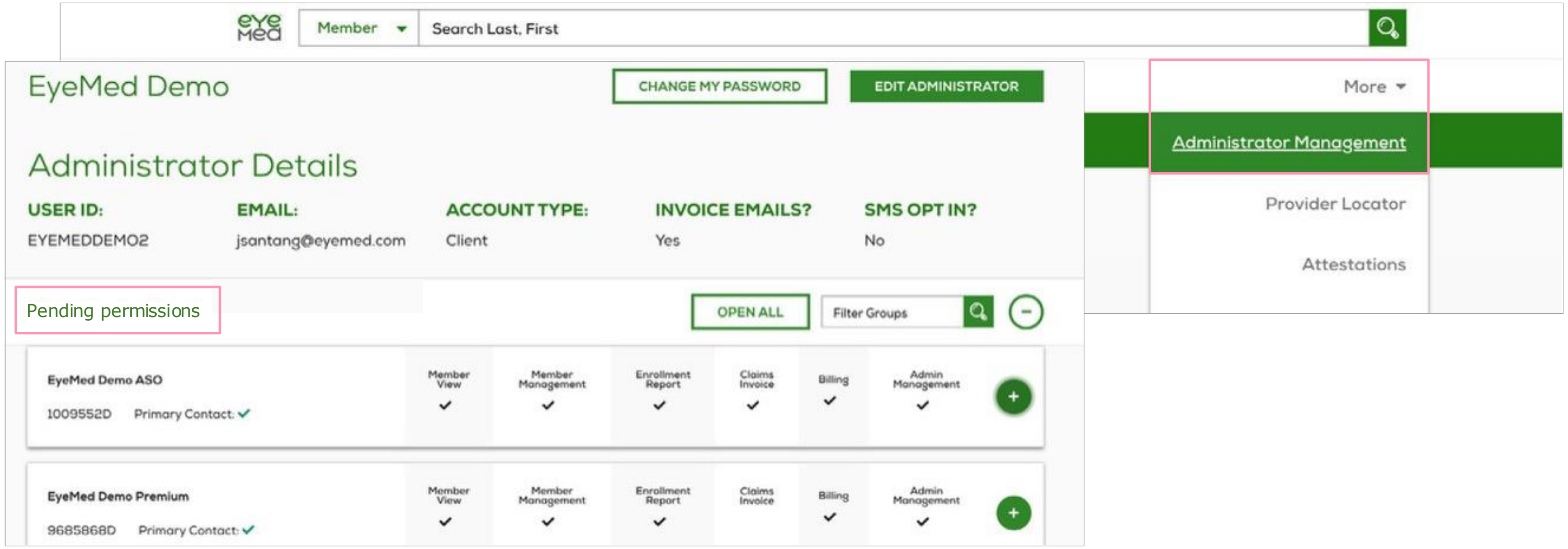
EyeMed has an attestation process that enables clients to manage which administrators can access their account data. Ensuring the protection of client data remains EyeMed's top priority. These safeguards provide a digital record of who has been granted access and by whom, offering a more centralized and efficient way to collaborate with clients' third-party partners.

- EyeManage maintains a record of all activity including who has access to what.
- Client users can access the data without going through the attestation process.
- Broker and TPA users must request and receive approval by a client admin user before accessing data.
- Access is requested at the subgroup level, while attestations are completed at the parent level; when a client approves access, it applies to all groups and subgroups under the parent account.
- For existing broker and TPA users requesting additional access, the system will only display pending access requests.

Broker/TPA requests

You can review pending permissions by going to "Administrator Management" from the More dropdown.

- **Member view** allows users to see member data only.
- **Member management** allows users to see and modify member data.
- **Enrollment** allows users to view and download enrollment reports.
- **Billing** allows users to view and download enrollment reports.
- **Claims** allows users to access claims-based invoices (this does not allow admins to view member claim details).



Clients will only be able to approve access for the above categories except admin management, as that is a client profile setting only.
Although the claims option is here for everyone, it only is available for ASO (self-funded) clients. No data will show for fully-funded clients.

