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Vision Care Direct New Group Set Up Documentation Process

Once you have enrolled as a new group with Vision Care Direct (VCD), a series of events will be set in motion to help you access multiple resources online. These resources will help you better manage your business and account with VCD.

The following steps will occur once your account is set up in our system:

1. You will receive a welcome letter from admin@visioncaredirect.com. This email will provide the following:

URL: www.visioncaredirect.com
Username: VCDXXXXX
Group Name: New Group
Group ID: XXXXXX
Email: hrdirector@companyname.com

2. Shortly after you receive this email another one from tech.support@visioncaredirect.com will arrive with the following information:

User name: **yourusername**
Temporary password: **yourpassword**

For security purposes, this password will expire 48 hours from the time it was sent.

After receiving the tech support email, you will need to change your password. The temporary password is only active for 48hrs.

Please see the sample copies of these emails on the following 2 pages.

Sample Welcome Email

Dear New HR Director,

Welcome to Vision Care Direct! We are thrilled to have the opportunity to provide you and your employees exceptional value through your new vision plan offering, and high-quality customer support that is second to none.

All group application and enrollment forms submitted by your company have been received and processed. Access to this information, including the ability to view your group profile, view and pay your bill, enroll/term employees and printing membership cards can be found by logging in to your user portal on our website:

URL: www.visioncaredirect.com

Username: VCDXXXXX

Group Name: New Group

Group ID: XXXXXX

Email: hrdirector@companyname.com

You should receive an email shortly from VCD Tech Support that will guide you through logging in to your new account for the first time. If you do not receive this email, check your spam folder, or feel free to call our friendly customer service team at 877-488-8900 and we will be more than happy to help you.

For your convenience, we have attached your first month's bill to this email. Here you will find a detailed report of all employees currently enrolled, along with their chosen plan and rate.

Thank you again for entrusting us with your company's vision benefit needs. If you have any questions or need help with your new account, please do not hesitate to reach out anytime. We are honored to serve you.

Sincerely,

Your Friends at Vision Care Direct

Phone: (877) 488-8900

Fax: (844) 810-8643

Email: admin@visioncaredirect.com

Sample Tech Support Email

From: <tech.support@visioncaredirect.com>
Date: Tue, Feb 18, 2020 at 12:45 PM
Subject: Vision Care Direct: Temporary Password
To: <hrdirector@companyname.com>

The temporary password is generated for your account.
After you log in using the password below, you will have to review your account information and change your password.

User name: **yourusername**
Temporary password: **yourpassword**

For security purposes, this password will expire 48 hours from the time it was sent.

You can change your password easily by following the prompts provided when you login in the first time. Here's a screen shot of what you will see after you login with your temporary password:

The screenshot shows a web form titled "Update Your Account Information" with three main sections: "1 Username & Password", "2 Notification Options", and "3 Confirmation". The form contains the following fields and instructions:

- First Name * (text input): CSR
- Last Name * (text input): User
- User Name * (text input): CsRuser
- Current Password * (password input): (An annotation box points to this field with the text "Enter your temp PW here")
- Instruction: Password must be 8 characters long and have at least one upper case letter and a number.
- New Password * (password input):
- Repeat Password * (password input):| (An annotation box points to these two fields with the text "Enter your new PW in these two boxes")
- Section: Select security question and provide answer.
- Question * (text input): What is your mother's maiden name? (An annotation box points to this field with the text "Choose your secret question and enter answer below")
- Answer * (text input):

At the bottom of the form are three buttons: "Previous", "Next", and "Finish". The "Next" button is highlighted in orange, and an annotation box points to it with the text "Click Next".

Once you click on the Next button you will be taken to Step 2. Here you can indicate whether you want verification done through email or text message:

Update Your Account Information

1 Username & Password

Mobile Number

Email Address *

Please select one of the following options to receive notifications and verification codes.

SMS (mobile phone)

Email Message

If notification options are unfamiliar, please call 877-488-8900.

2 Notification Options

3 Confirmation

Previous Next Finish

Click on the bubble next to the verification type you prefer

Click next to complete the process

On the next page you will be asked to confirm your choices. Once you've done that you will be logged in and ready to go!

