SIMON®

PARTNER PORTAL USER GUIDE

Guide Version 3.0.1

Last updated November 22, 2021

VIMLY
BENEFIT SOLUTIONS

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WHAT IS THE SIMON PARTNER PORTAL?

The **Partner Portal** is a central location where trusts/associations can manage all clients, members, and benefits programs. From this portal, you can:

- Edit member demographics
- Add employees
- Add dependents
- Terminate members
- Manage benefits
- View client activity
- View and print enrollment summaries
- Generate and schedule reports
- Create and send alerts
- Create tasks and notes
- Setup and manage open enrollment
- Manage SIMON user access

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, including (but not limited to):

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

SUPPORTED OPERATING SYSTEMS

Any operating system, including (but not limited to):

- Windows
- macOS
- iOS
- Android
- Linux

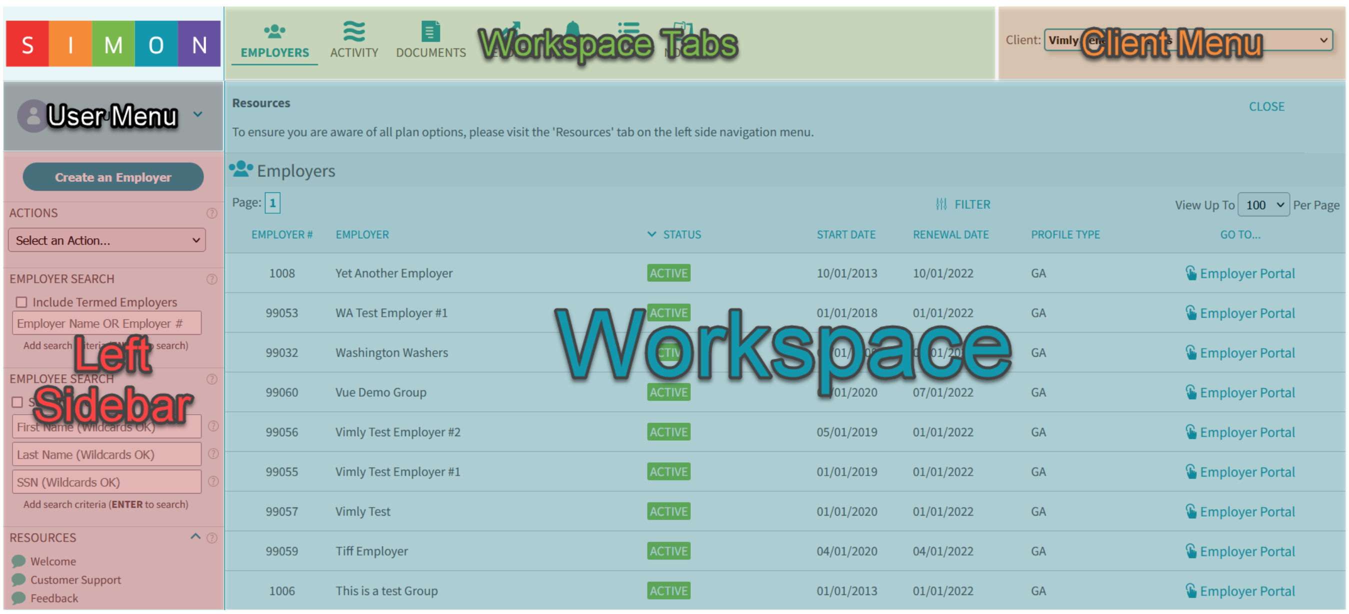
SUPPORTED DEVICES

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 Partner Portal user interface consists of five distinct sections:

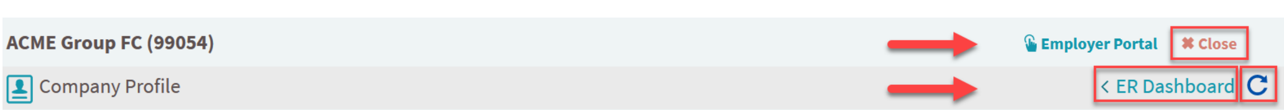
- User Menu
- Left Sidebar
- Workspace
- Workspace Tabs
- Client Menu



As you use Partner Portal, you'll switch between workspaces by using the workspace tabs, and you'll perform tasks in the workspace by using the options presented in the left sidebar. If you have access to multiple trusts/associations, you'll switch between them by using the Client menu. Options related to your user account are on the User menu.

HOW TO GO BACK TO PREVIOUS PAGES AND REFRESH PAGES

Throughout Partner Portal, you'll notice that your browser's *Back* button will not take you back to previous pages, and your browser's *Refresh* button won't refresh the page you're viewing. Instead, use the navigation buttons located within Partner Portal, near the top right of the page.

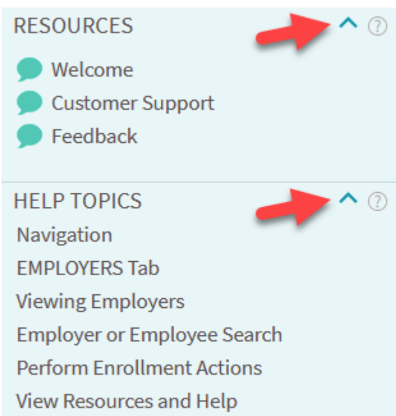


- Click the < **ER Dashboard** button to go back to previous pages. As you navigate deeper into the dashboard, this button's name will change to reflect the page you'll go back to.
- Click the **Close** button to close the dashboard and go back to the list of employers. You can also click the **Employers** icon at the very top of the page to go back to the list.
- Click the **Refresh** button to reload the information on the page.

HOW TO GET HELP

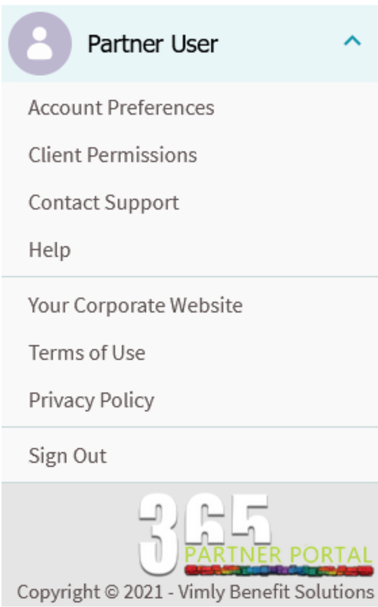
Throughout the user interface, you'll see small question mark icons in many areas. Click these icons to see helpful information about that part of the user interface.

In the left sidebar, you'll always see a list of links to helpful resources, and a list of help topics that are relevant to the area of the interface you're working in. If you don't see a list of help topics, click the down arrow to change it to an up arrow in each section of the left sidebar.



MANAGE YOUR ACCOUNT

The **User** menu contains options related to managing your SIMON account. It also contains other helpful resources. To open the User menu, click your name. In the following example, **Partner User** is the name on the user account.

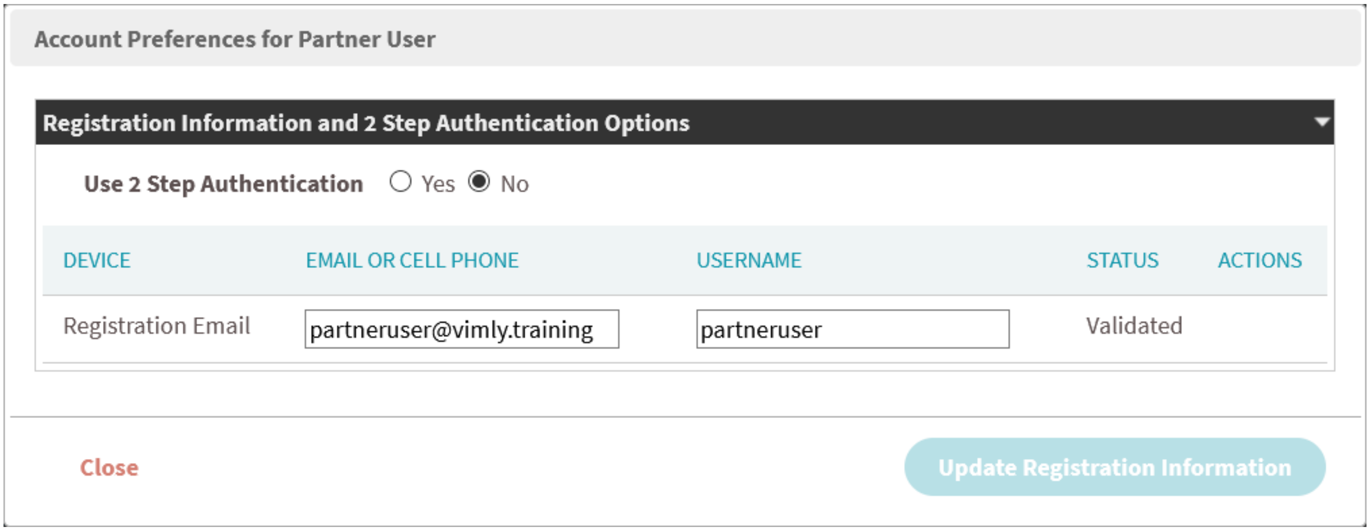


Account Preferences	Change your SIMON username and email address Change your SIMON password Turn SIMON email notifications on or off Turn 2-step authentication on or off Change the email or cellphone number used for 2-step authentication
Client Permissions	Show the tasks you have permission to perform in Partner Portal
Contact Support	List the contact information for your SIMON support team
Help	Open the Partner Portal online help window
Your Corporate Website	Open your organization's website
Terms of User	Review Vimly's Terms of Use (or go to https://www.simon365.com/terms-conditions)
Privacy Policy	Review Vimly's Privacy Policy (or go to https://www.simon365.com/privacy-policy)
Sign Out	Securely logout of SIMON

NOTE: If your organization uses the **SIMON Broker Portal** or the **SIMON Underwriting Portal**, you'll also see options to open those portals.

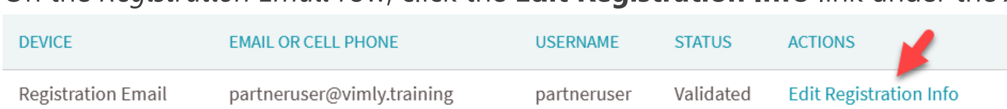
CHANGE YOUR USERNAME AND EMAIL ADDRESS

Your SIMON username and associated email address can be changed at any time. SIMON calls this your “registration” information.



To change your username and email address:

1. On the User menu, click **Account Preferences**.
2. Click **Registration Information and 2 Step Authentication Options**.
3. On the *Registration Email* row, click the **Edit Registration Info** link under the *Actions* column.



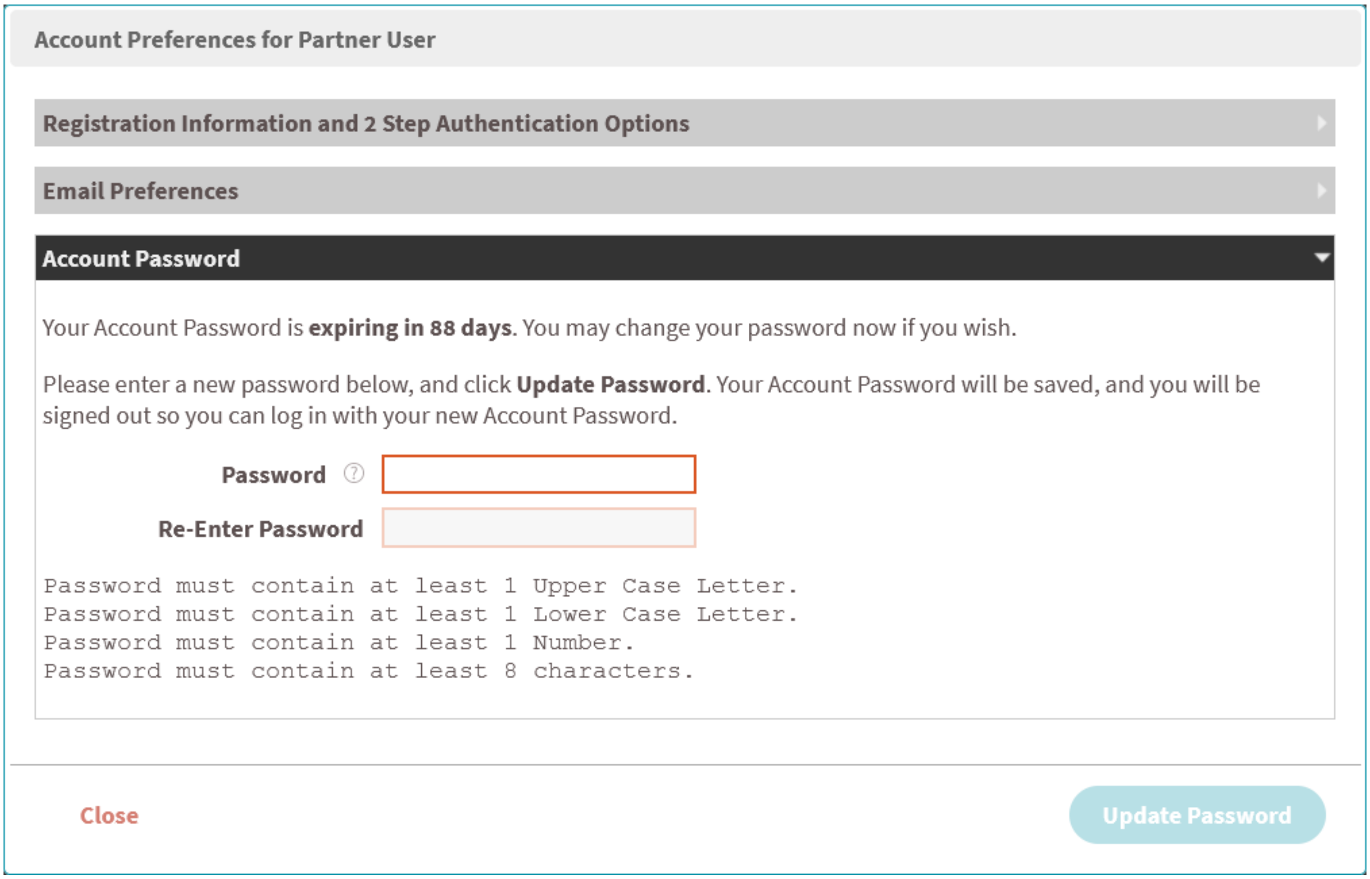
4. Enter the username and/or email address you want.
   WARNING: Never use a shared or group email address on a SIMON account. Shared credentials are prohibited by Vimly’s Terms of Use and can result in removal of your account.
5. Click **Update Registration Information**.

If your changes were saved successfully, you’ll see a message indicating success. If you see a failure message, please contact support for further assistance.

IMPORTANT: If you changed your email address, you’ll be required to verify the change by clicking a link in an email sent to the new address. For security, a notification of change will also be sent to your old email address. If the change is not verified, your email address will revert to the previous address. The verification link expires if it’s not clicked within 24 hours.

CHANGE YOUR PASSWORD

All SIMON account passwords expire after a preset number of days determined by your organization. You can use these steps to see how many days remain until your current password expires, or you can change your password at any time.



To change your password:

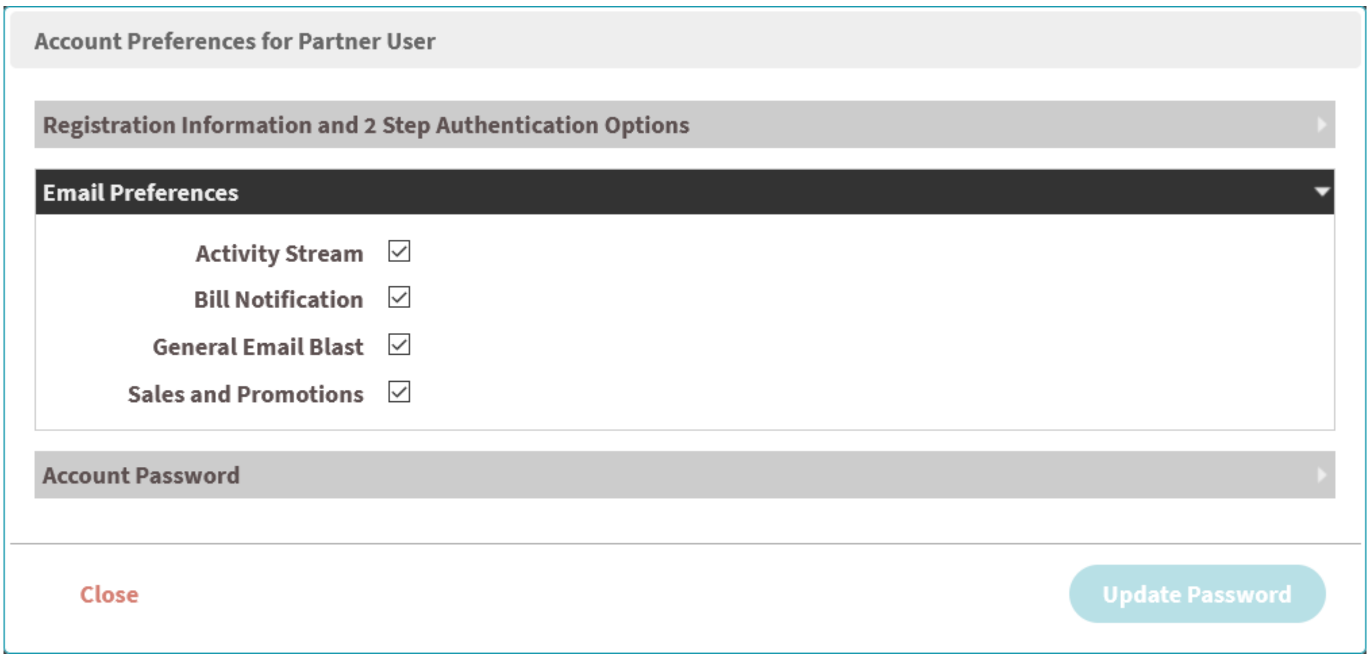
1. On the User menu, click **Account Preferences**.
2. Click **Account Password**.
   The number of days until your password expires is displayed.
3. Enter the new password you want in the **Password** and **Re-Enter Password** boxes.
4. Click **Update Password**.