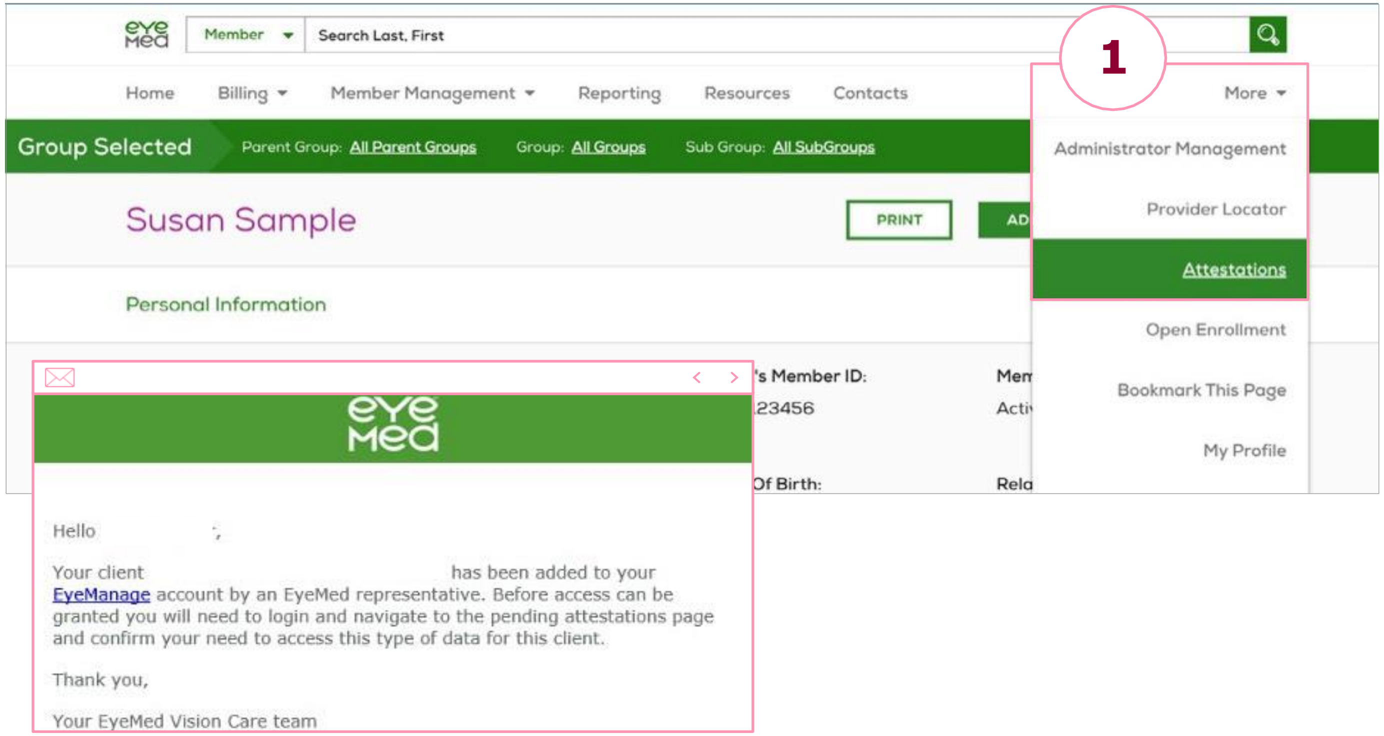
Broker/TPA requests

Continued on the next page

Once the new group is added to your admin profile by an internal EyeMed user, you will receive an email notification prompting you to attest to each permission request. *Email sample provided to the right.*

Only client admins who have admin management permissions can approve attestations.