Using the VCD Business Portal

Once you're logged in you will see a page that looks like this. You'll be able to manage the following tasks from this page.

- See a searchable list of all employees who are on the plan
- Access your bill online
- Pay your bill electronically each month
- Make adds and terms online
- Add users to your account
- See payment details

To see your billing history, click on the Billing Tab. To see your payment details, click on the Payments Details tab. To add a user, click on the Users tab.



Group ID: 8941
Group Name: CSR Gro
Address: PO Box
Magna U 4044
Primary Contact: Shawn
Edit Company Profile

My Account Log out

Amount Due: \$1,432.50

Pay Bill

To pay your bill online, click on Pay Bill.

Members Billing Payments Details Users

Add Member

Show Dependents

Active

Filter by Name or ID

Name	ID	Relationship	Coverage Started	Active	Edit
Bunny, Bugs	20531343	Self	01/01/2019	✓	✕
Bunny, Lola	20531344	Spouse	01/01/2019	✓	✕
Bunny, Babs	20531615	Child	01/01/2019	✓	✕
Bunny, Lacey	20537839	Child	06/01/2019	✓	✕
Cullen, Edward	20560849	Self	02/01/2020	✓	✕
Cullen, Bella	20560851	Spouse	02/01/2020	✓	✕
Dog, Pluto	20535084	Self	04/01/2019	✓	✕
Dog, Pete	20535085	Spouse	04/01/2019	✓	✕
Duck, Donald	20532336	Self	02/01/2019	✓	✕
Duck, Daffy	20532341	Spouse	02/01/2019	✓	✕
Fife, Barney	20525673	Self	12/01/2018	✓	✕
Gale, Dorothy	20539064	Self	06/01/2019	✓	✕
Lion, Cowardly	20539067	Child	06/01/2019	✓	✕
Man, Tin	20539066	Child	06/01/2019	✓	✕
Hill, Hank	20557826	Self	01/01/2020	✓	✕
Hill, Peggy	20557829	Spouse	01/01/2020	✓	✕
Hill, Bobby	20557830	Child	01/01/2020	✓	✕
Jetson, George	20552866	Self	01/01/2020	✓	✕
Jetson, Jane	20552867	Spouse	01/01/2020	✓	✕
Jetson, Elroy	20552869	Child	01/01/2020	✓	✕
Jetson, Judy	20552868	Child	01/01/2020	✓	✕

To search for an employee, type any part of the name here

Billing Page Details

Here you can pull and print your current or past bills for review. You can also see details of any adjustments by clicking on the amount.

The screenshot shows the VISION CARE DIRECT billing interface. At the top left is the logo. Below it, account information is listed: Group ID: 8941, Group Name: CSR Group, Address: PO Box 703, Magna UT 84044, and Primary Contact: Shawn Fenus. On the right, there are links for 'My Account' and 'Log out', and a summary showing 'Amount Due: \$1,432.50' with a 'Pay Bill' button. A navigation bar contains 'Members', 'Billing', 'Payments Details', and 'Users'. Below this is a table of bills with columns for Statement, Balance Forward, New Charges, Adjustments, and Ending Balance. The table lists bills from August 2019 to February 2020. Each row includes PDF and XLS icons. A callout box on the left points to these icons, and another callout box on the right points to the 'Adjustments' column.

Click on the icon here to open an excel or pdf version of your bill.

Click on amount to see detail. This will open a window showing that detail.

VISION CARE DIRECT

My Account Log out

Amount Due: \$1,432.50
Pay Bill

Members Billing Payments Details Users

Statement	Balance Forward	New Charges	Adjustments	Ending Balance
February 2020	\$1,243.50	\$189.00	\$22.00 1/25/2020 - 2/24/2020	\$1,454.50
January 2020	\$1,054.50	\$188.00	\$1.00 12/25/2019 - 1/24/2020	\$1,243.50
December 2019	\$853.00	\$186.00	\$15.50 11/25/2019 - 12/24/2019	\$1,054.50
November 2019	\$645.00	\$172.50	\$35.50 10/25/2019 - 11/24/2019	\$853.00
October 2019	\$472.50	\$161.00	\$11.50 9/25/2019 - 10/24/2019	\$645.00
September 2019	\$300.00	\$149.50	\$23.00 8/25/2019 - 9/24/2019	\$472.50
August 2019	\$150.50	\$149.50	\$0.00 7/25/2019 - 8/24/2019	\$300.00

Payments Details Page

When you click on the Payments Details tab it will open a window showing recent payments.