IMPORTANT: 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.

TURN EMAIL NOTIFICATIONS ON OR OFF

You can control the types of email notifications you receive from SIMON. For example, if you no longer want to receive any email notifications from SIMON, you can turn off all types of email notifications. Alternatively, you can turn off just the specific types of emails you don't want.

NOTE: These settings will not turn off security-related email notifications, such as password resets, 2-step authentication codes, and changes to your SIMON username or email address.



Activity Stream	Notices of all new enrollment and maintenance activities performed by your employers
Bill Notification	Notices related to new bills
General Email Blast	General announcements sent by Vimly staff to your employers
Sales and Promotions	Sales and promotional notices from Vimly's Sales and Marketing teams

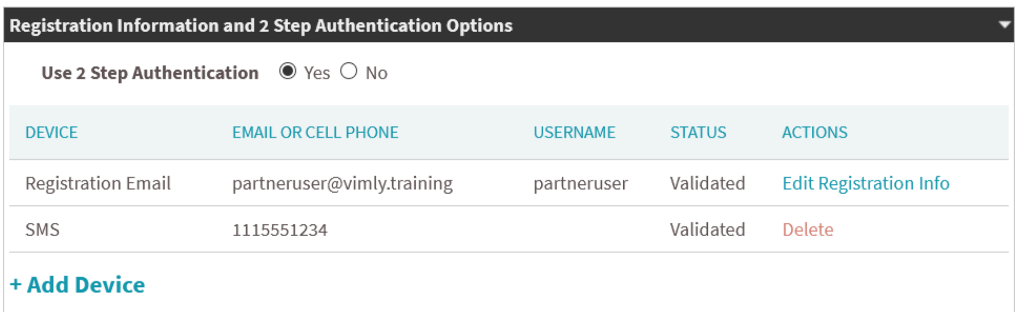
To turn email notifications on or off:

1. On the User menu, click **Account Preferences**.
2. Click **Email Preferences**.
3. Select or clear the checkbox next to each type of email notification you want or don't want. When you do this, the screen will briefly display a spinning hourglass as it saves your selection.
4. When you are finished, click **Close**.

TURN 2-STEP AUTHENTICATION ON OR OFF

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 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 turn on 2-step authentication:

1. On the User menu, click **Account Preferences**.
2. Click **Registration Information and 2 Step Authentication Options**.
3. Next to **Use 2 Step Authentication**, select **Yes**.
4. To add another email address or SMS text message number, click **Add Device**.
5. Enter the email address or phone number, and then click **Get PIN for Verification**.
6. Once you receive the PIN, enter it, and then click **Validate**.
7. Once completed, click **Close**.

To turn off 2-step authentication, or change/remove a device:

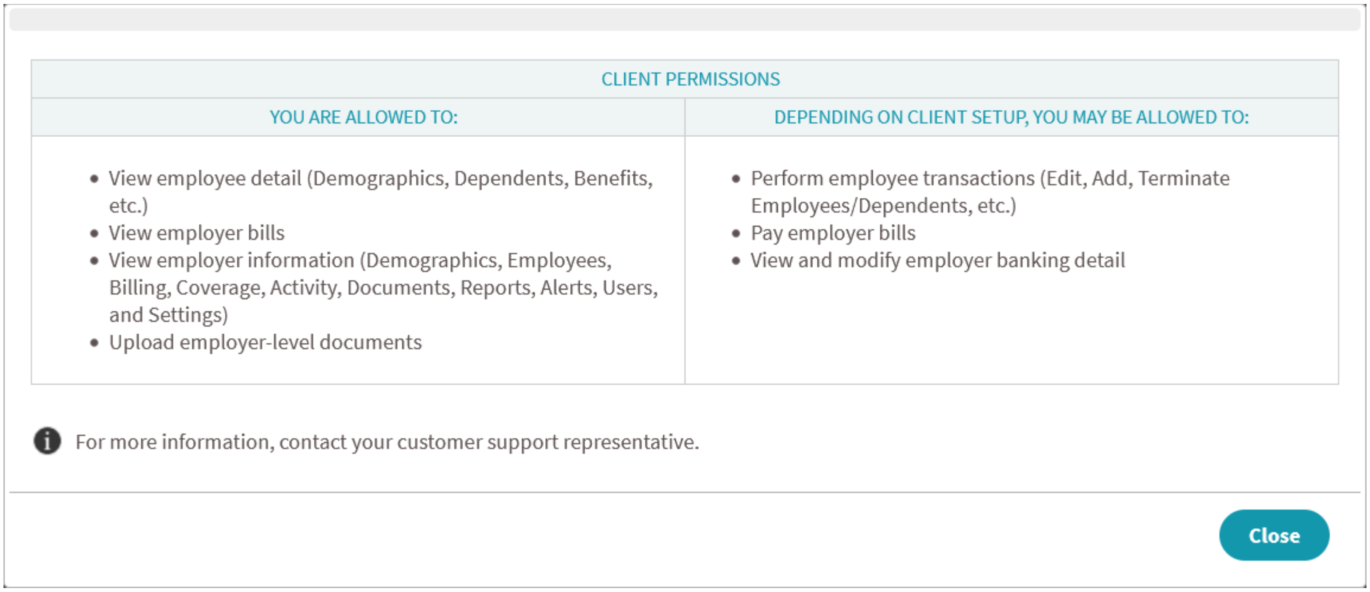
1. On the User menu, click **Account Preferences**.
2. Click **Registration Information and 2 Step Authentication Options**.
3. Next to **Use 2 Step Authentication**, select **No**.
4. To remove a device other than your *Registration Email*, click **Remove** in the row for that device.

✓ To change the email address or phone number for a device, you must remove and re-add it.

5. Once completed, click **Close**.

VIEW YOUR PERMISSIONS

Depending on the options configured for your organization and the permissions granted to your SIMON user account, there may be types of information your account is unable to view or edit. To get a better idea of what your account has permission to do in Partner Portal, on the User menu, click **Client Permissions**.

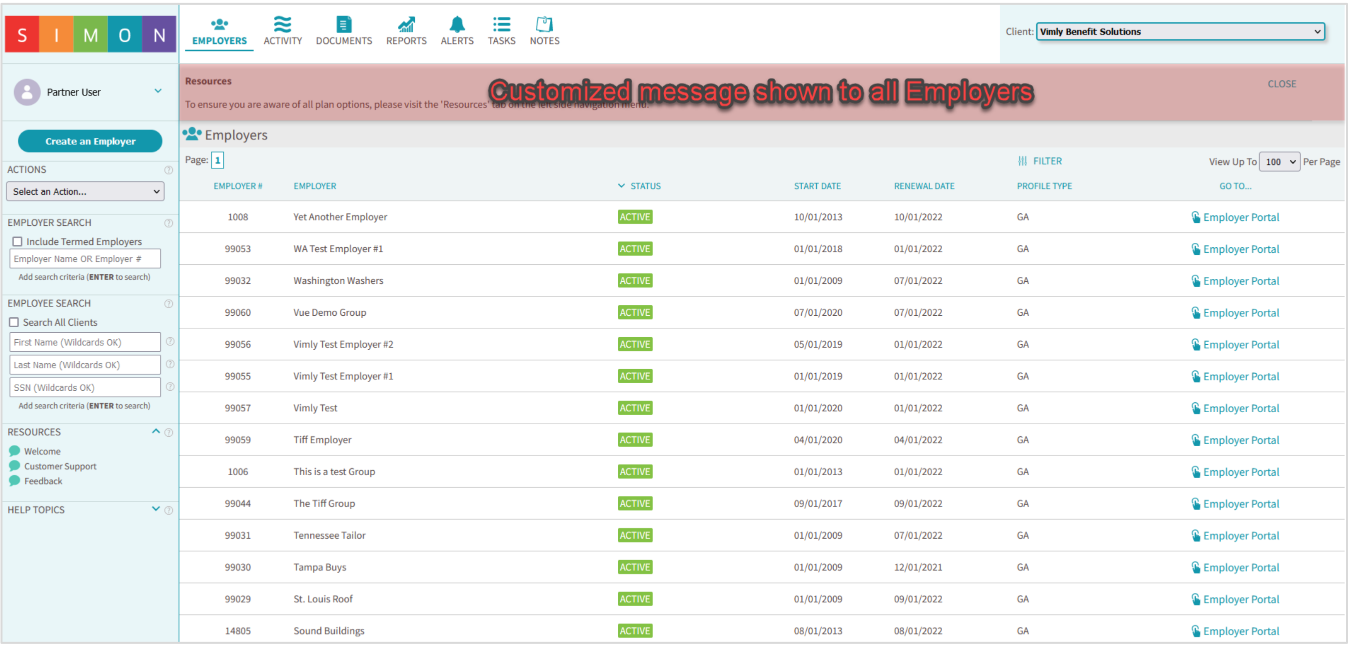


CLIENT PERMISSIONS	
YOU ARE ALLOWED TO:	DEPENDING ON CLIENT SETUP, YOU MAY BE ALLOWED TO:
• View employee detail (Demographics, Dependents, Benefits, etc.) • View employer bills • View employer information (Demographics, Employees, Billing, Coverage, Activity, Documents, Reports, Alerts, Users, and Settings) • Upload employer-level documents	• Perform employee transactions (Edit, Add, Terminate Employees/Dependents, etc.) • Pay employer bills • View and modify employer banking detail

For more information, contact your customer support representative.

Close

MANAGE EMPLOYERS



NOTE: You may not be able to perform all the steps described in this section. The permissions granted to your SIMON account determine what you can and cannot do. If you have questions about your account permissions, please contact the people managing this program for your organization.

From the **Employers** workspace, you can view and manage all employers, employees, and dependents under your organization.

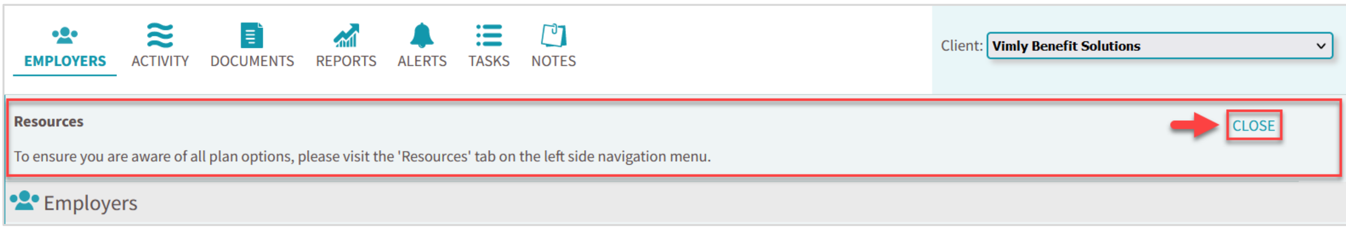
This list shows:

- The employer's **status** (*Active*, *Terminated*, or *Create – In Progress*)
- The employer's initial effective date (or **start date**) with your organization
- The employer's next expected **renewal date**
- The "profile type," which indicates your level of access to the employer
  - *GA* = General Agent-level access
  - *ER* = Employer-level access
  - *EE* = Employee-level access
- The employer's ID number (typically assigned by SIMON when the employer is created)

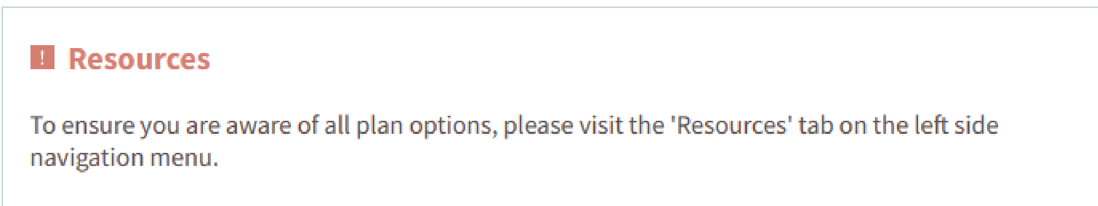
To view and manage an employer's information and settings, click the employer you want.

If you have a *GA* or *ER* profile type listed for the employer, you'll see a *Go To…* column at the far right of the list with a link to open the employer's portal.

Finally, if you've worked with Vimly staff to create a customized message for all employers (also known as the "custom widget"), you'll see it displayed above the list of employers. It serves as a regular reminder of the information currently displayed to all employers, and you can dismiss it from your view by clicking **Close**. Here's an example:



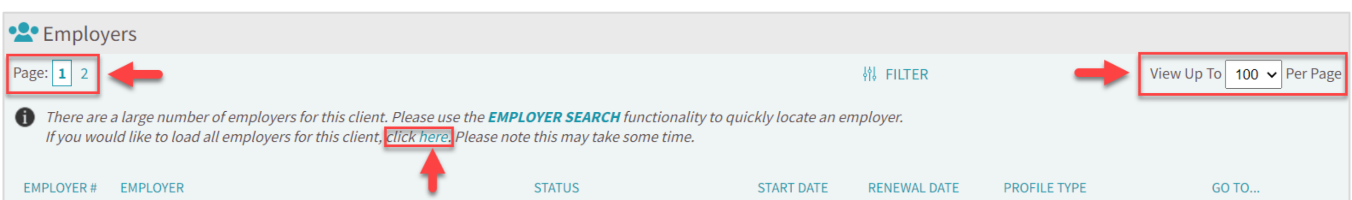
And here's what it looks like when employers open the Employer Portal:



If you need to make changes to this message, please contact Vimly staff for assistance.

FIND AN EMPLOYER

LOCATE AN EMPLOYER IN THE LIST



<u>If your organization has fewer than 200 employers</u>, you can quickly scroll thru the list to find the employer you want.

For performance reasons, SIMON loads just the first 200 employers in the list. However, if you need to load all employers into the list, you can click the "**here**" link in the informational text at the top of the list. Depending on how many employers you have, this load could take a long time to complete.

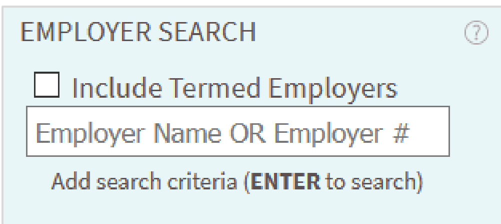
You can re-sort the list by clicking a column heading, and you can toggle between ascending (A-Z) and descending (Z-A) order by clicking the column heading again. You can use the **Page** control to move to the next page of employers, and you can control how many employers appear on one page (50 or 100).

You can also use the **Filter** button to reduce the list based on specific criteria, such as **Status**, **Start Date**, and **Renewal Date**. For best results, you might need to load all employers into the list by clicking the "**here**" link in the informational text at the top of the list. Otherwise, the filter might not include all employers that match your criteria.

To remove a filter, click the **Filter** button, and then click **Clear**.

SEARCH FOR AN EMPLOYER

If your organization has more than 200 employers, the best way to find the employer is to search. To do this, use the **Employer Search** box on the left sidebar.



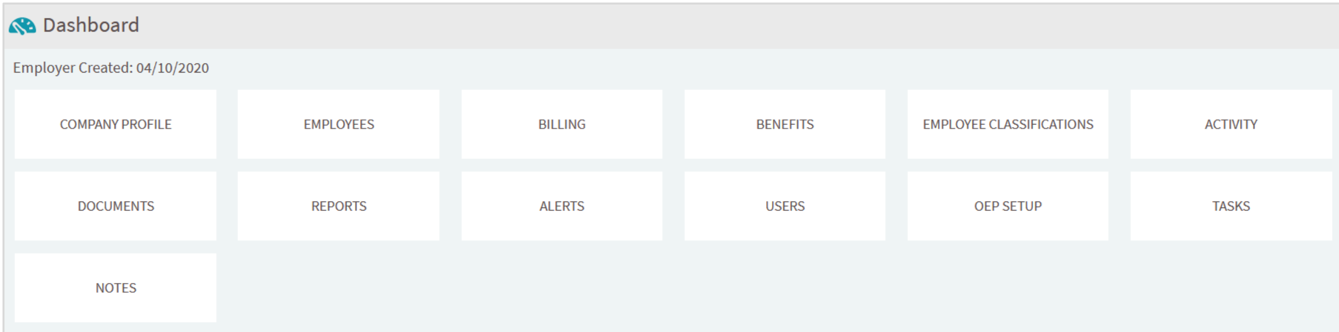
You can search by the employer's **legal** name, "Doing Business As" (**DBA**) name, or **pseudonym**. You can also search by the employer's **ID number**.

