



SIMON®

EMPLOYER PORTAL USER GUIDE

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WHAT IS THE SIMON EMPLOYER PORTAL?

The Employer Portal gives you one place to administer and manage your company's employee benefits programs. From here, you can:

- Enroll new employees
- View and update an employee's contact information, dependents, and benefit elections
- View and pay your bill
- Request and schedule reports
- Store and share benefits-related forms and documents
- Access important websites and view important messages about your benefits
- Issue alerts to your employees regarding important policies and administration changes

SUPPORTED BROWSERS AND PLATFORMS

SIMON portals work on almost any browser, on any device of any size, and on any operating system if the browser is standards-compliant and updated to its latest version.

Since most browsers are "evergreen" (automatically upgraded to their latest versions), we support the latest version of these standards-compliant browsers.

NOTE: Microsoft Internet Explorer is not supported.

SUPPORTED BROWSERS

Any standards-compliant browser, which includes, but is not limited to:

- Google Chrome
- Firefox
- Safari
- Microsoft Edge
- Opera

SUPPORTED OPERATING SYSTEMS

Any operating system which includes, but is not limited to:

- Windows
- macOS
- iOS
- Android
- Linux

SUPPORTED DEVICES

SIMON portals are optimized to work on any existing (or future) device of any size starting at 320+ pixels wide (iPhone 4 width), that can run an up-to-date, evergreen, standards-compliant browser, which includes but not limited to, mobile devices and tablets.

NAVIGATION



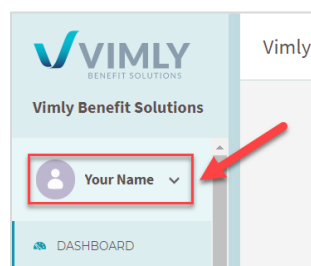
The Employer Portal user interface consists of the following distinct areas:

- User Menu
- Actions Bar
- Left Sidebar
- Workspace

USER MENU

Your **User** menu contains links to set your account and email preferences. It also contains links to review Vimly's terms of use and privacy policy. It may also contain other links that are specific to your organization, such as a link to your corporate website. Finally, this menu contains the most secure way to sign out of your SIMON account.

To open your User menu, on the left sidebar, click your name.



ACTIONS BAR

The *Actions Bar* shows the actions you can take on the workspace page you are viewing. For example, if you're looking at the *Resources / Documents & Links* workspace (pictured below), you'll see two action buttons (**Add a Link** and **Upload Document**), a **Filter** menu, and a search box.

Resources / Documents & Links			
NAME	DATE ADDED ▲	ADDED BY	SOURCE
Small Group Application	03-11-2014	System Admin	SPD
Domestic Partner Affidavit	03-11-2014	System Admin	SPD

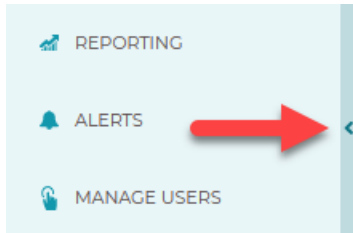
LEFT SIDEBAR

The left sidebar helps you quickly switch between the portal workspaces.

NOTE: Depending on how SIMON is configured for your organization, some of the workspaces may not be available to you in Employer Portal. If you have questions about this, please [contact your support team](#) for assistance.

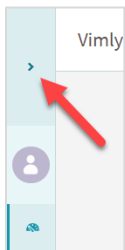
- Dashboard
- Employees
- Billing
 - Summary
 - History
 - Settings
- Resources
 - Benefits
 - Contact Information
 - Documents & Links
- Reporting
- Alerts
 - Inbox
 - Sent
- Manage Users
- Settings
 - Group Setup
 - Transaction Approval

You can minimize the left sidebar by clicking the horizontal divider line between the sidebar and the main workspace area.



The minimized sidebar shows icons for each workspace. Click the icons to switch between workspaces. If you're not sure which icon corresponds with the workspace you want, rest your mouse pointer over the icons to see the name of the workspace it corresponds with.

To restore the sidebar to full size, click the arrow at the top of the minimized sidebar.



WORKSPACE

The *Workspace* is the portal's main work area. Each workspace is a little different, but all are designed to be simple and easy to use.

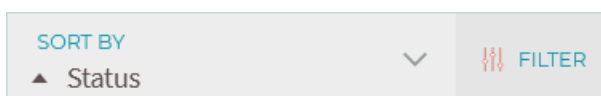
Most workspaces will display a list of items that you can sort, filter, search, and refresh.

SORT THE LIST

To sort the list, click any column heading that changes color when you move the mouse pointer over it. If the column heading does not change color, you cannot sort by it.

After you click a column heading, a ▲ (ascending order) or ▼ (descending order) indicator will appear next to the sorted column. Click the column heading again to reverse the sort order.

If you are in the *Employees* workspace, use the **Sort By** menu to select a sort option. Note the arrows next to each option that indicate ▲ ascending or ▼ descending order.



FILTER THE LIST

To filter the list, near the top right of the page, click  **Filter**, and then select the options you want. List items are filtered immediately when you select and clear the check boxes.

SEARCH THE LIST

To search for an item, start typing it in the  **Search** box. In most workspaces, the search box is located near the top right of the page. Search results are returned as soon as you start typing.

REFRESH THE LIST

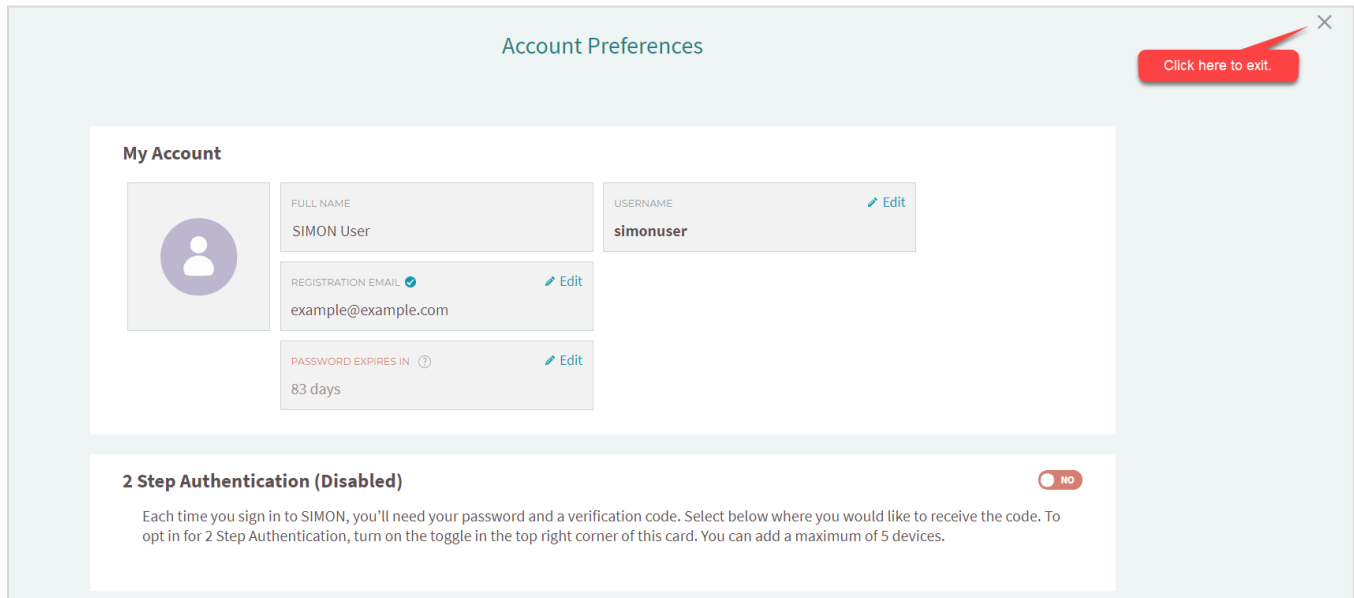
To ensure you're seeing the most up-to-date information, you can manually refresh some lists. Near the top right of the page, just below the search box, click  **Refresh**.

SET ACCOUNT PREFERENCES

On your [User menu](#), you'll find the **Account Preferences** option. Here, you can:

- Change your SIMON username, email address, or password
- See how much time remains until your current password expires (as set by your system administrator)
- Enable or disable 2-step authentication

NOTE: If you don't see the Account Preferences option, your organization may be configured to login via single sign-on or another authentication method. [Contact your support team](#) for further assistance.



To exit Account Preferences, click the **X** at the top right of the page, or simply click your browser's Back button.

CHANGE YOUR FULL NAME

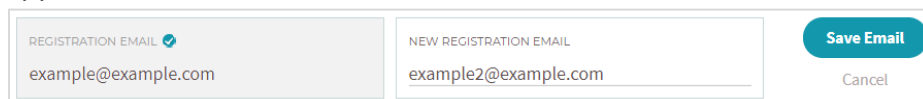
If you need to make changes to your full name, please [contact your support team](#) for assistance.

CHANGE YOUR USERNAME

1. On your [User menu](#), click **Account Preferences**.
2. In the **Username** box, click **Edit**.
If you don't see the **Edit** option, it might be disabled for your organization. Please [contact your support team](#) for assistance.
3. Change your username, and then click **Save Username**.

CHANGE YOUR EMAIL ADDRESS

1. On your [User menu](#), click **Account Preferences**.
2. In the **Registration Email** box, click **Edit**. When you do this, the *New Registration Email* box will appear.



3. Enter the email address you want, and then click **Save Email**.

CHANGE YOUR PASSWORD

1. On your [User menu](#), click **Account Preferences**.
2. In the **Password Expires In** box, click **Edit**. When you do this, the *New Password* and *Confirm Password* boxes will appear.

NEW PASSWORD ⓘ New Password	CONFIRM PASSWORD Confirm Password	Change Password Cancel
---	---	--

3. Enter the password you want in both boxes, and then click **Change Password**.

Passwords must contain at least 8 characters, and must contain at least one uppercase letter, at least one lowercase letter, and at least one number. Also, you cannot reuse your last 6 passwords.

ENABLE 2-STEP AUTHENTICATION

2-step authentication increases the level of security required to access your SIMON account. When enabled, you'll be asked to use two authentication methods – your password and a verification code – any time you sign in from a new computer, tablet, smartphone, or other device. In addition, if you have not signed in from the same device for more than 7 days, you'll also be prompted to use two authentication methods the next time you sign in.

The verification code can be sent via email to your verified email address, or via SMS text message to your verified mobile phone. You can add and verify a combined maximum of 5 email addresses and mobile phone numbers.

To enable 2-step authentication, click the **No** toggle on the right side of this option. The toggle switches to **Yes**, and additional options appear.

2 Step Authentication


☒ YES

Each time you sign in to SIMON, you'll need your password and a verification code. Select below where you would like to receive the code. To opt out of 2 Step Authentication, turn off the toggle in the top right corner of this card. You can add a maximum of 5 devices.

REGISTRATION EMAIL ✓
 example@example.com

MOBILE NUMBER
 (425) 555-1212

CARRIER
 Verizon Wireless

[+ Add another email](#)
[+ Add another phone number](#)

The email address on your SIMON account is automatically added and cannot be removed. If you want to use a different email address, you'll need to change it on your SIMON account. For assistance with this process, please contact your system administrator. You can edit or delete any other contact method you add.

If you add another email address or a mobile phone number (to verify via SMS text messaging), a verification PIN is sent to the new email or mobile number. This process verifies that you're in possession of the email account or mobile device.

To verify the email or mobile number, enter the PIN you received, and then click **Submit Pin**. If you did not receive a PIN, click **Resend Code**.

To verify the email or mobile number at another time, click **Verify later**.

 A pin has been sent to 4255551212, enter the pin below to verify your device:

VERIFICATION PIN

Submit Pin

Resend Code

Verify later

To verify later, go back to account preferences and click **Verify** to complete the process. Email addresses and mobile numbers will not be used for 2-step authentication until verified.

MOBILE NUMBER 📞

(425) 555-1212

[Verify](#)
[Edit](#)
[Delete](#)

EMAIL 📧

philttest@mailinator.com

[Verify](#)
[Edit](#)
[Delete](#)

SET EMAIL PREFERENCES

On your [User menu](#), you'll find the **Email Preferences** option. Here, you can control the types of notifications you receive from SIMON via email.

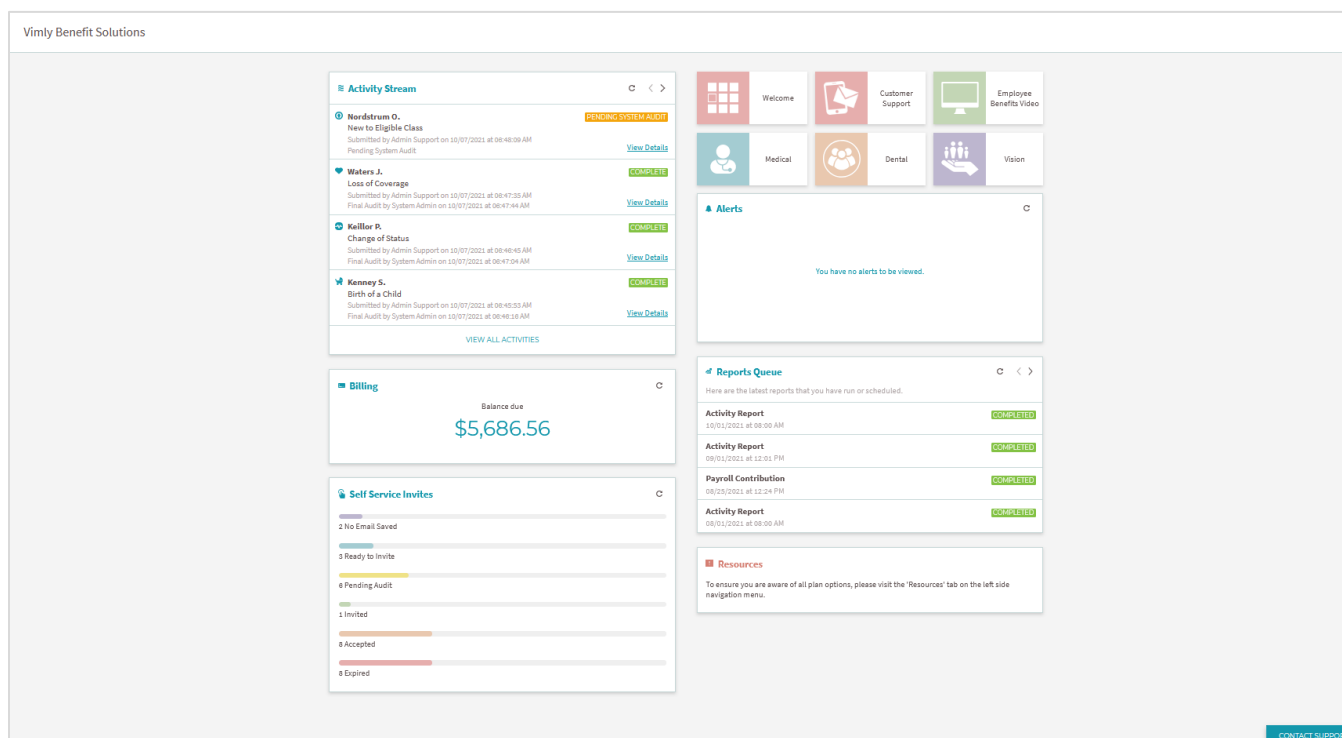
- **Activity Stream** - Receive a notification whenever benefits-related activities (new hires, terminations, etc.) occur.
- **Bill Notification** - Receive a notification whenever billing activity (bill due, bill paid, etc.) occurs.
 NOTE: If you don't use SIMON to view or pay your bill, you won't see this option.
- **General Email Blast** - Receive a notification when your organization sends an org-wide announcement to all employers that use SIMON.

- **Sales and Promotions** - Receive promotional emails from Vimly.

To turn email notifications on or off, click the **Yes/No** toggle for the notification type you want.

To exit Email Preferences, click the ✕ at the top right of the page, or simply click your browser's Back button.

DASHBOARD



The dashboard provides a comprehensive overview of employee benefits management. It includes sections for the Activity Stream, Billing, Self Service Invites, Alerts, Reports Queue, and Resources. The Activity Stream lists recent events such as new eligible classes, loss of coverage, and status changes. The Billing section shows the current balance due. The Self Service Invites section tracks the status of invitations sent to employees. The Alerts section provides notifications about benefits and policy updates. The Reports Queue lists recent and scheduled reports. The Resources section offers guidance on plan options.

The **Dashboard** highlights information that is important for managing your employee benefits, such as:

- The status of your open enrollment period (if you are currently in one)
- If you've enabled employee self-service, the status of all invitations sent to your employees
- A log of actions taken in SIMON that are related to your employees (Activity Stream)
- Alerts about benefits, policy updates, and other important information
- A list of the last 4 reports you requested or scheduled
- Icons that link to additional information about your benefits
- Your balance due

Click the title of a dashboard panel (for example, **Activity Stream**, **Billing**, **Reports Queue**, etc.) to open a more detailed view of the items in that panel. Click  to refresh the information in a panel. Click the  and  icons to page thru the information in a panel.

Click an icon to open a window with additional information (including videos) or open another website. If the icon opens another website, Employer Portal will alert you.

Click an alert to see its full details. You can also see the full details by clicking **Alerts** on the left sidebar.

MANAGE EMPLOYEES

The Employees workspace allows you to manage your employee's information, dependents, and benefit elections. Here, you can:

- Enroll new employees in benefits
- Change an employee's contact information
- Change an employee's benefit elections when there's a valid change reason
- Add or remove an employee's dependents and beneficiaries
- Terminate employees
- View summaries of changes made to an employee's benefit elections
- Identify over-age dependents

ADD A NEW EMPLOYEE

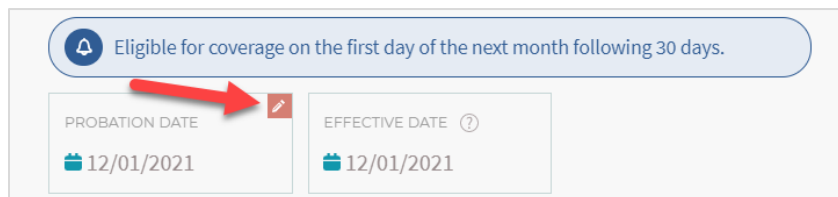
When you add a new employee, you'll be asked to enter the following information:

NOTE: Depending on how SIMON is configured for your organization, some of this information may not be required. If you have questions about this, please [contact your support team](#) for assistance.

- Social Security Number
- Qualifying Event
- Employee Classification (Class)
- Date of Qualifying Event
- Additional information about the Qualifying Event (if needed, based on the selected event)
- First and Last Name
- Date of Birth
- Gender
- Home Address
- Annual Salary (if needed for available benefits)
- Phone Number
- Email Address
- Occupation
- Prior Coverage Carrier
- Dependents
- Marital Status
- Benefit elections for the employee
- Beneficiaries (if applicable, based on selected benefits)

To add a new employee:

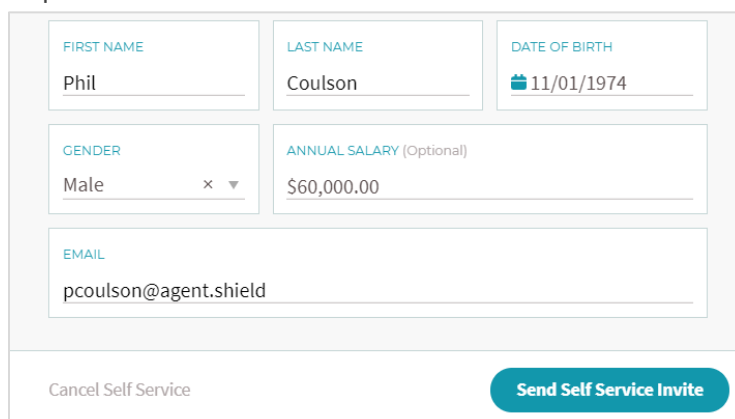
1. On the left sidebar, click **Employees**.
2. At the top right of the page, click **+Add Employee**.
3. Enter the employee's Social Security Number (SSN).
SIMON will check to see if it's already in use by another employee. If a match is found, the employee's name will be displayed, and you won't be able to proceed any further. Correct the SSN or click the ✕ at top right to exit the process.
4. Select the appropriate **Qualifying Event**, and then enter the dates and any other information required for the event you selected. If additional documentation is required, please [contact your support team](#) for assistance with submission of required documents.
5. Select the appropriate employee classification (**Class**).
When you do this, the **Probation Date** and **Effective Date** are calculated automatically, per the rules set for the selected classification and qualifying event. If you need to override the probation date, click the ✎ pencil icon in the Probation Date box.



Eligible for coverage on the first day of the next month following 30 days.

PROBATION DATE 12/01/2021 ✎	EFFECTIVE DATE ⓘ 12/01/2021
---------------------------------------	---------------------------------------

6. If self-service is enabled for your employees, you can click **Send Self Service Invite** to send an email to the employee. When you do this, you'll need to provide a few more pieces of information. Enter the employee's **First Name**, **Last Name**, **Email Address**, and any other required information, and then click **Send Self Service Invite**.



FIRST NAME Phil	LAST NAME Coulson	DATE OF BIRTH 11/01/1974
GENDER Male × ▾	ANNUAL SALARY (Optional) \$60,000.00	
EMAIL pcoulson@agent.shield		

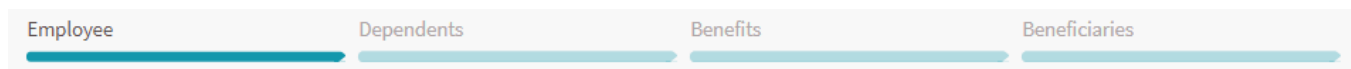
Cancel Self Service **Send Self Service Invite**

The employee will immediately receive an email with instructions for how to create their SIMON account, enter their personal information, and complete their benefits enrollment. Their account will remain in **Pending** status until they complete the enrollment.