VISION CARE DIRECT

[My Account](#) [Log out](#)

Group ID: 8941
Group Name: CSR Group
Address: PO Box 703
Magna UT 84044
Primary Contact: Shawn Fenus
[Edit Company Profile](#)

Amount Due: \$1,432.50

Pay Bill

[Members](#) [Billing](#) **[Payments Details](#)** [Users](#)

Payment Method	Date Posted	Amount	Applied To
Paid Online	06/11/2019	\$1.00	June 2019

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Users Page

This shows all current users for your company.



VISION CARE DIRECT [My Account](#) [Log out](#)

Group ID: 8941
Group Name: CSR Group
Address: PO Box 703
Magna UT 84044
Primary Contact: Shawn Fenus
[Edit Company Profile](#)

Amount Due: \$1,432.50
[Pay Bill](#)

[Members](#) [Billing](#) [Payments Details](#) **[Users](#)**

ID	Name	Email	Permission	Enabled	Change Password
csrGroupUser	CSR User	admin@visioncaredirect.com	Group User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
csrGroupUserTest	Shawn Fenus	a@a.com	Group User	<input type="checkbox"/>	

Online Bill Pay Process

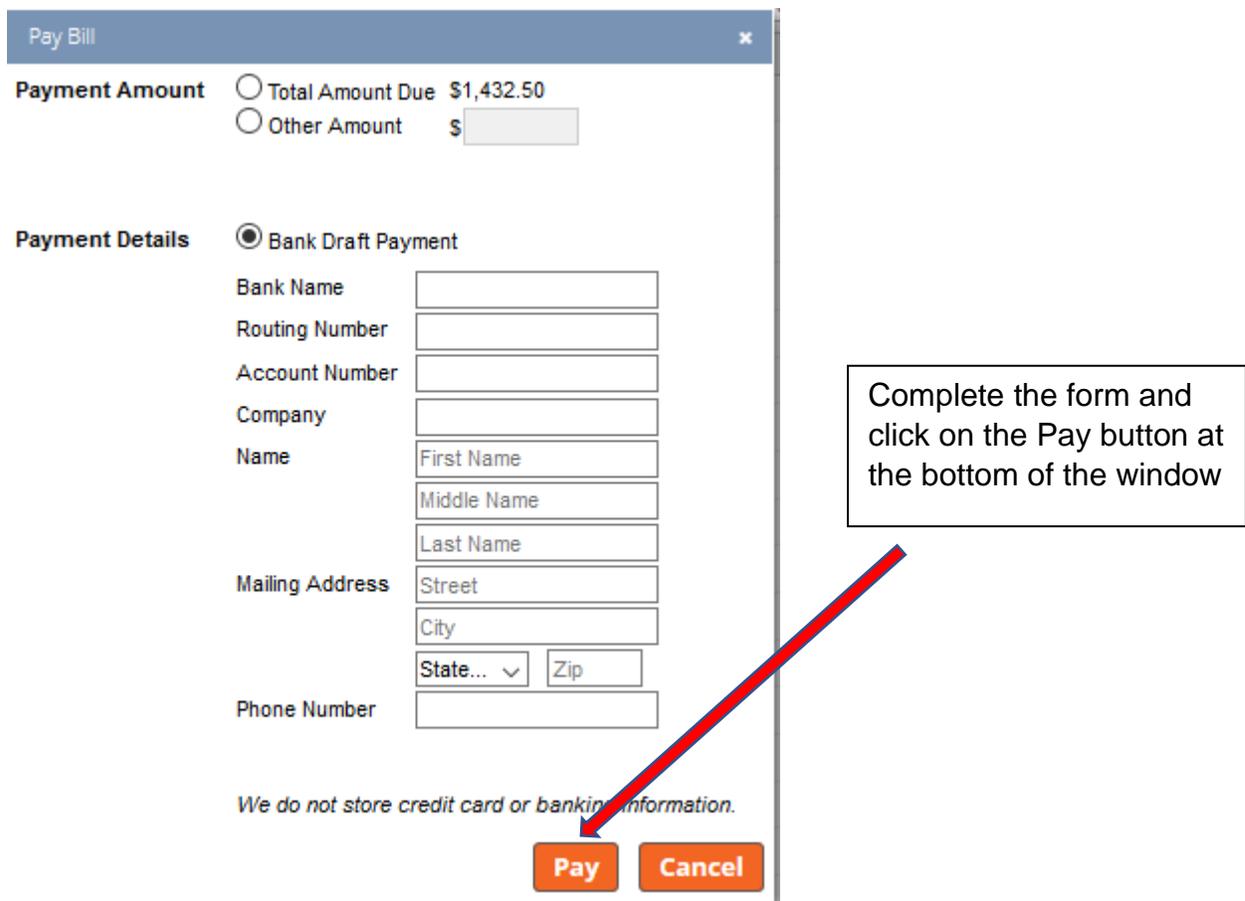
You can click on the Pay Bill Button for your group.