1. Log in to your EyeManage account, navigate to the "More" dropdown menu and click on the "Attestations" option.



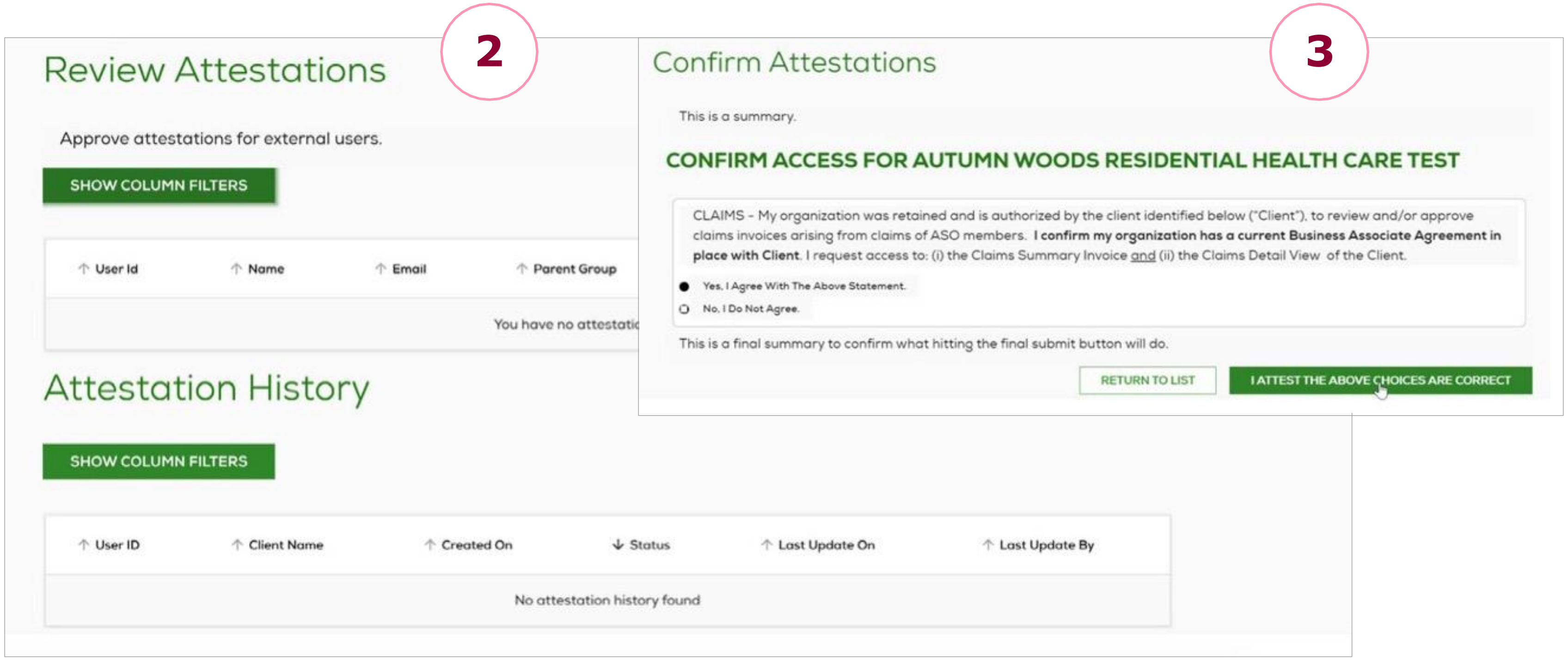
Broker/TPA requests

Continued

2. Attestations that you have submitted can be found here. Click on each request to confirm access.

3. Choose "Yes, I agree" to confirm each client's access.

Once this is approved it will trigger an email to the client to finish the approval.