TIP: If the search results don't appear to match the employer you're looking for, check to see if there's a match on the employer's DBA name or pseudonym.

To search for an employer:

1. Enter at least 4 characters that appear consecutively in the employer's name OR enter the employer's exact ID number.
   For example, if you are searching for employers named ***Sheridan*** you could enter ***sher*** or ***erid*** or ***idan*** in the search box. If those characters appear consecutively anywhere in the name, SIMON will include it in the search results.
2. Press **ENTER**.
3. If no employers are found, enter another set of 4 characters and press **ENTER** again.
   By default, only employers in *Active* or *Created – In Progress* status are returned. If you want to include *Terminated* employers, select the **Include Termed Employers** check box.
   If you have access to multiple clients on the **Client menu** (at top right), you'll see a link to **Search All Clients** in the "no employers found" message.
4. To return to the full list of employers, near the top right of the page, click **Clear Search Results**.

VIEW AN EMPLOYER'S INFORMATION



To view an employer's information, make sure you're in the **Employers** workspace (click the **Employers** icon at the very top of the page), and then click the name of the employer you want in the list. If you don't see the employer you want, search for it.

This is the employer's dashboard. The options you see here are determined by your SIMON account permissions and by SIMON's configuration for your organization. If you have questions about this, please contact Vimly staff for assistance.

To go back to the list of employers, click **Close** near the top right of the page, or click the **Employers** icon at the very top of the page.

NOTE: Your browser's **Back** button won't take you back to previous pages, and your browser's **Refresh** button won't refresh the page you're viewing. See How to Go Back to Previous Pages and Refresh Pages for more information on how to navigate in Partner Portal.

EDIT AN EMPLOYER'S INFORMATION

NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.

SIMON stores employer information in a company profile, including:

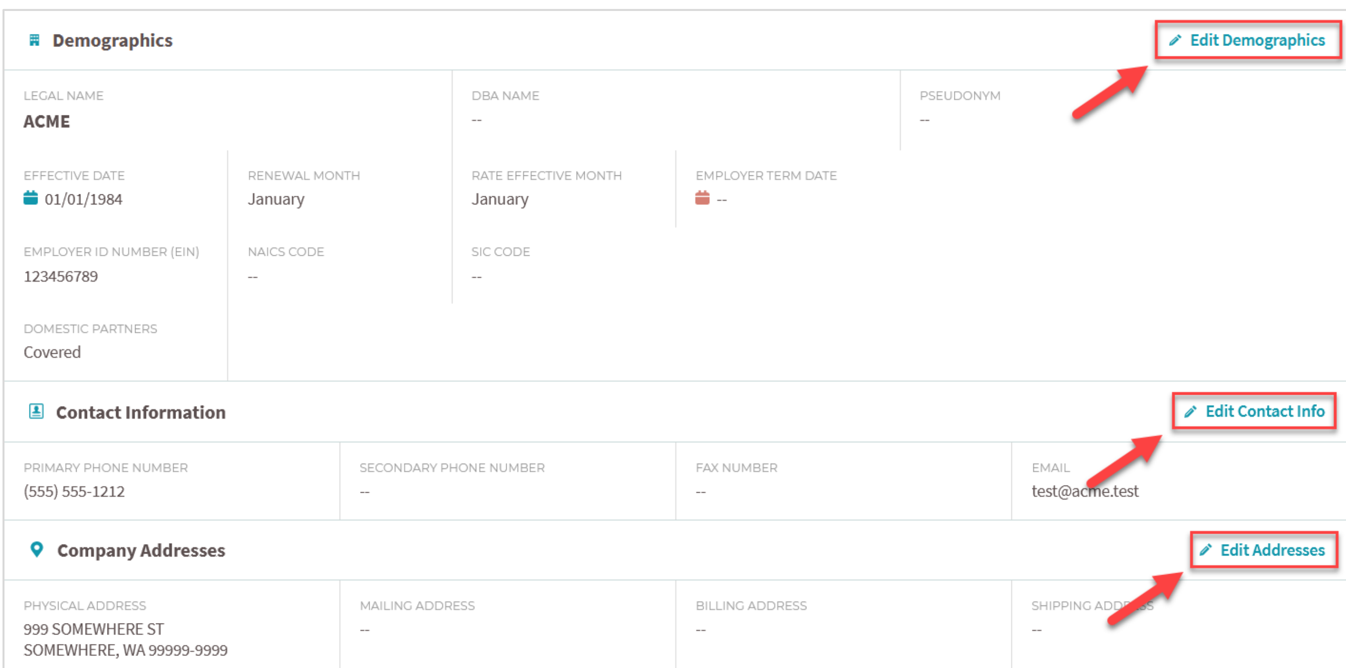
- Legal name
- "Doing Business As" (DBA) name (if applicable)
- Pseudonym name (if applicable)
- Tax ID / Employer ID Number (EIN)
- Standard Industry Classification (SIC) code
- North American Industry Classification System (NAICS) code
- Addresses, phone numbers, and email addresses
- Key company contacts

- Related brokers and agencies
- The employer's initial effective date with your organization
- COBRA information

The company profile also stores the employer's **Renewal Month** and **Rate Effective Month** (typically the same month), and the employer's **Domestic Partners** coverage preference.

To edit the company profile:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Company Profile**.
4. Scroll to the profile section you want to change, and then click the **Edit** link at the top right corner of that section.



Important notes:

- If you don't see the **Edit** links, you may not have permission to edit company profile information. Please contact Vimly for assistance.
- When editing demographics, if you don't know the appropriate SIC code for an employer, click **Lookup SIC code** to open the US Department of Labor's OSHA SIC Code search page.
- You cannot change the employer's initial **effective date**. If this date needs to be changed, please contact Vimly for assistance.

- Your account may not have permission to change the **Domestic Partners** coverage preference. If you're unable to change it, please contact Vimly for assistance.
- US and Canadian addresses are automatically validated by SIMON with the USPS when all required fields are completed. The **4-digit ZIP Code extension** field and **County** field are not required.
- If you're unable to change the **Broker** and **Agency** information, please contact Vimly for assistance.
- **COBRA Information** cannot be edited. If you need help with this information, please contact Vimly for assistance.

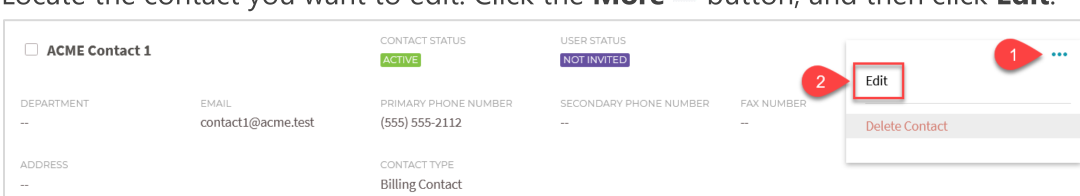
ADD, EDIT, OR DELETE EMPLOYER CONTACTS

To add a new contact:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Company Profile**, and then scroll to the **Employer Contacts** section.
4. Click **+Add a New Contact**. If you selected this option in error, click **Delete Contact**.
5. Enter the contact's information. If you want to enter a specific address for the contact, click **+Add an address**. If you selected this option in error, click **Remove Address**.
6. If you want to grant a contact access to SIMON, click **+Add as user** and select the appropriate permissions. If you selected this option in error, click **Delete User**.
7. If you want to add another contact, click **+Add another contact**. If you selected this option in error, click **Delete Contact**.
8. When you are finished, at the top right of the page, click **Save Changes**.

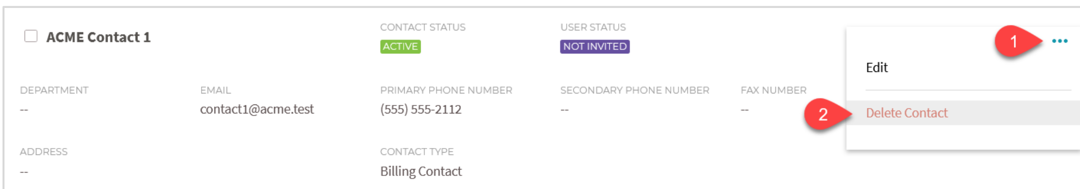
To edit a contact:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Company Profile**, and then scroll to the **Employer Contacts** section.
4. Locate the contact you want to edit. Click the **More** button, and then click **Edit**.

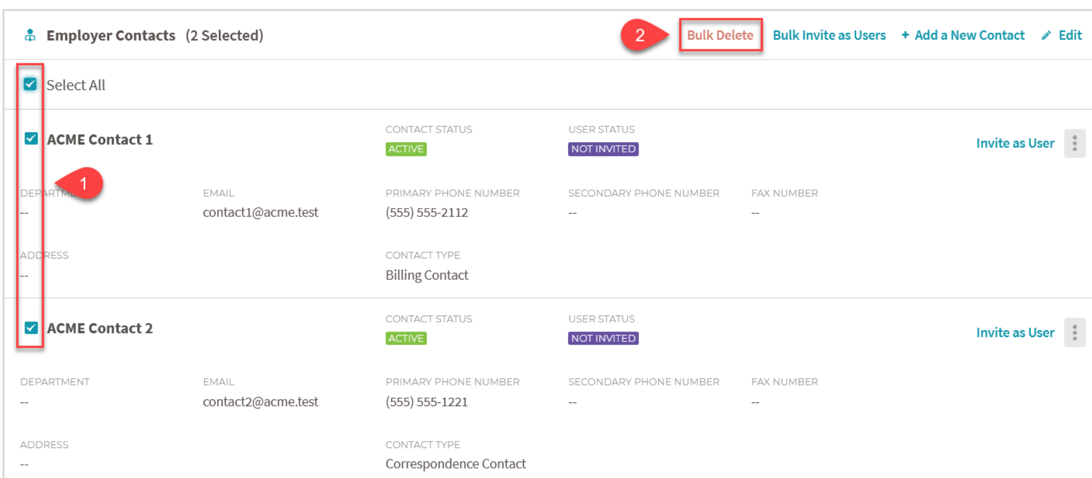


To delete a contact:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Company Profile**, and then scroll to the **Employer Contacts** section.
4. Locate the contact you want to delete. Click the **More** button, and then click **Delete Contact**.



5. If you want to delete multiple contacts, click the check boxes next to the ones you want (or click **Select All**), and then click **Bulk Delete**.



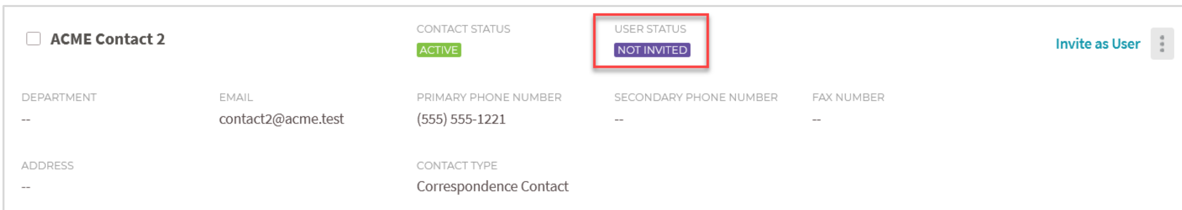
TIP: If an employer has an inactive contact, but you want to keep that contact's information in SIMON, instead of deleting the contact, you can mark the contact as inactive. To do this, edit the contact to change the **Contact Status** to **Inactive**.

However, please note that SIMON may be configured to hide inactive contacts for employers under your organization. If an inactive contact is no longer displayed after you edit it, and you need to get it back, please contact Vimly for assistance.

GRANT AN EMPLOYER CONTACT ACCESS TO SIMON

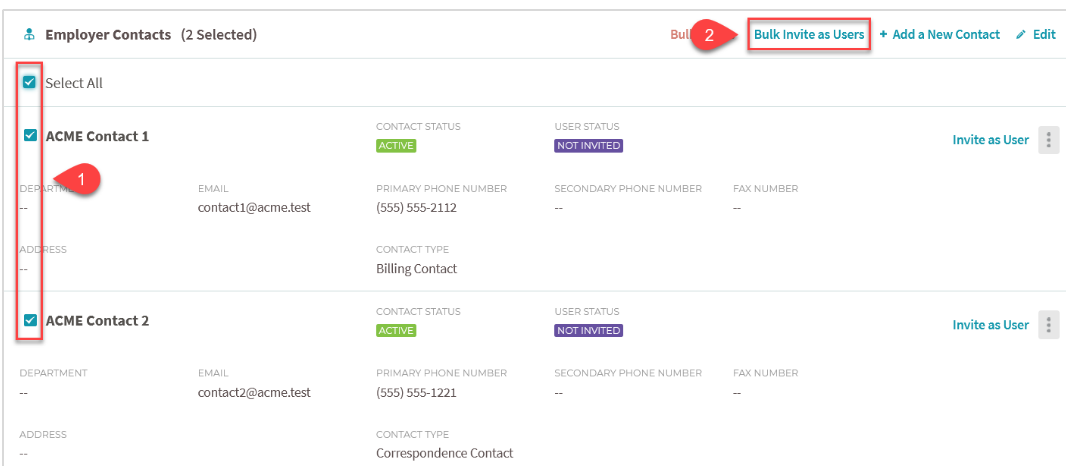
NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.

Not all company contacts are SIMON users. You can quickly see if a contact has access to SIMON by looking at the contact's **User Status** in the **Employer Contacts** section of the **Company Profile**. If the contact is listed as **NOT INVITED**, they do not have access to SIMON.

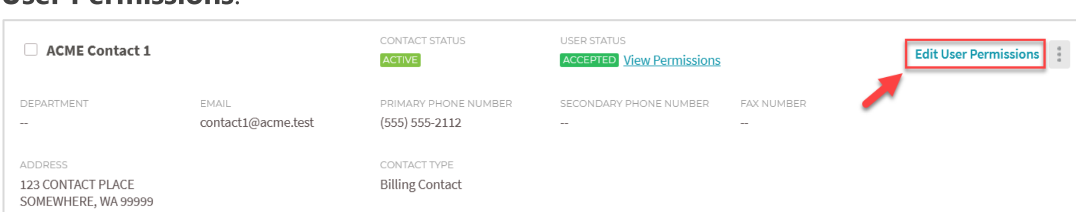


If a company contact needs access to SIMON, you can invite them from the **Company Profile** page.

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Company Profile**, and then scroll to the **Employer Contacts** section.
4. Locate the contact you want to invite, and then click **Invite as User**.
   If you want to invite multiple contacts, click the check boxes next to the ones you want (or click **Select All**), and then click **Bulk Invite as Users**.

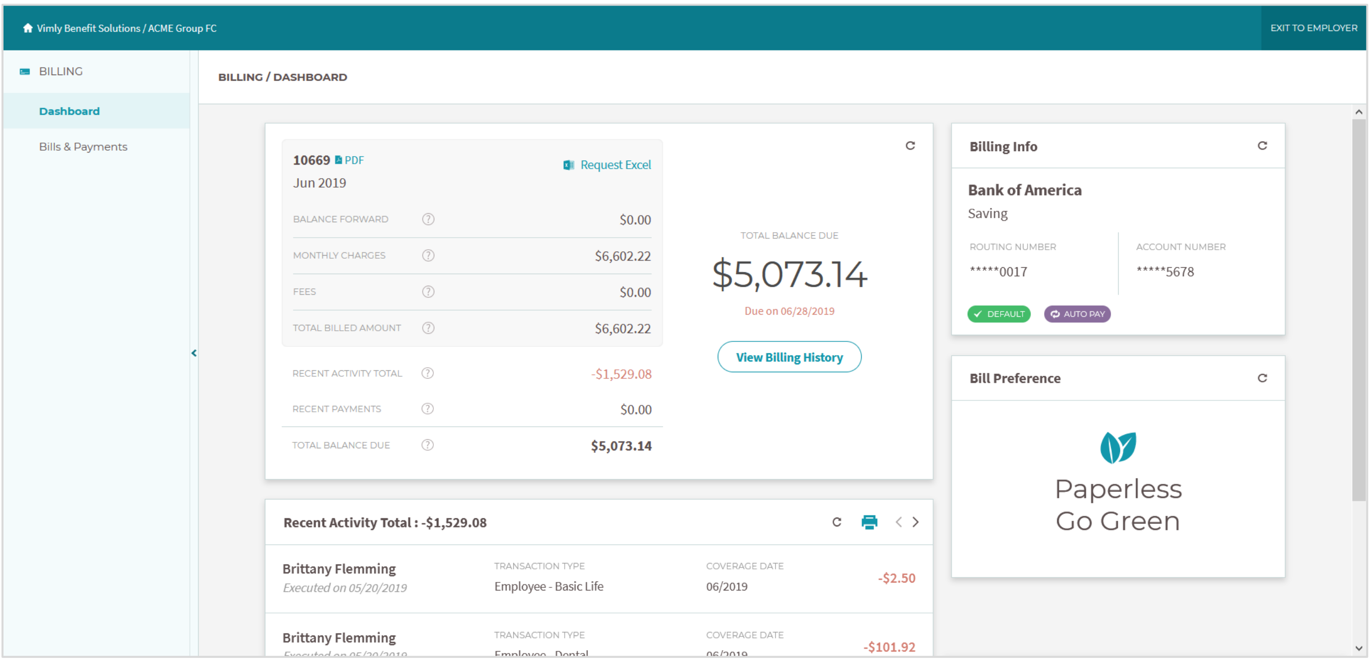


5. Follow the steps to confirm the user's email address, set their permissions in SIMON, and send the invitation. Once you've completed these steps, the contact's **User Status** will change to **INVITED**. When the user accepts the invitation, the **User Status** will change to **ACCEPTED**.
6. To change the permissions granted to this user, or to remove their access to SIMON, click **Edit User Permissions**.