on any page to process a payment

When you click on the button it will open a window allowing you to complete the form. This will allow us to pull the payment from your account.

We do not store any financial information so you will have to complete the form each time you wish to make an online payment.

A screenshot of a web browser window titled "Pay Bill". The window contains a form with two main sections: "Payment Amount" and "Payment Details".
- "Payment Amount": Two radio buttons. The first is "Total Amount Due \$1,432.50" and is selected. The second is "Other Amount" followed by a text input field with a dollar sign.
- "Payment Details": A radio button labeled "Bank Draft Payment" is selected. Below it are several text input fields: "Bank Name", "Routing Number", "Account Number", "Company", "Name" (with sub-fields for "First Name", "Middle Name", and "Last Name"), "Mailing Address" (with sub-fields for "Street", "City", "State..." (a dropdown menu), and "Zip"), and "Phone Number".
- At the bottom of the form, there is a disclaimer: "We do not store credit card or banking information."
- At the very bottom of the window are two orange buttons: "Pay" and "Cancel".
- A red arrow points from a text box on the right to the "Pay" button. The text box contains the instruction: "Complete the form and click on the Pay button at the bottom of the window".

Once you complete the form and hit "Pay" you should receive an email receipt showing your payment was received. The email will be sent to the user who completed the payment.

Please note: your bank statement will show the payment was made to:

Independent Eye Care Professionals NOT Vision Care Direct.

Printing a Member Card

Member cards are printed and mailed to every primary member after your group has been entered into the system. New cards are NOT printed and mailed each year if a primary member does not have any changes. MEMBERS DO NOT NEED A CARD TO BE SEEN OR RECEIVE BENEFITS.

New additions (primaries) will be sent a card each year after open enrollment. At some point we may move to email delivered cards in order to protect rates for our groups.

A group user can at any time log in to www.visioncardirect.com and print a card for your employees. The following will describe this process.

1. Log into www.visioncardirect.com
2. Locate your employee by entering their name into the search box or by clicking on the name of the primary if it already shows on the page

The screenshot displays the Vision Care Direct user interface. At the top left is the logo and name "VISION CARE DIRECT". To the right are links for "My Account" and "Log out". Below the logo, group details are listed: Group ID: 8941, Group Name: CSR Group, Address: PO Box 703, Magna UT 84044, and Primary Contact: Shawn Fenus. An "Amount Due: \$1,432.50" is shown with a "Pay Bill" button. A navigation bar includes "Members", "Billing", "Payments Details", and "Users". Below this is a search area with "Add Member", "Show Dependents" (checked), "Active" (dropdown), and a "Filter by Name or ID" search box. A table lists members with columns for Name, ID, Relationship, Coverage Started, Active, and Edit. The first row is "Bunny, Bugs" with ID 20531343, Relationship Self, Coverage Started 01/01/2019, and Active status checked. A red arrow points from the search box to the "Bunny, Bugs" name in the table.