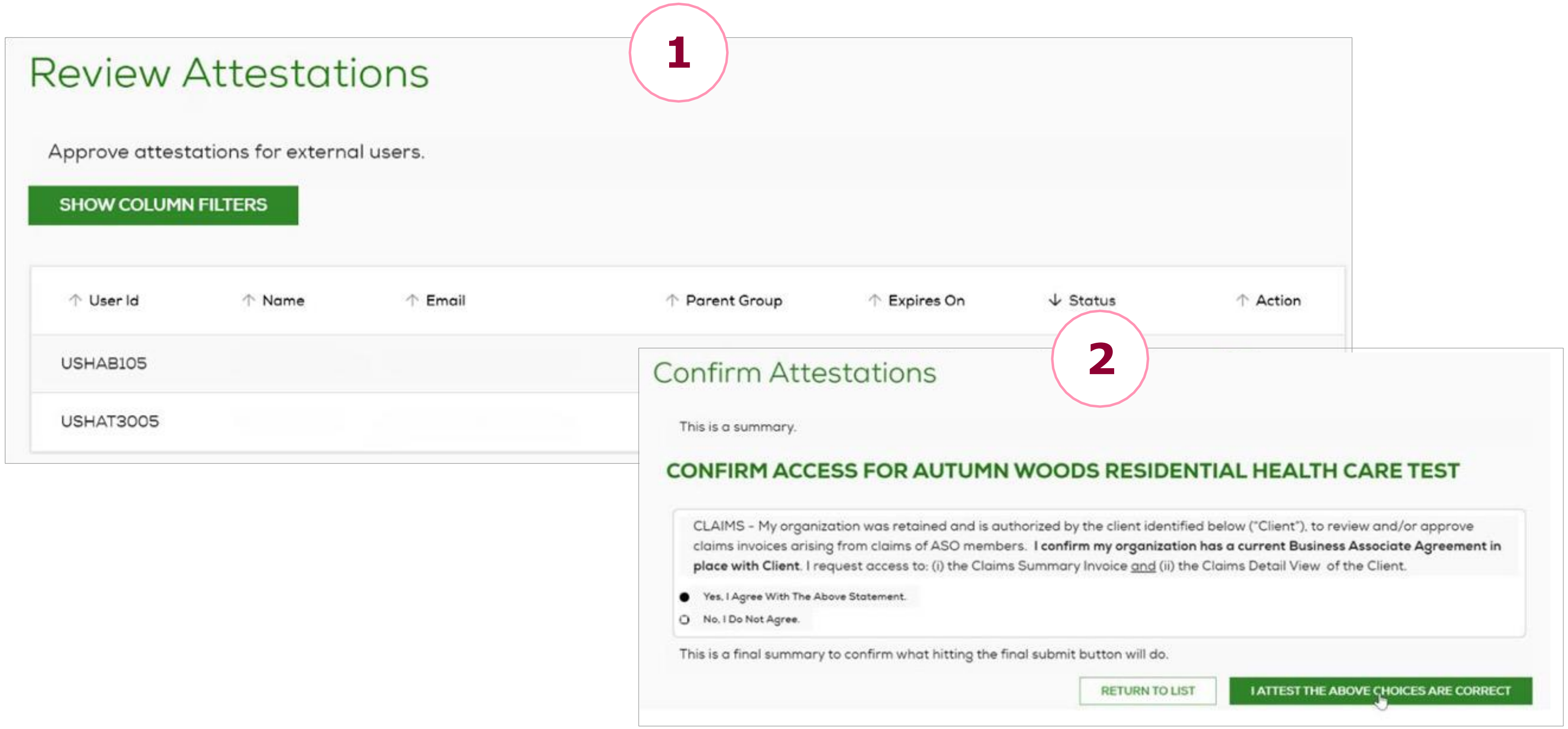
Client approving requests

Continued on the next page

1. Clients pending attestations will show here. Click on each request to confirm access.

2. Choose "Yes, I agree" to confirm each client's access.

Attestation requests expire if they are not approved/denied 6 months after the date the broker/TPA submitted the request.



Client approving requests

Continued

3. Once the client account approves or denies the request, an email will be triggered to the broker/TPA, summarizing the result.

3

Hello Jessie Broker,

Your request to access data in EyeManage for client has been completed. Here is the status of the request:

Access to MEMBER data was **approved**,Access to CLAIMS data was **approved**,Access to BILLING data was **approved**,Access to ENROLLMENT data was **approved**

Your access has been automatically applied. If you believe there is an error with your request, please contact the EyeMed associate that assisted you with your initial request.

Thank you,

Your EyeMed Vision Care team

Open enrollment

p.58-61

Navigate directly to a topic by clicking on the topic title

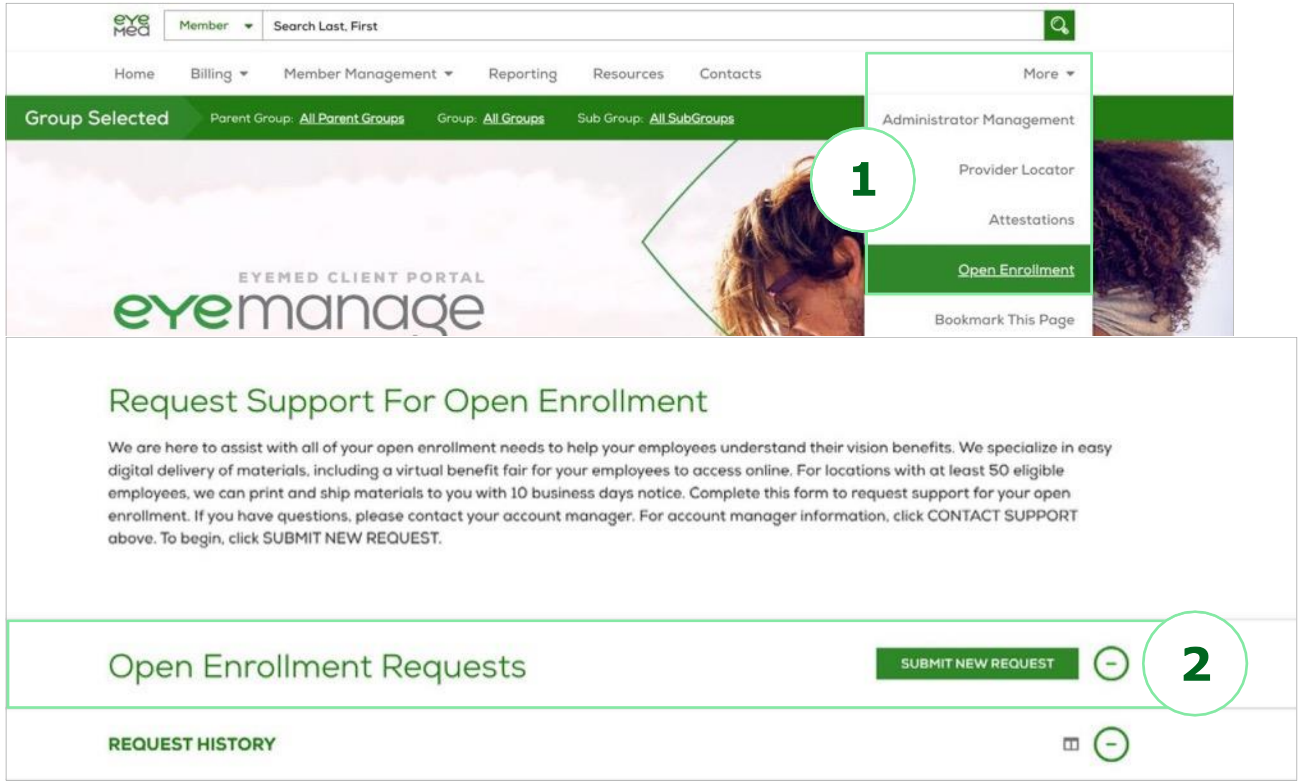
Submit open enrollment requests

Part 1 of 3

1. Add your group to the green "Smart Search" bar. From the EyeManage home page, hover your cursor over the "More" dropdown menu and click on the "Open Enrollment" button.