VIEW EMPLOYER BILLS AND PAYMENTS

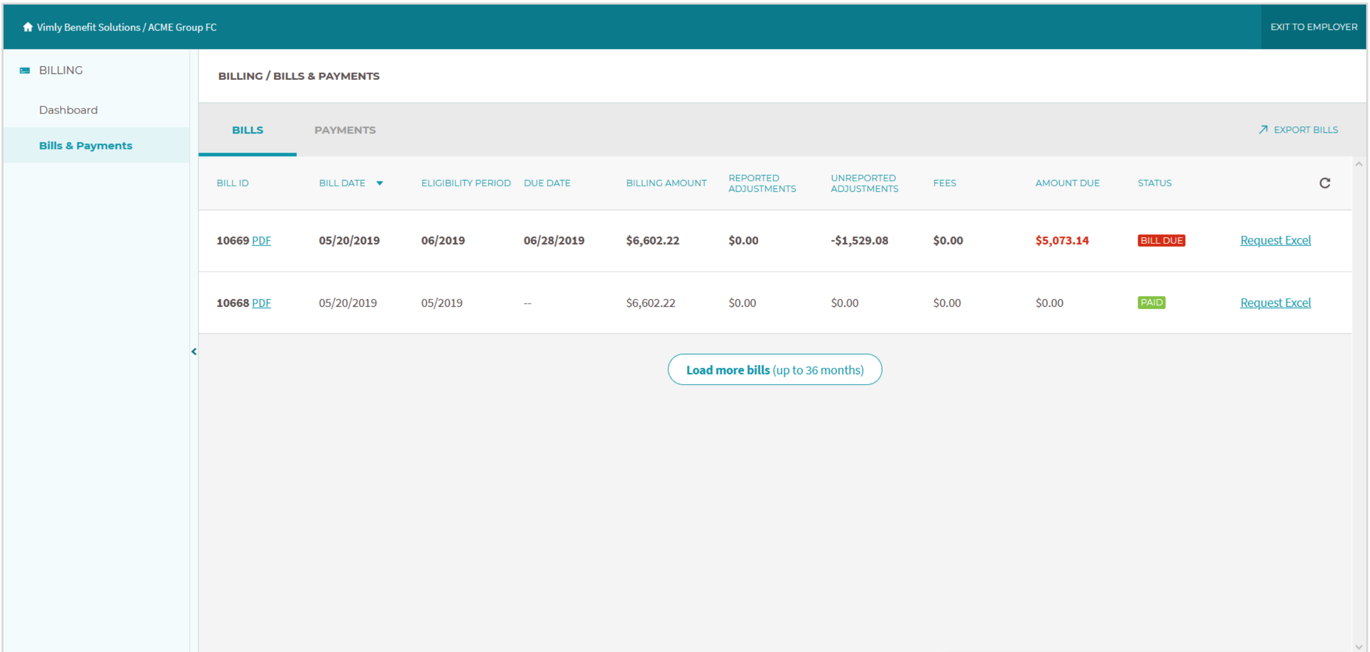
NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.



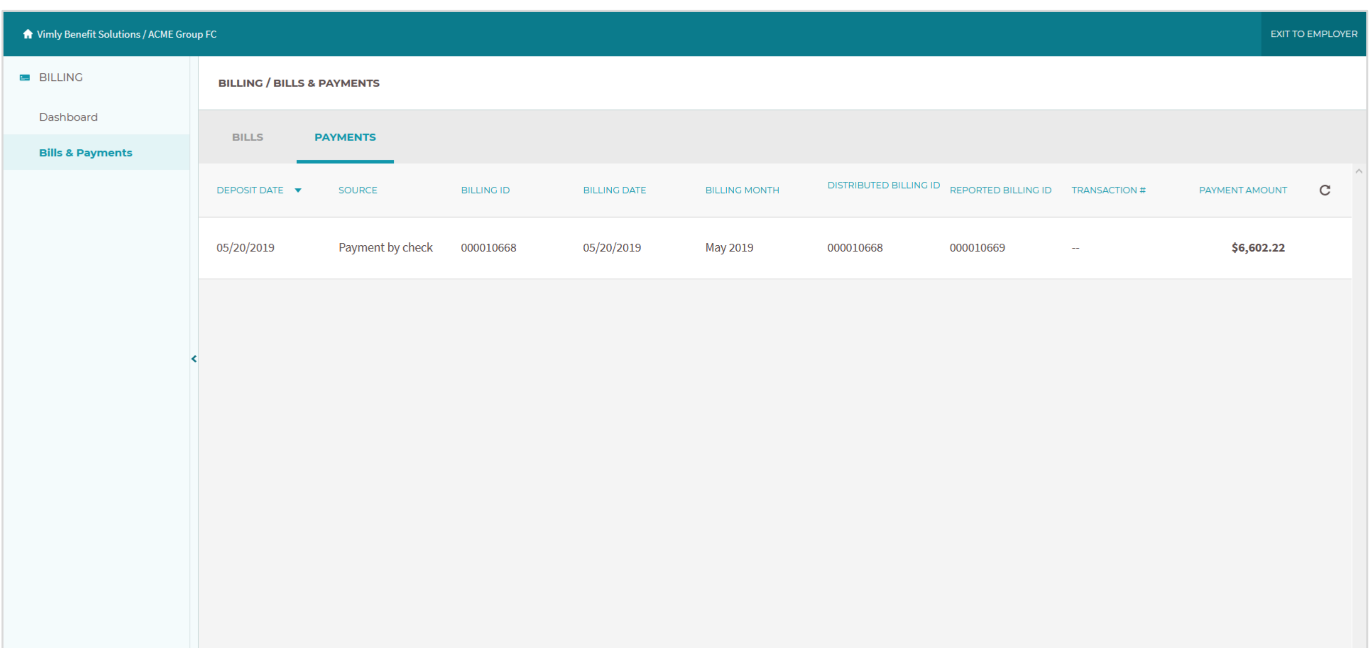
You can view the same billing and payments information that's available to the employer in the Employer Portal. To do this, in the **Employers** workspace, click the employer you want, and then on the employer's dashboard, click **Billing**.

On the left sidebar, the **Dashboard** displays the employer's current bill summary, a list of recent billing activity, and the employer's "masked" bank account information. Using the links in the bill summary, you can open a copy of the bill summary in **PDF** format or can request a more detailed billing invoice in **Excel** (.xlsx) format. If you request the Excel option, SIMON adds the request to the report queue and notifies you via email when the Excel file is ready for download.

If the employer has opted into Vimly's **Go Green** paperless billing option, you'll see it reflected on the dashboard. For more information about Go Green, please contact Vimly staff for assistance.



On the left sidebar, **Bills & Payments** displays a list of billing invoices on the **Bills** tab. You can load up to 36 months of previous billing invoices by clicking the **Load more bills** button. You can export this list of bills to a comma-separated-values (CSV) file by clicking **Export Bills** at the top right of the bills list. Like the billing summary on the dashboard, links to open a copy of the bill summary in **PDF** format or request a more detailed billing invoice in **Excel** (.xlsx) format are also available on this list.



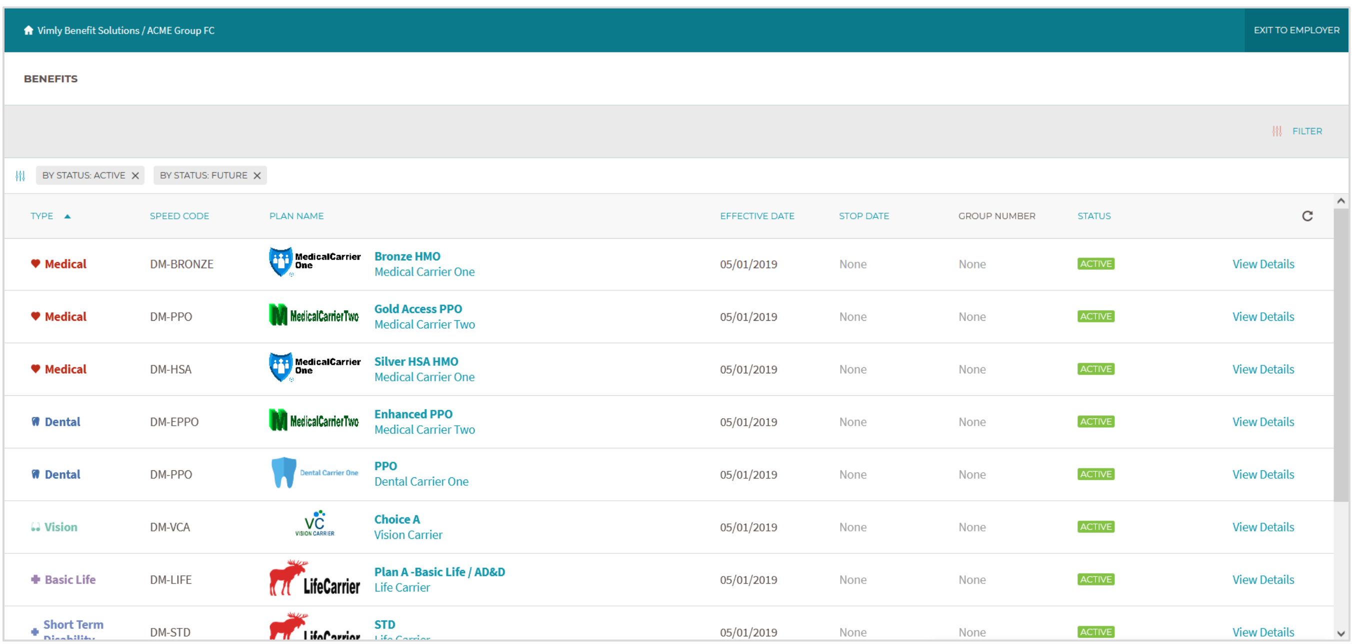
On the **Payments** tab, you'll find a list of all payments made in the last 36 months.

On either list, you can click the **Refresh** button to load the most recent billing and payment information.

When you are finished and want to return to the employer's dashboard, at the top right of the page, click **Exit to Employer**.

VIEW EMPLOYER BENEFITS

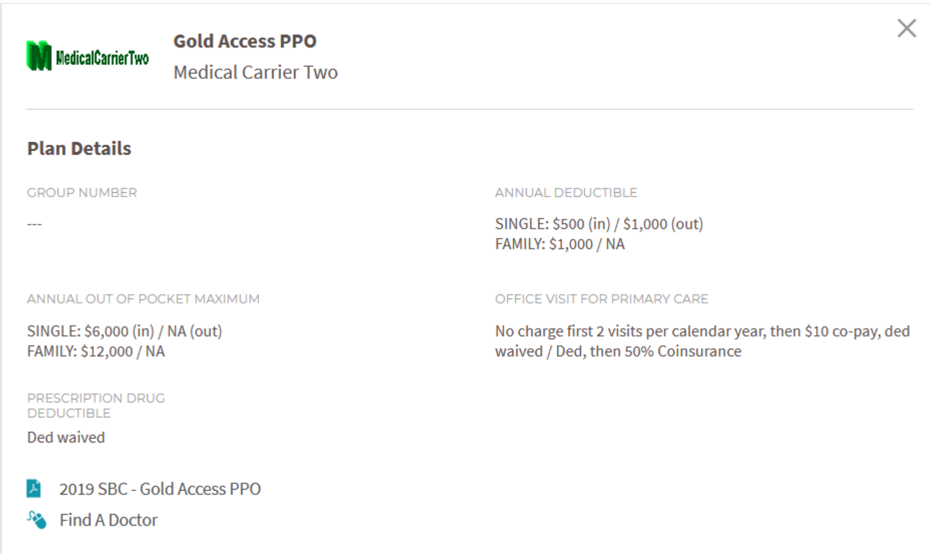
NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.



You can view all the benefits offered by an employer. In the **Employers** workspace, click the employer you want, and then on the employer's dashboard, click **Benefits**.

By default, *Active* and *Future* benefits are shown. *Future* benefits are shown only if the employer has been renewed. You can show past ("*Terminated*") benefits, and you can filter the list based on benefit type. To filter the list, at the top right of the list, click **Filter**.

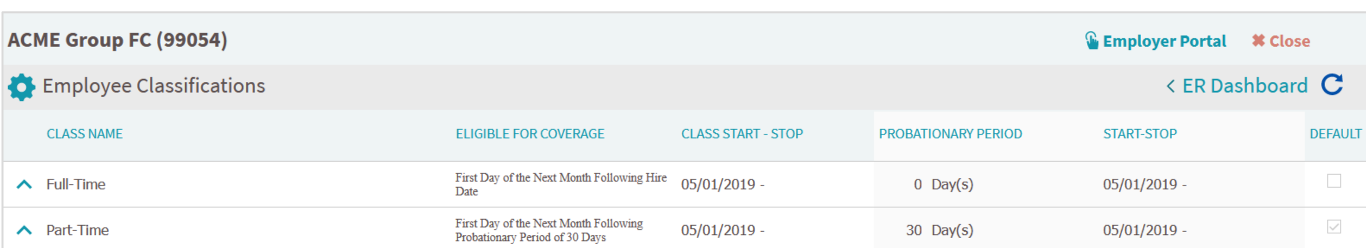
If you'd like to see more details about a plan, click the **View Details** link for that plan. For example, for medical plans, you can see the annual out-of-pocket maximums and annual deductibles, open related documents like SBCs, and view other helpful information when you click the name of the medical plan.



If benefit changes are needed, or if you have any questions about this list, please contact Vimly staff for assistance.

VIEW THE EMPLOYEE CLASSIFICATIONS USED BY AN EMPLOYER

NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.

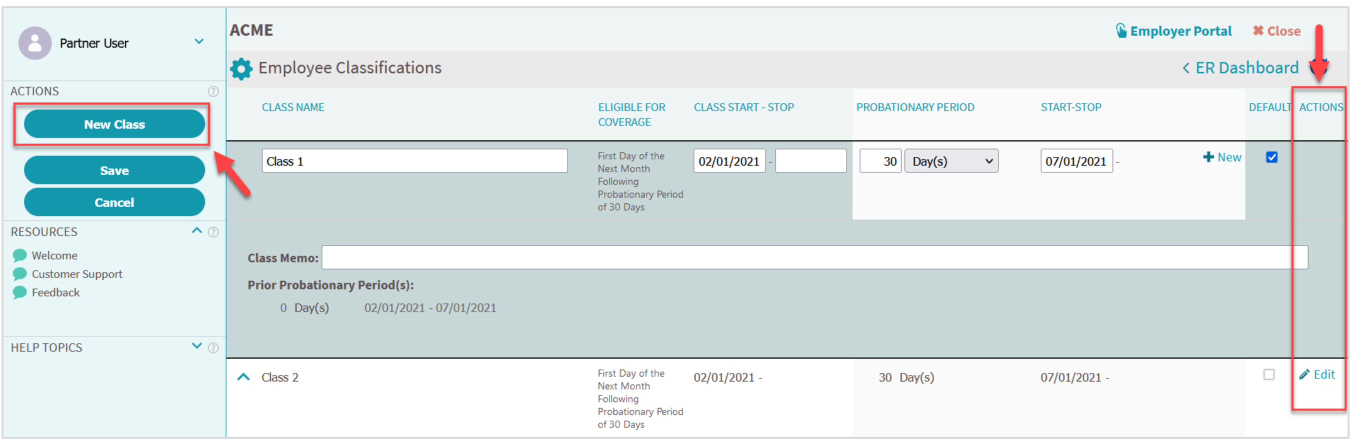


CLASS NAME	ELIGIBLE FOR COVERAGE	CLASS START - STOP	PROBATIONARY PERIOD	START-STOP	DEFAULT
Full-Time	First Day of the Next Month Following Hire Date	05/01/2019 -	0 Day(s)	05/01/2019 -	
Part-Time	First Day of the Next Month Following Probationary Period of 30 Days	05/01/2019 -	30 Day(s)	05/01/2019 -	✓

You can view the employee classifications used by an employer. In the **Employers** workspace, click the employer you want, and then on the employer's dashboard, click **Employee Classifications**.