If you later decide to complete this employee's enrollment yourself, you can come back and do it (see the [Complete an Enrollment for a Self-Service Employee](#) section of this document). This can be helpful if the employee never responds to the email or has trouble receiving the email.

If self-service is not enabled, click **Enroll Employee**. You'll now be prompted to enter the rest of the employee's personal information and benefit elections.

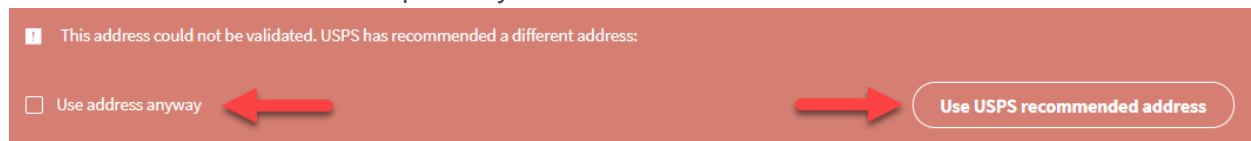
ENTER CONTACT AND EMPLOYMENT INFORMATION



On the **Employee** step, please do the following:

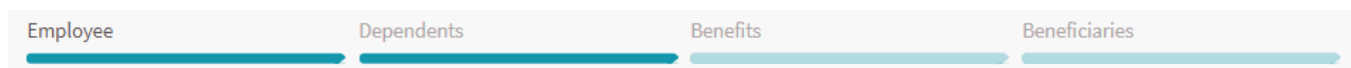
1. Enter the employee's **First Name, Last Name, Date of Birth, Social Security Number (SSN)**, and any other required information.

When you enter the employee's **Address**, SIMON checks with the United States Postal Service to make sure it's an actual, valid address. This is done to check for possible typos. However, USPS may recommend a slightly variation on the address you entered. You can choose to accept the USPS recommendation, or keep what you entered.



2. Enter any **Optional** information you want to include.
3. When you are finished, near the top right of the page, click **Next: Add Dependents**.

ADD DEPENDENTS

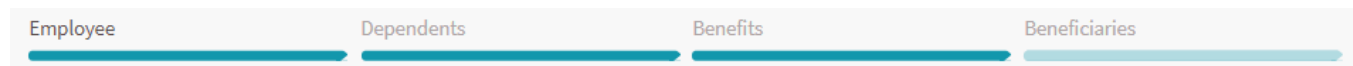


On the **Dependents** step, please do the following:

1. Click **+Add a Dependent**.
If the employee does not have any dependents, click **Skip and continue to Benefits**.
2. Enter the dependent's **First Name, Last Name, Date of Birth** and any other required information.
 - If the dependent's **Address** is different from your address, clear the **Use Subscriber Address?** check box, and then enter the address.

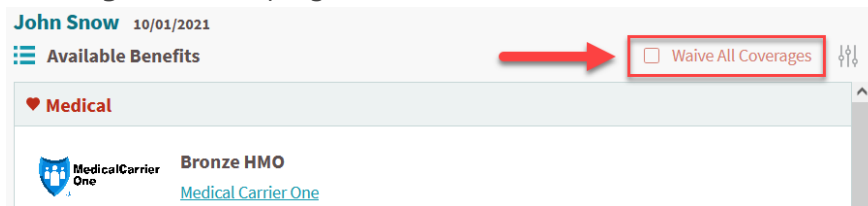
- If the dependent is disabled, be sure to select the **This dependent is disabled** check box. This is an important factor in maintaining eligibility for older dependent children.
3. If you need to add additional dependents, click **+Add Another Dependent** at the bottom of the list.
 4. When you are finished, near the top right of the page, click **Next: Benefits**.

SELECT BENEFITS



On the **Benefits** step, please do the following:

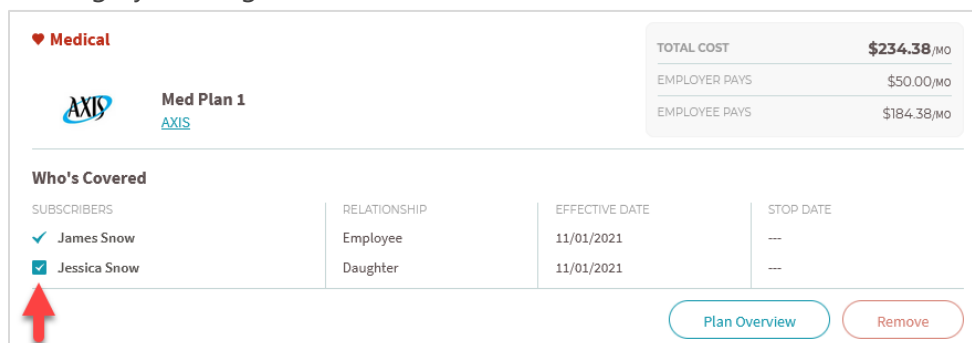
1. In the **Available Benefits** column on the left, click the **Add to cart** button next to each plan you want.
If the button name displays as **Required**, you must add it to your list of elected benefits.
2. If your organization allows it, you'll see an option to waive all coverages. Click **Waive All Coverages** at the top right of the available benefits list.



You'll need to provide a waiver reason for each waived coverage. For each coverage, select a reason from the drop-down list. If the reason is not listed, select the **Custom Reason** check box, and type it in. If you want to use the same reason for all coverages (even if it's a custom reason), select the **Same reason for all coverage types** check box.

To undo this change, click **Waive All Coverages** again to clear the check box.

3. In the **Elected Benefits** column on the right, remove dependents from the plans they are not electing by clearing the check boxes in the **Who's Covered** area.



4. If the **Elected Benefits** list looks good, click the **Next** button at the top right of the page to move to the next step.
 - If you did not select a plan for all available benefits, you may be asked to enter a waiver reason. When you are finished, click **Waive Coverages**. Otherwise, click **Cancel** and select plans for the remaining benefits.
 - If you selected a benefit that takes beneficiaries, click **Next: Beneficiaries**.
 - Otherwise, click **Next: Review Summary**.

ADD BENEFICIARIES (IF APPLICABLE)



NOTE: If you did not select a benefit that takes beneficiaries, you won't see this step.

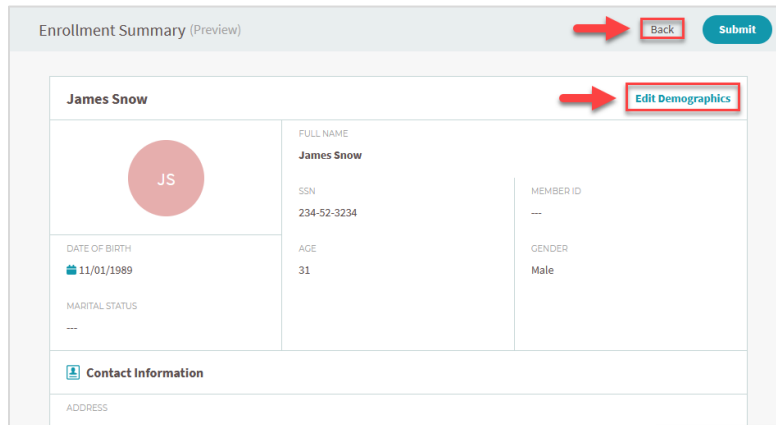
On the **Beneficiaries** step, please do the following:

1. Click **+Add a Beneficiary**.
If the employee has not yet designated their beneficiaries, click **Skip and continue to Enrollment Summary**.
2. Enter the beneficiary's **First Name**, **Last Name**, and **Relationship** to the employee for each beneficiary.
3. Enter or change the **Rank** (primary or contingent) and **Allocation** percentage for each beneficiary. If you're not sure what these options mean, click the ? icons to learn more.
4. If the beneficiary's **Address** is different from the employee's address, clear the **Use Subscriber Address?** check box, and then enter the address.
5. If you need to add additional beneficiaries, click **+Add Another Beneficiary** at the bottom of the list.
6. When you are finished, near the top right of the page, click **Next: Review Summary**.

REVIEW AND SUBMIT

On the **Enrollment Summary** step, please do the following:

1. If you need to make more changes, click the **Back** button near the top right of the page, or click the **Edit** or **Manage** button in the section of information you need to change.



2. If all the information is correct, near the top right of the page, click **Submit**.

Once submitted, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to the employee's personal information, dependents, benefits, or beneficiaries.

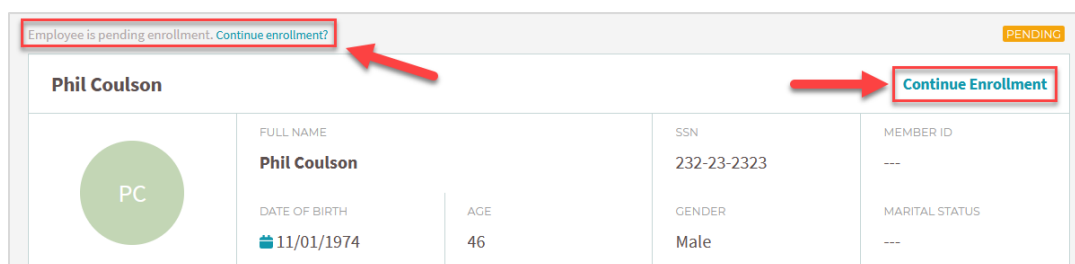
Once the audit process has completed, the employee's status will change to **Active**, and you'll be able to make further changes, if necessary.

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

COMPLETE AN ENROLLMENT FOR A SELF-SERVICE EMPLOYEE

If self-service is enabled for your employees, and you have employees that never respond to the invitation email or have trouble receiving the email, you can complete the enrollment on their behalf.

1. On the left sidebar, click **Employees**.
2. [Find the employee](#) whose enrollment you want to complete.
3. Click **Continue Enrollment**.

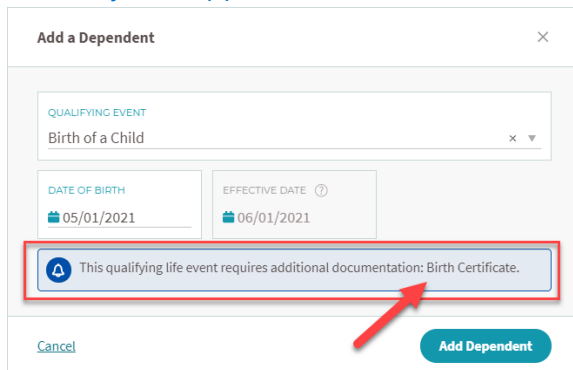


4. Follow the steps (starting with the [Enter Contact and Employment Information](#) section of this document) to complete the enrollment process.

ADD A NEW DEPENDENT

NOTE: This process opens the full enrollment experience, so you could change your personal information, existing dependents, benefit elections, and beneficiaries at the same time. If you do this, more time may be needed for the audit and approval process.

5. Make sure the employee is in **Active** status. If they are not in **Active** status, you won't see the option to add new dependents.
6. On the left sidebar, click **Employees**.
7. [Find the employee](#) you want to add a dependent to.
8. Click the employee in the list, scroll down to the **Dependents** section, and then click **+Add a Dependent**.
9. Select a **Qualifying Event** from the drop-down menu, and then enter the requested **Date**.
 - SIMON uses the event and date you enter, along with federal/state regulations, to automatically calculate the coverage **Effective Date** for the dependent.
 - If you need a different **Effective Date**, complete this process (even though the date is incorrect), and when you are finished, please [contact your support team](#) and ask them to correct it.
 - Some qualifying events require additional documentation, such as a birth certificate. Please [contact your support team](#) for assistance with submission of required documents.

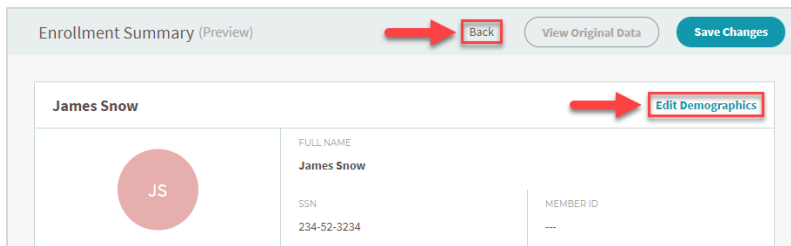


10. Click **Add Dependent**, and then enter all required information for the dependent.
 - If the dependent's **Address** is different from your address, clear the **Use Subscriber Address?** check box, and then enter the address.
 - If the dependent is disabled, be sure to select the **This dependent is disabled** check box. This is an important factor in maintaining eligibility for older dependent children.
 - If the dependent is an adopted child, please select the **This dependent is adopted** check box. This ensures that that correct required documentation is requested.

11. If you need to add additional dependents, click **+Add Another Dependent** at the bottom of the list.

IMPORTANT: If you add additional dependents, they must all qualify under the same qualifying reason and date you specified in step 5. If they don't, your changes will be delayed in audit. If you need to add dependents with different qualifying reasons and dates, start with one, wait for the audit to complete and then follow these steps again to enter the next one.

12. When you are finished, near the top right of the page, click the **Next: Benefits**.
13. On the **Benefits** page, the dependent(s) you added are automatically enrolled in your eligible benefit plans. If you need to remove the dependent(s) from some of your plans, in the **Elected Benefits** list, clear the check box next to their name(s) for every plan they should not be enrolled in.
14. When you are finished, near the top right of the page, click the **Next** button to move to the next step.
 - If the employee has a benefit that takes beneficiaries, click **Next: Beneficiaries**, and then add the beneficiaries. If you need help determining the **Rank** and **Allocation** settings, see the [Beneficiary Rank and Allocation](#) section of this document.
 - Otherwise, click **Next: Review Summary**.
15. If you need to make more changes, click the **Back** button near the top right of the page, or click the **Edit** or **Manage** button in the section of information you need to change.



16. To compare the employee's original information with the changes you've changed, near the top right of the page, click **View Original Data** or **View Changes**.
17. If all the information is correct, click **Save Changes**.

Once saved, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to the employee's personal information, dependents, benefits, or beneficiaries.

Once the audit process has completed, the employee's status will change to **Active**, and you'll be able to make further changes, if necessary.

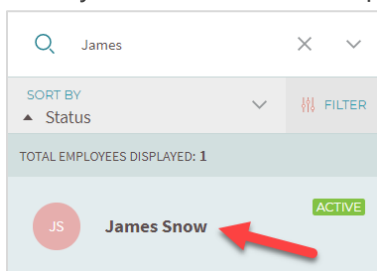
At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

FIND AN EMPLOYEE

1. On the left sidebar, click **Employees**.
2. In the  **Search** box (just above the employee list), type any part of the employee's **Name**, **Social Security Number (SSN)**, or any other searchable information that's enabled for your organization (for example, **Member ID**). Matches are returned as soon as you start typing.

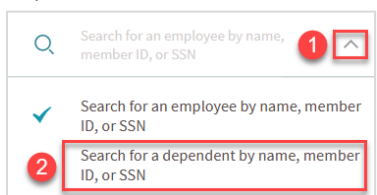
NOTE: If the employee you want is terminated, you'll need to make terminated members visible in the list. Above the  **Search** box, select the check box for the **Terminated** status.

3. Use the [Sort](#) and [Filter](#) options to further refine the list.
4. Once you've located the employee you want, click their name in the list to see their information.



FIND A DEPENDENT

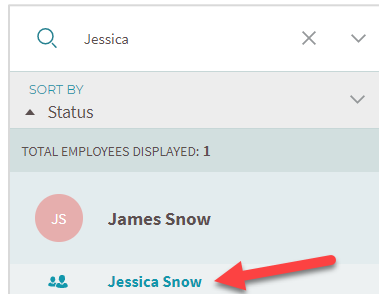
1. On the left sidebar, click **Employees**.
2. In the  **Search** box (just above the employee list), click the  arrow, click **Search for a dependent**, and then type any part of the dependent's **Name**, **Social Security Number (SSN)**, or any other searchable information that's enabled for your organization (for example, **Member ID**). Matches are returned as soon as you start typing.



NOTE: If the dependent you want is terminated, you'll need to make terminated members visible in the list. Above the  **Search** box, select the check box for the **Terminated** status.

3. Use the [Sort](#) and [Filter](#) options to further refine the list.

- Once you've located the dependent you want, click their name in the list to see their information.



VIEW AN EMPLOYEE'S INFORMATION

The Employee's workspace provides a comprehensive view of each employee's personal information, employment information, dependents, benefit elections, benefit costs, and benefit history. You'll also find links to important documents related to each employee, such as enrollment summaries and electronically signed agreements.

NOTE: If the employee you want is terminated, you'll need to make terminated members visible in the list. Above the  **Search** box, select the check box for the **Terminated** status.

- On the left sidebar, click **Employees**.
- [Find the employee](#) you want to view.
- Click the employee in the list to see their information.

VIEW AN EMPLOYEE'S CLASSIFICATION HISTORY

- Scroll to the **Class** section of the employee's information.
- Click **View Historical Class Info**.

VIEW AN EMPLOYEE'S BENEFIT ELECTIONS, COSTS, AND HISTORY

Benefits

Manage Benefits

Active Coverage Cost

ACTIVE

TOTAL MONTHLY COST	EMPLOYER PAYS	EMPLOYEE PAYS
\$1,108.65 /Mo	\$500.00 /Mo	\$608.65 /Mo

SORT BY ▲ Coverage type ▼

←

→

FILTER

Medical

MedicalCarrier One

Bronze HMO
[Medical Carrier One](#)

TOTAL COST	\$1,105.60 /MO
EMPLOYER PAYS	\$500.00 /MO
EMPLOYEE PAYS	\$605.60 /MO

NOTE: Depending on how SIMON is configured for your organization, cost information may not be displayed. If you have questions about this, please [contact your support team](#) for assistance.

1. Scroll to the **Benefits** section of the employee's information.
2. If necessary, use the [Sort](#) and [Filter](#) options to show the benefits you want.
You can filter the list by **Status**, **Benefit Type**, and **Member**. Sorting and filtering won't affect the total coverage costs displayed at the top of the list.
3. To view an employee's benefit history, click **Filter**, and then select the check box for the **Terminated** status.

VIEW A DEPENDENT'S INFORMATION

NOTE: If the dependent you want is terminated, you'll need to make terminated members visible in the list. Above the **Search** box, select the check box for the **Terminated** status.

1. On the left sidebar, click **Employees**.
2. [Find the dependent](#) you want to view.
3. Click the dependent in the list to see their information.

VIEW A DEPENDENT'S BENEFIT ELECTIONS

SORT BY

▲ Coverage type ▼



FILTER

♥ Medical



MedicalCarrier One

Silver HSA HMO

Medical Carrier One

TOTAL COST

\$755.57/MO

EMPLOYER PAYS

\$500.00/MO

EMPLOYEE PAYS

\$255.57/MO

Who's Covered

ACTIVE

SUBSCRIBER	RELATIONSHIP	EFFECTIVE DATE	STOP DATE
Wheatley Bunnag	Employee	06/01/2020	---
Baby Bunnag	Daughter	10/25/2021	---

GROUP NUMBER

--

Plan Overview

NOTE: Depending on how SIMON is configured for your organization, cost information may not be displayed. If you have questions about this, please [contact your support team](#) for assistance.

1. Scroll to the **Benefits** section of the employee's information.
2. To view a specific dependent's benefit elections, click **Filter**, and then select the check box for the dependent you want.

EDIT AN EMPLOYEE'S INFORMATION

ACTIVE

Jon Snow

JS

FULL NAME

Jon Snow

DATE OF BIRTH

06/06/1988

AGE

33

GENDER

Male

SSN

715-51-2734

MARITAL STATUS

Single

Terminate ▼





1. On the left sidebar, click **Employees**.
2. [Find the employee](#) you want to view.
3. Click the employee in the list, and then click the  pencil icon.

ACTIVE

Jon Snow

Terminate ▼





4. Make the changes you want. When you are finished, near the top right of the page, click the **Next** button to move to the next step.
 - If you have dependents, click **Next: Edit Dependents**. Update the information, if necessary.
 - You cannot add dependents during this process. If you need to add dependents, follow the steps in the [Add a New Dependent](#) section of this document.
 - If you don't have dependents, or if no updates are needed, click **Next: Review Summary**.
5. If all the information is correct, near the top right of the page, click **Save Changes**.

Once saved, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. Once completed, the status will change back to **Active** or **Terminated** (whichever it was before you saved changes).

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

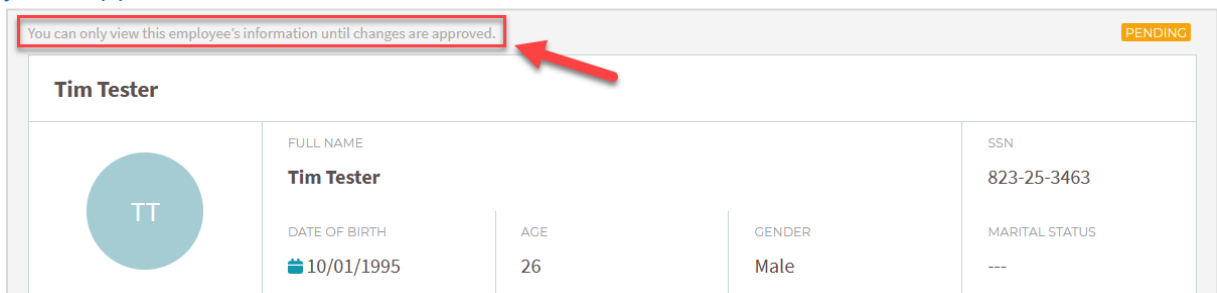
HOW STATUS AFFECTS YOUR EDIT OPTIONS

If the employee you want to edit is in **Active** status, you can edit the personal information, contact information, employment information, benefit elections, dependents, and beneficiaries (if applicable).