2. Click on the green "Submit New Request" button.

The open enrollment team offers virtual tools, printed materials, as well as a rep for qualifying events. Reach out to your assigned account manager for assistance or questions.



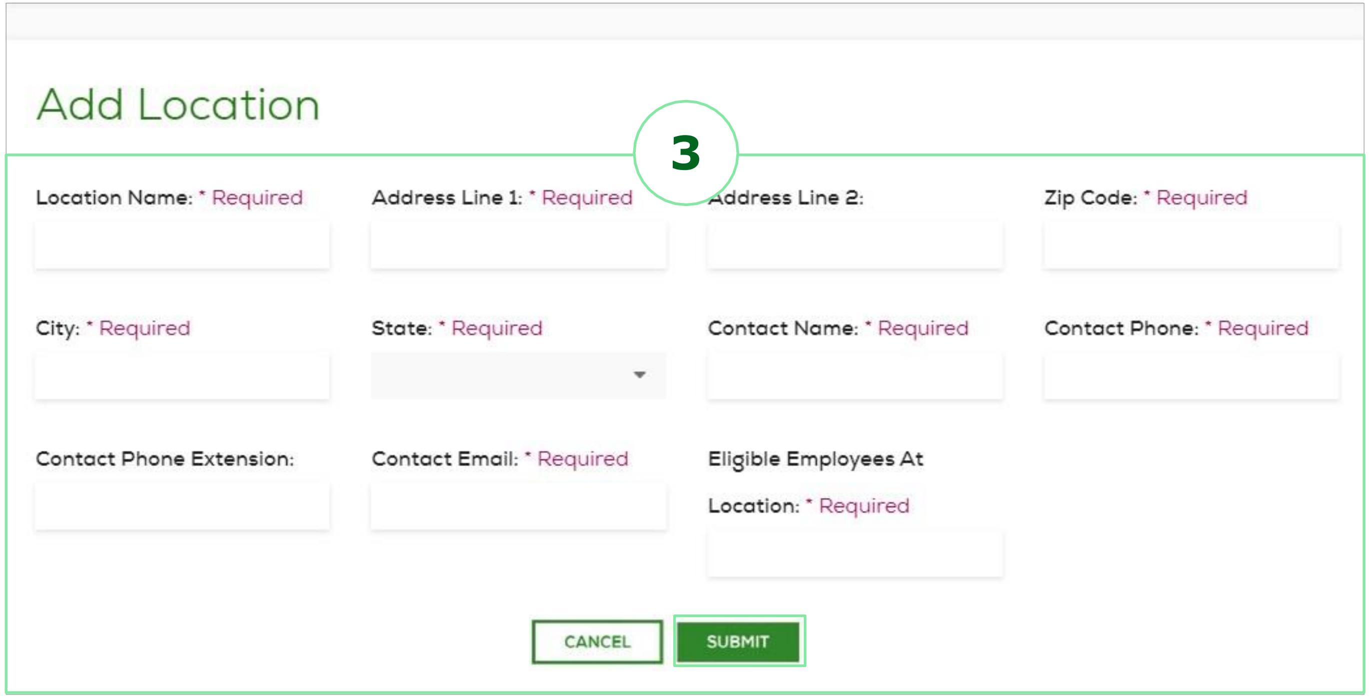
Submit open enrollment requests

Part 2 of 3

Depending on your group's size you can request virtual benefit fairs, printed materials or an in-person representative.

3. Fill out the required information and then click the green "Submit" button.

4. Select "Continue" to proceed to the next step.



Submit open enrollment requests

Part 3 of 3

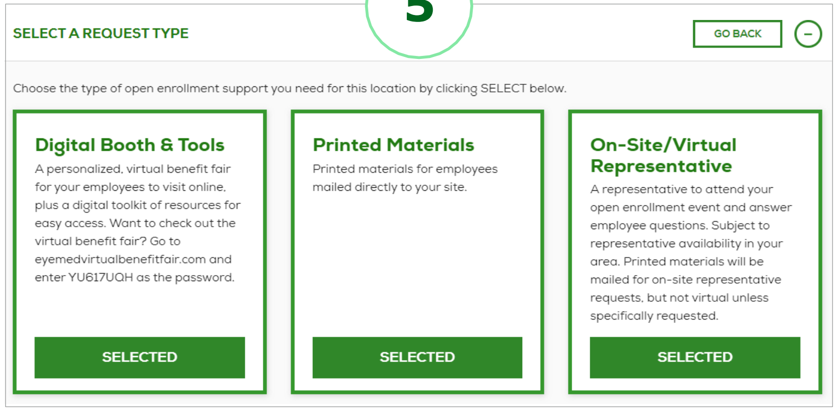
When requesting printed materials, you'll also receive a digital kit. When choosing on-site rep, we'll include printed materials and a digital kit.

