

TIPS TO MAKE YOUR OPEN ENROLLMENT FILE SUCCESSFUL

This document provides proven best practices to support a smooth open enrollment (OE) membership file load, including details on naming and transmitting files, membership effective dates, member terminations, and suggestions for managing your data after your OE file transmission.

Please Note: EyeMed does not require a separate Open Enrollment file. We prefer to receive a combined year file, which can be accomplished by adding the new elections or changes from Open Enrollment to the regularly scheduled weekly files as they become available.

If you have questions on how to provide data within these guidelines, please contact your EyeMed partner.

OPEN ENROLLMENT TEST FILES

When to test

If there are changes to group structure or file layout, EyeMed will accept a test file to ensure proper upload. Test files outside of this criteria should be discussed and reviewed with your EyeMed contact prior to file transmittal.

How to submit test

To ensure your test file is not unintentionally loaded into the production environment, follow the same process and guidelines provided for your regular file (e.g., *OEClientName_MMDDCCYY*) and add “TEST” to the file name.

Example: *OEClientName_MMDDCCYY_TEST*

Test results

Test files are processed in order of receipt, with a 5-7 business day turnaround time for results.

OPEN ENROLLMENT FILE TRANSMITTAL

File name

To avoid member data issues, please add “OE” to the beginning of the file name followed by no dashes or special characters. An underscore should *not* be used between “OE” and the client's name. Please remove “OE” after the file has been submitted.

Example: *OEClientName_MMDDCCYY*

File transmittal

Open enrollment files should be transmitted using the same method as your regularly scheduled membership file. Please submit the open enrollment file on a different day than the regular file.

- If using EyeMed’s proprietary layout, please notify your Operations Service Manager if the Open Enrollment file should be loaded differently than the regularly scheduled file (Change Only vs Full).
- If using the 834 format, the BGN08 must reflect how the file should be loaded. (2= changes only; 4= full).

Example for Full File: *BGN*00*0001*CCYYMMDD*HHMM****4~*

Example for Changes Only: *BGN*00*0001*CCYYMMDD*HHMM****2~*

File confirmation

Communication is key, so you’ll receive an automated confirmation of receipt upon a successful SFTP file submission. If you do not have an SFTP account established, please reach out to your EyeMed contact.

Post Load and Enrollment Reports

Post Load reports will be securely delivered to you within 2 business days of a successful file load. If you do not receive the Post Load reports within 5 business days, please reach out to your EyeMed contact.

Once the file has processed, Enrollment Reports can be downloaded from the client portal, [EyeManage](#), to audit member updates received on the OE file. If you do not have access, please contact your EyeMed Account Manager.

MEMBER EFFECTIVE DATES

Any effective date submitted on an enrollment file should represent the day in which 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 - New Effective Date

To add newly enrolled members, use the new plan year effective date.

✓ Existing Member - Original Effective Date:

Existing members with no change in coverage should be transmitted using the original effective date. This will ensure no break in coverage.

If you have been instructed to change the group, subgroup or class/plan numbers on your membership file, use the new plan year effective date.

ID CARDS

New subscribers will automatically receive a Welcome Kit with two ID cards delivered to their home address within 10 business days of successful enrollment. Additional or replacement cards can be requested through the member portal at [EyeMed.com](https://www.eyemed.com) or by downloading the EyeMed app for an on-the-go digital card.

ID cards are usable for the entire duration of the contract, existing members do not need to update or change cards; providers can access member information with name and date of birth.

MANAGING DATA AFTER FILE TRANSMISSION

We cannot accept full files with only 2024 data after the 2025 OE file is processed. Please work with your Operations Manager if you cannot manage data using one of the three methods listed below.

Once the new plan year date has passed, the EyeMed system cannot retroactively adjust effective or termination dates on members. Here are three (3) options to manage data after the Open Enrollment file is transmitted.

- 1. DUAL YEAR FILE:** Continue sending regularly scheduled full files, combining data for 2024 and 2025.
- 2. CURRENT PLAN YEAR FILE:** If selecting this method, please notify your EyeMed contact that you'll be using a 'changes-only' file submission process.
 - If using the same format and transmission as your regularly-scheduled membership file for 2024 changes only, please ensure the header is updated to reflect changes only. 834 files should update the BGN08 in the header (2= changes only) **Example for Changes Only: BGN*00*0001*CCYYMMDD*HHMM****2~**
 - If files cannot be sent in the same format as your regularly-scheduled format, our manual file template can be used. The file must be completed in our required format for processing. We are unable to edit client files or manipulate data. Any file provided to EyeMed that is not in an EyeMed required format will be returned for corrections.
 - At the end of the month, send a second or 'refresher' full OE file. Please ensure to update BGN08 (full=4). **Example for Full File: BGN*00*0001*CCYYMMDD*HHMM****4~**
- 3. ONLINE:** Immediate updates (add, reinstatements, changes & terms) can be made via [EyeManage](https://www.eyemanager.com), the EyeMed Client Portal. Additionally, you can request and download an enrollment report through EyeManage.

MEMBER TERM DATES

We understand that it may seem easier to terminate full membership and provide a full reinstatement file, however this may result in gaps in coverage. Instead, by following the guidelines provided we can ensure your employee population has the most streamlined experience possible from year-to-year.

Client specified terminations (Recommended)

For add/change/delete files, specified term dates are required. We can also accept specified term dates on full files. The client must provide the specific termination date on the file submitted.

Implied terminations (Full Files Only)

Member termination dates are determined by the last date of the month that the file is processed.

Note: Member implied termination dates are determined by the last date of the month that the file is processed. For example, if a previously active member is not included in a full file processed on November 24th, then the termination date will be listed as November 30th (last day of the month).