If the employee is in **Terminated** status, you can edit their personal information, contact information, employment information, and their dependent's information. However, you cannot change their list of dependents, their list of beneficiaries, or their benefit history.

If the employee is in **Pending** status, your ability to edit their information depends on how SIMON is configured for your organization. If you have questions about this, please [contact your support team](#) for assistance.

- Pending changes may be waiting for review and approval by your organization. Please [contact your support team](#) for assistance.



Tim Tester				
	FULL NAME		SSN	
	Tim Tester		823-25-3463	
	DATE OF BIRTH	AGE	GENDER	MARITAL STATUS
	10/01/1995	26	Male	---

- If self-service is enabled for your employees, pending changes made by the employee may be waiting for your review and approval. Click **Review Pending Changes** to complete the review

and approval process.

This employee is pending your approval.

PENDING

Toby Flenderson

Review Pending Changes

	FULL NAME Toby Flenderson		SSN 287-98-3644
	DATE OF BIRTH 08/15/1976	AGE 45	MARITAL STATUS ---
	GENDER Male		

- If self-service is enabled for your employees and you sent a self-service invitation email to a new employee, SIMON may be waiting for them to complete the enrollment process. You can wait for them to do it, or you can complete it on their behalf. To do that, click **Continue Enrollment**.

Employee is pending enrollment. Continue enrollment?

PENDING

Phil Coulson

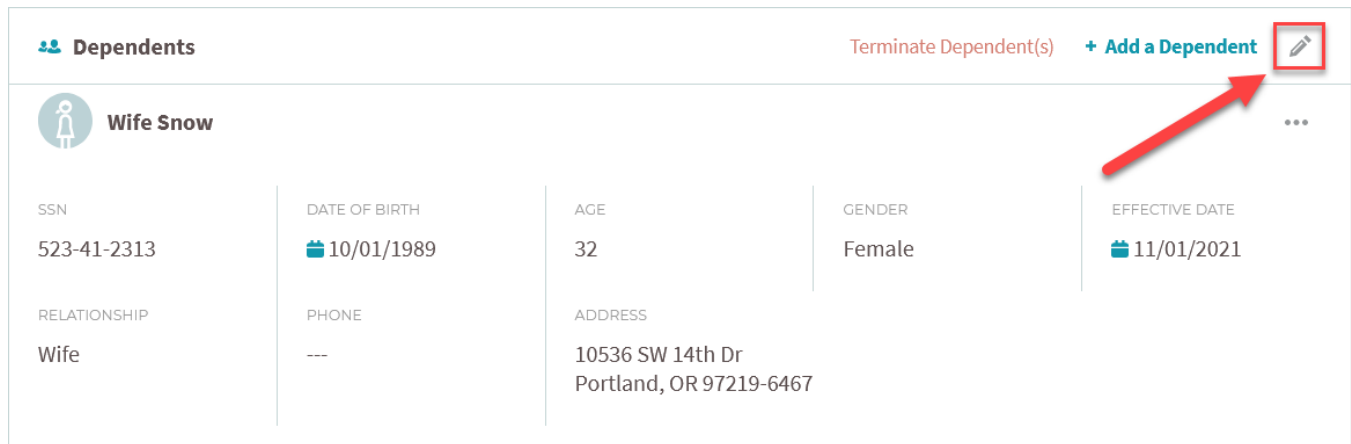
Continue Enrollment

	FULL NAME Phil Coulson		SSN 232-23-2323	MEMBER ID ---
	DATE OF BIRTH 11/01/1974	AGE 46	MARITAL STATUS ---	
	GENDER Male			

Once the audit process has completed, the employee's status will change to **Active**, and you'll be able to make further changes, if necessary.

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

EDIT A DEPENDENT'S INFORMATION



NOTE: Before you can edit a dependent's information, you'll need to make sure the employee that the dependent is under is in **Active** status. If it's not, see the [How Status Affects Your Edit Options](#) section of this document for more information.

1. On the left sidebar, click **Employees**.
2. [Find the dependent](#) you want to edit.
3. Click the dependent in the list, and then click the  pencil icon.



4. Make the changes you want.
5. When you are finished, near the top right of the page, click **Next: Review Summary**.
6. If all the information is correct, near the top right of the page, click **Save Changes**.

Once saved, the employee this dependent is under will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. Once completed, the status will change back to **Active** or **Terminated** (whichever it was before you saved changes).

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

CHANGE BENEFIT ELECTIONS

If an employee has experienced a qualifying event and their account is in **Active** status, you can make changes to their benefit elections.

NOTE: This process opens the full enrollment experience, so you can change the employee's personal information, dependent information, and beneficiaries at the same time.

However, you cannot add dependents during this process. If you need to add dependents, follow the steps in the [Add a New Dependent](#) section of this document.

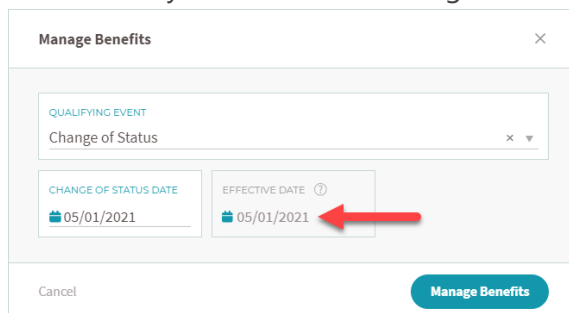
Also, keep in mind that if you make changes beyond benefit elections, more time may be needed for the audit and approval process.

1. On the left sidebar, click **Employees**, and then [find the employee](#) you want.
2. Scroll to the **Benefits** section of the employee's information, and then click **Manage Benefits**.



The screenshot shows the 'Benefits' section for an employee. At the top, there's a 'Manage Benefits' button highlighted with a red box and a red arrow. Below it, a table displays 'Active Coverage Cost' with columns for 'TOTAL MONTHLY COST' (\$959.21/MO), 'EMPLOYER PAYS' (\$500.00/MO), and 'EMPLOYEE PAYS' (\$459.21/MO). A green 'ACTIVE' status tag is visible. At the bottom, there's a 'SORT BY' dropdown set to 'Coverage type' and a 'FILTER' button.

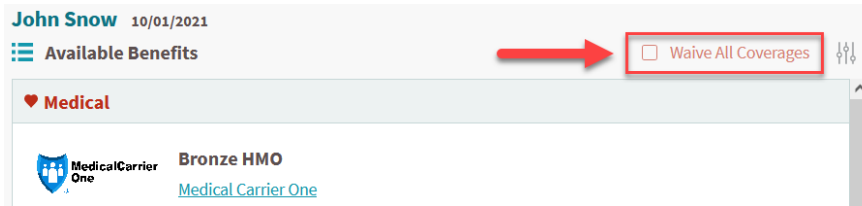
3. Select a **Qualifying Event** from the drop-down menu, and then enter the requested **Date**.
 - a. SIMON uses the event and date you enter, along with federal/state regulations, to automatically calculate the coverage **Effective Date** for the change.



The screenshot shows the 'Manage Benefits' modal. It has a 'QUALIFYING EVENT' dropdown set to 'Change of Status'. Below it, there are two date fields: 'CHANGE OF STATUS DATE' (05/01/2021) and 'EFFECTIVE DATE' (05/01/2021). A red arrow points to the 'EFFECTIVE DATE' field. At the bottom, there are 'Cancel' and 'Manage Benefits' buttons.

- b. If you need a different **Effective Date**, complete this process (even though the date is incorrect), and when you are finished, please [contact your support team](#) and ask them to correct it.
 - c. Some qualifying events require additional documentation, such as a birth certificate. Please [contact your support team](#) for assistance with submission of required documents.
4. Click **Manage Benefits**.
5. Make the changes you want.
 - a. In the **Available Benefits** column on the left, click the **Add to cart** button next to plans you want to add.
 - b. In the **Elected Benefits** column on the right, click the **Remove** button next to plans you want to remove.

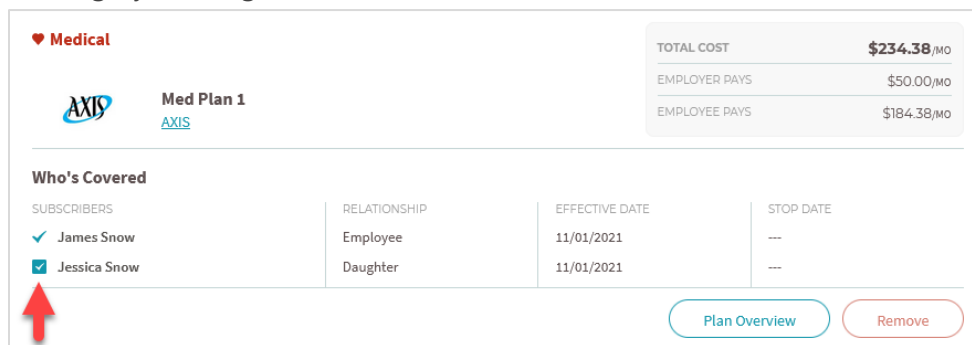
- c. If your organization allows it, you'll see an option to waive all coverages. Click **Waive All Coverages** at the top right of the available benefits list.



You'll need to provide a waiver reason for each waived coverage. For each coverage, select a reason from the drop-down list. If the reason is not listed, select the **Custom Reason** check box, and type it in. If you want to use the same reason for all coverages (even if it's a custom reason), select the **Same reason for all coverage types** check box.

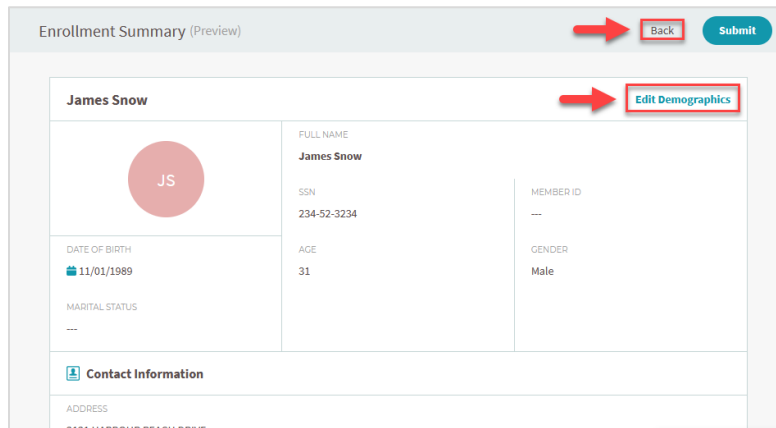
To undo this change, click **Waive All Coverages** again to clear the check box.

6. In the **Elected Benefits** column on the right, remove dependents from the plans they are not electing by clearing the check boxes in the **Who's Covered** area.



7. If the **Elected Benefits** list looks good, click the **Next** button at the top right of the page to move to the next step.
- If you did not select a plan for all available benefits, you may be asked to enter a waiver reason. When you are finished, click **Waive Coverages**. Otherwise, click **Cancel** and select plans for the remaining benefits.
 - If you selected a benefit that takes beneficiaries, click **Next: Beneficiaries**. Update the information, if necessary. If you need help determining the **Rank** and **Allocation** settings, see the [Beneficiary Rank and Allocation](#) section of this document.
 - Otherwise, click **Next: Review Summary**.

- If you need to make more changes, click the **Back** button near the top right of the page, or click the **Edit** or **Manage** button in the section of information you need to change.



Enrollment Summary (Preview)

James Snow

JS

FULL NAME
James Snow

SSN
234-52-3234

MEMBER ID

DATE OF BIRTH
11/01/1989

AGE
31

GENDER
Male

MARITAL STATUS

Contact Information

ADDRESS

- To compare the employee's original information with the changes you've changed, near the top right of the page, click **View Original Data** or **View Changes**.
- If all the information is correct, near the top right of the page, click **Save Changes**.

Once saved, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to the employee's personal information, dependents, benefits, or beneficiaries.

Once the audit process has completed, the employee's status will change to **Active**, and you'll be able to make further changes, if necessary.

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

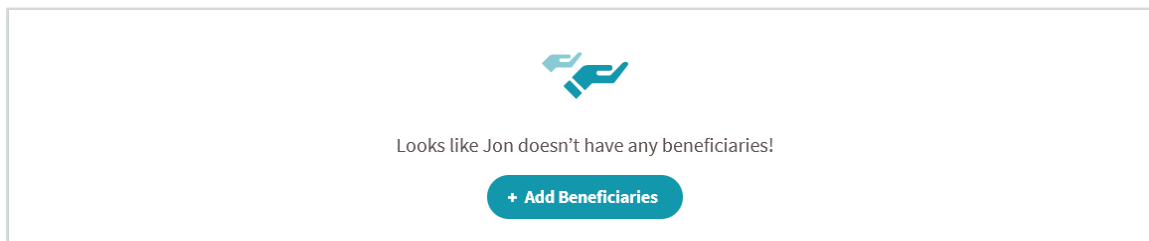
ADD, EDIT, OR REMOVE BENEFICIARIES

If you offer benefits that allow you to specify beneficiaries, such as life insurance, you can manage the beneficiary list for the employees that elect those benefits.

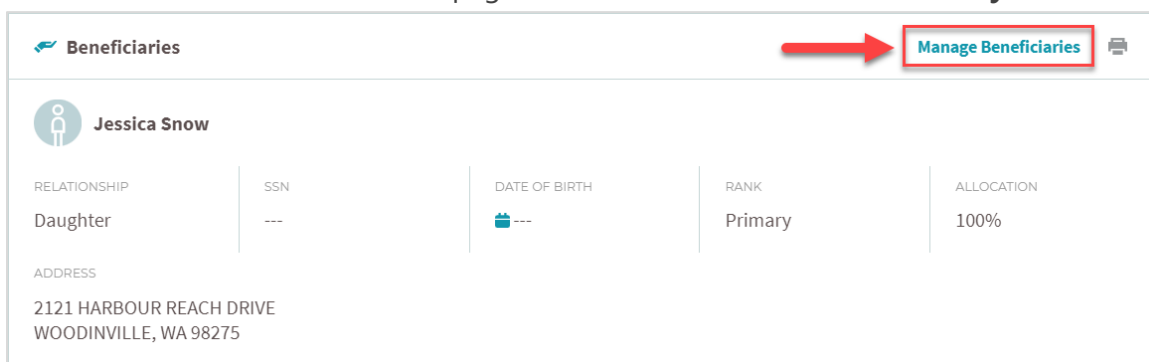
Before you can add, edit, or remove beneficiaries for an employee, their account must be in **Active** status.

ADD A BENEFICIARY

- On the left sidebar, click **Employees**, and then [find the employee](#) you want.
- Scroll to the **Beneficiaries** section of the employee's information.
- If no beneficiaries have been entered, click **+Add Beneficiaries**, and then on the next screen, click **+Add a Beneficiary**.



If some beneficiaries have been entered, click **Manage Beneficiaries**, and then on the next screen, scroll to the bottom of the page and click **+Add Another Beneficiary**.



4. Enter the **First Name**, **Last Name**, and **Relationship** to the employee for each beneficiary. To save time, the **Last Name** is pre-filled to match the employee. If the beneficiary has a different last name, be sure to correct it.
5. Enter any optional information you want to include.
6. Enter or change the **Rank** (primary or contingent) and **Allocation** percentage for each beneficiary. If you're not sure what these options mean, click the  icons or see the [Beneficiary Rank and Allocation](#) section of this document.
7. If the beneficiary's **Address** is different from the employee's address, clear the **Use Subscriber Address?** check box, and then enter the address.
8. If you need to add additional beneficiaries, click **+Add Another Beneficiary** at the bottom of the list.
9. If you need to remove a beneficiary that you just entered, click **Remove Beneficiary**.

IMPORTANT: If you remove a beneficiary, make sure you adjust the **Allocation** percentages for the remaining beneficiaries. For more information, see the [Beneficiary Rank and Allocation](#) section of this document.

10. When you are finished, near the top right of the page, click **Next: Review Summary**.
11. Review your changes. If you need to make corrections, click **Back** near the top right of the page, or simply click your browser's Back button. Otherwise, if all the information is correct, click **Save Changes**.

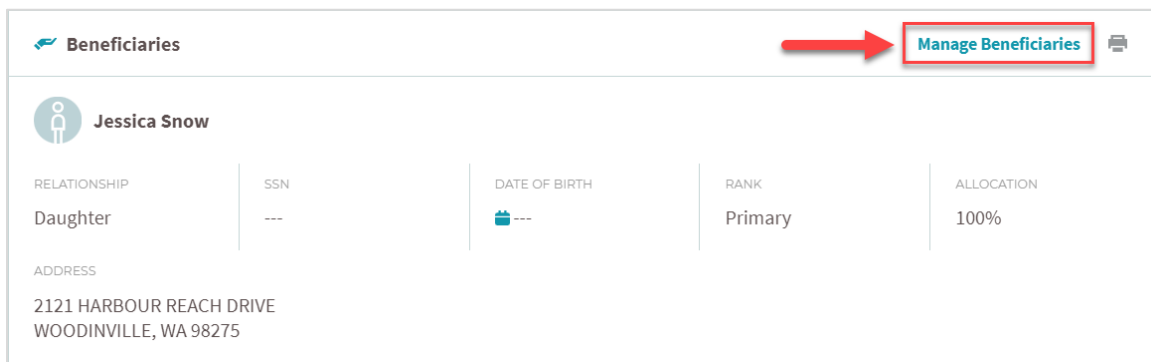
Once saved, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to the employee's personal information, dependents, benefits, or beneficiaries.

Once the audit process has completed, the employee's status will change to **Active**, and you'll be able to make further changes, if necessary.

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

EDIT OR REMOVE A BENEFICIARY

1. On the left sidebar, click **Employees**, and then [find the employee](#) you want.
2. Scroll to the **Beneficiaries** section of the employee's information, and then click **Manage Beneficiaries**.



Beneficiaries

Jessica Snow

RELATIONSHIP	SSN	DATE OF BIRTH	RANK	ALLOCATION
Daughter	---	---	Primary	100%

ADDRESS
2121 HARBOUR REACH DRIVE
WOODINVILLE, WA 98275

3. Make the changes you want.
If a beneficiary's **Address** is now different from the employee's address, clear the **Use Subscriber Address?** check box, and then enter the address.
4. If you need to remove a beneficiary, click **Terminate Beneficiary**. The current date will appear as the **Stop Date** for the beneficiary. If you change your mind, click **Undo Terminate**.

IMPORTANT: If you remove a beneficiary, make sure you adjust the **Allocation** percentages for the remaining beneficiaries. For more information, see the [Beneficiary Rank and Allocation](#) section of this document.

5. When you are finished, near the top right of the page, click **Next: Review Summary**.
6. Review your changes. If you need to make corrections, click **Back** near the top right of the page, or simply click your browser's Back button. Otherwise, if all the information is correct, click **Save Changes**.

Once saved, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to the employee's personal information, dependents, benefits, or beneficiaries.

Once the audit process has completed, the employee's status will change to **Active**, and you'll be able to make further changes, if necessary.

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

BENEFICIARY RANK AND ALLOCATION

When an employee has multiple beneficiaries, you'll need to pay attention to the **Allocation** percentage total for all that have the **Primary** rank, and the total for all that have the **Contingent** rank. The allocation percentage total must add up to 100% for all **Primary** beneficiaries, and it must add up to 100% for all **Contingent** beneficiaries.

For example, if the employee has 7 beneficiaries:

Beneficiary	Rank	Allocation
Beneficiary 1	Primary	50%
Beneficiary 2	Primary	50%
Total	Primary	100%
Beneficiary 3	Contingent	20%
Beneficiary 4	Contingent	20%
Beneficiary 5	Contingent	20%
Beneficiary 6	Contingent	20%
Beneficiary 7	Contingent	20%
Total	Contingent	100%

And you remove two beneficiaries – one **Primary** and one **Contingent**:

Beneficiary	Rank	Allocation
Beneficiary 1	Primary	50%
Beneficiary 2	Primary	50%

Beneficiary	Rank	Allocation
Total	Primary	100%
Beneficiary 3	Contingent	20%
Beneficiary 4	Contingent	20%
Beneficiary 5	Contingent	20%
Beneficiary 6	Contingent	20%
Beneficiary 7	Contingent	20%
Total	Contingent	100%

You must adjust the Allocation percentages for all remaining beneficiaries so that the total equals 100%

Beneficiary	Rank	Allocation
Beneficiary 1	Primary	100%
Total	Primary	100%
Beneficiary 3	Contingent	25%
Beneficiary 4	Contingent	25%
Beneficiary 5	Contingent	25%
Beneficiary 6	Contingent	25%
Total	Contingent	100%

TERMINATE AN EMPLOYEE

Follow this process to stop all benefits for an employee and all their dependents. If you just need to remove specific benefits from the employee or their dependents, see the [Change Benefit Elections](#) section of this document.

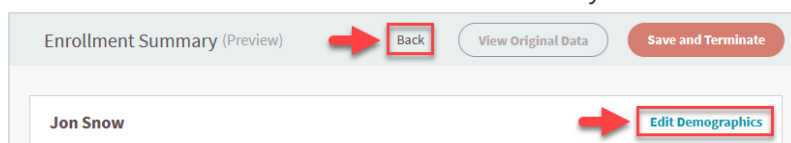
NOTE: Before you can terminate an employee, make sure their account is in **Active** status. If it's not, see the [Edit an Employee's Information](#) section of this document for more information.

1. On the left sidebar, click **Employees**, and then [find the employee](#) you want to terminate.

2. Click the employee in the list, click **Terminate**, and then click **Terminate Employee**.



3. Select a **Reason** from the drop-down menu.
4. In the **Termination Date** box, enter the employee's last day of employment.
 - If the termination date you need is in the past, there may be a limit to how far back you can go. SIMON will notify you if the date you enter exceeds the limit. If you still need to exceed the limit, please [contact your support team](#) for assistance.
 - SIMON uses the reason and date you enter, along with federal/state regulations, to automatically calculate the **Last Day of Coverage** and the **Stop Date**. If you need different dates, complete this process (even though the date is incorrect), and when you are finished, please [contact your support team](#) and ask them to correct it.
5. If you need to make other changes to the employee's information (such as updating their contact information or their dependent's information), leave the **Edit before terminating** box selected. Otherwise, clear that check box.
6. Click the **Preview then Terminate** or **Edit then Terminate** button (whichever one appears for you).
7. If you chose to edit before terminating, make the changes you want. When you are finished, at the top right of the page, click **Next: Review Summary**.
8. If you need to make more changes, click the **Back** button near the top right of the page, or click the **Edit** button in the section of information you need to change.