5. Choose the type of support you are requesting by clicking on one of the "Selected" buttons."

6. Fill out the request form and verify that the information listed is correct.

7. Click "Continue" to select your group's benefit summary. You can click on the "+" button to review the benefit and click "yes" in the dropdown menu.

5



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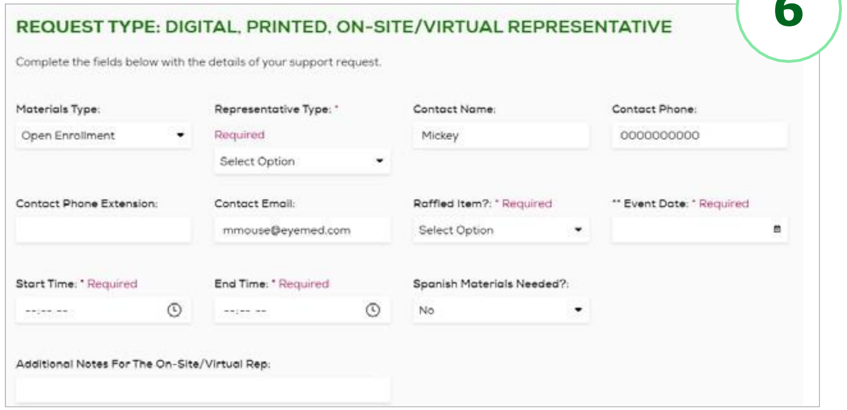

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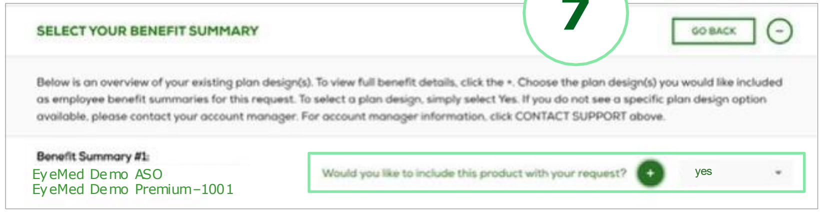


Fill out applicable information based on request type (address for materials, email address for digital, etc). For printed materials, verify if the shipping address for the materials is the same as the location address listed.