Name	ID	Relationship	Coverage Started	Active	Edit
Bunny, Bugs	20531343	Self	01/01/2019	✓	•
Bunny, Lola	20531344	Spouse	01/01/2019	✓	•
Bunny, Babs	20531615	Child	01/01/2019	✓	•

Enter employee name here or click on primary if visible

If you enter the name in the search box, you will get this result:

VISION CARE DIRECT My Account Log out

Group ID: 8941
Group Name: CSR Group
Address: PO Box 703
Magna UT 84044
Primary Contact: Shawn Fenus Amount Due: \$1,432.50
Pay Bill

[Edit Company Profile](#)

Members Billing Payments Details Users

[Add Member](#) Show Dependents Active

Name	ID	Relationship	Coverage Started	Active	Edit
Bunny, Bugs	20531343	Self	01/01/2019	✓	✖
Bunny, Lola	20531344	Spouse	01/01/2019	✓	✖
Bunny, Babs	20531615	Child	01/01/2019	✓	✖
bunny, booBoo	20564052	Child	12/01/2019	✓	✖
Bunny, Lacey	20537839	Child	06/01/2019	✓	✖

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Click on the primary name

This will take you to the Member eligibility page:

VISION CARE DIRECT My Account Log out

Bugs Bunny

Group: CSR Group
Coverage Start Date: 1/1/2019
Vision Plans: Gold + Material Plan

MEMBERS ON PLAN

Plan Tier: Gold + Material Plan - Whole Family (12.50 per month)
Active Dependents: 4

Name	Dependent Type	Date of Birth	Coverage Ended
Bugs Bunny	Self	07/10/1984	
Lola Bunny	Spouse	09/10/1985	
Lacey Bunny	Child	07/08/1985	
Babs Bunny	Child	01/01/2001	
BooBoo Bunny	Child	01/01/2020	

Click on the "Print Card" link

[Print Card](#)

Bugs Bunny is currently authorized for an appointment on 02/03/2020 with CSR Provider Dr. Ninja.

Gold + Material Plan

For Medically Necessary Contacts, all plans that have contact allowance are eligible for up to \$250. Please click [here](#) for instructions on submitting a medically necessary request for payment.

1. IPA medical board must approve all medically necessary requests for payment. Your office must submit medical records including corneal map.
2. Medically necessary lenses allowance - \$250 (aphakia, keratoconus only). (Member pays the difference between allowance of \$250 and your UCR).

STANDARD ELIGIBILITY

- Authorized for an appointment on 2/3/2020 at CSR Provider Dr. Ninja 555-555-5555

After you click on the "Print Card" link a new window will open showing a pdf of the card.

Gold + Material Plan

Bugs Bunny
1234 Candycane Lane

Kansas City MO 64105



VISION CARE DIRECT

Primary Member	Bugs Bunny
Group	CSR Group
Member ID	20531343
Covered Dependents	Lola, Lacey, Babs, booBoo

Check your eligibility status, plan information, or a directory of participating providers, visit visioncaredirect.com or call 877.488.8900

Depending on your computer you will be able to click on the printer icon (usually found in the upper right corner of your screen), or you can hit your CTRL key and "P" key to open your printer window.

Receiving Benefits without a Card

Vision Care Direct members DO NOT NEED A CARD IN ORDER TO BE SEEN AT THE DOCTOR OR RECEIVE THEIR BENEFITS.

Our providers have online access to all member eligibility information. A member just needs to provide the following information to receive benefits.

- Member ID #
- Date of Birth

If a member doesn't have the Member ID# all they need is:

- Correct spelling of their first and last name
- Date of Birth

If a member has any issues accessing their benefit or scheduling an appointment, they can call our customer service line at **877-488-8900** and we will call the doctor to confirm benefits.



Contact Information for our expert Customer Service Team

You can call us any time between the hours of 8am CST and 5pm CST at
877-488-8900.

Or email us at admin@visioncaredirect.com

We're here to serve you. Thank you for allowing us the privilege of providing your company with the vision plan for your employees.