9. To compare the employee's original information with the changes you've changed, near the top right of the page, click **View Original Data** or **View Changes**.
10. If all the information is correct, click **Save and Terminate**.

Once saved, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to the employee's personal information, dependents, benefits, or beneficiaries.

Once the audit process has completed, the employee's status will change to **Terminated**, and you'll be able to make further changes, if necessary.

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

TERMINATE A DEPENDENT

Follow this process to stop all benefits for a dependent. If you just need to remove specific benefits from a dependent, see the [Change Benefit Elections](#) section of this document.

NOTE: Before you can terminate a dependent, you'll need to make sure the employee that the dependent is under is in **Active** status. If it's not, see the [Edit an Employee's Information](#) section of this document for more information.

1. On the left sidebar, click **Employees**, and then [find the dependent](#) you want to terminate.
2. Click the dependent in the list, and then click **Terminate Dependent(s)**.



3. Select the check box next to each dependent you want to remove.

SELECT DEPENDENTS

☒ O'Neal Kenney	RELATIONSHIP Wife
☒ Jennry Kenney	RELATIONSHIP Daughter

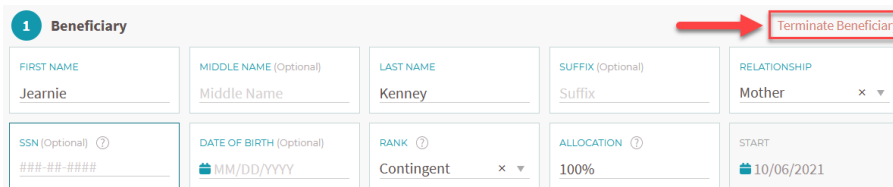
☒ Specify a different reason for each dependent

4. Select a **Reason** from the drop-down menu. If you need to select different reasons for each dependent, select the **Specify a different reason for each dependent** check box.
5. In the **Termination Date** box, enter the date the dependent(s) should be removed from benefits.
 - If you need to enter different termination dates for each dependent, you'll need to go through this process for one dependent at a time.
 - If the termination date you need is in the past, there may be a limit to how far back you can go. SIMON will notify you if the date you enter exceeds the limit. If you still need to exceed the limit, please [contact your support team](#) for assistance.
 - SIMON uses the reason and date you enter, along with federal/state regulations, to automatically calculate the **Last Day of Coverage** and the **Stop Date**. If you need different dates, complete this process (even though the date is incorrect), and when you are finished, please [contact your support team](#) and ask them to correct it.
6. If you need to make other changes to the dependent's information (such as updating their contact information), leave the **Edit before terminating** box selected. Otherwise, clear that check box.

7. Click the **Preview then Terminate** or **Edit then Terminate** button (whichever one appears for you).
8. If you chose to edit before terminating, make the changes you want to the dependent's information. When you are finished, at the top right of the page, click **Next: Benefits**.
9. Under the **Elected Benefits** column on the right, confirm that the dependent(s) you're terminating are no longer selected in the **Who's Covered** list for each benefit.

NOTE: This process opens the full enrollment experience, so you could change the employee's benefit elections and other information at the same time. If you do this, more time may be needed for the audit and approval process.

10. When you are finished, near the top right of the page, click the **Next** button to move to the next step.
 - If the employee has a benefit that requires beneficiaries, click **Next: Beneficiaries**, and then make the changes you want. Click **Terminate Beneficiary** to remove a beneficiary.



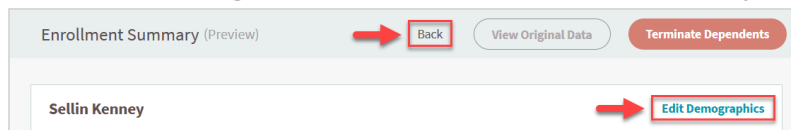
1 Beneficiary

FIRST NAME Jearnie	MIDDLE NAME (Optional) Middle Name	LAST NAME Kenney	SUFFIX (Optional) Suffix	RELATIONSHIP Mother x ▾
SSN (Optional) ⓘ ###-##-####	DATE OF BIRTH (Optional) MM/DD/YYYY	RANK ⓘ Contingent x ▾	ALLOCATION ⓘ 100%	START 10/06/2021

Terminate Beneficiary

If you need help adjusting the **Rank** and **Allocation** settings, see the [Beneficiary Rank and Allocation](#) section of this document.

- Otherwise, click **Next: Review Summary**.
11. If you need to make more changes, click the **Back** button near the top right of the page, or click the **Edit** or **Manage** button in the section of information you need to change.



Enrollment Summary (Preview)

Back View Original Data Terminate Dependents

Sellin Kenney

Edit Demographics

12. To compare the employee's original information with the changes you've changed, near the top right of the page, click **View Original Data** or **View Changes**.
13. If all the information is correct, click **Terminate Dependents**.

Once saved, the employee will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to the employee's personal information, dependents, benefits, or beneficiaries.

Once the audit process has completed, the employee's status will change to **Active**, and you'll be able to make further changes, if necessary.

At the bottom of the employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

RESTORE A TERMINATED EMPLOYEE

IMPORTANT: Follow this process only when an employee returns after some time has passed (such that there's a gap in coverage). **If you need to "undo" an unintentional employee termination** (such that there's no gap in coverage), you must [contact your support team](#) for assistance.

While SIMON will allow you to override the effective date to match a terminated employee's last stop date, if you do it, problems will occur! You'll need to [ask your support team](#) to correct it.

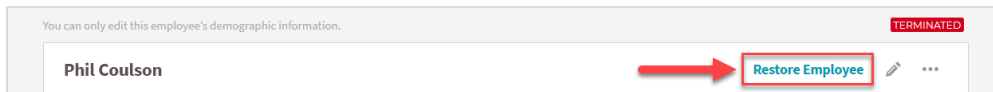
PLEASE DON'T ATTEMPT IT! PLEASE CONTACT YOUR SUPPORT TEAM FIRST!

1. On the left sidebar, click **Employees**.
2. Above the  **Search** box, select the check box for the **Terminated** status, and then [find the terminated employee](#) you want to restore.

TIP: During this process, you (or if self-service is enabled for your employees, the employee) will need to re-select their benefit elections. SIMON does not automatically select the previous benefit elections.

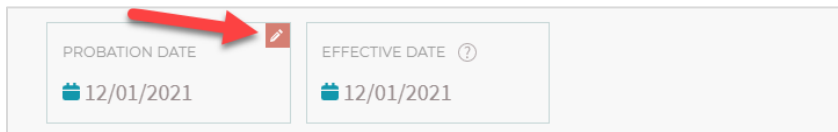
If you'd like to see the employee's previous elections (or you want to send them to the employee), scroll to the bottom of the employee's page to the **Documents** area, and then click the **Enrollment Summary** links to open a list of the employee's previous elections. The summary will open in a separate browser tab or window so you can easily switch to it at the benefit elections step.

3. Click the employee in the list, and then click **Restore Employee**.



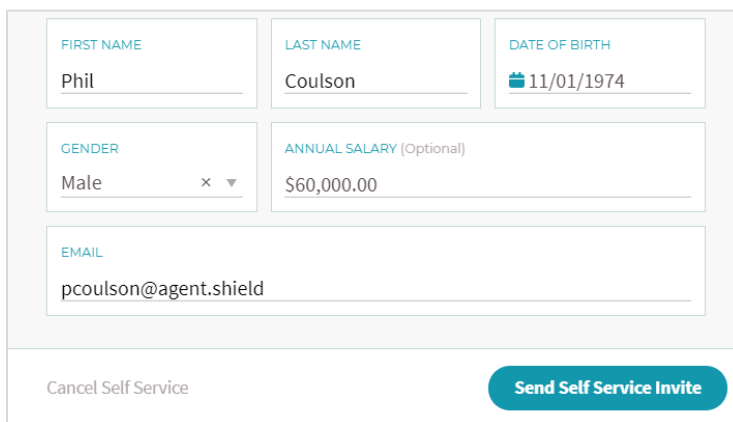
4. SIMON will check to see if the employee's Social Security Number (SSN) is already in use by another employee. If a match is found, the employee's name will be displayed, and you won't be able to proceed any further. Either correct the SSN or click the ✕ at top right to exit the process and [contact your support team](#) for assistance.
5. Select the appropriate **Qualifying Event**, and then enter the dates and any other information required for the event you selected. If additional documentation is required, please [contact your support team](#) for assistance with submission of required documents.
6. Make sure the appropriate employee classification (**Class**) is selected. Correct it, if necessary. When you do this, the **Probation Date** and **Effective Date** are calculated automatically, per the rules set for the selected classification and qualifying event. If you need to override the

probation date, click the  pencil icon in the Probation Date box.



PROBATION DATE  12/01/2021	EFFECTIVE DATE   12/01/2021
---	---

7. If self-service is enabled for your employees, you can click **Send Self Service Invite** to send an email to the employee. When you do this, you'll need to make sure a few more pieces of information are correct. Check (and correct, if necessary) the employee's **First Name**, **Last Name**, **Email Address**, and any other required information, and then click **Send Self Service Invite**.



FIRST NAME Phil	LAST NAME Coulson	DATE OF BIRTH  11/01/1974
GENDER Male × ▼	ANNUAL SALARY (Optional) \$60,000.00	
EMAIL pcoulson@agent.shield		
Cancel Self Service		Send Self Service Invite

The employee will immediately receive an email with instructions for how to create (or log back into) their SIMON account, enter (or update) their personal information, and complete their benefits enrollment. Their account will remain in **Pending** status until they complete the enrollment.

If you later decide to complete this employee's enrollment yourself, you can come back and do it (see the [Complete an Enrollment for a Self-Service Employee](#) section of this document). This can be helpful if the employee never responds to the email or has trouble receiving the email.

If self-service is not enabled, click **Enroll Employee**. You'll now be prompted to enter the rest of the employee's personal information and benefit elections.

8. Follow the steps (starting with the [Enter Contact and Employment Information](#) section of this document) to complete the restoration process.

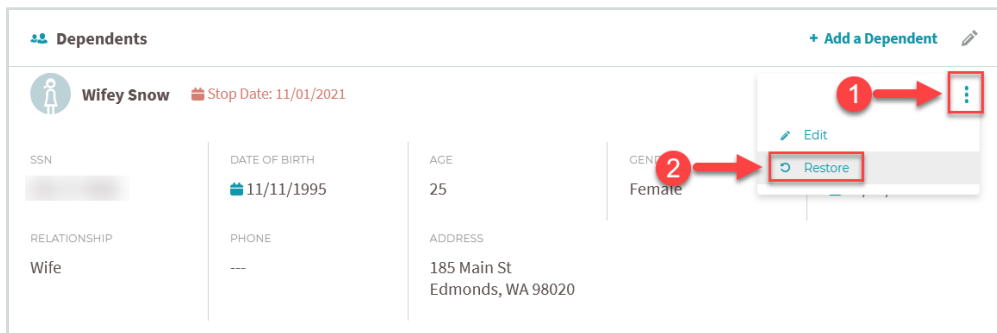
RESTORE A TERMINATED DEPENDENT

IMPORTANT: Follow this process only when a dependent returns after some time has passed (such that there's a gap in coverage). **If you need to "undo" an unintentional dependent termination** (such that there's no gap in coverage), you must [contact your support team](#) for assistance.

While SIMON will allow you to override the effective date to match a terminated dependent's last stop date, if you do it, problems will occur! You'll need to [ask your support team](#) to correct it.

PLEASE DON'T ATTEMPT IT! PLEASE CONTACT YOUR SUPPORT TEAM FIRST!

1. On the left sidebar, click **Employees**.
2. [Find the terminated dependent](#) you want to restore.
3. Click the dependent in the list.
4. Click the **More**  button for the dependent, and then click  **Restore**.



Dependents + Add a Dependent

 **Wifey Snow** Stop Date: 11/01/2021

SSN [REDACTED]	DATE OF BIRTH  11/11/1995	AGE 25	GENDER Female
RELATIONSHIP Wife	PHONE ---	ADDRESS 185 Main St Edmonds, WA 98020	

Actions:  Edit  Restore

5. Select the appropriate **Qualifying Event**, and then enter the dates and any other information required for the event you selected. When you do this, SIMON calculates the **Effective Date** automatically, per the rules set for the qualifying event you selected.
6. If additional documentation is required, please [contact your support team](#) for assistance with submission of required documents.
7. Click **Edit then Restore**.
8. Follow the steps (starting with the [Add Dependents](#) section of this document) to complete the restoration process.
9. On the last step, if all the information is correct, click **Save Changes and Restore**.

MANAGE RESOURCES

On the left sidebar, when you click **Resources**, you'll find links to the following workspaces:

- Benefits
- Contact Information
- Documents & Links

VIEW YOUR BENEFIT PLANS

Resources / Benefits

COVERAGE TYPE	COVERAGE NAME	CARRIER	START DATE - STOP DATE	STATUS	
Medical	Bronze HMO	MedicalCarrier One	Medical Carrier One	05/01/2019 -	ACTIVE View Plan Details
Medical	Gold Access PPO	MedicalCarrierTwo	Medical Carrier Two	05/01/2019 -	ACTIVE View Plan Details
Medical	Silver HSA HMO	MedicalCarrier One	Medical Carrier One	05/01/2019 -	ACTIVE View Plan Details
Dental	Enhanced PPO	MedicalCarrierTwo	Medical Carrier Two	05/01/2019 -	ACTIVE View Plan Details
Dental	PPO	Dental Carrier One	Dental Carrier One	05/01/2019 -	ACTIVE View Plan Details
Vision	Choice A	VC VISION CARRIER	Vision Carrier	05/01/2019 -	ACTIVE View Plan Details
Basic Life	Plan A -Basic Life / AD&D	LifeCarrier	Life Carrier	05/01/2019 -	ACTIVE View Plan Details
Short Term Disability	STD	LifeCarrier	Life Carrier	05/01/2019 -	ACTIVE View Plan Details

You can see a complete list of the benefit plans you offer to your employees thru SIMON.

1. On the left sidebar, click **Resources**, and then click **Benefits**.
2. Use the [Sort](#) and [Filter](#) options to further refine the list. You can filter by **Status** and **Benefit Type**.
3. Use the [Search](#) box to [Search](#) for specific plans. You can search by **Coverage Type** or **Coverage Name**.

VIEW YOUR BENEFIT PLANS FROM PRIOR YEARS

1. Near the top right of the page, click [Filter](#).
2. Select check box for the **Terminated** status.
3. Clear the check boxes for the **Active** and **Future** statuses.
List items are filtered immediately when you select and clear the check boxes.
4. Click the **Start Date – Stop Date** column heading to sort the plans by date.

VIEW YOUR FUTURE BENEFIT PLANS

If your benefit plans have been renewed, you'll see them listed here. However, you can reduce the list to show just your future plans.

1. Click the **Filter** menu.
2. Select check box for the **Future** status.
3. Clear the check boxes for the **Active** and **Terminated** statuses.
4. Click the **Start Date – Stop Date** column heading to sort the plans by date.

VIEW YOUR CONTACT INFORMATION

You can view your employer contact information (name, physical/shipping/billing/mailling addresses, email address, company contacts). On the left sidebar, click **Resources**, and then click **Contact Information**.

EDIT YOUR CONTACT INFORMATION

NAME ACME Group FC		EMAIL ---		 Edit Information
PHYSICAL ADDRESS 12121 HARBOUR REACH DR MUKILTEO, WA 98275-5314	SHIPPING ADDRESS ---	BILLING ADDRESS 123 MAIN STREET LYNNWOOD, WA 98037	MAILING ADDRESS ---	

If editing is enabled by your organization, you'll see an  **Edit Information** link at the top right corner of your contact information. Click the link to edit your information. Changes won't take effect until reviewed and approved by your organization.

VIEW YOUR BROKER'S INFORMATION

Resources / Contact Information

Group Information **Broker House Information** 

 **Broker House**

Broker House LLC ACTIVE

ADDRESS	EMAIL	PHONE	FAX	START DATE	STOP DATE
12121 Harbour Reach Drive Woodinville, WA 98072	brokerhouse@houselc.biz	(555) 555-5555	---	01/01/2021	---

 **Broker Contact**

Broker Person ACTIVE

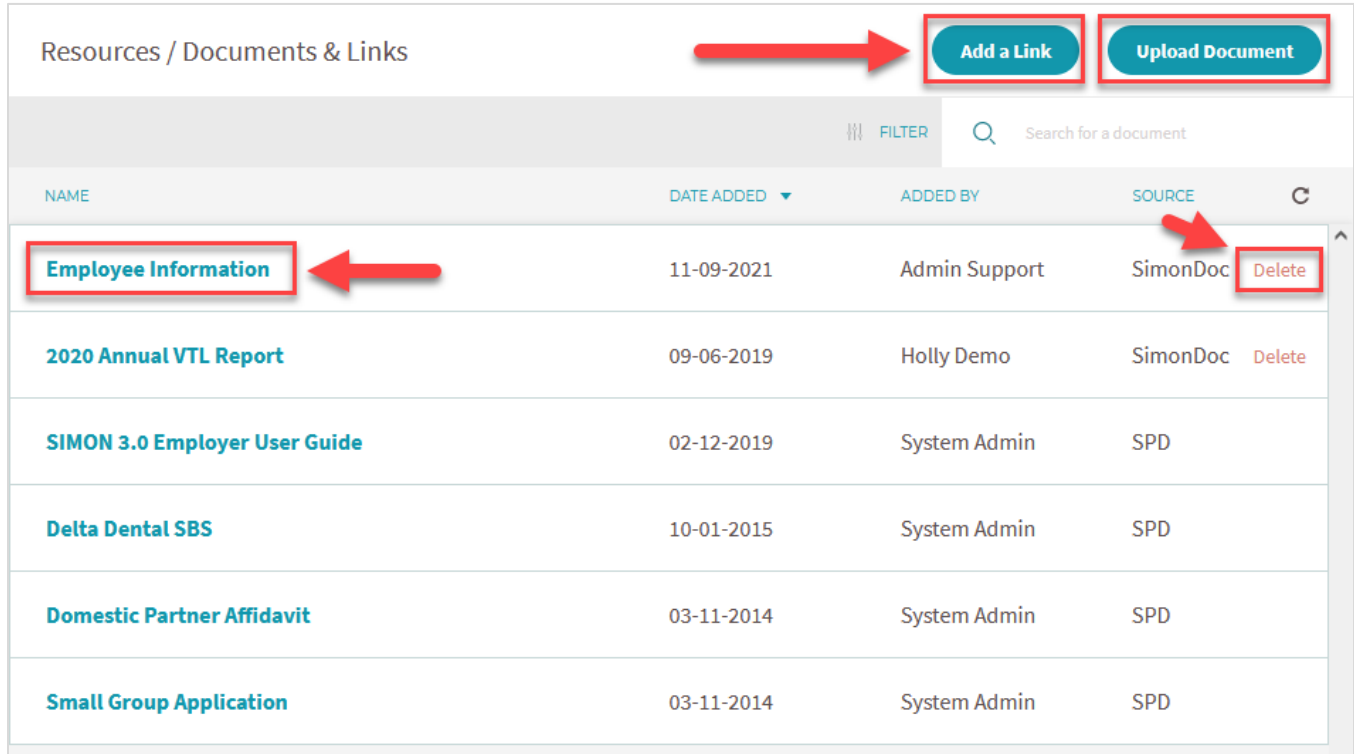
ADDRESS	EMAIL	PHONE	FAX	START DATE	STOP DATE
12121 Harbour Reach Drive Woodinville, WA 98072	person@houselc.biz	(555) 555-4444	---	01/01/2021	---

You can view the broker and broker house assigned to your account.

1. On the left sidebar, click **Resources**, and then click **Contact Information**.
2. Near the top of the page, click **Broker House Information**.

If you have questions or concerns about this information, please [contact your support team](#) for assistance.

MAKE IMPORTANT DOCUMENTS AND LINKS AVAILABLE TO YOUR EMPLOYEES



Resources / Documents & Links				
				 FILTER  Search for a document
NAME	DATE ADDED ▼	ADDED BY	SOURCE	
Employee Information	11-09-2021	Admin Support	SimonDoc	Delete
2020 Annual VTL Report	09-06-2019	Holly Demo	SimonDoc	Delete
SIMON 3.0 Employer User Guide	02-12-2019	System Admin	SPD	
Delta Dental SBS	10-01-2015	System Admin	SPD	
Domestic Partner Affidavit	03-11-2014	System Admin	SPD	
Small Group Application	03-11-2014	System Admin	SPD	

If self-service is enabled for your employees, you can make important documents and links to website available to your employees via the Employee Portal.

You can [Sort](#), [Filter](#), and [Search](#) this list. You can filter by **Source**, and you can search by **Name**.

NOTE: If you're looking for **Enrollment Summaries**, please [find the employee](#), click the employee in the list, and then scroll down to the **Documents** area. Click the name of an enrollment summary to open it.

VIEW A DOCUMENT

Click the name of the document. Once opened, you can print or download the document, if desired.

UPLOAD A DOCUMENT

1. At the top right of the page, click **Upload Document**.
2. Enter a helpful title for the document (for example, "Important Enrollment Information").
3. Select the document file by doing one of the following:
 - Drag the file from a file folder and drop it on the **Choose (or drag and drop) file** box.