Additional tools

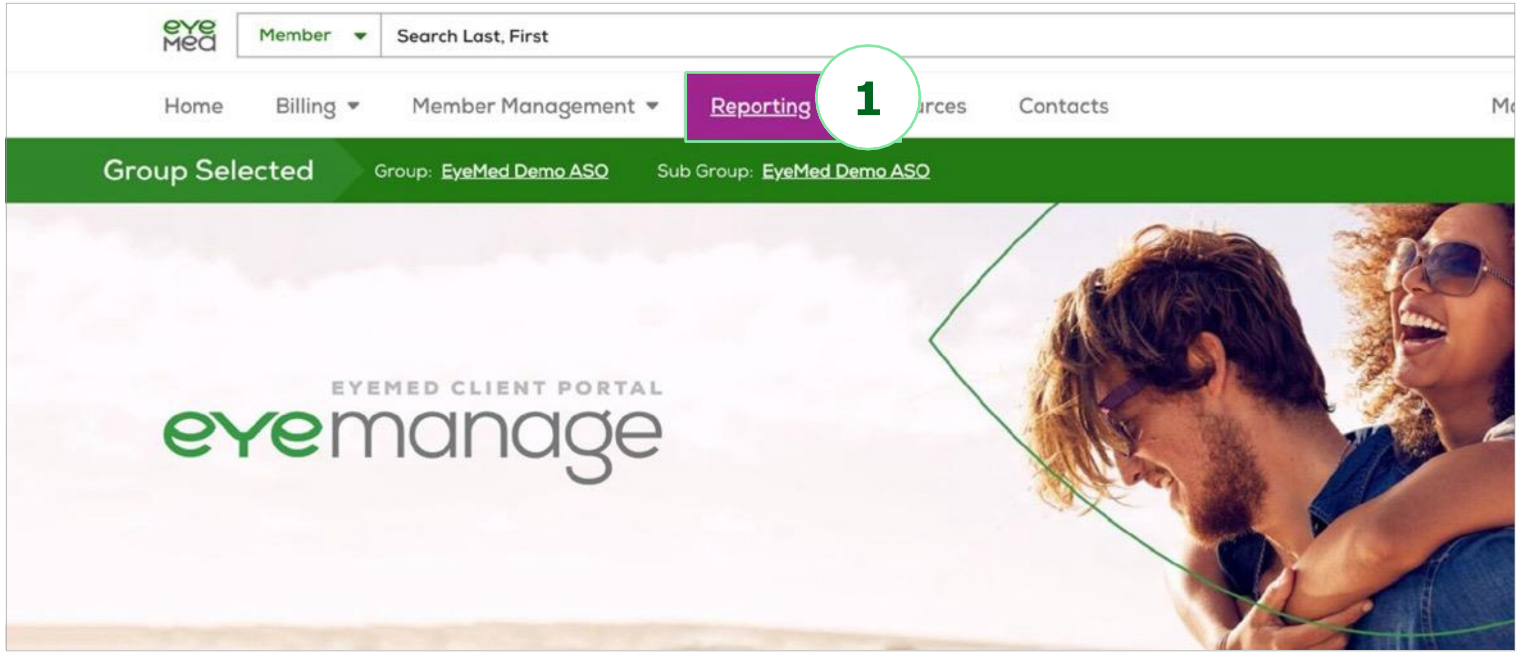
p.62-65

Navigate directly to a topic by clicking on the topic title

Scheduled reporting

1. From the EyeManage homepage, make sure that you have your group information specified in the green context bar. Then select the "Reporting" button at the top of the screen.

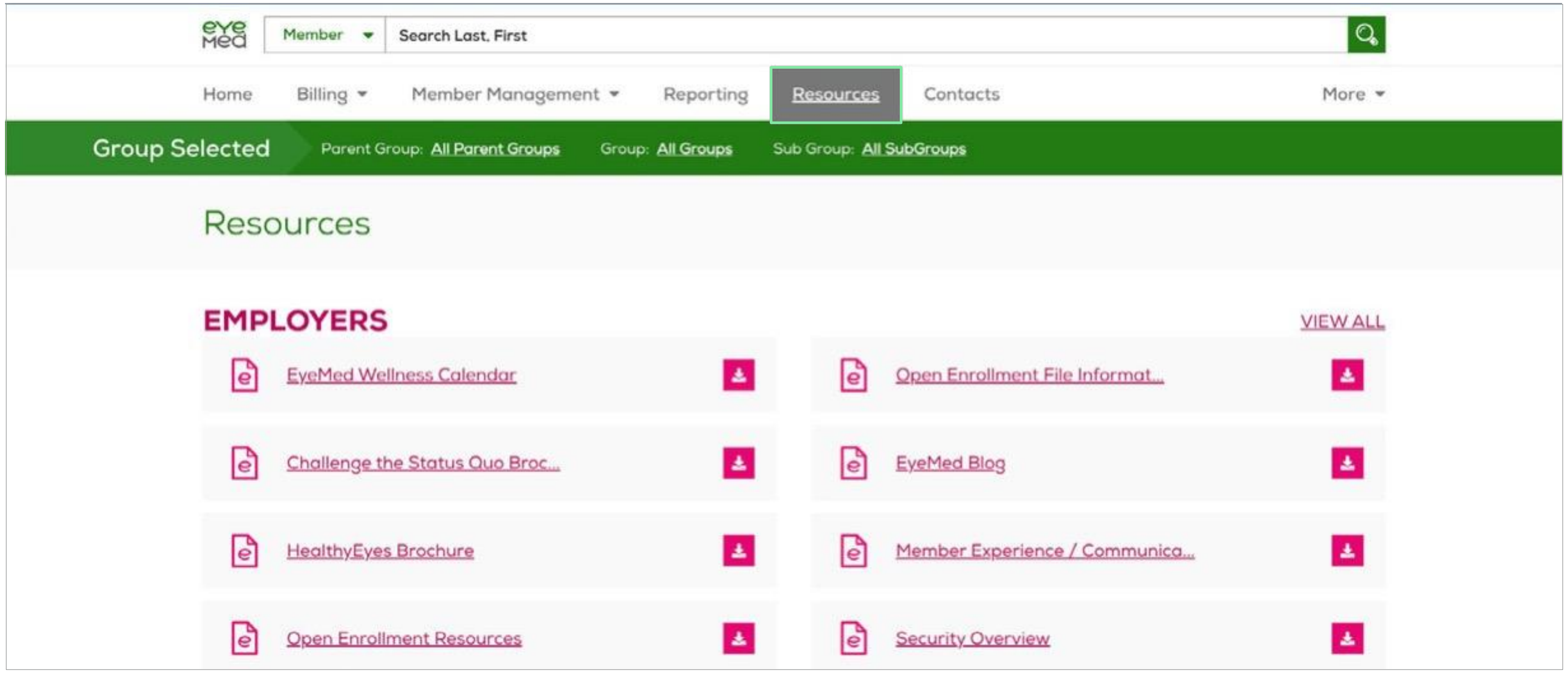
If your group has any scheduled reporting set up, it will appear in this window. To inquire if your group qualifies for scheduled reporting we recommend contacting your account manager.



Resources tab

You can find additional resources by clicking the "Resources" button at the top of the EyeManage homepage.

Here you can find helpful guides and member facing flyers to provide to your employees/clients.