You can click the ^ arrows to expand each row and reveal any "memo" information associated with a classification.

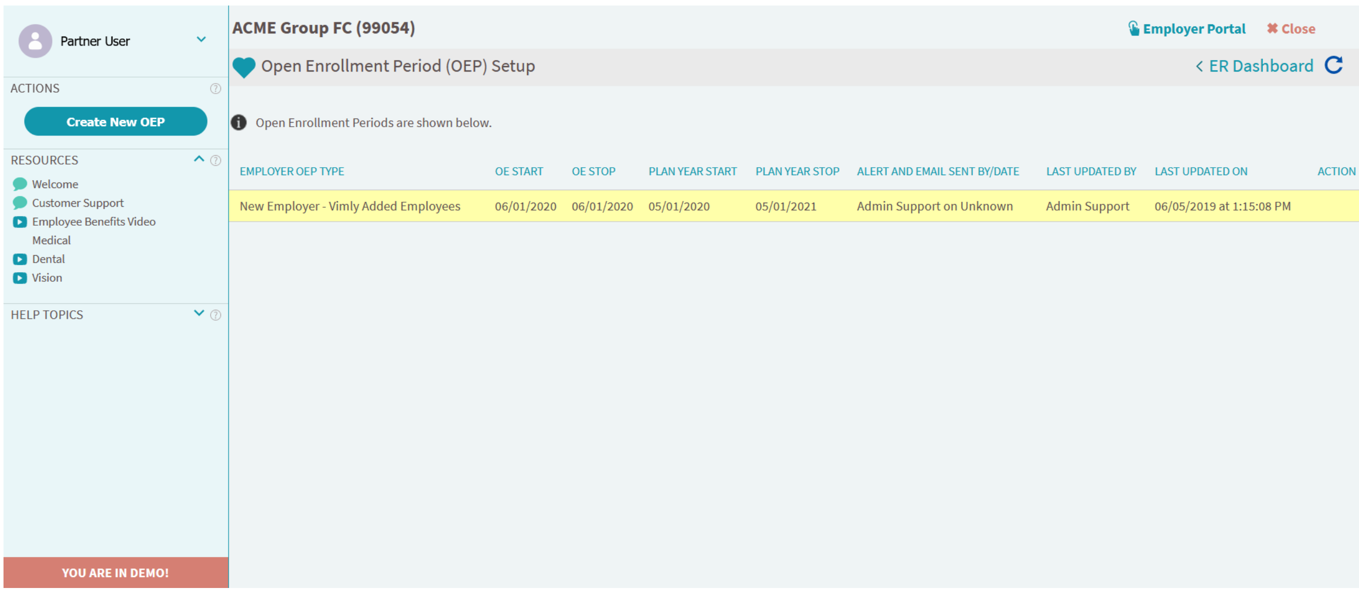
If SIMON is configured to allow your organization to add and edit employee classifications, you'll see an **Actions** column on the right side of the list that contains **Edit** links. You can click these links to make changes to existing classifications. You'll also see a **New Class** button in the left sidebar. Click this button to add new employee classifications.



If you don't see these options, please contact Vimly staff for assistance with classification changes.

MANAGE OPEN ENROLLMENT FOR AN EMPLOYER

NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.



In Partner Portal, you can start or change Open Enrollment Periods (OEP) for the employers in your organization. During this period, new members can be added with the change reason of *Open Enrollment*. If employee self-service (ESS) is configured for your organization, they can login and make new benefit elections during this period.

OEPs are managed on an employer-by-employer basis. You cannot create one OEP that applies to multiple employers.

To manage OEP for an employer:

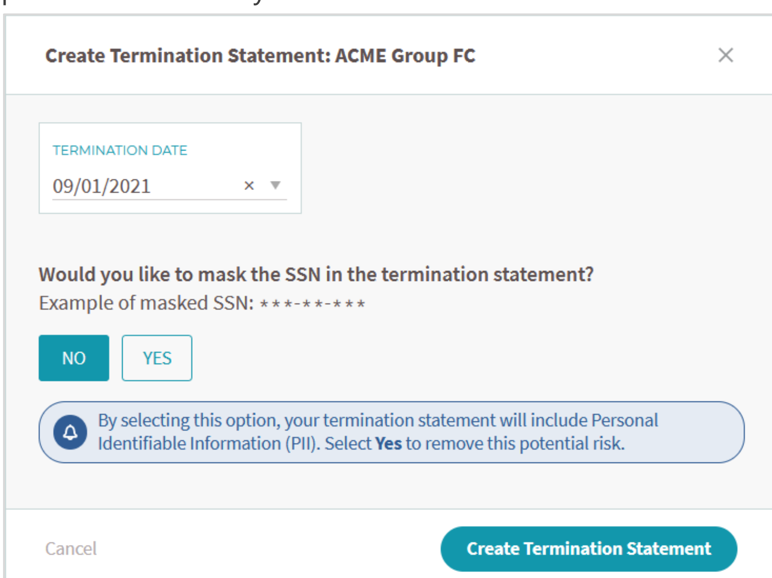
1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. On the employer's dashboard, click **OEP Setup**.
4. If you want to change an existing OEP, click that row in the list.
   If you want to create a new OEP, on the left sidebar, click **Create New OEP**.
5. Follow the instructions on the next page to create or change the OEP.
6. When you are finished, on the left sidebar, click **Save OEP**.

CREATE A DRAFT TERMINATION STATEMENT

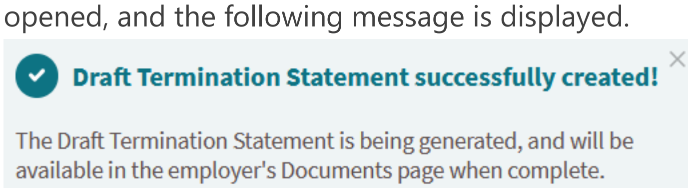
NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.

If you need to create a termination statement before terminating an employer, you can have SIMON generate a draft termination statement.

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. On the left sidebar, click **Create Term Statement**.
4. Select the termination date for the employer.
   The available retroactive dates are determined by your SIMON setup. If you need an earlier date, please contact Vimly staff for assistance.

5. Select the Social Security Number (SSN) masking option you want.
6. Click **Create Termination Statement**. When you do this, the employer's **Documents** page is opened, and the following message is displayed.

7. Click the name "**Draft Termination Statement**" to view the statement (in PDF format).
   The statement is only visible to you and other General Agent-level users of Partner Portal in your organization. Upon creation, it is not visible to the employer.

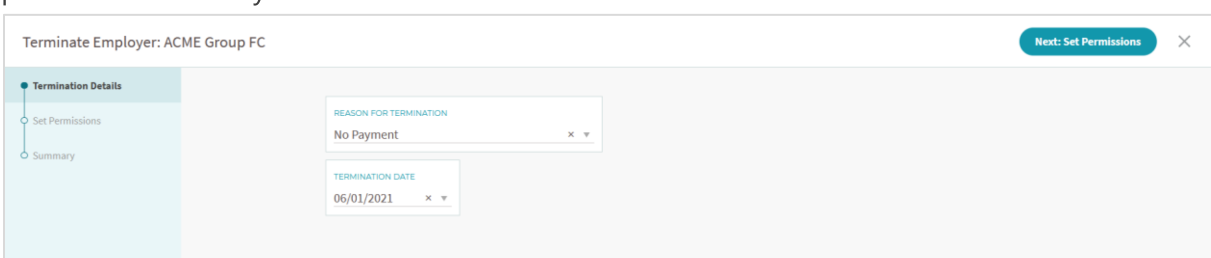
8. If the statement is ready to be shared with the employer, you can make it visible in their Employer Portal by clicking **Edit Share Options** (at the far right of the "Draft Termination Statement" row), select **Employer**, and then click **Save Changes**.

TERMINATE AN EMPLOYER

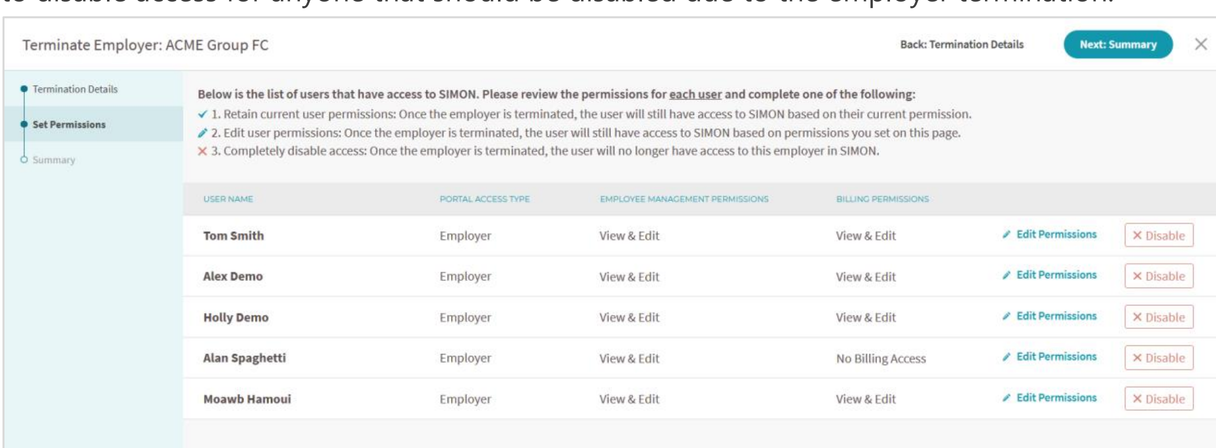
NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.

SIMON will walk you thru the steps to terminate an employer.

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. On the left sidebar, click **Terminate Employer**.
4. On the next page, select the **Reason for Termination** and the **Termination Date**.
   The available retroactive dates are determined by your SIMON setup. If you need an earlier date, please contact Vimly staff for assistance.

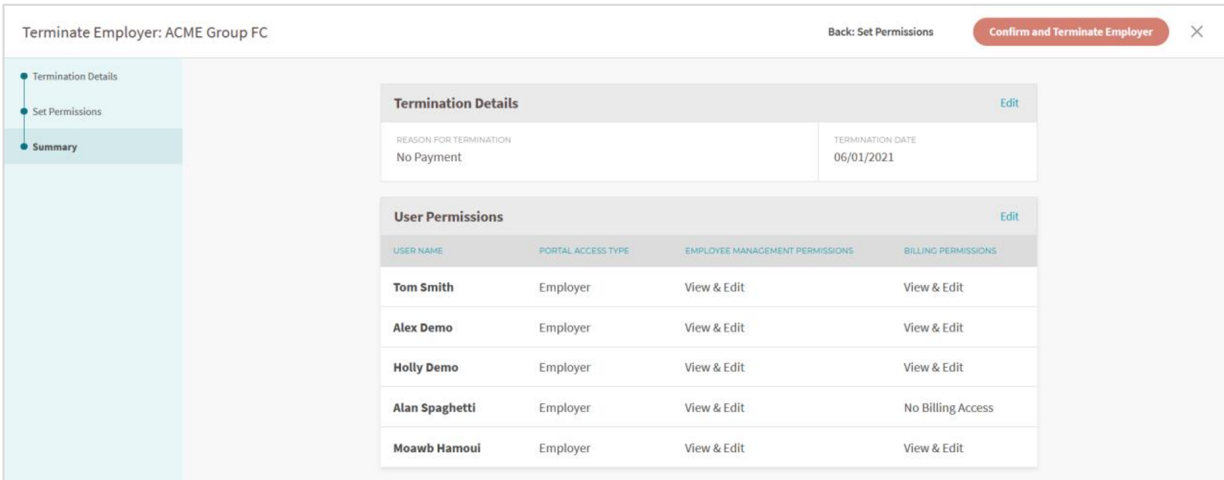


5. Click **Next: Set Permissions**.
6. On the next page, SIMON presents a list of all users with access to the employer. This allows you to disable access for anyone that should be disabled due to the employer termination.



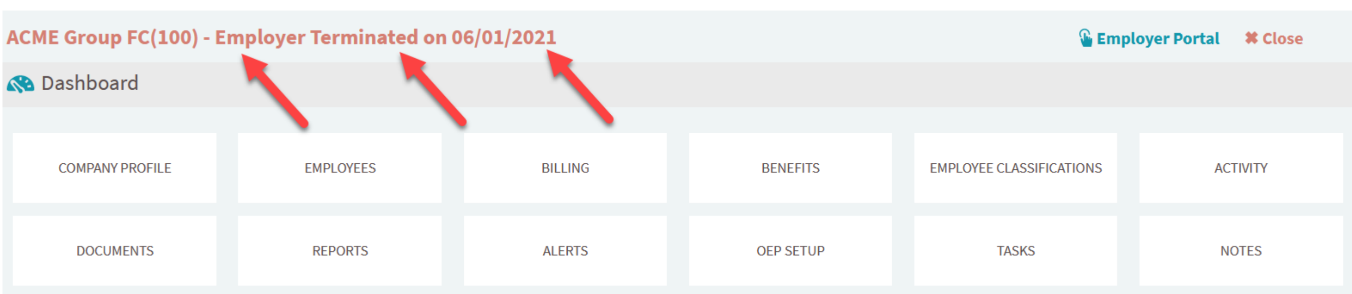
7. When you are finished, click **Next: Summary**.

8. Review the summary and click **Back** or **Edit** if anything needs to be changed. When you are ready, click **Confirm and Terminate Employer**.



If successful, you'll see a message indicating that the termination is in progress. You can refresh this message page by clicking the "**click here**" link, or you can click **Close**.

Once the employer is terminated, the employer's dashboard will display with termination information reflected.



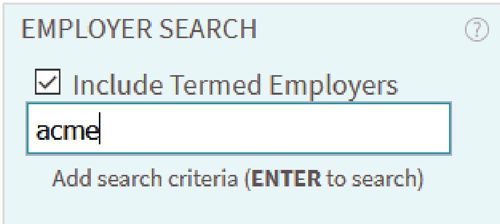
Also, under **Documents**, you'll find the "**Final Employer Termination Statement**" PDF file.

REINSTATE A TERMINATED EMPLOYER

NOTE: Based on your SIMON permissions, you may not be able to perform the steps described in this section. For assistance, please contact the people managing this program for your organization.

If you need to reinstate a terminated employer, you can do so at any time. This process puts the employer back to its original state prior to termination. This means that all coverages, employees, classes, and anything else that was active at the time of termination will be re-activated as if it was never terminated.

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. Search for the terminated employer. Be sure to select the **Include Termed Employers** checkbox.



3. In the search results, click the terminated employer you want to reinstate.
4. On the left sidebar, click **Reinstate Employer**.
5. Review the information, and then at the top right of the page, click **Confirm and Reinstate**.

If successful, you'll see a message indicating that the reinstatement is in progress. You can refresh this message page by clicking the "**click here**" link, or you can click **Close**.

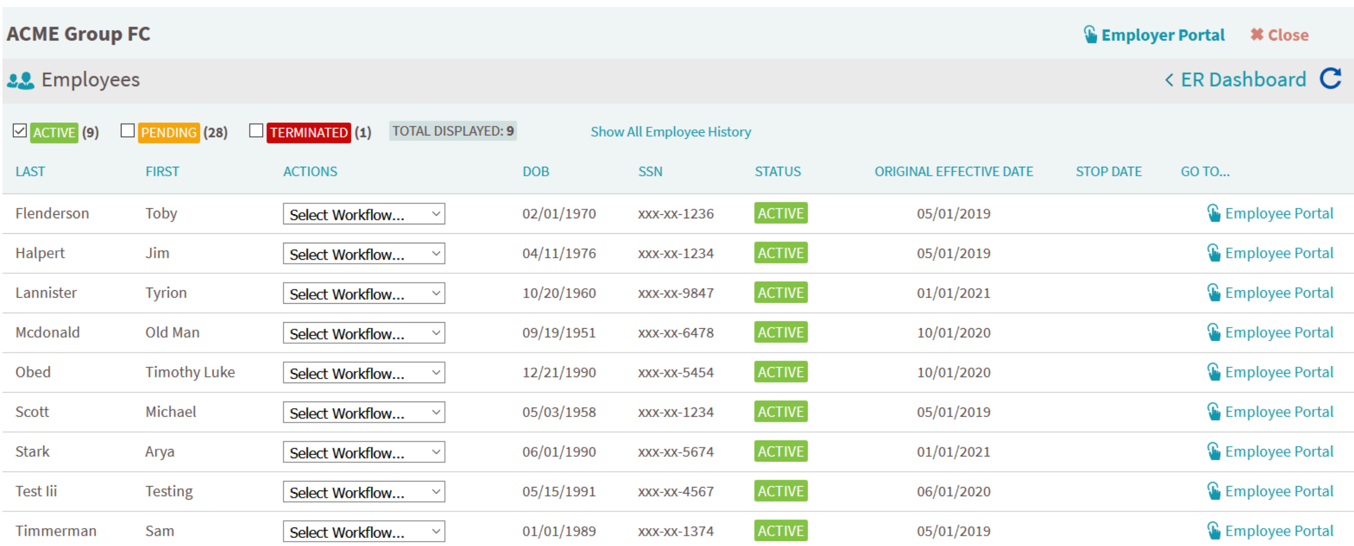
Once the employer is reinstated, the employer's dashboard will no longer display termination information. Also, the employer's **Documents** list will retain any "draft" or "final" termination statements that were previously created.