- Click the **Choose (or drag and drop) file** box, and then use the **Open** window to navigate to the file on your computer.

NOTE: If the document you want to upload is in an email, first save the document to a folder on your computer. After you do that, you'll be able to complete step 3.

4. If you need to upload more than one document, click **+Add Another Document**.
5. To make the document visible to your employees via the Employee Portal, select the **Attach document(s) to employee's documents & links folder**.
6. When you are finished, click **Upload Document(s)**.

NOTE: Once you add a document, you won't be able to edit it. If you made a mistake or need to update the document, [delete it](#), and then add a new document with the correct information.

ADD A LINK

1. At the top right of the page, click **Add a Link**.
2. Enter a helpful title for the link (for example, "Employee Intranet").
3. Enter the website address in the **Link URL** box. Be sure to include the **http://** or **https://** part of the address.
4. If you need to add more than one link, click **+Add Another Link**.
5. To make the link visible to your employees via the Employee Portal, select the **Attach link(s) to employee's documents & links folder**.
6. When you are finished, click **Upload Link(s)**.

NOTE: Once you add a link, you won't be able to edit it. If you made a mistake or need to update a link, [delete it](#), and then add a new link with the correct information.

DELETE A DOCUMENT OR LINK

On the right side of the page, click **Delete** next to the document or link you want, and then click **Delete Document/Link** to confirm the deletion.

Some documents and links cannot be deleted by you. If you have questions or concerns about these items, please [contact your support team](#) for assistance.

MANAGE BILLING

Billing / Summary

10704 PDF Jun 2020 Request Excel

BALANCE FORWARD	\$0.00
MONTHLY CHARGES	\$7,215.64
FEES	\$0.00
TOTAL BILLED AMOUNT	\$7,215.64
RECENT ACTIVITY TOTAL	-\$1,529.08
RECENT PAYMENTS	\$0.00
TOTAL BALANCE DUE	\$5,686.56

TOTAL BALANCE DUE
\$5,686.56
Due on 06/28/2020

Billing Info

Bank of America Saving

ROUTING NUMBER *****0017

ACCOUNT NUMBER *****9317

✓ DEFAULT

⚙️ AUTO PAY

Recent Activity Total : -\$1,529.08

Sellin Kenney Executed on 05/20/2019	TRANSACTION TYPE Employee - Dental	COVERAGE DATE 06/2019	-\$101.92
Sellin Kenney Executed on 05/20/2019	TRANSACTION TYPE Employee - Dental	COVERAGE DATE 06/2019	\$52.43
Sellin Kenney Executed on 05/20/2019	TRANSACTION TYPE Employee - Medical	COVERAGE DATE 06/2019	-\$863.06
Sellin Kenney Executed on 05/20/2019	TRANSACTION TYPE Employee - Medical	COVERAGE DATE 06/2019	\$404.01

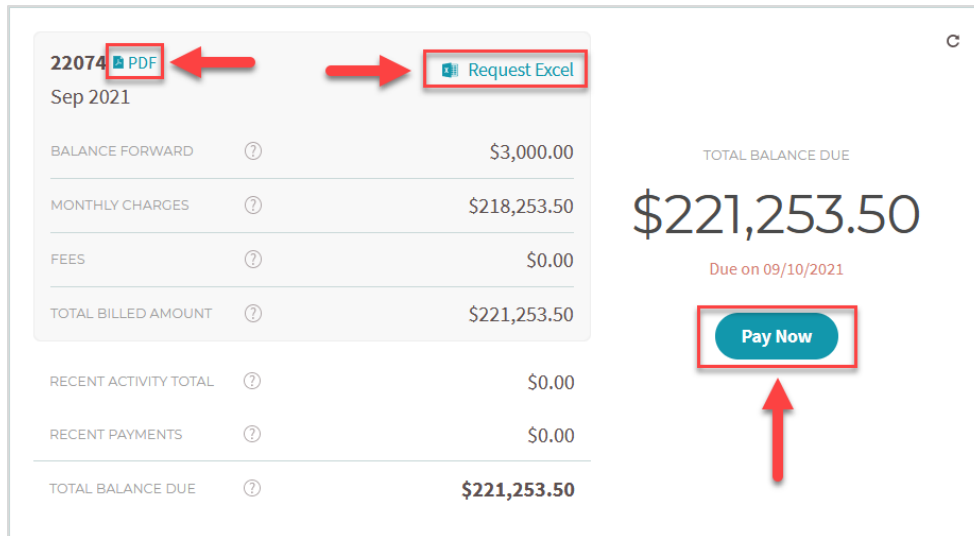
Depending on how Employer Portal is configured for your organization, you can view and pay your bill, view your billing history, manage your bank account information, setup automatic payments, and “go green” with paperless (emailed) billing statements.

To access the billing features in Employer Portal, on the left sidebar, click **Billing**, and then click one of the following workspaces:

- Summary
- History
- Settings

NOTE: If you don't see the **Billing** option on the left sidebar, or if you don't see other options discussed in this section, your organization may not have Employer Portal's billing features enabled. If you have questions about this, please [contact your support team](#) for assistance.

PAY YOUR BILL



22074 PDF Request Excel

Sep 2021

BALANCE FORWARD	?	\$3,000.00
MONTHLY CHARGES	?	\$218,253.50
FEES	?	\$0.00
TOTAL BILLED AMOUNT	?	\$221,253.50
RECENT ACTIVITY TOTAL	?	\$0.00
RECENT PAYMENTS	?	\$0.00
TOTAL BALANCE DUE	?	\$221,253.50

TOTAL BALANCE DUE

\$221,253.50

Due on 09/10/2021

Pay Now

- On the left sidebar, click **Billing**, and then click **Summary**.
 - To view the billing details in PDF format, at the top left of the billing summary, click the **PDF** link. The document will open in a separate browser tab or window. It can then be printed or downloaded.
 - To download the billing details in Microsoft Excel (.xlsx) format, at the top left of the billing summary, click the **Request Excel** link. Your request will be queued and made available for download on the **Reporting** workspace. For more information, see the [Request Reports](#) section of this document.
- Click **Pay Now**.
- Enter (or select) a bank account to use for payment.
 - If you've not yet setup a bank account, enter the required account information. To save the account for later use, select the **Save this account for future payments** check box.
 - If you've already [setup a bank account](#) in Employer Portal, it will be selected automatically. If you've setup multiple accounts, the "default" bank account will be selected automatically. To change it, click inside the **Select Existing Account** box and select the one you want.
 - If you want to enter a different bank account for a payment, click **+Use a New Account**, and then enter the required account information. To save the new account for later use, select the **Save this account for future payments** check box.
- Click **Pay Bill Now**.

If the payment was processed successfully, you'll receive a confirmation email, and you'll see the payment reflected in the billing activity area of the **Summary** workspace.

Recent Activity Total : \$0.00			
Health Care Inc <i>Executed on 11/09/2021</i>	TRANSACTION TYPE Unreported Payment -	COVERAGE DATE None	-\$1,363.06

VIEW YOUR BILLING HISTORY

Billing / History						
Invoices Receipts EXPORT INVOICES FILTER Search for an invoice						
INVOICE NUMBER	MONTH/YEAR	BALANCE FORWARD	MONTHLY CHARGES	FEES	TOTAL BILLED AMOUNT	STATUS
10704 PDF	Jun 2020	\$0.00	\$7,215.64	\$0.00	\$7,215.64	DUE Request Excel
10703 PDF	Aug 2019	\$11,675.36	\$5,073.14	\$0.00	\$16,748.50	DUE Request Excel
10702 PDF	Jul 2019	\$6,602.22	\$5,073.14	\$0.00	\$11,675.36	DUE Request Excel
Load more invoices (up to 36 months)						

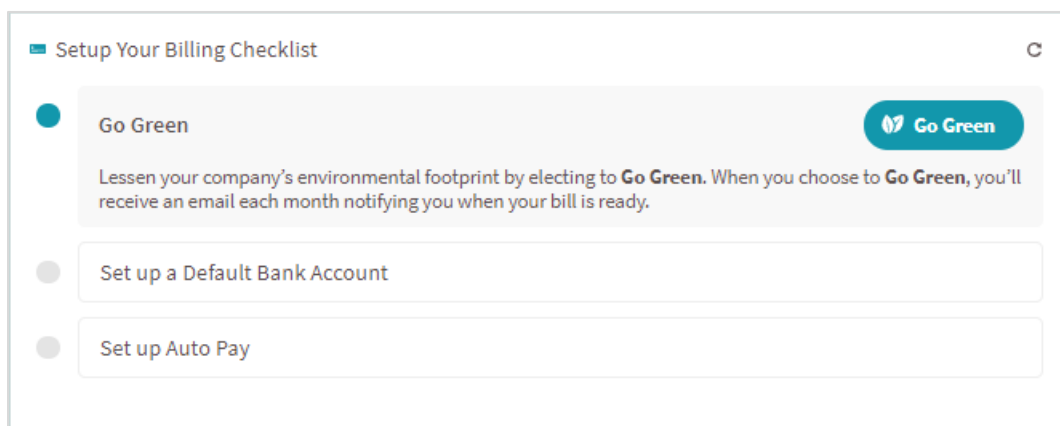
- On the left sidebar, click **Billing**, and then click **History**.
- To view billing invoices, above the list, click **Invoices**.
 - You can [Sort](#), [Filter](#), and [Search](#) this list. You can filter by **Status**, and you can search by **Invoice Number** and **Month/Year**.
 - To see older invoices, at the bottom center of the list, click **Load more invoices**.
 - To export the full list of invoices in Comma-Separated Values (.csv) format (compatible with Microsoft Excel and other spreadsheet apps), click **Export Invoices**.
 - To view the billing details in [PDF format](#), next to the **Invoice Number**, click the **PDF** link. The document will open in a separate browser tab or window. It can then be printed or downloaded.
 - To download the billing details in [Microsoft Excel \(.xlsx\) format](#), in the rightmost column, click the **Request Excel** link. Your request will be queued and made available for download on the **Reporting** workspace. For more information, see the [Request Reports](#) section of this document.
- To view payment receipts, above the list, click **Receipts**.
 - You can [Sort](#), [Filter](#), and [Search](#) this list. You can filter by **Source**, and you can search by **ID** and **Created Date**.

- To view the payment receipt in PDF format, next to the **Receipt Name**, click the **PDF** link. The document will open in a separate browser tab or window. It can then be printed or downloaded.

NOTE: Receipts appear on this list only if you paid your bill through SIMON.

BILLING SETTINGS

In the **Billing > Settings** workspace, you can manage your bank account information, setup automatic payments, and “Go Green” by activating paperless (emailed) billing statements. Use the **Billing Checklist** to setup these important options.



Setup Your Billing Checklist

- Go Green** Go Green
Lessen your company's environmental footprint by electing to **Go Green**. When you choose to **Go Green**, you'll receive an email each month notifying you when your bill is ready.
- Set up a Default Bank Account**
- Set up Auto Pay**

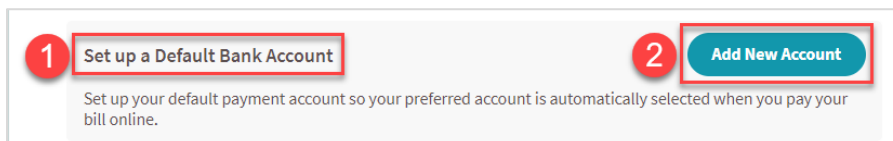
NOTE: If you don't see the **Billing Checklist**, you may not have permission to edit billing settings. Please [contact your support team](#) for assistance.

MANAGE YOUR BANK ACCOUNTS

To reduce the time needed to make future payments, or to enable Auto Pay, you can securely store your bank account information in SIMON. If you make payments from multiple accounts, you can store them in SIMON and select the one you want each time you make a payment.

To add a bank account:

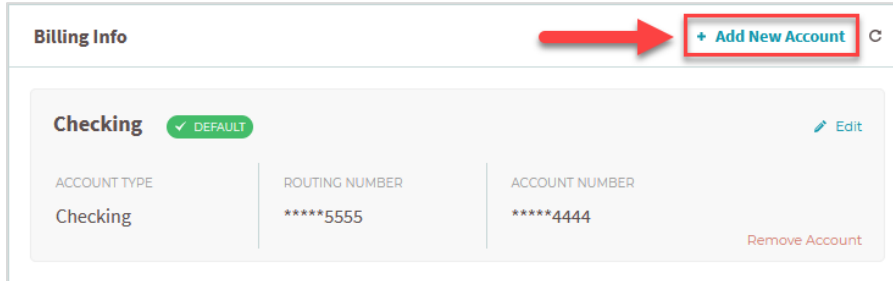
- On the left sidebar, click **Billing**, and then click **Settings**.
- If you've not yet setup a bank account, on the **Billing Checklist**, click **Set up a Default Bank Account**, and then click **Add New Account**.



1 Set up a Default Bank Account **2 Add New Account**

Set up your default payment account so your preferred account is automatically selected when you pay your bill online.

If you've setup at least one bank account, and you want to add another account, in the **Billing Info** area, click **+Add New Account**.



Billing Info + Add New Account

Checking ✓ DEFAULT Edit

ACCOUNT TYPE	ROUTING NUMBER	ACCOUNT NUMBER
Checking	*****5555	*****4444

Remove Account

NOTE: If you don't see **+Add New Account** link in the **Billing Info** area, you may not have permission to modify bank account information. Please [contact your support team](#) for assistance.

- Give the account a unique and descriptive **Account Nickname**.
- Enter all the requested bank account information.
- If you want the account to be the default (automatic) selection every time to pay a bill, select the **Set as Default Account** check box.
- Take note of the **ACH Originator ID** that's displayed at the top of the dialog. If you have positive pay on your bank account, you'll want to provide this ID to your bank.

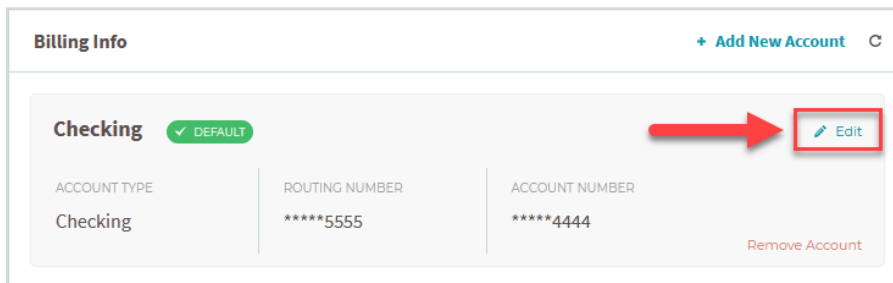
Please provide your bank with **ACH Originator ID 5555555555** if you have positive pay on your bank account. This ID identifies our company to your bank, so your bank knows that it can allow the electronic payment to proceed.

(The number shown above is fake) This number identifies SIMON to your bank, which helps them ensure that electronic payments from SIMON can proceed through their system.

- Click **Save New Account**.

To edit bank account information:

- On the left sidebar, click **Billing**, and then click **Settings**.
- In the **Billing Info** area, click **Edit** for the account you want to change.



Billing Info + Add New Account

Checking ✓ DEFAULT Edit

ACCOUNT TYPE	ROUTING NUMBER	ACCOUNT NUMBER
Checking	*****5555	*****4444

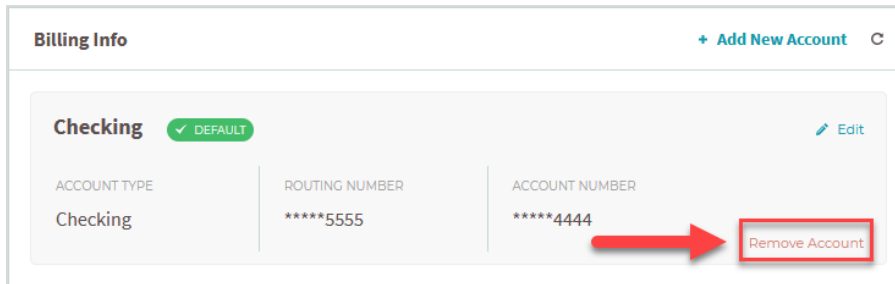
Remove Account

- Make the changes you want.

- Click **Save Changes**.

To remove a bank account:

- On the left sidebar, click **Billing**, and then click **Settings**.
- In the **Billing Info** area, click **Remove Account** for the account you want.



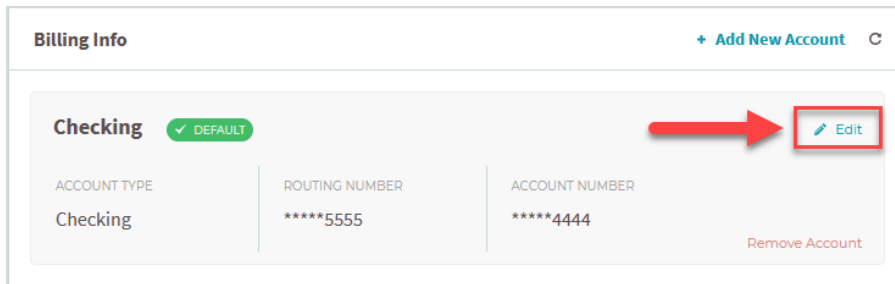
The screenshot shows the 'Billing Info' section with a '+ Add New Account' link and a refresh icon. Below, a 'Checking' account is listed as the 'DEFAULT'. It shows the account type as 'Checking', the routing number as '*****5555', and the account number as '*****4444'. A red arrow points from the account number to a red-bordered 'Remove Account' button.

- Click **Remove Account** to confirm.

ACTIVATE OR DEACTIVATE AUTO PAY

If you prefer to pay your invoices automatically, you can activate **Auto Pay** on your default bank account. If you later choose to pay your bill manually, you can deactivate Auto Pay.

- On the left sidebar, click **Billing**, and then click **Settings**.
- In the **Billing Info** area, click **Edit** for your **default** bank account.



The screenshot shows the 'Billing Info' section with a '+ Add New Account' link and a refresh icon. Below, a 'Checking' account is listed as the 'DEFAULT'. It shows the account type as 'Checking', the routing number as '*****5555', and the account number as '*****4444'. A red arrow points from the account number to a red-bordered 'Edit' button. A 'Remove Account' link is visible at the bottom right of the account details.

- To activate **Auto Pay**, select the **Set as Auto Pay Account** check box.
To deactivate **Auto Pay**, clear the **Set as Auto Pay Account** check box.
- Click **Save Changes**.

NOTE: If you don't see **Set as Auto Pay Account** check box, you may not have permission to enable this setting. Please [contact your support team](#) for assistance.

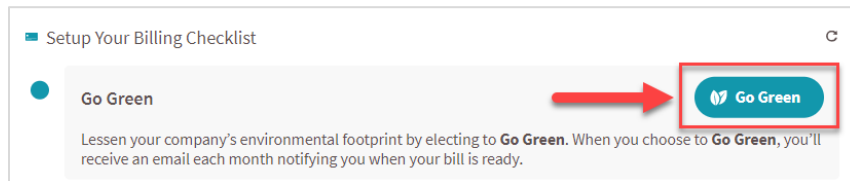
ACTIVATE OR DEACTIVATE PAPERLESS BILLING STATEMENTS ("GO GREEN")

When you "Go Green," you'll no longer receive a paper bill in the mail each month. Instead, when your bill is ready, you'll receive an email notification with instructions to view it in SIMON.

NOTE: Your organization may have activated this setting for all its members. If so, you won't see the option to change it. If you have questions or concerns about this, please [contact your support team](#) for assistance.

To activate paperless billing statements:

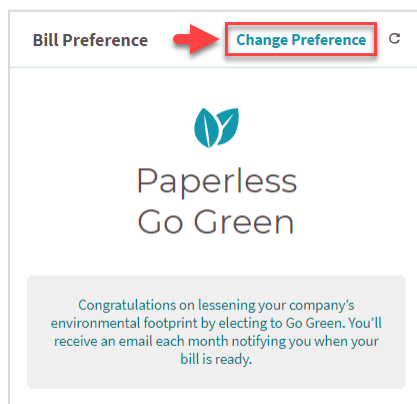
1. On the left sidebar, click **Billing**, and then click **Settings**.
2. On the **Billing Checklist**, click **Go Green**.



3. Select the **Paperless – Go Green** option.
4. Click the **Go Green terms and conditions** link to read the terms and conditions.
 When you are finished, click the ✕ at the top right of the page, or simply click your browser's Back button.
 - a. If you agree to the terms and conditions, select the **I accept** check box, and then click **Save Preference**.
 - b. If you disagree and don't want to proceed, click **Cancel**.

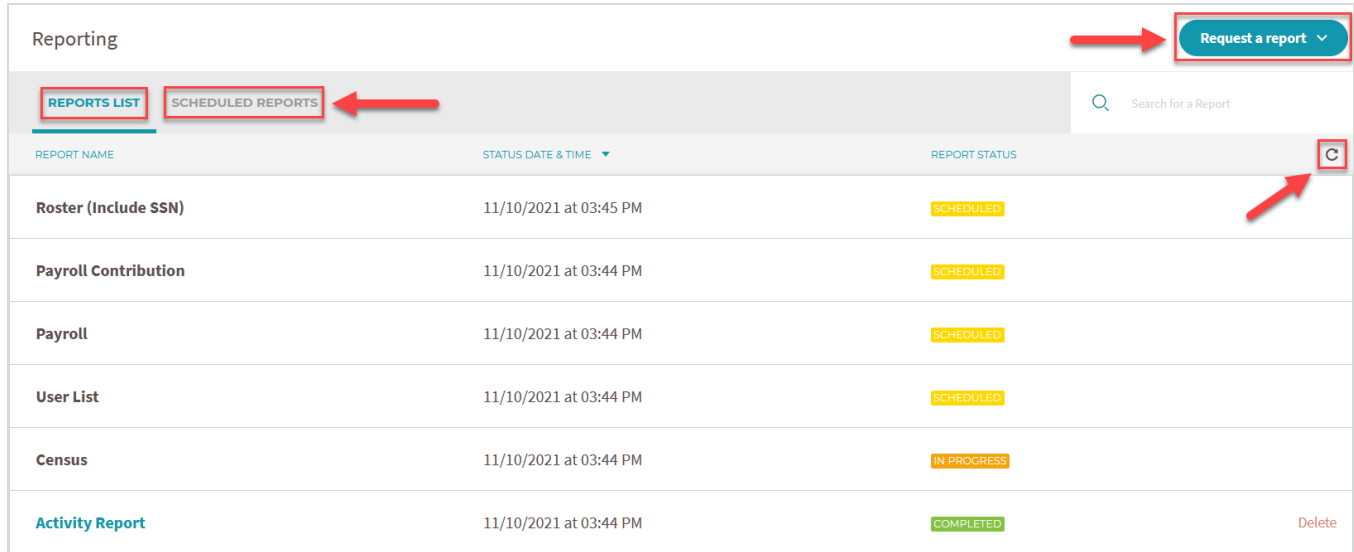
To switch back to paper billing statements:

1. On the left sidebar, click **Billing**, and then click **Settings**.
2. In the **Bill Preference** area, click **Change Preference**.



