



Open Enrollment Tip Sheet

This guide walks you through preparing and sending your Open Enrollment (OE) membership file to EyeMed. Follow these steps to make sure your employees' vision benefits are loaded correctly and on time. If you have any questions along the way or need information, please contact your EyeMed account manager.

1. Testing your open enrollment files (if needed)

- **When to test:**
 - Only if your group structure or file layout has changed.
 - If you have another reason to send test files, please discuss this with your account manager prior to file transmittal.
- **How to send a test file:**
 - Use the same process and guidelines provided for your regular file name and add TEST at the beginning.
 - Example: TEST_CLIENTNAME_GROUP#_YYYYMMDD
 - If you use an 834 format, set ISA15 = T (for test)
- **Timing:** Test files take 5-7 business days to process.

2. Sending your open enrollment file

- **File name format:**
 - Example: OE_CLIENTNAME_GROUP#_YYYYMMDD
 - Please remove OE from your naming convention after submitting your OE file.
- **When to send:** Submit on a different day than your regular file.
- **How to send:**
 - Use the same method you regularly use (usually SFTP).
 - If using our EyeMed Enrollment Template – Expanded, please notify your account manager if the Open Enrollment file should be loaded differently than the regularly scheduled file (Change Only vs Full).
 - **834 format:** the BGN08 must reflect how the file should be loaded. (2= changes only; 4= full).
 - **Changes Only Example:** BGN*00*0001*CCYYMMDD*HHMM****2~
 - **Full File Example:** BGN*00*0001*CCYYMMDD*HHMM****4~
- **File confirmation:** You'll get an automated receipt upon a successful SFTP file submission. Let us know if you do not have an SFTP account established.
- **Processing reports:**
 - Post-Load Report arrives within 2 business days. Let us know if you don't see within 5 business days.
 - Enrollment Reports are available on the client portal, [EyeManage](#). If you do not have access, reach out to your EyeMed Account Manager.

3. **Member effective dates:** Any effective date submitted on an enrollment file should represent the day that the member is eligible to access vision care services. All effective dates must be on or after the effective date of the plan/benefit.
- **New member:** To add newly enrolled members, use the **new plan year effective date**.
 - **Existing member with no changes:** Submit with their **original effective date**.
 - **Change in group/subgroup/class/plan numbers:** If you've been instructed to change the group, subgroup or class/plan numbers on your membership file, use the **new plan year effective date**.
4. **Member termination dates:** We understand it may seem easier to terminate full membership and provide a full reinstatement file; however, this may result in gaps in coverage.
Note: Please reference the EyeMed File Guide for specifics.
- **Preferred:** To add, change or delete, give specific termination dates on the file.
 - **Full files only: If someone is missing from a full file, they will be termed on the last day of that month.**
 - Example: If a previously active member is not included in a full file on Nov 24, their term date = Nov 30.

5. ID Cards

- **New subscribers:** Receive 2 ID cards within 10 business days of successful enrollment.
- **Existing members:** Keep using their current cards (cards don't expire), and at any time you don't have your ID card with you, providers can look up member information with name and date of birth.
- **Additional/Replacements:** Order online through the [member portal](#) on eyemed.com or the EyeMed mobile app.

6. Managing data after OE submission

Once the plan year begins, effective and termination dates cannot be changed retroactively. There are 3 options below:

- 1) **Dual year file:** (full file with both existing coverage and new plan year data)
 - **When to use:** If you want to continue sending full files regularly.
 - **Benefit:** Good for keeping all data in one place; avoiding retroactive issues

- 2) **Current plan year file (changes only):** If you select this method, let your account manager know you're switching to a changes-only file.
- **Format:** Use the same format as your regular file.
 - Update the header: BGN08 = 2 (for "changes only")
 - *Example:* `BGN*00*0001*CCYYMMDD*HHMM****2~`
 - **Alternative:** Use ***EyeMed's Enrollment Template - Expanded*** if your format differs. Reach out to your account manager if you need a copy of the template.
 - There is a required format, so make sure you review it carefully. Any file sent incorrectly will be returned.
 - **End-of-Month refresher file:**
 - Send a refresher full OE file with BGN08 = 4 (for "full")
 - *Example:* `BGN*00*0001*CCYYMMDD*HHMM****4~`
- 3) **Update online in [EyeManage](#)**
- Add, reinstate, change or terminate members immediately.
 - Download enrollment reports directly.