MANAGE EMPLOYEES AND DEPENDENTS

NOTE: You may not be able to perform all the steps described in this section. The permissions granted to your SIMON account determine what you can and cannot do. If you have questions about your account permissions, please contact the people managing this program for your organization.

FIND AN EMPLOYEE

LOCATE AN EMPLOYEE IN THE LIST


ACME Group FC — Employer Portal — Close
Employees — ER Dashboard
ACTIVE (9) — PENDING (28) — TERMINATED (1) — TOTAL DISPLAYED: 9 — Show All Employee History

LAST	FIRST	ACTIONS	DOB	SSN	STATUS	ORIGINAL EFFECTIVE DATE	STOP DATE	GO TO...
Flenderson	Toby	Select Workflow...	02/01/1970	xxx-xx-1236	ACTIVE	05/01/2019		Employee Portal
Halpert	Jim	Select Workflow...	04/11/1976	xxx-xx-1234	ACTIVE	05/01/2019		Employee Portal
Lannister	Tyrion	Select Workflow...	10/20/1960	xxx-xx-9847	ACTIVE	01/01/2021		Employee Portal
Mcdonald	Old Man	Select Workflow...	09/19/1951	xxx-xx-6478	ACTIVE	10/01/2020		Employee Portal
Obed	Timothy Luke	Select Workflow...	12/21/1990	xxx-xx-5454	ACTIVE	10/01/2020		Employee Portal
Scott	Michael	Select Workflow...	05/03/1958	xxx-xx-1234	ACTIVE	05/01/2019		Employee Portal
Stark	Arya	Select Workflow...	06/01/1990	xxx-xx-5674	ACTIVE	01/01/2021		Employee Portal
Test Iii	Testing	Select Workflow...	05/15/1991	xxx-xx-4567	ACTIVE	06/01/2020		Employee Portal
Timmerman	Sam	Select Workflow...	01/01/1989	xxx-xx-1374	ACTIVE	05/01/2019		Employee Portal

If you know the employer of the employee you're looking for, you can quickly open that list of employees and scroll thru to find them.

To open the employee list for an employer:

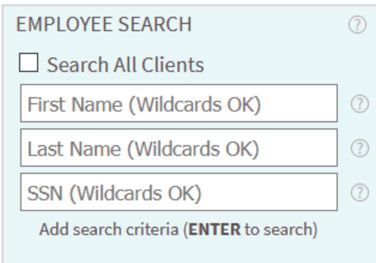
1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**.

You can re-sort the list by clicking column headings (*Last*, *First*, *SSN*, *Status*, *Original Effective Date*, *Stop Date*), and you can toggle between ascending (A-Z) and descending (Z-A) order by clicking the column heading again. Use the **Active**, **Pending**, and **Terminated** status check boxes at the top of the list to include or exclude employees based on status.

For performance reasons, SIMON loads only employees that were active within a certain number of years (as few as 1 year back, and as much as 6 years back, with 3 years back being the most common setting). If you are looking for an older employee record, click **Show All Employee History** to load all employee records back to the "beginning of time" (meaning everything stored in SIMON).

SEARCH FOR AN EMPLOYER

If you don't know the employer of the employee, but you know their name or Social Security Number (SSN), you can search by using the **Employee Search** box on the left sidebar.



You can search by the employee first name, last name, or Social Security Number (SSN). You don't need to know their exact name. SIMON will search for matching employees in any status (*Active*, *Pending*, and *Terminated*).

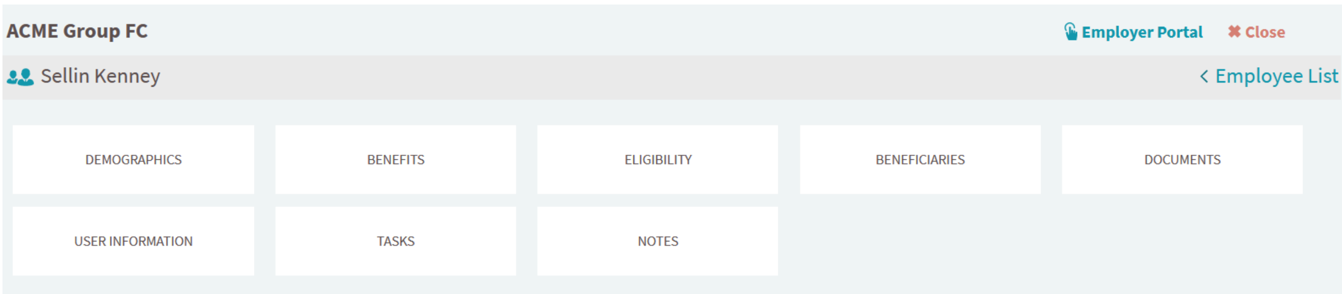
To search for an employee:

1. In the appropriate search box, enter the first 4 characters of the employee's **First** or **Last** name OR enter the employee's exact **Social Security Number** (SSN).
    a. If the employee's first name is "Stanley," enter "stan" in the First Name box.
    b. If the employee's last name is "Miller," enter "mill" in the Last Name box.
    c. If the employee's Social Security Number is 099-888-7777, enter that number (with or without the dashes) in the SSN box.
2. Press **ENTER**.
3. If no employees are found, or SIMON reports that the search is too broad, try the following:
    a. Enter more than 4 characters in the search box you used.
    b. Use more than one search box. You can use all 3 boxes together
    c. Use wildcards to refine your search. Click the ⓘ icons next to each search box for instructions and helpful examples.

Search results for: **First Name: 'stan', Last Name: '', SSN: ''** — ✕ Clear Search Results

EMPLOYEE (EMPLOYER)	STATUS	START DATE - STOP DATE	PROFILE TYPE	SSN #
Stan Smith (Sonics Trust)	TERMINATED	07/01/2010 - **07/01/2010**	Employee	xxx-xx-1720
Stan Man (Seattle Trust)	ACTIVE	01/01/2017	Employee	xxx-xx-3311
Stannis Baratheon (ACME Group FC)	PENDING	04/01/2021	Employee	xxx-xx-4232
Stanley Hudson (ACME Group FC)	PENDING	05/01/2019	Employee	xxx-xx-4311

VIEW AN EMPLOYEE'S INFORMATION



To view an employee's information:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.

This is the employer's dashboard. The options you see here are determined by your SIMON account permissions and by SIMON's configuration for your organization. If you have questions about this, please contact Vimly staff for assistance.

To go back to the list of employees, click **Employee List** near the top right of the page.

To go back to the list of employers, click **Close** near the top right of the page, or click the **Employers** icon at the very top of the page.

NOTE: Your browser's **Back** button won't take you back to previous pages, and your browser's **Refresh** button won't refresh the page you're viewing. See How to Go Back to Previous Pages and Refresh Pages for more information on how to navigate in Partner Portal.

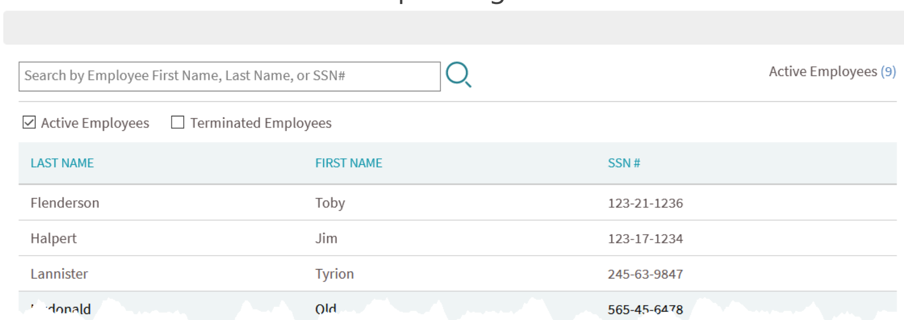
PRINT AN EMPLOYEE'S INFORMATION

You can view a concise list of an employee's information in SIMON, including their demographics, social security number, contact information, employment details, prior coverage carrier, current benefits, dependents, and beneficiaries (if applicable).

1. On the **Actions** menu, click **View Member(s)**.
2. In the **Employer/Employer #** box, enter at least 4 characters that appear consecutively in the employer's name OR enter the employer's exact ID number.
   For example, if you are searching for employers named ***Sheridan***, you could enter ***sher*** or ***erid***

or ***idan*** in the search box. If those characters appear consecutively anywhere in the name, SIMON will include it in the search results.

3. Press **ENTER**.
4. If multiple employers match your search, select one in the results list.
   If only one employer matches your search, you'll see a list of the employer's active employees.
5. Select an employee from the list.
   To select a terminated employee, click the **Terminated Employees** checkbox.
   You can narrow down the list by entering all or part of the employee's name or social security number in the search box and pressing **ENTER**.



6. To print this information, print the page using your browser's **Print** command.
7. When you are finished, in the left sidebar, click **Close**.

VIEW AN EMPLOYEE'S PORTAL

If employee self-service (ESS) is configured for your organization and your SIMON account has permission to open employee portals, follow these steps to open

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, [search for it](#).
3. Click **Employees**, and then locate the employee you want in the list. If you don't see the employee, [search for them](#).
4. In the **Go To…** column, click **Employee Portal**.

EDIT AN EMPLOYEE'S INFORMATION

SIMON stores the following employee information, including:

- First Name
- Middle Name
- Last Name
- Name Suffix (Jr., Sr., etc.)

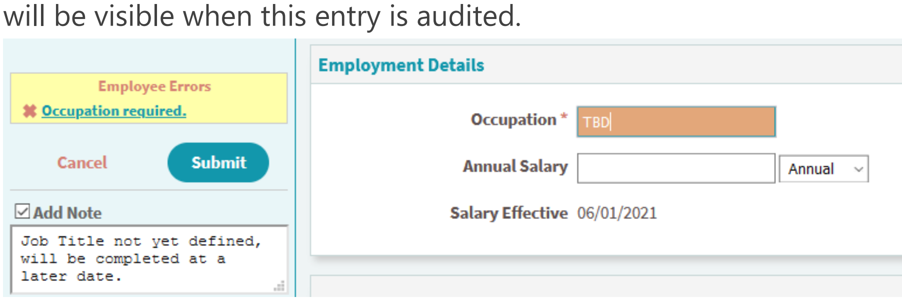
- Date of Birth
- Gender
- Social Security Number (SSN)
- Marital Status
- Home Address
- Phone Number
- Email Address
- Occupation (Job Title)
- Annual Salary
- Salary Effective Date
- Prior Coverage Carrier and Start/Stop Dates
- Beneficiaries

NOTE: For help with viewing or changing an employee's benefits, see the Manage Employee Benefits section of this document.

To edit an employee's information:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. On the left sidebar, click **Edit Demographics**.
5. Make the changes you want. When you are finished, near the top of the left sidebar, click **Submit**.
   If errors are found or required information is missing, you'll see a notification at the top of the left sidebar. Click the link in the notification to quickly locate the error in the form.

   If you need to make an exception, you can enter a temporary value that satisfies the form requirement. Then, click the **Add Note** checkbox and add a note about the exception. The note will be visible when this entry is audited.

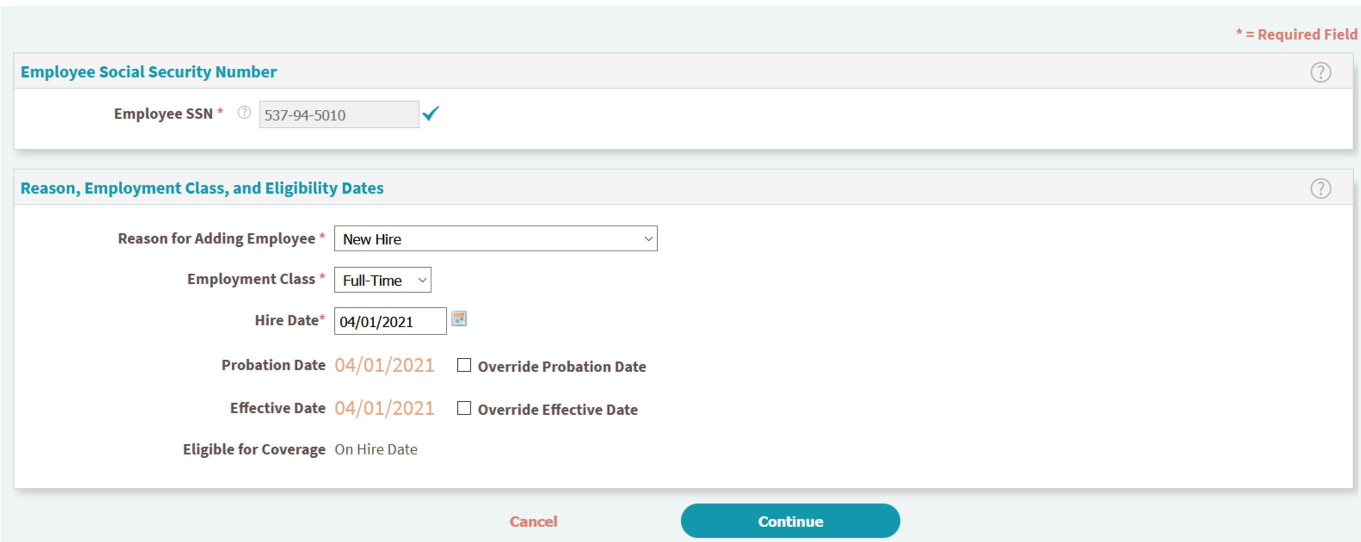


Important notes:

- When entering an address, SIMON will validate it with the USPS and recommend corrections. Also, if you enter the **ZIP Code** before you enter the **City** and **State**, SIMON will automatically identify and fill in the **City** and **State** from the ZIP Code.
- If you enter a **Prior Coverage Carrier**, you can also enter the prior coverage's start and end dates.

Once you've submitted the changes, you'll see that the employee appears on the Employees list in **Pending** status. Employees in **Pending** status cannot be changed. Once the changes have cleared audit (which may be performed manually or via automation), the employee's status will change to **Active**.

ADD A NEW EMPLOYEE



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

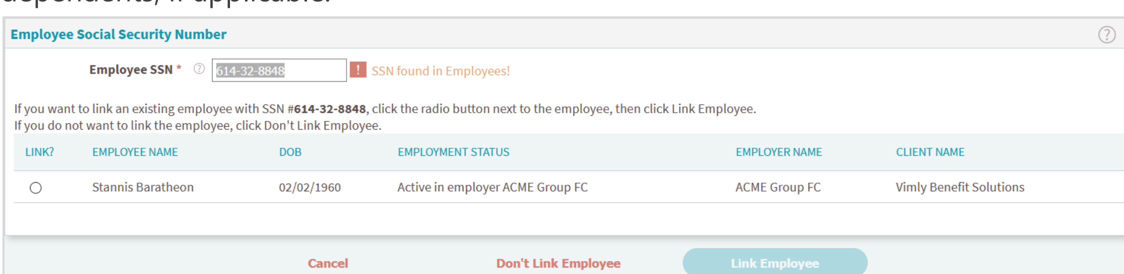
> **NOTE:** Depending on how Partner Portal is configured for your organization, some of this information may not be required. If you have questions about this, please contact Vimly staff for assistance.

- Social Security Number
- Add Reason (the Qualifying Event)
- Employee Classification
- Date of Qualifying 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)

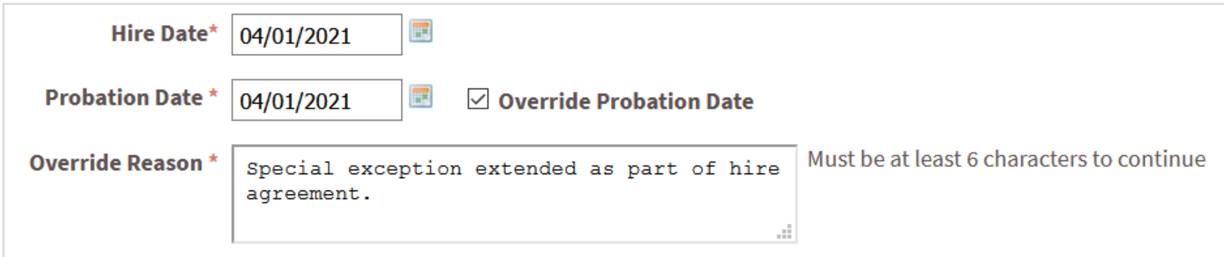
To add a new employee:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. On the left sidebar, click **Add New Employee**.
4. Enter the employee's Social Security Number (SSN).
   The moment you enter all 9 digits, SIMON will a) make sure you've entered a valid SSN, and b) check if the employee already exists in SIMON.
   a. If the employee already exists under the employer, you won't need to proceed.
   b. If the employee already exists under another employer or client that you have permission to see in SIMON, you can proceed by clicking **Link Employee**. If you're sure that the person you're entering is not the same employee, click **Don't Link Employee**. If you're unsure, click **Cancel**.
   c. If you choose to link the employee, you'll also be asked to review and link their dependents, if applicable.