3. Select the **Paper** option.
4. Select the **I accept** check box, and then click **Save Preference**.
 If you change your mind, click **Cancel**.

CREATE AND MANAGE REPORTS



REPORT NAME	STATUS DATE & TIME	REPORT STATUS
Roster (Include SSN)	11/10/2021 at 03:45 PM	SCHEDULED
Payroll Contribution	11/10/2021 at 03:44 PM	SCHEDULED
Payroll	11/10/2021 at 03:44 PM	SCHEDULED
User List	11/10/2021 at 03:44 PM	SCHEDULED
Census	11/10/2021 at 03:44 PM	IN PROGRESS
Activity Report	11/10/2021 at 03:44 PM	COMPLETED

On the left sidebar, the **Reporting** workspace gives you one place to create, view, and delete reports. From here, you'll find reports that help you manage your employees, track payments, track benefits changes, and track medical coverage for ACA compliance.

You might see other reports listed here. These reports are created by your organization, by Vimly staff, or automatically by SIMON:

- **Billing Invoice** – created by SIMON when you pay your bill
- **Census Import** – created by SIMON when you (or someone working on your behalf) import employee information into SIMON
- **Email Blast List** – created when your organization or Vimly staff send a bulk email message to your employees on your behalf
- **Enrollment Summary** – created by SIMON when you make changes to an employee's information, dependents, beneficiaries, or benefit elections.
 - You can create enrollment summaries that cover all changes within a given period. On the left sidebar, click **Employees**, and then near the top of the page, click **Print Enrollment Summary**.
- **Simon Alert Report** – created when requested for an alert listed in the **Alerts > Sent** workspace. It shows which users have viewed and acknowledged the alert.

If you have questions or concerns about these reports, please [contact your support team](#) for assistance.

REQUEST A REPORT

Reports can be run on-demand or scheduled to run automatically. When you request a report, it's added to SIMON's reporting queue. If there are many requests in the queue ahead of yours, it may take some time for the report to complete.

You cannot see how many requests are ahead of yours, but you can click  **Refresh Queue** to check the status of your request.

1. On the left sidebar, click **Reporting**.
2. At the top right of the page, click **Request a report**, click the report you want, and then select the options you want.
To learn more about the available reports, see the [Available Reports](#) section of this document.
3. If you want this report to run on a regular schedule, select the **Schedule as a recurrent report** check box, and select the options you want.
4. Click **Request Report**.

When the report is ready, the status will change to **COMPLETED**, and you'll receive an email notification. If your report does not complete within 24 hours, please [contact your support team](#) for assistance.

VIEW A COMPLETED REPORT

To view a completed report, click the name of the report to download and view it.

DELETE A REPORT

If you don't want to keep a report, on the right side of the list, click **Delete** for that report.

If you scheduled a recurring report that you won't need anymore, you remove the recurrence. Click the **Scheduled Reports** tab, and then on the right side of the list, click **Delete** for that report.

AVAILABLE REPORTS

NOTES:

Some of these reports contain sensitive and confidential information protected by both federal and state privacy laws. Vimly is not responsible for any liability associated with any re-transmission of this information.

You may not see all the reports described in this section in your instance of SIMON. If you have questions about this, please [contact your support team](#) for assistance.

ACTIVITY REPORT

The Activity report displays, for a given period, all transactions processed for your employees. It includes:

- Submitted By
- Submitted Date/Time
- Enrollment Reason
- Effective Date
- Audited Time

Activity Report							
Last Name	First Name	Transaction Type	Effective Date	Submitted By	Submitted Date/Time	Audit Date/Time	Status
Michael	Scott	Termination	05/22/2018	Demo User	1/0/2018 1:52:21 PM	1/0/2018 1:52:21 PM	Complete
Jim	Halpert	Benefits Change	05/17/2018	Demo User	1/0/2018 3:59:17 PM	1/0/2018 1:52:21 PM	Complete
Pam	Beesly	Birth of a Child	5/17/2018	Admin User	1/0/2018 1:52:21 PM	1/0/2018 1:52:21 PM	Complete
Kevin	Malone	New Hire	7/1/2018	Admin User	1/0/2018 3:59:17 PM	1/0/2018 1:52:21 PM	Complete
Angela	Malone	New Hire	7/1/2018	Demo User	1/0/2018 1:52:21 PM	1/0/2018 1:52:21 PM	Complete
Toby	Flenderson	New Hire	7/15/2018	Admin User	1/0/2018 3:59:17 PM	1/0/2018 1:52:21 PM	Complete
Andy	Bernard	Termination	8/15/2018	Admin User	1/0/2018 1:52:21 PM	09/01/2018 13:52:21	Pending

CENSUS REPORT

The Census report displays demographic information and coverage elections for all your members (employees and dependents). It includes:

- Employee Name
- Gender
- Social Security Number
- Date of Birth
- Marital Status
- Address
- Class
- Product
- Carrier
- Election

Census Report																		
This report contains details of changes to coverage information as reported to Vimly by the Employer and/or Employee as of the date the report is generated. Please note this report contains sensitive and confidential information protected by both federal and state privacy laws. Vimly is not responsible for any liability associated with any re-transmission of this information.																		
Last Name	First Name	Middle	Relation	Gender	SSN	DOB	Age	Marital Sta	Address Line 1	Address Line 2	City	State	Zip Code	Class	Product Type	Product Name	Carrier	Election
Baratheon	Stannis		Self	Male	489-78-4447	2/2/1960	58	Married	10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	Medical	Medical - Bronze	Blue Cross	ES
Baratheon	Stannis		Self	Male	212-15-4887	2/2/1960	58	Married	10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	Medical	Medical - Bronze	Blue Cross	ES
Baratheon	Stannis		Self	Male	655-45-6565	2/2/1960	58	Married	10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	Medical	Medical - Bronze	Blue Cross	ES
Baratheon	Stannis		Self	Male	489-78-4447	2/2/1960	58	Married	10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	CDHP	Basic Vision	Futher	ES
Baratheon	Stannis		Self	Male	212-15-4887	2/2/1960	58	Married	10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	CDHP	Basic Vision	Futher	ES
Baratheon	Stannis		Self	Male	655-45-6565	2/2/1960	58	Married	10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	CDHP	Basic Vision	Futher	ES
Baratheon	Stannis		Self	Male	655-45-6565	2/2/1960	58	Married	10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	All Coverages	Waiver of Coverage	All Other Carrier	EO
Baratheon	Emili		Wife	Female	-	1/1/1976	42		10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	Medical	Medical - Bronze	Blue Cross	
Baratheon	Emili		Wife	Female	-	1/1/1976	42		10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	CDHP	Basic Vision	Futher	
Baratheon	Emily		Wife	Female	-	8/1/1976	42		10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	Medical	Medical - Bronze	Blue Cross	
Baratheon	Emily		Wife	Female	-	8/1/1976	42		10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	CDHP	Basic Vision	Futher	
Baratheon	Cersei		Wife	Female	-	1/1/1980	38		10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	Medical	Medical - Bronze	Blue Cross	
Baratheon	Cersei		Wife	Female	-	1/1/1980	38		10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	CDHP	Basic Vision	Futher	
Bryant	Anthony		Self	Male	324-65-4657	10/20/018	1828		12121 Harbour Reach Dr		Mukilteo	WA	98275	Part-Time	Medical	Medical - Silver	Blue Cross	EO
Bryant	Anthony		Self	Male	324-65-4657	10/20/018	1828		12121 Harbour Reach Dr		Mukilteo	WA	98275	Part-Time	CDHP	Basic Vision	Futher	EO
Coles	Levi		Self	Male	777-02-0042	5/13/1952	66		4217 S 296th Place		Auburn	WA	98001	Full-Time	Medical	Medical - Bronze	Blue Cross	EF
Coles	Levi		Self	Male	777-02-0042	5/13/1952	66		4217 S 296th Place		Auburn	WA	98001	Full-Time	CDHP	Basic Vision	Futher	ES
Coles	Mary		Wife	Female	-	4/1/2016	2		4217 S 296th Place		Auburn	WA	98001	Full-Time	Medical	Medical - Bronze	Blue Cross	
Coles	Mary		Wife	Female	-	4/1/2016	2		4217 S 296th Place		Auburn	WA	98001	Full-Time	CDHP	Basic Vision	Futher	

CONTRIBUTION PAYROLL REPORT

The Contribution Payroll report shows a breakdown of cost sharing between employer and employee for all available benefits. It includes:

- Employee Names
- Social Security Number
- Classification
- Pay Cycle
- Contribution Strategy
- Contribution and Responsibility Amounts
- Cost and Employer/Employee Share by Benefit Type
- Additional Fees

Payroll Contribution Report																						
Employer:		Alliance Home Health Care Inc																				
Month:		2021 November																				
Report Date:		11/10/2021																				
							PayCycle		Contribution		Employer		Employee		Employee Pre		Employee Post		Medical		Medical	
Last Name	First Name	Middle	Suffix	SSN	Class Description	PayCycle	Amount	Strategy	Contribution	Offered	Responsibility	Contribution	Responsibility	Tax Total	Tax Total	Medical Cost	Share	Share	PreTax			
Angelson	Kley			110-12-7000	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Binder	Brink			953-70-9007	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Brackey	Laurelyn			317-98-3390	All F/T EE's that work Monthly		0.00	Defined Benefit			176.70	0.00	0.00	0.00	0.00	160.70	160.70	0.00	FALSE			
Chudasama	Leukuma			372-01-2569	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Dobberstein	Ashlee			803-57-5814	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Elmquist	Onda			206-79-0032	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Hurley	Magstadt			839-39-4196	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Keiser	Haala			266-45-1559	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Putzel	Terina			423-66-4487	All F/T EE's that work Monthly		0.00	Defined Benefit			106.79	0.00	0.00	0.00	0.00	90.79	90.79	0.00	FALSE			
Snow	Baby			- -			0.00				204.75	0.00	93.25	0.00	93.25	178.38	178.38	0.00	FALSE			
Tersteeg	Travon			- -			0.00				332.04	0.00	0.00	0.00	0.00	316.04	316.04	0.00	FALSE			

MEDICAL COVERAGE (ACA) REPORT

The Medical Coverage report displays coverage by month for all your employees. It's particularly useful for reporting compliance with the Affordable Care Act (ACA) and for preparation of IRS 1095 forms. It includes:

- First Name
- Last Name
- Middle Name
- Relation
- Dependent ID
- Social Security Number (SSN)
- Date of Birth (DOB)
- Coverage Months (January thru December)

Medical Coverage Report

Report Disclaimer: Please be advised this report does not constitute legal advice with regards to any regulatory reporting requirements, including reporting under the Affordable Care Act. This report contains coverage information, only as reported to BSI by the Employer, as of the date the report is generated. The report contains sensitive and confidential information protected by federal and state privacy laws. BSI is not responsible for any liability associated with re-transmission of this information.

Employer: Demo Group

Report Year: 2017

"x" indicates months coverage was active

First Name	Last Name	Middle	Relation	Dependent ID	SSN	DOB	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Michael	Scott				123-16-1234	5/3/1958	X	X	X	X	X	X	X	X	X			
Jim	Halpert				123-17-1234	4/11/1961	X	X	X	X	X	X	X	X	X	X		
Pam	Beesly				123-18-1235	10/23/1984	X	X	X	X	X	X	X	X	X	X		
Kevin	Malone				123-19-1235	8/22/1952	X	X	X	X	X							
Angela	Malone		Wife	56789101	123-20-1236	11/10/1953	X	X	X	X	X							
Toby	Flenderson				123-21-1236	2/1/1970	X	X	X	X	X	X	X	X	X	X		
Andy	Bernard				123-22-1237	9/12/1982	X	X	X	X	X	X	X	X	X			

MEMBERSHIP CHANGE REPORT

The Membership Change report displays, for a given period, the *before* and *after* results of activities performed on all your members (employees and dependents). It includes:

- Session Item Number
- Item Description
- Is Changed? (Yes/No)
- Before
- After

Membership Change Report				
This report contains details of changes to coverage information as reported to Vimly by the Employer and/or Employee as of the date the report is generated. Please note this report contains sensitive and confidential information protected by both federal and state privacy laws. Vimly is not responsible for any liability associated with any re-transmission of this information.				
Employer: SIMON Demo Group				
Report Date: 08/17/2018 10:52:19				
Session Item	Item Description	Is Changed	Before	After
279944.01	Session Info		Employee Halpert Jim , Reason: New Hire, Status: Auto finalized	
279944.02	Session record info		Submitted by Demo User on 08/16/2018 13:15:22	
279944.03	Employee Name	Y		Jim, Halpert
279944.04	Employee SSN	Y		*****4447
279944.05	Employee DOB	Y		10/20/1960
279944.06	Employee Sex Code	Y		Male
279944.07	Employee Marital Status	Y		Single
279944.08	Employee Address	Y		10536 SW 14th Dr, Portland, OR, 97219
279944.09	Employee Phone	Y		1234567444
279944.10	Employee Email	Y		handofthequeen@example.com
279944.11	Salary effective date & Annual Salary	Y	00/00/0000, 0.00	07/01/2018, 30000.00
279944.12	Job Title	Y		Drinks and knows things
279944.13	Hire Date, Effective Date, Stop Date & Term Date	Y		06/01/2018, 06/01/2018
279944.14	Class & Effective Date	Y		Full-Time, 06/01/2018
279944.15	Dependent Name	Y		Pam, Halpert
279944.17	Dependent DOB	Y		01/01/1980
279944.18	Dependent Sex Code	Y		Female
279944.19	Dependent Address	Y		10536 SW 14th Dr, Portland, OR, 97219
279944.21	Plan Description, Carrier, Effective Date & Stop Date	Y		UNUM Provident, 06/01/2018
279944.22	Plan Description, Carrier, Effective Date & Stop Date	Y		Guardian, 06/01/2018
279944.23	Plan Description, Carrier, Effective Date & Stop Date	Y		Vision Service Plan, 06/01/2018
279944.24	Plan Description, Carrier, Effective Date & Stop Date	Y		Premiera Blue Cross, 06/01/2018
279944.25	Plan Description, Carrier, Effective Date & Stop Date	Y		Guardian, 06/01/2018, (Pam)
279944.26	Plan Description, Carrier, Effective Date & Stop Date	Y		Vision Service Plan, 06/01/2018, (Pam)
279944.27	Plan Description, Carrier, Effective Date & Stop Date	Y		Premiera Blue Cross, 06/01/2018, (Pam)
279944.28	Beneficiary Name	Y		Pam, Halpert
279944.31	Beneficiary Address	Y		10536 SW 14th DR, PORTLAND, OR, 97219

PAYROLL REPORT

The Payroll report shows cost by employee for all lines of coverage. It includes:

- Employee Names
- Social Security Number ("masked" to last 4 digits)
- Product
- Election Code
- Cost by Plan

PAYROLL REPORT												
This report contains details of changes to coverage information as reported to Vimly by the Employer and/or Employee as of the date the report is generated. Please note this report contains sensitive and confidential information protected by both federal and state privacy laws. Vimly is not responsible for any liability associated with any re-transmission of this information.												
Effective Date	Relationship	Last Name	First Name	SSN4	Product Type	Product Name	Election Code	Cost	Annual Salary	Start Date	Stop Date	Volume Amount
1/1/2018	Self	Anya	Stark	***-**-8999	Medical	Aware \$1500	EO	\$0.00		01/01/2018		\$0.00
1/1/2018	Self	Anya	Stark	***-**-8999	CDHP	Healthcare FSA Limited	EO	\$0.00		01/01/2018		\$0.00
1/1/2018	Self	Anya	Stark	***-**-8999	CDHP	Dependent Care FSA	EO	0.00		01/01/2018		\$0.00

ROSTER REPORT

The Roster report displays all demographic information for all your members (employees and dependents). It includes:

- Employee Names
- Dependent Names
- Relationship to Employee
- Social Security Number - specify **Full SSN**, **No SSN**, or **Masked SSN** (last 4 digits)
- Date of Birth
- Gender
- Marital Status
- Occupation
- Hire Date
- Coverage Effective Date
- Termination Date
- Address
- Phone
- Email
- Annual Salary

Roster Report																					
Relation	Last Name	First Name	Middle	Suffix Name	SSN	DOB	Gender	Marital	Occupation	Hire Date	Effective Date	Term Date	Address Line 1	Address Line 2	City	State	Zip Code	Phone	Email	Coverage	Annual Salary
Self	Bernard	Andy			****1237	09/12/1982	M	S		08/01/2018	05/01/2019		123 Main St	Apt 201	Sampleville	CA	55123	(206) 555-1212	abernard@dundermif	Full-Time	\$4000.00
Son	Bernard	Bart			****2145	11/05/1993	M			09/01/2019			123 Main St	Apt 201	Sampleville	CA	55123				
Self	Stark	Arya			****5674	06/01/1990	F	S	Faceless Men member	01/01/2021	01/01/2021		10536 SW 14th Dr		Portland	OR	97219-6467	(123) 456-7890	nottoday@example.co	Full-Time	58000.00
Son	Stark	Baby			****	01/01/2021	M			01/01/2021			10536 SW 14th Dr		Portland	OR	97219-6467				
Self	Evans	Chris			****4878	05/30/1983	M	S	b occupation	10/01/2020	10/01/2020		185 Main St		Edmonds	WA	98020	(445) 145-6545		Full-Time	300000.00
Self	Gleeson	Dohmnaill			****4654	05/13/1983	M	S	a occupation	04/01/2020	04/01/2020		2345 9th Ave		Seattle	WA	98121-1907	(263) 458-2604	miylnc@seahawk.co	Full-Time	365000.00
Self	Martin	Hank			****5444	10/12/1988	M	S		04/14/2020	06/01/2020		123 Berry		Seattle	WA	98088			Part-Time	245559.00
Self	Halpert	Jim			****1234	04/11/1976	M	M		07/01/2018	05/01/2019		123 Main St	Apt 201	Sampleville	CA	55123	(206) 999-1234	jerry@example.com	Full-Time	85000.00
Self	Malone	Kevin			****1235	08/22/1971	M	M		07/01/2018	05/01/2019		1212 Birch Ave		Sampleville	CA	55112		kmalone@dundermif	Full-Time	60000.00
Wife	Malone	Angela			****1236	11/10/1953	F			05/01/2019			6431 Pine St	C-123	Sampleville	CA	55112				
Self	Scott	Michael			****1234	05/03/1958	M	S		06/01/2018	05/01/2019		123 Main St	Apt 201	Sampleville	CA	55123	(206) 555-1212	jane@example.com	Full-Time	125000.00
Self	Mcdonald	Old	Man		****6478	09/19/1951	M		a occupation	10/01/2020	10/01/2020		852 Main St		Edmonds	WA	98020-3034	(206) 555-1212		Full-Time	78685.00
Self	Timmerman	Sam			****1874	01/01/1989	M	M	Solution Engineer	05/01/2019	05/01/2019		33109 City Drive		Lake Stevens	WA	98258	(425) 771-2121		Full-Time	150000.00
Self	Hudson	Stanley			****4811	02/05/1965	M	M	a occupation	05/01/2019	05/01/2019		121212 Harbour Re Apartment	Mukiteo	WA	98275		shudson@dundermif	Full-Time	75000.00	
Wife	Hudson	Terri			****4844	01/01/1970	F			05/01/2019			121212 Harbour Re Apartment	Mukiteo	WA	98275					
Daughter	Hudson	Lisa			****4545	03/04/1994	F			09/01/2019			121212 Harbour Re Apartment	Mukiteo	WA	98275					
Self	Test III	Testing			****5567	05/15/1991	M	S	a occupation	06/01/2020	06/01/2020		2345 8th Ave		Seattle	WA	98121-1907	(263) 458-2604	test@test.com	Full-Time	98489.00
Self	Obed	Timothy	Luke		****5454	12/21/1990	M	S	b occupation	10/01/2020	10/01/2020		963 Lovelace Lane		Seattle	WA	98012	(555) 555-5555		Full-Time	98000.00
Self	Fienderson	Toby			****1236	02/01/1970	M	S		08/01/2018	05/01/2019		6431 Pine St	C-123	Sampleville	CA	55112		tfienderson@dunder	Full-Time	65000.00
Self	Lannister	Tyrion			****9847	10/20/1960	M	S	Drinks and knows thi	01/01/2021	01/01/2021		10536 SW 14th Dr		Portland	OR	97219-6467	(123) 456-7444	handofthequeen@ex	Full-Time	30000.00

USER LIST REPORT

The User List report displays all users with access to SIMON. It includes:

- SIMON ID
- Name
- Username
- Email Address
- User Type

User List													
First Name	Last Name	Registration Email	Default User	Invite Status	User ID	Username	Invite Sent	Registered Date	Last Login Date	Employer	Profile Excluded	Profile Disabled	Role Type
Tiffany	Hudspeth	demouser@email.com	EP	Accepted	000003056			04/16/2014	08/16/2018	(All Active Employers)	False	False	EP
Tiffany	Hudspeth	demouser@email.com	EP	Accepted	000003056			04/16/2014	08/16/2018	Demo Group	False	False	EE
Jaime	Gallagher	demouser@email.com	GA	Accepted	000020934		01/15/2015	01/16/2015	01/12/2018	(All Active Employers)	False	False	ER
Genna	Testing	demouser@email.com	GA	Accepted	000022157		03/20/2018	06/10/2015	07/31/2018	(All Active Employers)	False	False	GA
Demo	User	demouser@email.com	EP	Accepted	000026211		09/08/2016	09/08/2016	08/17/2018	Demo Group	False	False	EP
Client	Demo	demouser@email.com	EP	Accepted	000026237		09/16/2016	09/16/2016	12/26/2016	Demo Group	False	False	EP
Vimly	Testing	bsitesting@email.com	GA	Accepted	000026590			10/06/2016	08/17/2018	(All Active Employers)	False	False	GA
Brett	Foster	abcdef@me.com	EE	Created	000028216					Demo Group	False	False	EE
Mike	Nuget	abcdefghi@me.com	EE	Created	000028217					Demo Group	False	False	EE
Levi	Coles	abcd_test@me.com	EE	Forwarded Invi	000028218		02/09/2017			Demo Group	False	False	EE

OVER-AGE DEPENDENT AUDIT REPORT

Over Age Dependent Audit

Export to CSV

SELECT NUMBER OF MONTHS
6

OVER AGE DEPENDENTS
If the dependent is eligible to be terminated, then you can and should terminate them now. Otherwise, you can send an email to your Administrator directly or utilize the Contact Support menu.