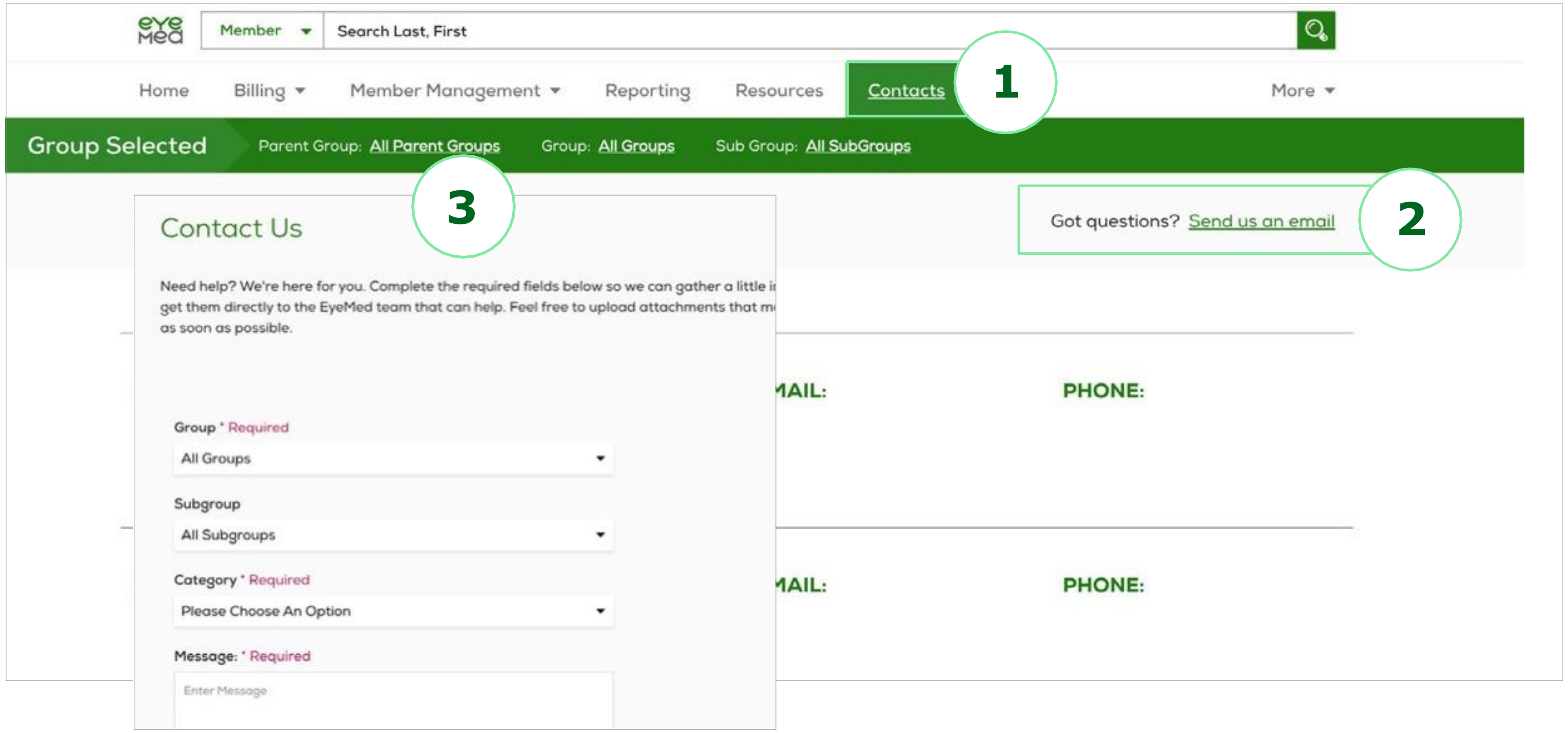


Got questions? Send us an email

1. Go to the contacts tab.

2. Click "Send us an email" hyperlink.

3. Fill out the form based on what you need assistance with and attach any applicable information.
   A member of our team will reach out to you to discuss further once reviewed.



FAQ

p.66

Navigate directly to a topic by clicking on the topic title

Commonly asked questions

1. Where can members get assistance with their claim's inquiries?	Members can contact our service center for assistance with insurance verification, understanding their benefit and claims troubleshooting. Our service center offers phone, email and live chat assistance. **Call Center:** 866-800-5457 | M-Sat: 8 am-11 pm, Sun: 11 am-8 pm EST | eyemed.com (24/7)
2. I'm not receiving the verification email (registration, password reset or multifactor authentication)?	We recommend connecting with your internal IT teams to verify that the email address *donotreply-eyemanage@eyemed.com* is whitelisted. Some firewalls can block the email as spam.
3. Why are download boxes not working for invoices, rosters, enrollment reports or flyers?	We recommend using the latest versions of either Google Chrome or Firefox to access the EyeManage portal. Additionally, you can try clearing cookies and cache as this can occasionally correct any issues with the download buttons.
4. What is the deactivation rule?	Existing users will be deactivated after 18 months of inactivity. Pending users will be deactivated if they haven't activated their account within 6 months.

EYEMED CLIENT PORTAL
eyemanage

Thank you for using EyeManage