5. If the SSN is valid and unique, select the **Reason for Adding Employee**, select the **Employment Class**, and then enter the **Date** of the event/reason you selected.
   When you do this, the **Probation Date** and **Effective Date** are calculated automatically, per the rules set for the selected classification. If you need to override either date, select the **Override**

checkbox and enter the reason for it.



6. Click **Continue**.
7. Enter all required information in the *Add Employee* form, and select **Benefits** for the employee (and dependents, if applicable).

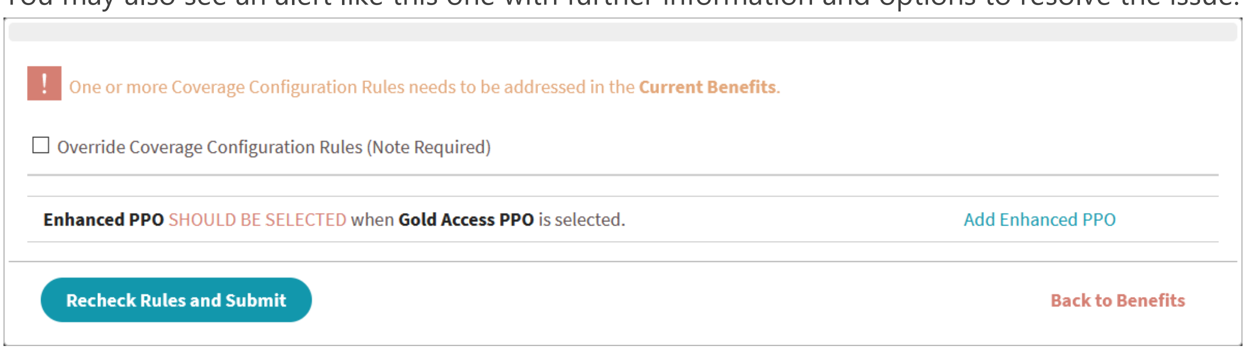
NOTE: You may be required to select some benefits. In these cases, the required benefits are identified in the **Current Benefits** list.

8. When you are finished, near the top of the left sidebar, click **Submit**.

   If errors are found, or if required information is missing, you'll see a notification at the top of the left sidebar. Click the link in the notification to quickly locate the error in the form.

   If you need to make an exception, you can enter a temporary value that satisfies the form requirement. Then, click the **Add Note** checkbox and add a note about the exception. The note will be visible when this entry is audited.

   You may also see an alert like this one with further information and options to resolve the issue.



   In this case, you'll need to either click ***Add Plan Name*** (in this example, the plan is named

"Enhanced PPO") to add the required coverage, or you'll need to select the **Override** check box and enter a valid reason for review at audit. Then, you'll be able to click **Recheck Rules and Submit**.

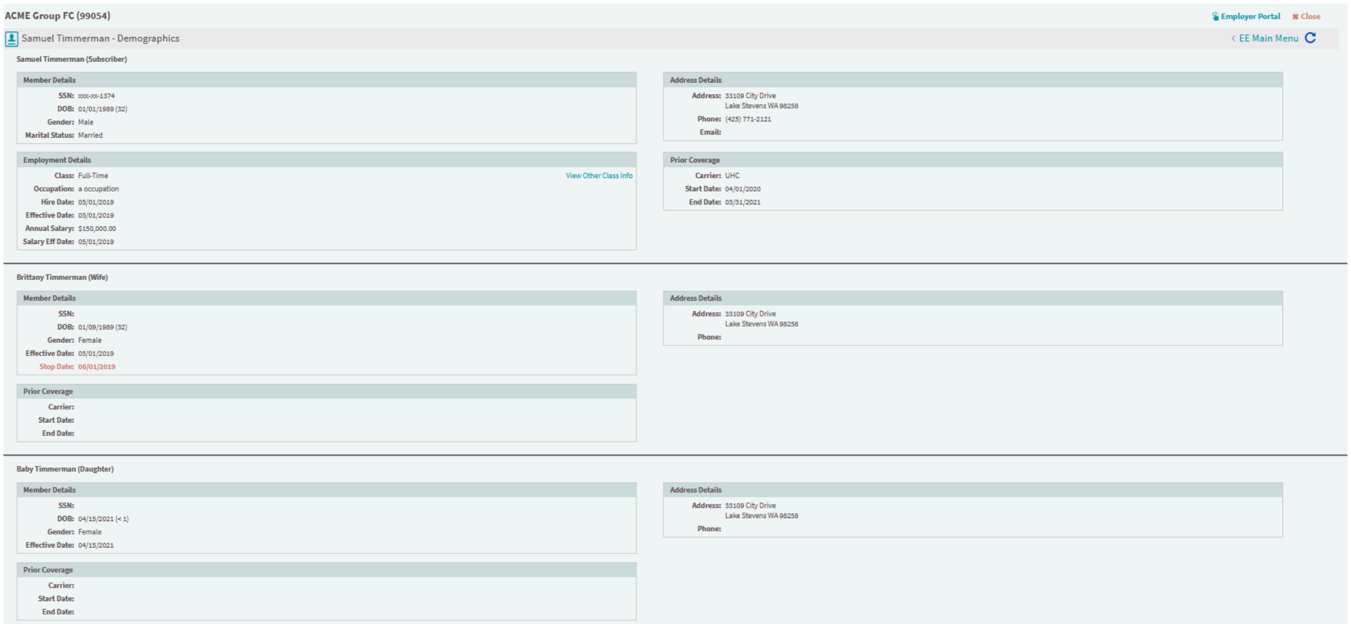
Important notes:

- When entering an address, SIMON will validate it with the USPS and recommend corrections. If you enter the **ZIP Code** before you enter the **City** and **State**, SIMON will automatically identify and fill in the **City** and **State** from the ZIP Code.
- If you enter a **Prior Coverage Carrier**, you can also enter the prior coverage's start and end dates. Note that only the 1st day of a month can be entered in the **Prior Coverage Start Date** box.
- When entering a dependent, **Gender** is automatically set per your selection in the **Relation** box. If you select the **Partner** or **Other** relation, you'll be able to set the gender.
- If you start to enter an address for a dependent that's different from the employee, the **Same Address as Subscriber?** checkbox will automatically be cleared. To quickly switch back to the employee's address, check the box again.
- If you enter a dependent with a **Relation** of **Husband**, **Wife**, or **Partner**, you'll be required to enter a valid **Date of Marriage**.
- If you enter a dependent child that is over-age (per your carrier's underwriting policies), you won't be able to add the dependent unless they are **disabled**.

Once you've submitted the new employee, you'll see them on the Employees list in **Pending** status. Employees in **Pending** status cannot be changed. Once the entry has cleared audit (which may be performed manually or via automation), the employee's status will change to **Active**.

FIND A DEPENDENT

LOCATE A DEPENDENT IN THE LIST



If you know the employee that the dependent you want is under, you can locate the dependent thru the **Employees** list. To learn more about locating an employee, see Locate an Employee in the List.

Once you've located and opened the employee's dashboard, you can view all their enrolled dependents.

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. Click **Demographics**.

SEARCH FOR A DEPENDENT

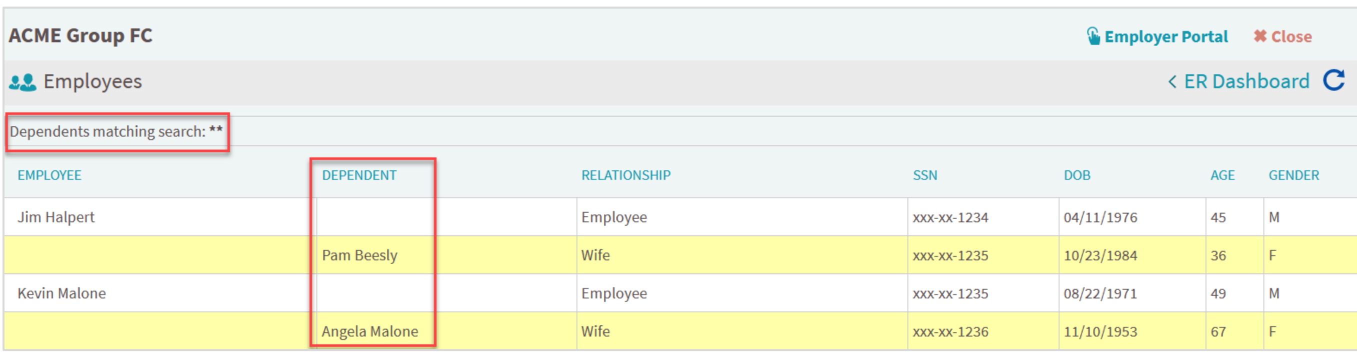
If you don't know the employee that the dependent you want is under, but you know their name, Social Security Number (SSN), phone number, or member ID (if enabled by your organization), you can search by using the **Dependent Search** box on the left sidebar.

To search for a dependent:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then on the left sidebar, in the first box, select how you want to search: **Last Name**, **First Name**, **Social Security Number**, **Phone Number**, **Member ID** (if enabled).
4. Based on your selection, in the second box, enter the following:
    a. Enter the dependent's exact **First** or **Last** name.
    Or, use a **wildcard**:
        i. If you want to find all dependents with a first name that starts with ***al***, enter ***al**** in the box.
        ii. If you want to find all dependents with a first name that ends with ***by***, enter ****by*** in the box.
        iii. To find all dependents for all employees under the employer, enter ** in the box.
    b. Enter the dependent's exact **Social Security Number** (SSN).
    Or, use a **wildcard**:
        i. If you want to find all dependents with an SSN that starts with ***123***, enter ***123**** in the box.
        ii. If you want to find all dependents with an SSN that ends with ***1235***, enter ****1235*** in the box.
        iii. To find all dependents for all employees under the employer, enter ** in the box.
    c. Enter the dependent's exact **Phone Number**.
    Or, use a **wildcard**:
        i. If you want to find all dependents with a phone number that starts with ***123***, enter ***123**** in the box.
        ii. If you want to find all dependents with a phone number that ends with ***1235***, enter ****1235*** in the box.
        iii. To find all dependents for all employees under the employer, enter ** in the box.
    d. Enter the dependent's exact **Member ID**.
    Or, use a **wildcard**:
        i. If you want to find all dependents with a member ID that starts with ***123***, enter ***123**** in the box.
        ii. If you want to find all dependents with a member ID that ends with ***1235***, enter ****1235*** in the box.
        iii. To find all dependents for all employees under the employer, enter ** in the box.
5. To further refine your search, in the third box, enter or choose an **Effective (Start) Date**. This will limit the results to include only dependents that were eligible for benefits on or after that

date.
Use format MM/DD/YYYY. For example, April 1, 2021 should be entered ***04/01/2021***.

6. Click the second box, and then press **ENTER**.
   If you press **ENTER** when the third box is selected, nothing will happen.
7. If no dependents are found, or SIMON reports that the search is too broad, try the following:
   a. Change or delete the effective date in the third box.
   b. Use more sophisticated wildcards to refine your search. Click the ⓘ icon next to the second box for additional instructions and helpful examples.



EMPLOYEE	DEPENDENT	RELATIONSHIP	SSN	DOB	AGE	GENDER
Jim Halpert		Employee	xxx-xx-1234	04/11/1976	45	M
	Pam Beesly	Wife	xxx-xx-1235	10/23/1984	36	F
Kevin Malone		Employee	xxx-xx-1235	08/22/1971	49	M
	Angela Malone	Wife	xxx-xx-1236	11/10/1953	67	F

When you're finished, click **Clear Search Results** to go back to the full list of employees.

ADD A DEPENDENT

When you add dependents to an enrolled employee, you'll be asked to enter the following information:

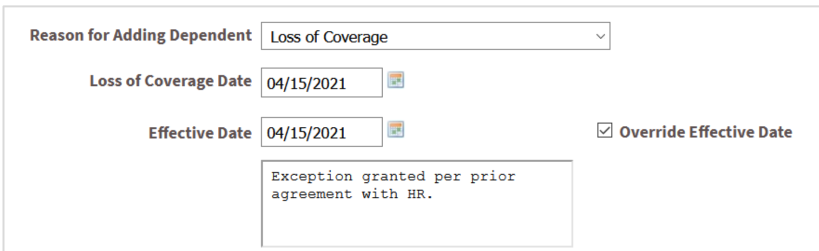
NOTE: Depending on how Partner Portal is configured for your organization, some of this information may not be required. If you have questions about this, please contact Vimly staff for assistance.

- Add Reason (the Qualifying Event)
- Date of Qualifying Event
- First and Last Name
- Relation (Husband/Wife/Partner or Son/Daughter/Other)
- Social Security Number (typically optional, not required)
- Disability status (if applicable)
- Home Address
- Prior Coverage Carrier
- Benefit elections for the dependent

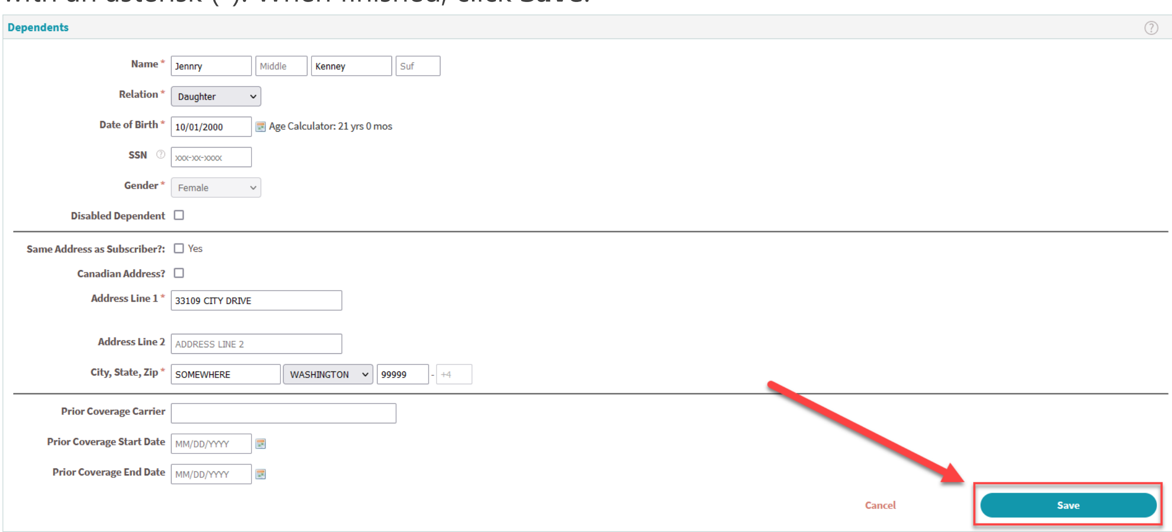
To add dependents:

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.

2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. On the left sidebar, click **Add Dependent(s)**.
5. Select the **Reason for Adding Dependent**, and then enter the **Date** of the event/reason you selected.
   When you do this, the **Effective Date** is calculated automatically, per the rules set for the employee's classification. If you need to override this date, select the **Override** checkbox, and then enter the reason for it.



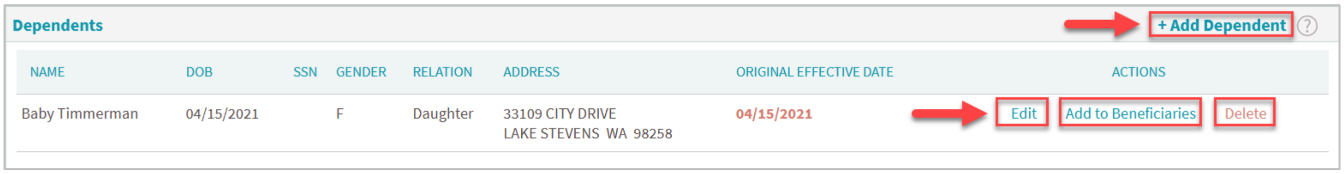
6. Click **Continue**.
7. Scroll down to the **Dependents** section of the form (SIMON should scroll to this section automatically) and enter all required information for the dependent. Required fields are marked with an asterisk (*). When finished, click **Save**.



NOTE: You cannot make changes to existing dependents during this process. In fact, **you will not see existing dependents listed on the page during this process**. Once you click **Save**, you'll see the full list of dependents, and you'll be able to edit them.

8. **DO NOT submit the changes just yet!** Instead, do the following:
   - To add another dependent, click **+Add Dependent**.
   - To correct the information for a dependent you just added, click **Edit**.