DISABLED DEPENDENTS
The dependent(s) may be over-age now, or will be over-age in the next 6 months, but are disabled and no action is required.

UPCOMING DEPENDENTS
Dependents will be over-age in the next 3 months, and are shown for reference only.

DEPENDENT	DATE OF BIRTH	AGE	GENDER	OVER-AGE DATE	
Kushner S Braund, Daughter of Briggs E Braund,	03/15/1986	35	Female	03/15/2012	DISABLED
Penning M Picka, Daughter of Delmerico L Lunning,	02/20/1996	25	Female	02/20/2022	UPCOMING
Schenfisch D Damhof, Son of Steffen L Traeger,	10/27/1995	26	Male	10/27/2021	OVER AGE

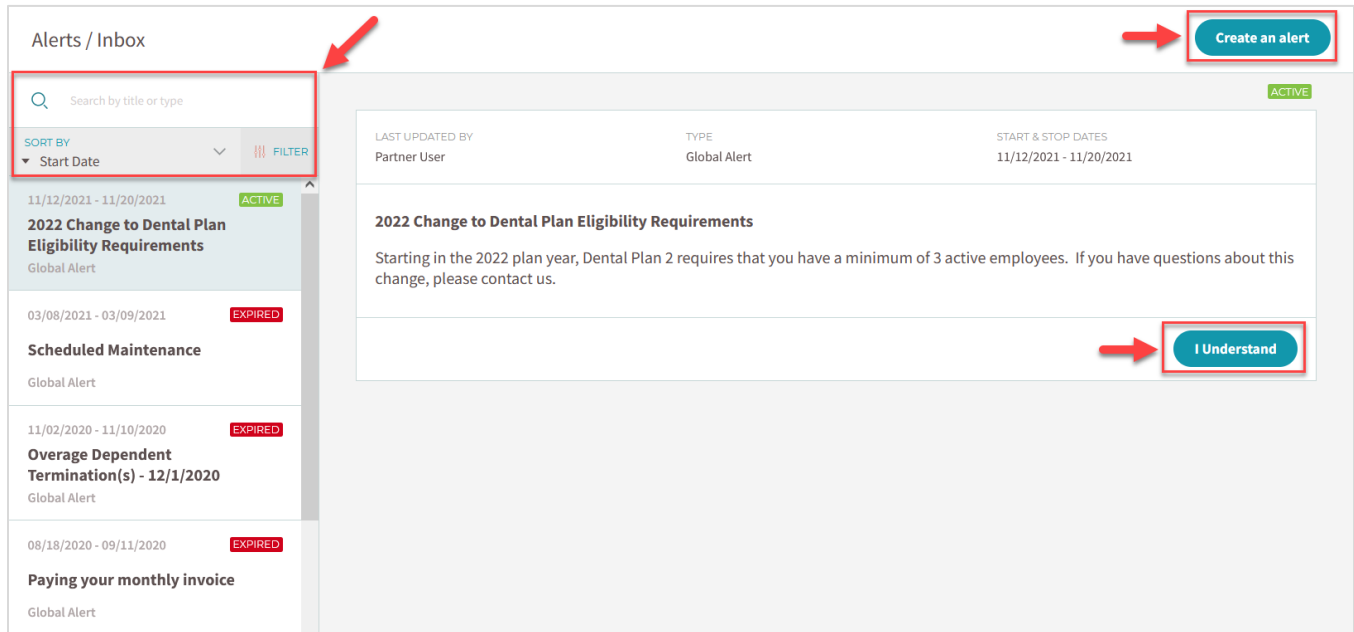
The Over-Age Dependent Audit report helps you identify dependent children that are over the age limit (typically 26) for coverage eligibility. It also shows dependent children that will reach the age limit within the next 3 months, and disabled dependent children that are eligible for coverage regardless of age. It includes:

- Dependent Name
- Relation to Employee
- Employee Name
- Date of Birth
- Age
- Gender
- Over Age Date
- Status
 - **Upcoming** - Dependent child will be over-age in the next 3 months
 - **Over-Age** - Dependent child is over-age and eligible to be terminated
 - **Disabled** – Dependent child is a disabled individual, eligible for coverage regardless of age

You can expand the number of dependents shown in the report by changing the value in the **Select Number of Months** box. The maximum value is 12 months.

To export this list to a file in Comma-Separated Values (.csv) format, which is compatible with spreadsheet apps like Microsoft Excel, at the top right of the page, click **Export to CSV**.

CREATE AND MANAGE ALERTS



Alerts / Inbox

Search by title or type

SORT BY Start Date FILTER

11/12/2021 - 11/20/2021 **ACTIVE**

2022 Change to Dental Plan Eligibility Requirements

Global Alert

03/08/2021 - 03/09/2021 **EXPIRED**

Scheduled Maintenance

Global Alert

11/02/2020 - 11/10/2020 **EXPIRED**

Overage Dependent Termination(s) - 12/1/2020

Global Alert

08/18/2020 - 09/11/2020 **EXPIRED**

Paying your monthly invoice

Global Alert

LAST UPDATED BY Partner User

TYPE Global Alert

START & STOP DATES 11/12/2021 - 11/20/2021

2022 Change to Dental Plan Eligibility Requirements

Starting in the 2022 plan year, Dental Plan 2 requires that you have a minimum of 3 active employees. If you have questions about this change, please contact us.

I Understand

On the left sidebar, the **Alerts** workspace lists important notifications from your organization. For example, if important documents have been updated or plan eligibility rules have changed, your organization can create an alert to share this information with all their employers. Alerts might also announce important information for all SIMON users, such as scheduled maintenance notifications.

Each time you login to SIMON, you're presented with alerts. Alerts are also listed on the [Dashboard](#). Once you've viewed or acknowledged an alert (by clicking **I Understand**), you'll no longer see it at login, but you can always view it again by clicking **Alerts** on the left sidebar.

You can [Sort](#), [Filter](#), and [Search](#) this list. You can sort by **Start Date**, **Title**, or **Status**. You can filter by **Status** or **Type**. You can search by **Title** or **Type**.

VIEW EXPIRED ALERTS

In the alerts list, you'll see a date range listed for each alert. This is the **ACTIVE** status period for the alert. If you want to see alerts that have expired because they now fall outside their active status period, click **Filter**, select the **EXPIRED** status, and then click **Apply filters**.

CREATE AN ALERT

If your organization has given you permission to create alerts, at the top right of the page, you'll see the option to **Create an alert**. This option allows you to send alerts to your employees, and you can control

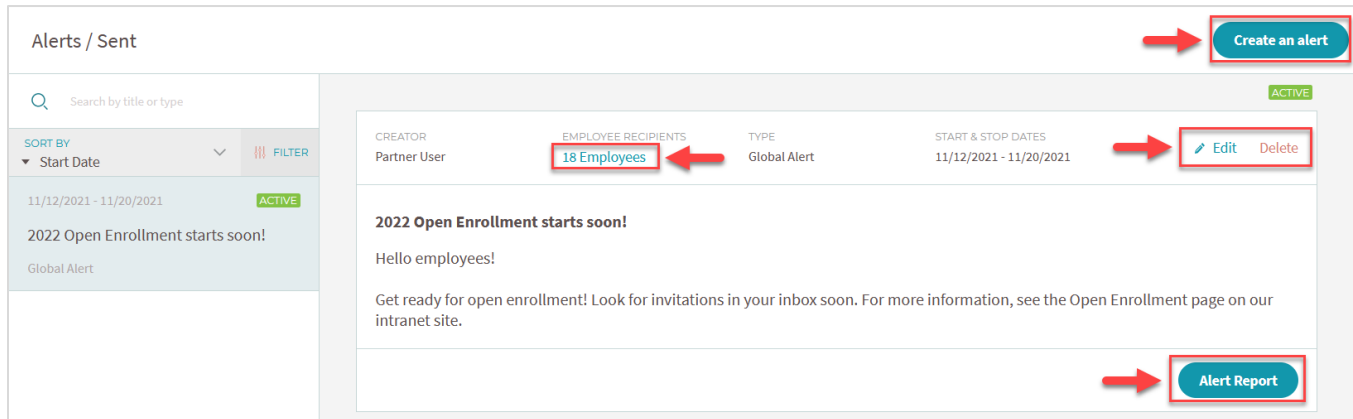
which employees see them. If you don't see this option, please [contact your support team](#) for assistance.

1. On the left sidebar, click **Alerts**.
2. At the top right of the page, click **Create an alert**.
3. Click the **Filter Employee List By** box, and then select the option that matches the audience for your alert.
 - If the alert is meant for all your employees, select **Show all employers (not filtered)**.
 - If the alert is meant for all employees enrolled in specific coverages, select **Filter By Coverage**, and then select the coverages.
 - If this alert is meant for all employees within a specific classification (part-time, full-time, etc.), select **Filter By Class**, and then select the classifications.
 - If this alert is meant for a small group of specific employees that you want to select individually, select **Show all employers (not filtered)**.
4. Click **Next: Select Employees**.
5. Select the check boxes next to each employee you want. You can search for specific employees by typing their name or Social Security Number (SSN) into the  **Search** box.
To select every employee that matches the filter you selected in step 3, click **Send to all employees**.
6. Click **Next: Compose Alert**.
7. Enter a title for the alert. The title will be prominently displayed, so try to make it clear and concise.
8. If the alert is related to a specific situation, such as billing, enrollment, or other issues, select an appropriate **Alert Type**. Otherwise, set it to **Global Alert**.
9. Select a start and stop date for when this alert should be displayed.
10. Enter the text of your alert. Again, try to make it clear and concise. Use the formatting options to make it easier to read.
11. If you want users to also receive notification of this alert in email, select the **Send an email notification about this alert** checkbox. Users will be prompted to login to SIMON to see the alert.

NOTE: If you selected a future start date in step 9, you won't be able to select this option. To use it, the start date must be set to today's date.

12. If all the information is correct, click **Send alert**.

MANAGE SENT ALERTS



To view and manage alerts you've sent to your employees, on the left sidebar, click **Alerts**, and then click **Sent**.

VIEW THE EMPLOYEE RECIPIENT LIST FOR AN ALERT

NOTE: Once an alert is sent, the recipient list cannot be changed. If you need to change it, delete the alert, and recreate it with the correct list of recipients.

1. On the left sidebar, click **Alerts**, and then click **Sent**.
2. In the alerts list, click the alert you want.
3. Under **Employee Recipients**, click the **Employees** link.

SEE WHICH EMPLOYEES HAVE VIEWED AND ACKNOWLEDGED AN ALERT

1. On the left sidebar, click **Alerts**, and then click **Sent**.
2. In the alerts list, click the alert you want.
3. Click **Alert Report**.

When you do this, the report request is added to SIMON's report queue, and you'll see it listed in the **Reporting** workspace. When the report is ready, the status will change to **COMPLETED**, and you'll receive an email notification. If your report does not complete within 24 hours, please [contact your support team](#) for assistance.

CHANGE THE EXPIRATION DATE FOR AN ALERT

1. On the left sidebar, click **Alerts**, and then click **Sent**.
2. In the alerts list, click the alert you want.
3. Click **Edit**.

4. Change the **Alert Stop Date** to the date you want, and then click **Save Changes**.

DELETE AN ALERT

1. On the left sidebar, click **Alerts**, and then click **Sent**.
2. In the alerts list, click the alert you want.
3. Click **Delete**.
4. If you're sure you want to delete it, click **Delete Alert**.

MANAGE USERS (EMPLOYEE SELF-SERVICE)

Manage Users				
Users Permissions		Export to CSV Invite User(s)		
USER	EMPLOYMENT STATUS	EMAIL	USER STATUS	
AB Andy Bernard Edit Email	Pending	abernard@dundermifflin.com	ACCEPTED	Disable
AS Arya Stark	Pending	nottoday@example.com	PENDING AUDIT	
BW Britt Wright Edit Email	Pending	bwright@vimly.com	ACCEPTED	Disable
BO Bruinsma Ollila	Pending	bollila@example.com	PENDING AUDIT	
CL Cercei Lannister	Pending	powerispower@example.com	PENDING AUDIT	
CS Conlan M Stalpes	Terminated	+ Add Email	NONE	
DG Dohmnall Gleeson	Pending	dglee@example.com	PENDING AUDIT	

SIMON offers the option to enable Employee Self-Service (ESS). When enabled, you can grant permission to some or all your employees to login to SIMON's Employee Portal.

On this portal, employees can make their benefit elections during open enrollment, update their contact information, view their benefits, manage their dependents and beneficiaries, and find important benefits-related notifications and documents in one central location.

You can configure Employee Self-Service to require your review and approval of all employee-submitted changes. You can also set limits on the types of changes your employees can submit.

On the left sidebar, the **Manage Users** workspace shows you which employees have self-service access to SIMON, and which do not. From here, you can send invitations to other employees on this list, check the status of invitations you've already sent, or disable an employee's access to self-service.

You can [Sort](#), [Filter](#), and [Search](#) this list. You can sort by the employee's **Name**, **Employment Status**, **Email Address**, or **User Status**. You can filter by **User Status**. You can search by employee **Name** or **Social Security Number (SSN)**.

When you invite someone, they receive an email from SIMON with instructions on how to register their account.

The following statuses are displayed (in the **User Status** column) to help you understand what's happened with sent invitations.

- **None:** The employee has not been invited to use self-service, or the employee's access to self-service has been disabled.
- **Pending Audit:** Changes have been made to the employee that must be reviewed and approved before they can be invited to self-service.
- **Invited:** The employee has been invited to use self-service, but they have not yet completed the registration process.
- **Invite Forwarded:** When the self-service invitation email was sent, the *"Send invite to me instead and I will forward to my employees"* option was selected. However, the employee has not yet completed the registration process, so they may not have received the forwarded email.
- **Accepted:** The employee has accepted the invitation and completed the SIMON registration process.
- **Expired:** The employee did not complete the SIMON registration process within 30 days of their invitation. If the employee still needs access, a new invitation must be sent to them.

NOTE: You can invite **Terminated** employees to use self-service, and when an employee is terminated, they can retain their access to self-service if you permit it.

You'll want to keep an eye on these statuses, especially during open enrollment. If an invitation never changes to **Accepted** status, you may need to follow-up with the employee to help them complete their enrollment.

IMPORTANT: Even for employees that are waiving all coverage, **all employees must complete the enrollment process**. If you have questions about this, please [contact your support team](#) for assistance.

INVITE USERS

There are a few ways to invite your employees to register for self-service. Pick the option that best suits your needs.

INVITE A NEW EMPLOYEE

To invite a new employee, on the **Invite User(s)** menu, click **Invite New Employee**.

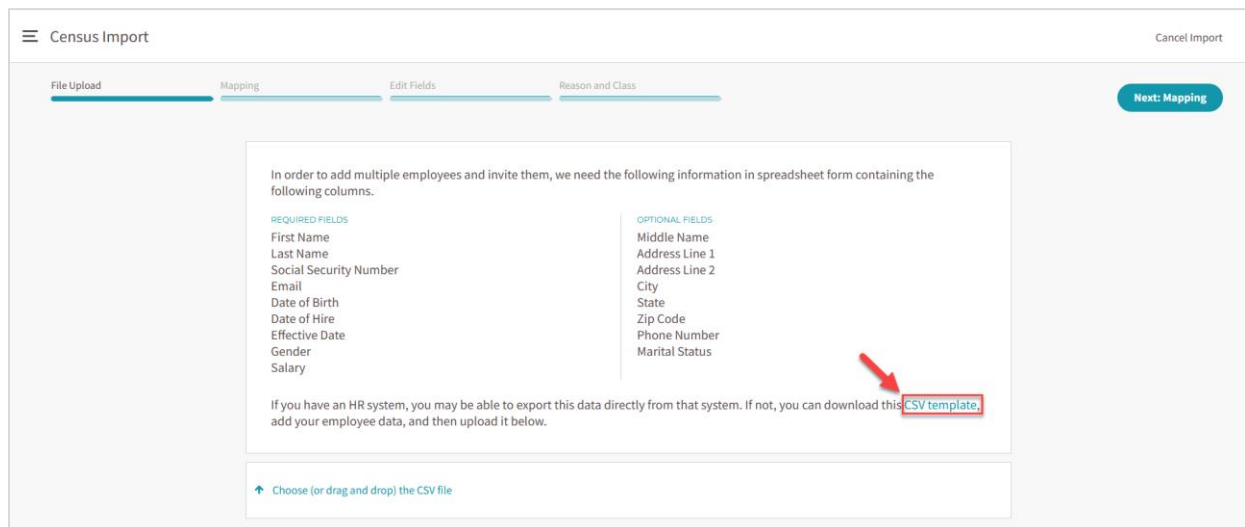
Next, follow the steps in the [Add a New Employee](#) section of this document to complete the process.

ADD AND INVITE A LIST OF NEW EMPLOYEES (CENSUS IMPORT)

To add a bulk list of new employees to SIMON and invite all of them to register for self-service, you can enter their information in a spreadsheet and import it into SIMON.

NOTE: This process doesn't work for existing employees whose information has already been entered into SIMON. It's available only for new employees that have not yet been entered into SIMON.

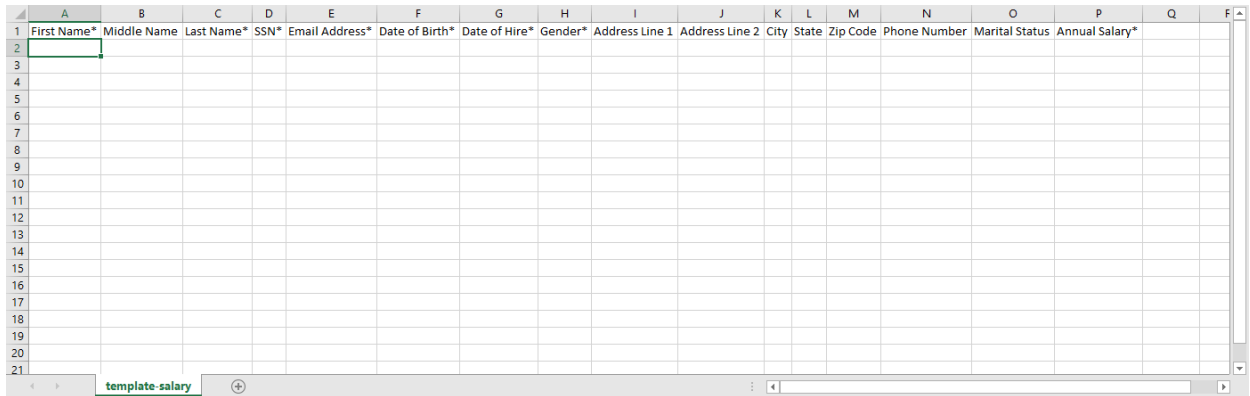
1. On the left sidebar, click **Manage Users**.
2. On the **Invite User(s)** menu, click **Census Import**.
3. If you don't yet have a file that contains the required information, you can download and complete a template. Click the **CSV template** link to download it and open it in a spreadsheet app.



4. If you already have a file that contains the required information, select the file by doing one of the following:
 - Drag the file from a file folder and drop it on the **Choose (or drag and drop) the CSV file** box.
 - Click the **Choose (or drag and drop) the CSV file** box, and then use the **Open** window to navigate to the file on your computer.

NOTE: If the file you want to upload is attached to an email, first save the file to a folder on your computer. After you do that, you'll be able to complete step 4.

- If the file you want to import has column headings (or if you are using the provided CSV template), select the **first row in my file is a column header, do not import it** check box. In many cases, SIMON will look for column headers, and if found, will select this option automatically.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	First Name*	Middle Name	Last Name*	SSN*	Email Address*	Date of Birth*	Date of Hire*	Gender*	Address Line 1	Address Line 2	City	State	Zip Code	Phone Number	Marital Status	Annual Salary*		
2																		
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
13																		
14																		
15																		
16																		
17																		
18																		
19																		
20																		
21																		

☐ The first row in my file is a column header, do not import it

QUALIFYING EVENT (Optional)

Qualifying Event

CLASS (Optional)

Class

EFFECTIVE DATE

☒ Select an effective date

EFFECTIVE DATE

MM/DD/YYYY

☐ My data has an effective date column for each member's effective date

- If desired, enter a **Qualifying Event** and a **Class** to apply to all the new employees you're adding. This step is optional.
- If you have an *Effective Date* column in your file, select the **My data has an effective date column for each member's effective date** option. Otherwise, if everyone in your file has the same effective date, enter it in the **Effective Date** box.
- At the top right of the page, click **Next: Mapping**.
- On the **Mapping** step, make sure the information in your file maps correctly to SIMON's data fields. If you need to change a data field mapping, click the **Specify Column Content** box for it, and then select the appropriate field from the drop-down menu.

10. If the information looks correct, at the top right of the page, click **Next: Edit**.
11. Review the data again. If required data is missing, or any data is incorrect, enter it here.
SIMON will highlight in red any required fields that are missing information.
12. At the top right of the page, click **Next: Reason and Class**.
13. Review the **Reason for Adding Employees** and **Employment Class** settings for each employee you are importing. If any are empty, make selections to fill them in.
14. At the top right of the page, click **Next: Summary**.
15. On the **Import Summary** page, review the total number of **Imported Employees** and the number of employees being imported based on **Reason for Adding Employees** and **Employment Class**. Make sure the information matches your expectations.
16. If you need to make any changes to the import, click the **Back** button near the top right of the page.
17. If all the information looks correct, at the top right of the page, click **Import & Invite**.
If the process is successful, you will see a confirmation message at the top of the page.
18. For help with next steps when adding new employees, see the [Complete an Enrollment for a Self-Service Employee](#) section of this document.

NOTE: If any of the employees you added have a previously established account on SIMON (such as thru a previous employer), please [contact your support team](#) for assistance.

Once submitted, the new employees will be listed in **Pending** status. Employees in **Pending** status are in the process of being audited and approved. During this period, no further changes can be made to their personal information, dependents, benefits, or beneficiaries.

Once the audit process has completed, their status will change to **Active**, and you'll be able to make further changes, if necessary.

At the bottom of each employee's page, you'll see a **Documents** area with a link to a printable, downloadable **Enrollment Summary** document (in PDF format). Click the title of the document to open it.

INVITE EXISTING EMPLOYEES

☐ Invite Existing Employees
 Clear Selection
Send Self Service
×

Search for an employee by name or SSN

SORT BY
 ▲ Status

☒ Oye Nordstrum PENDING

☒ Stanley Hudson PENDING

☒ Jamie K Lannister ACTIVE

☒ Mosloski Kashyap ACTIVE

☒ Pankoff L Keillor ACTIVE

☒ Steven K Michaels ACTIVE

☐ Vandeveire Hagman ACTIVE

☐ Send invites to me instead and I will forward to my employees

ON	Oye Nordstrum 983-50-7574	EMAIL jerry@example.com	Remove
SH	Stanley Hudson 120-59-5206	EMAIL shudson@dundermifflin.com	Remove
JL	Jamie Kingslayer Lannister 617-28-7471	EMAIL kingslayer@example.com	Remove
MK	Mosloski Kashyap 734-76-0125	EMAIL hankmartin@vimly.com	Remove
PK	Pankoff Luke Keillor 867-07-4783	EMAIL ex: name@example.com	Remove
SM	Steven Kingslayer Michaels 716-28-1246	EMAIL kingslayer@example.com	Remove

CONTACT SUPPORT

If you have email addresses stored in SIMON for most of your existing employees, or if you want to send invitations to a select group of existing employees, you can invite just those employees.

1. On the left sidebar, click **Manage Users**.
2. On the **Invite User(s)** menu, click **Invite Existing Employees**.
3. In the employee list, select the check boxes next to each employee you want to invite.

You can [Sort](#) and [Search](#) the list to find and select just the employees you want. You can sort by the employee's **First Name**, **Last Name**, or **Employment Status**. You can search by the employee's **Name** or **Social Security Number (SSN)**.

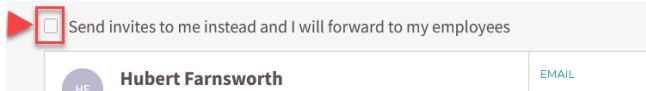
If you want to invite all employees in the list, above the list, click the check box next to **Invite Existing Employees**.

☒ Invite Existing Employees

Search for an employee by name or SSN

SORT BY
 ▲ Status

4. Make sure each employee you've selected has a valid email address in the **Email** box. Add or correct the email addresses if they're missing or incorrect.
5. If you want to personally forward the invitations to each employee (perhaps you want to write a personalized message to your employees, or perhaps you don't want them to receive a message from SIMON that they might not recognize as a legitimate sender), at the top of the list, click the **Send invites to me instead and I will forward to my employees** check box.



6. Review the employees listed on the right. If the list is correct and complete, at the top right of the page, click **Send Self Service**.

SEND A SELF-REGISTRATION CODE

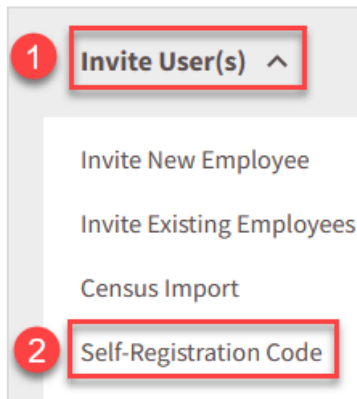
If you have a lot of employees, and you have not entered email addresses into SIMON for most (or all) of them, you can save time by creating a self-registration code. You can then include the code and instructions in an all-employee email message or other communication. Employees can use the code to register themselves directly on the SIMON website (which includes entering their email address). However, this method includes a few requirements:

- This process cannot be used for new employees that have not yet been entered into SIMON. Only existing employees whose information is already been entered into SIMON can use it.
- Only employees in **Active** status can use this process. Employees in **Pending** or **Terminated** status cannot use it.
- Employees must confirm their identity by providing a few key pieces of personal information. The information they type must match exactly with the information stored in SIMON.

To use this method:

1. [Contact your support team](#) to request a **Self-Registration Code**. As part of your request, specify the code you want to use (for example, "Enroll2022" or "GetSimor").
2. On the left sidebar, click **Manage Users**.

3. At the top right of the page, click **Invite User(s)**, and then click **Self-Registration Code**.



If you don't see it, the code has not yet been setup. Please [contact your support team](#) for assistance.

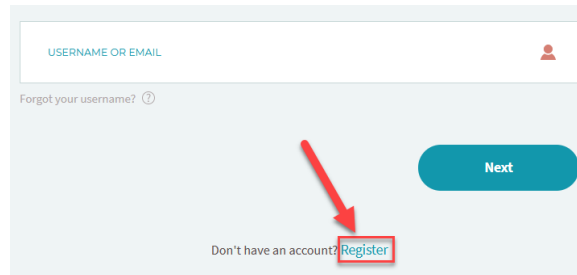
4. Click **Copy Link and Code**.
5. Paste the code and URL information into an email or other communication.
6. Send it to your existing employees in **Active** status.

Here are sample instructions you can copy and update with your unique code.

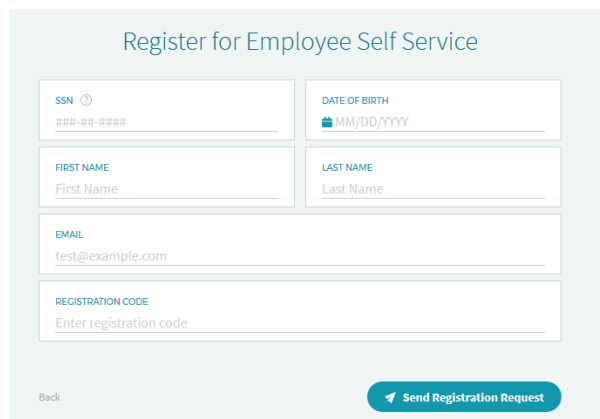
SELF-REGISTRATION INSTRUCTIONS FOR YOUR EMPLOYEES

To access your benefit information on SIMON, you'll need to complete a simple registration process. Self-registration is available for **currently enrolled employees only**.

- ❶ Go to <https://www.simon365.com>
- ❷ Click **Register**.



- ❸ Enter your personal information as requested.
 - ▶ Your Registration Code is **Type Your Code Here**
- ❹ Click **Send Registration Request**.
- ❺ Check your email. Click the link in the email to complete the registration process.

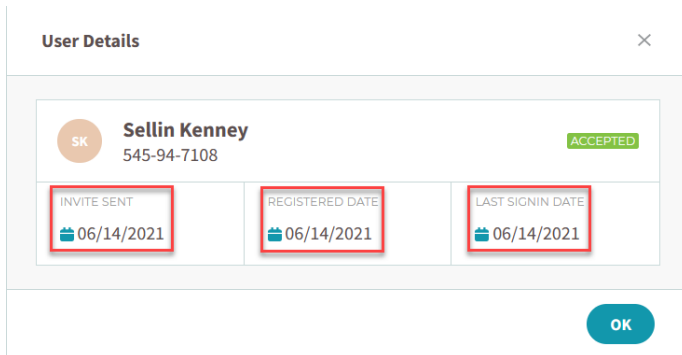


Congratulations! You now have access to view and/or manage your benefit information as allowed by your employer.

Questions? Please contact your employer.

VIEW A USER'S INVITATION DATE, REGISTERED DATE, AND LAST SIGNIN DATE

In the **Manage Users** workspace, you can see a user's **Invite Sent Date**, **Registered Date**, and **Last Sign-In Date**. To view these dates, click the name of the employee in the list.



User Details [Close]

Sellin Kenney 545-94-7108 ACCEPTED

INVITE SENT 06/14/2021	REGISTERED DATE 06/14/2021	LAST SIGNIN DATE 06/14/2021
----------------------------------	--------------------------------------	---------------------------------------

OK

ADD OR EDIT A USER'S EMAIL ADDRESS

1. On the left sidebar, click **Manage Users**.
2. [Find the employee](#) you want.
3. To add an email address, click the **+Add Email** link in the **Email** column for that user.
4. To edit an email address, click the **Edit Email** link in the **User** column, below the name of the user you want.

DISABLE A USER'S ACCESS

1. On the left sidebar, click **Manage Users**.
2. [Find the employee](#) you want to disable.
3. At the right side of the list, click the **Disable** link for the employee you want.
4. Click **Disable User** to confirm the action.

EXPORT THE USERS LIST

1. On the left sidebar, click **Manage Users**.
2. Near the top right of the page, click the **Export to CSV** link.
3. Follow your browser's instructions to download the file.

TRACK AND REVIEW EMPLOYEE CHANGES

All changes made by employees are listed in the **Activity Stream** section of the **Dashboard**, and in reports in the **Reporting** workspace.

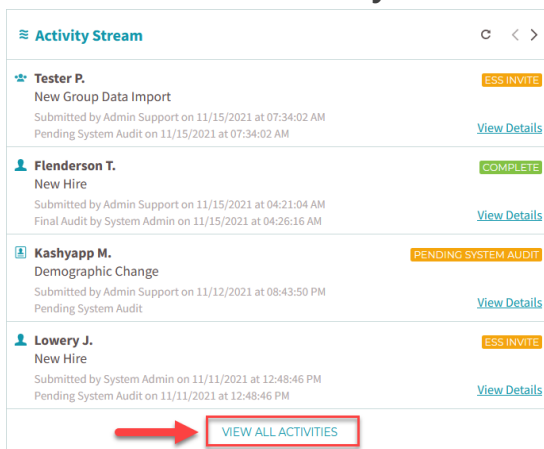
If **Transaction Approval** is turned on, you can review and approve or deny changes submitted by your employees. To learn more about this setting, see the [Transaction Approval](#) section of this document.

When an employee submits a change to their information, their account will switch to **Pending** status. The accounts remain in **Pending** status until you review and approve or deny their changes. During this period, no further changes can be made to their personal information, dependents, benefits, or beneficiaries.

Once you've reviewed and approved or denied the changes, the employee's account status will switch back to **Active**, and further changes can be made, if necessary.

To review changes that are pending your review:

1. On the left sidebar, click **Dashboard**.
2. At the bottom of the **Activity Stream** section, click **View All Activities**.



3. [Filter](#) the activity stream list. Clear the **Select All** check box, and then select the **Pending Your Approval** check box.

Activity Stream							
				FILTER		FROM	TO
						MM/DD/YYYY	MM/DD/YYYY
TRANSACTION TYPE	EMPLOYEE	EFFECTIVE DATE	SUBMITTED BY	SUBMITTED ON	FINAL AUDIT BY	FINAL AUDIT ON	STATUS
New Hire	Stiles N.	06/01/2020	System Admin	11/05/2021 at 12:12:21 PM	System Admin	---	PENDING YOUR APPROVAL
New Hire	Wright B.	09/01/2021	System Admin	11/02/2021 at 03:14:35 PM	System Admin	---	PENDING YOUR APPROVAL
New Hire	Green J.	09/01/2021	System Admin	10/25/2021 at 05:32:06 PM	System Admin	---	PENDING YOUR APPROVAL
New Hire	Baratheon S.	09/01/2021	System Admin	09/01/2021 at 02:02:40 PM	System Admin	---	PENDING YOUR APPROVAL
New Hire	Picard J.	04/01/2020	Jean-Luc Picard	04/01/2020 at 01:58:26 PM	System Admin	---	PENDING YOUR APPROVAL
Benefits Change	Bernard A.	10/01/2019	System Admin	10/17/2019 at 12:28:54 PM	System Admin	---	PENDING YOUR APPROVAL

4. For each item pending your approval, on the right side of the list, click **View Comments**.
5. On the next page, click **Review Pending Changes**.

This employee is pending your approval.

Nick Stiles

FULL NAME

SSN

Review Pending Changes

6. Review the changes. All fields with changed information will be shaded in a darker color. Click **View Original Data** to see the original information, and then click **View Changes** to switch back.

Review Changes (Preview)

View Original Data **Deny** **Approve**

Nick Stiles

NS

FULL NAME
Nick Stiles

SSN
491-93-8004

DATE OF BIRTH
06/06/1988

AGE
33

GENDER
Male

MARITAL STATUS
Single

Contact Information

ADDRESS
10536 SW 14th DR
PORTLAND, OR 97219-6467

PHONE
(123) 456-7890

EMAIL
iknownothing@example.com

Employment

OCCUPATION

ANNUAL SALARY
\$20,000.00

HIRE DATE
06/01/2020

EFFECTIVE DATE
06/01/2020

SALARY EFFECTIVE DATE
12/01/2021

7. When you've finished your review, at the top right of the page, click **Approve** or **Deny**.

- If you **Deny** the changes, you will be prompted to send a **Change Denied Alert** to the employee.

Change Denied Alert

RECIPIENTS

- Employee Users: Nick Stiles

ALERT TITLE

Changes Requested

ALERT TYPE

Global Alert

ALERT START DATE

11/15/2021

ALERT STOP DATE

11/22/2021

ALERT TEXT

B

I

T

Date of Birth and Phone Number are incorrect. Should be:

- 08/06/1988
- (223) 456-7890

☒ Send an email notification about this alert (Email notification is only available for alerts started on today's date).

Cancel

Deny and Send

- Alert Title:** If desired, change the title to make it more descriptive.
- Alert Text:** Explain why you denied their request and/or what the employee should do next.
- Send an email notification about this alert:** Select this checkbox to send the employee an email notification about this denial.

- Click **Deny and Send**.

NOTE: When you deny changes, the employee's account switches back to **Active** status so they can try again.

SET LIMITS ON THE CHANGES AN EMPLOYEE CAN SUMIT

You can set limits on the types of changes an employee can submit to their contact information, employment information, dependents, beneficiaries, and benefit elections.

1. On the left sidebar, click **Manage Users**.
2. Near the top of the page, click **Permissions**.
3. At the right of the list, click the **Yes/No** toggle.

DEMOGRAPHIC INFORMATION

Controls whether employees can submit changes to their address, birth date, Social Security Number (SSN), phone number(s), or other contact and employment information. If set to **No**, they must ask you (the employer) to make these changes on their behalf.

DEPENDENTS

Controls whether employees can submit new dependents, changes to a dependent's information, or termination of a dependent. If set to **No**, they must ask you (the employer) to make these changes on their behalf.

- Adoption/Legal Guardianship
- Birth of a Child
- Change of Status
- Court Order
- Loss of Coverage
- Marriage/Declaration of Domestic Partnership
- Termination
- Allow Benefit Changes During Dependent Termination

BENEFICIARY INFORMATION

Controls whether employees can submit changes to a beneficiary's information. If set to **No**, they must ask you (the employer) to make these changes on their behalf.

BENEFITS

Controls whether employees can submit changes to their benefits outside of an open enrollment period (when a qualifying life event has occurred). If set to **No**, they must ask you (the employer) to make these changes on their behalf.

NOTE: If the **Change Benefits** reason is enabled, it will give employees the ability to add or remove benefits without specifying a corresponding life event.

- Change Benefits
- Change of Status
- Loss of Coverage
- New to Eligible Class

TROUBLESHOOT EMPLOYEE SELF-SERVICE

YOU RECEIVE AN ERROR WHEN SENDING AN EMPLOYEE INVITE

If you receive an error when sending an invitation to an employee, check the following:

- **User Status = Pending Audit?**
Employees cannot be sent an invitation if their employment status is **Pending Audit**. For more information, see the section [Manage Users \(Employee Self-Service\)](#) section of this document.
- **Previous SIMON Account?**
Has this employee had SIMON self-service in the past, perhaps from a previous employer? If yes, make sure the invitation is sent to their original email address in SIMON. If the employee no longer has access to the original email address, please [contact your support team](#) for assistance.

EMPLOYEE RECEIVES A REGISTRATION ERROR

If an existing employee receives an error when trying to self-register, make sure their personal information is correct in SIMON.

1. On the left sidebar, click **Employees**.
2. [Find the employee](#) in the list.
3. Confirm the following information:
 - a. The employee's **First Name**, **Last Name**, **Date of Birth**, and **Social Security Number (SSN)** exactly match what the employee is entering at self-registration.
 - b. The employee's status is **Active**.

Also, make sure they haven't already been sent an invitation, and that they're using the correct code.

1. On the left sidebar, click **Manage Users**.
2. [Find the employee](#) in the list.
3. Check that an invite has already been sent to the employee.
4. Check that the employee is using the correct **Self Registration Code**.

EMPLOYEE RECEIVES AN ERROR AFTER A SELF-SERVICE INVITE IS SENT FROM SIMON

If an employee is having trouble registering immediately after receiving their invitation email, check the following:

1. On the left sidebar, click **Employees**.
2. [Find the employee](#) in the list.
3. Confirm that the employee's **First Name**, **Last Name**, **Date of Birth**, and **Social Security Number (SSN)** exactly match what the employee is entering at self-registration.

If the information is correct, complete the following:

1. On the left sidebar, click **Manage Users**.
2. [Find the employee](#) in the list.
3. Confirm that the employee's **Email** is present and entered correctly.
4. If it's been 24 hours since the last invitation was sent to their email address, send them another invitation.

EMPLOYEE DOES NOT RECEIVE THE SELF-SERVICE INVITE

If an employee reports that they have not received their invite, complete the following:

1. Confirm that the employee's **Email** is entered correctly.
2. Confirm the email is not in the employee's Junk Mail folder.
3. Check with the employee's email service provider to confirm that they are not blocking emails that originate from *vimly.com*.

MANAGE SETTINGS

GROUP SETUP / EMPLOYEE CLASSIFICATIONS

Settings / Group Setup						
Employee Classification	Open Enrollment Period	☐ Show all versions		FILTER	Q Search by Class Name	
CLASS NAME	ELIGIBLE FOR COVERAGE	PROBATION PERIOD	PAY CYCLE	PAY CYCLE START DATE - STOP DATE	CLASS EFFECTIVE DATE - STOP DATE	C
Part-Time	First Day of the Next Month following Probation Period	30 Days	---	---	05/01/2019 -	
Full-Time	First Day of the Next Month following Hire Date	0 Days	---	---	05/01/2019 -	

To see a list of your employee classifications, on the left sidebar, click **Settings**.

By default, this list shows all active employee classifications. If you want to see inactive employee classifications (for example, those with a Stop Date that matches today's date or earlier), select the **Show all versions** check box.

You can also [Sort](#), [Filter](#), and [Search](#) this list.

If **Pay Cycle** is enabled on your account, you'll see an option to edit the pay cycle settings for your classifications. To edit, click the  pencil icon on the right side of the list.

If you have questions or concerns about these items, please [contact your support team](#) for assistance.

GROUP SETUP / OPEN ENROLLMENT PERIOD

Settings / Group Setup					
Employee Classification	Open Enrollment Period	☐ Show all versions		FILTER	Q Search for an Enrollment Period
TYPE	START	STOP	PLAN YEAR START	PLAN YEAR STOP	C
Passive Renewal	08/19/2021	09/18/2021	05/01/2022	05/01/2023	
New Group - BSI Added Employees	06/01/2020	06/01/2020	05/01/2020	05/01/2021	

To see a list of your open enrollment periods, on the left sidebar, click **Settings**, and then click **Open Enrollment Period**.

You can [Sort](#), [Filter](#), and [Search](#) this list.

If you have questions or concerns about these items, please [contact your support team](#) for assistance.

TRANSACTION APPROVAL

If self-service is enabled for your employees, they can login to SIMON and make changes to their information. If you want to review all employee-submitted changes and approve or deny them before they take effect, you can turn on transaction approval.

1. On the left sidebar, click **Settings**, and then click **Transaction Approval**.
2. On the right side of the page, click the **Yes/No** toggle.

When turned on, Company Contacts that are setup with access to the Employer Portal will receive an email notification whenever an employee submits a change. However, to receive the email, each user must also have **Activity Stream** set to **YES** under their **User Menu > Email Preferences** in Employer Portal.

GET HELP FROM YOUR SUPPORT TEAM

If you need further assistance, click **Contact Support** at the bottom right of any page in Employer Portal.