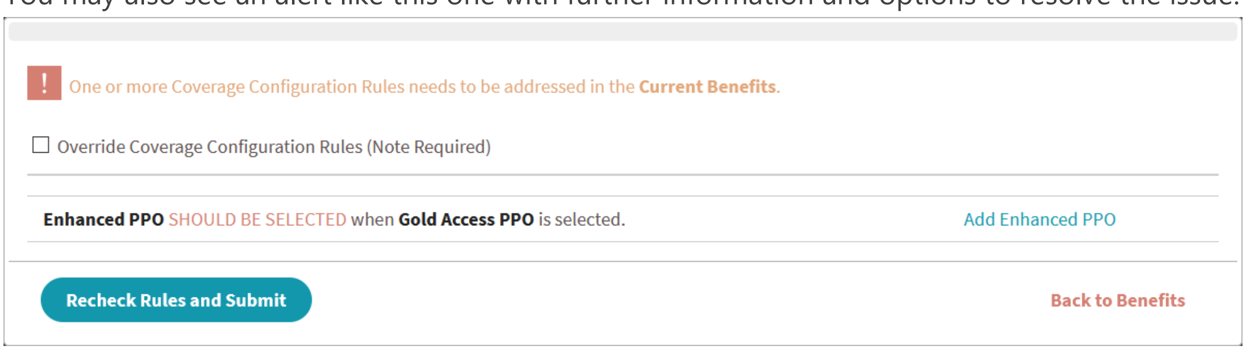
- To add a dependent to the Beneficiaries list, click **Add to Beneficiaries**.
- If you added a new dependent in error, click **Delete**.
  You can't delete existing dependents as part of this process. To remove an existing dependent, see the Terminate an Employee or Dependent section of this document.



9. Scroll down to the **Benefits** section, find the dependent(s) you added, and make sure the correct benefits are selected. The employee's applicable benefits are pre-selected for you.
10. When you are finished, at the bottom of the page, click **Submit**.
    If errors are found, or if required information is missing, you'll see a notification at the top of the left sidebar. Click the link in the notification to quickly locate the error in the form.

    If you need to make an exception, you can enter a temporary value that satisfies the form requirement. Then, click the **Add Note** checkbox and add a note about the exception. The note will be visible when this entry is audited.

    You may also see an alert like this one with further information and options to resolve the issue.



    In this case, you'll need to either click **Add *[Plan Name]*** (in this example, the plan name is ***Enhanced PPO***) to add the required coverage, or you'll need to select the **Override** check box and enter a valid reason for review at audit. Then, you'll be able to click **Recheck Rules and Submit**.

Important notes:

- If you start to enter an address for a dependent that's different from the employee, the **Same Address as Subscriber?** checkbox will automatically be cleared. To quickly switch back to the employee's address, check the box again.
- When entering an address, SIMON will validate it with the USPS and recommend corrections. Also, if you enter the **ZIP Code** before you enter the **City** and **State**, SIMON will automatically identify and fill in the **City** and **State** from the ZIP Code.
- **Gender** is automatically set per your selection in the **Relation** box. If you select the **Partner** or **Other** relation, you'll be able to set the gender.
- If you add more than one dependent, make sure all the dependents you add are being added for the same **reason** (or qualifying event) and **date** that you entered in step 5. For example, if you start by adding a newborn child with reason **Birth of Child**, and then you also add a spouse, partner, or older child, your changes will not pass audit.
- If you enter a **Prior Coverage Carrier**, you can also enter the prior coverage's start and end dates. Note that only the 1st day of a month can be entered in the **Prior Coverage Start Date** box.
- If you select a **Relation** of **Husband**, **Wife**, or **Partner**, you'll be required to enter a valid **Date of Marriage**.
- If you add a dependent to the **Beneficiaries** list, and then you **delete** the dependent from the **Dependents** list, they will remain on the Beneficiaries list. You'll also need to delete them from the Beneficiaries list, if applicable.
- If you enter a child that is over-age (per your carrier's underwriting policies), you won't be able to add the dependent unless they are **disabled**.

Once you've submitted the new dependent(s), you'll see them on the employee's dashboard when you click **Demographics**, **Benefits**, or **Beneficiaries**.

You'll now see the employee listed in **Pending** status. Employees in **Pending** status cannot be changed. Once the dependents and any other employee changes have cleared audit (which may be performed manually or via automation), the status will change to **Active**.

EDIT A DEPENDENT

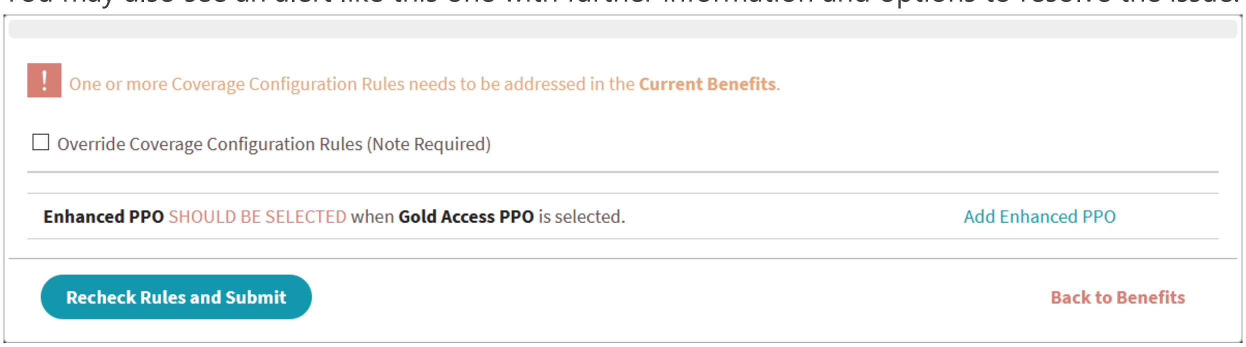
1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.

4. On the left sidebar, click **Edit Demographics**, and then scroll down to the **Dependents** section of the page.
5. Click **Edit** for the dependent you want, and then make the changes you want.
6. When you are finished, click **Save**. Then, at the bottom of the page, click **Submit**.
   If you forgot to save changes to a dependent, you won't be able to click **Submit** until you've clicked **Save** or **Cancel** in the **Dependents** section.

   If errors are found, or if required information is missing, you'll see a notification at the top of the left sidebar. Click the link in the notification to quickly locate the error in the form.

   If you need to make an exception, you can enter a temporary value that satisfies the form requirement. Then, click the **Add Note** checkbox and add a note about the exception. The note will be visible when this entry is audited.

You may also see an alert like this one with further information and options to resolve the issue.



In this case, you'll need to either click **Add *[Plan Name]*** (in this example, the plan name is ***Enhanced PPO***) to add the required coverage, or you'll need to select the **Override** check box and enter a valid reason for review at audit. Then, you'll be able to click **Recheck Rules and Submit**.

Important notes:

- If you start to enter an address for a dependent that's different from the employee, the **Same Address as Subscriber?** checkbox will automatically be cleared. To quickly switch back to the employee's address, check the box again.

- When entering an address, SIMON will validate it with the USPS and recommend corrections. Also, if you enter the **ZIP Code** before you enter the **City** and **State**, SIMON will automatically identify and fill in the **City** and **State** from the ZIP Code.
- **Gender** is automatically set per your selection in the **Relation** box. If you select the **Partner** or **Other** relation, you'll be able to set the gender.
- If you enter a **Prior Coverage Carrier**, you can also enter the prior coverage's start and end dates. Note that only the 1st day of a month can be entered in the **Prior Coverage Start Date** box.
- If you select a **Relation** of **Husband**, **Wife**, or **Partner**, you'll be required to enter a valid **Date of Marriage**.
- If you enter a child that is over-age (per your carrier's underwriting policies), you won't be able to add the dependent unless they are **disabled**.

Once the changes are submitted, you'll see the employee listed in **Pending** status. **Pending** status cannot be changed. Once the dependents and any other employee changes have cleared audit (which may be performed manually or via automation), the status will change to **Active**.

TERMINATE AN EMPLOYEE OR DEPENDENT

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. On the left sidebar, click **Terminate Member(s)**.
5. Select the employee and/or dependents you want to terminate, and then click **Continue**.
   If you select the employee (the "Subscriber"), all their dependents are selected automatically.
6. Select the **Reason for Termination**, and then enter the **Termination Date**.
   When you do this, the **Last Day of Coverage** is calculated automatically, per the rules set for the employee's classification. If you need to override this date, select the **Override** checkbox, and then enter the reason for it.
7. If you need to correct the employee or dependent(s) information (such as their mailing address or other contact information), make those changes now.
8. When finished, at the bottom of the page, click **Submit**.
   If errors are found, or if required information is missing, you'll see a notification at the top of the left sidebar. Click the link in the notification to quickly locate the error in the form.

   If you need to make an exception, you can enter a temporary value that satisfies the form requirement. Then, click the **Add Note** checkbox and add a note about the exception. The note will be visible when this entry is audited.

Once the changes are submitted, you'll see the employee listed in **Pending** status. **Employees in Pending status cannot be changed.** Once the terminations have cleared audit (which may be performed manually or via automation), the status will change to **Active**.

RESTORE A TERMINATED DEPENDENT

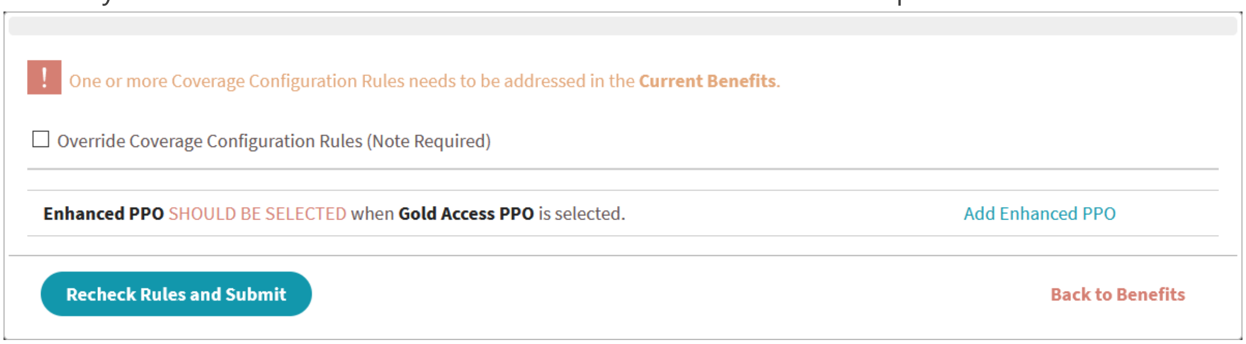
You can restore coverage for dependents that were previously terminated.

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. On the left sidebar, click **Restore Dependent(s)**.
5. Select the dependents you want to restore, and then click **Continue**.
6. Select the **Reason for Restoring Dependent(s)**, and then enter the **Date** of the event/reason you selected.
   When you do this, the **Effective Date** is calculated automatically, per the rules set for the employee's classification. If you need to override this date, select the **Override** checkbox, and then enter the reason for it.
7. Click **Continue**.
8. Scroll down to the **Dependents** section of the form (SIMON should scroll to this section automatically) and make sure the dependent's information is correct. If you need to change it, click the **Edit** link under the Actions column.
9. Under **Current Benefits**, scroll down to the section for the restored dependent, and then make sure the selected benefits are correct.
10. If the dependent is also a beneficiary, make sure the information in the **Beneficiaries** section is correct.
11. When finished, at the bottom of the page, click **Submit**.
    If errors are found, or if required information is missing, you'll see a notification at the top of the

left sidebar. Click the link in the notification to quickly locate the error in the form.

If you need to make an exception, you can enter a temporary value that satisfies the form requirement. Then, click the **Add Note** checkbox and add a note about the exception. The note will be visible when this entry is audited.

You may also see an alert like this one with further information and options to resolve the issue.



In this case, you'll need to either click **Add *[Plan Name]*** (in this example, the plan name is ***Enhanced PPO***) to add the required coverage, or you'll need to select the **Override** check box and enter a valid reason for review at audit. Then, you'll be able to click **Recheck Rules and Submit**.

Once you've submitted the restored dependent(s), you'll see them on the employee's dashboard when you click **Demographics**, **Benefits**, or **Beneficiaries**.

You'll now see the employee listed in **Pending** status. Employees in **Pending** status cannot be changed. Once the dependents and any other employee changes have cleared audit (which may be performed manually or via automation), the status will change to **Active**.

IMPORT EMPLOYEES AND DEPENDENTS FROM A FILE

If you need to add many employees and dependents to an employer, you can enter all the census information in a spreadsheet (such as Microsoft Excel), and then import it into SIMON.

PREPARE THE FILE

Follow these guidelines to ensure your spreadsheet is compatible with SIMON's import process.

FILE FORMAT

The import process accepts data in the following formats:

- Tab-delimited text
- Comma-delimited text
- 834 files

REQUIRED COLUMNS

Make sure your spreadsheet contains the following columns of data.

- **Family ID**
  - *This number ensures that SIMON links dependents to the correct employees. It can be any number, but it must be the same value for all an employee's dependents. For example, if your spreadsheet lists an employee followed by all their dependents, the Family ID value could be 1 for the employee and all their dependents. The next employee and their dependents could have a Family ID of 2, and the next family unit could have a Family ID of 3, and so on. The specific value you use doesn't matter, if it's unique for each family unit, and consistently applied to all members of the unit.*
  - *If this number is not included in your data, you'll be prompted to add it during the import process.*
- **First Name**
- **Last Name**
- **Social Security Number**
  - *Required for employees only.*
  - *For dependents, this information might be optional, depending on how SIMON is configured for your organization.*
- **Date of Birth**
- **Date of Hire**
  - *Required for employees only.*
- **Address Line 1**
- **City, State, Zip Code**
  - *This information can be combined in one column of data.*
- **Gender** *(Male, Female, Other)*
- **Relation** *(Husband, Wife, Son, Daughter, Partner, Other)*
  - *Required for dependents only*

- **Effective Date**

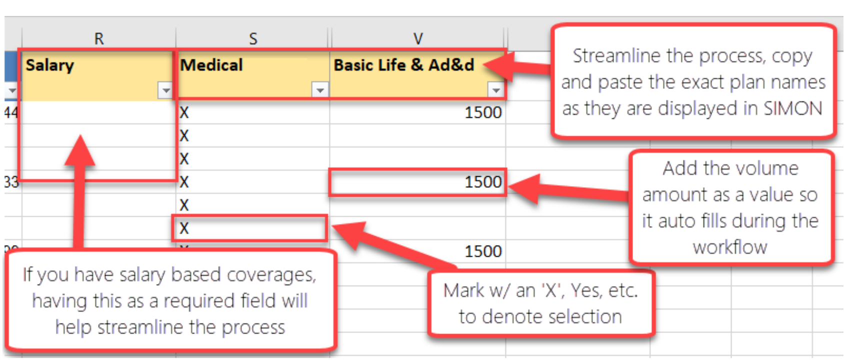
OPTIONAL COLUMNS

If your spreadsheet contains the following columns of data, SIMON can import them.

- **Middle Name**
- **Suffix** *(Jr, Sr, II, III, etc.)*
- **Marital Status** *(Single, Married, Divorced, Widowed)*
- **Address Line 2**
- **Occupation**
  - *For employees only.*
  - *Must match a value defined in SIMON for your organization.*
  - *This information might be required, depending on how SIMON is configured for your organization.*
- **Annual Salary**
  - *For employees only. This information might be required, depending on how SIMON is configured for your organization.*
- **Email Address**
- **Phone #**
- **Employment Class**
  - *Must match a value defined in SIMON for your organization.*
- **Eligibility Class Date**
- **Medical Benefits**
- **Vision Benefits**
- **Dental Benefits**
- **Other Benefits**

ADDITIONAL TIPS

You can further ensure a successful import by following these tips.



SPLITTING COLUMNS IN CENSUS IMPORT DATA (MICROSOFT EXCEL)

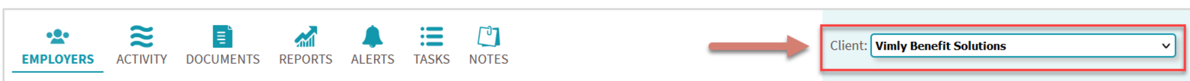
If your spreadsheet contains data that's combined into one column (like **First Name**, **Middle Name**, and **Last Name**), you need to split the column into multiple columns before you import the data.

In Microsoft Excel, to split a column into multiple columns:

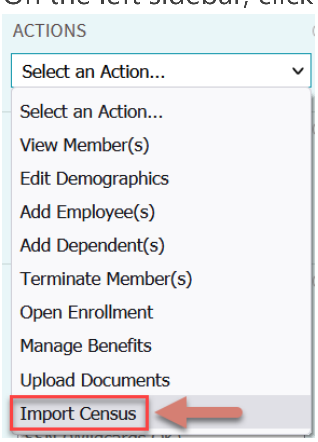
1. Select the column you want to split.
2. Click the **Text to Column** button under **Data Tab**.
3. In the **Convert Text to Columns Wizard** dialog box, check the **Delimited** option, and click **Next**.
4. Check the **Space** option in the **Delimiters** section, and then click **Next**.
5. Check the **Text** option in the **Column data format** section, and then click **Finish**. The column is split into multiple columns.

IMPORT THE FILE

1. If you have access to more than one client in SIMON, on the **Client** drop-down menu, select the correct client.



2. On the left sidebar, click the **Actions** drop-down menu, and then click **Import Census**.

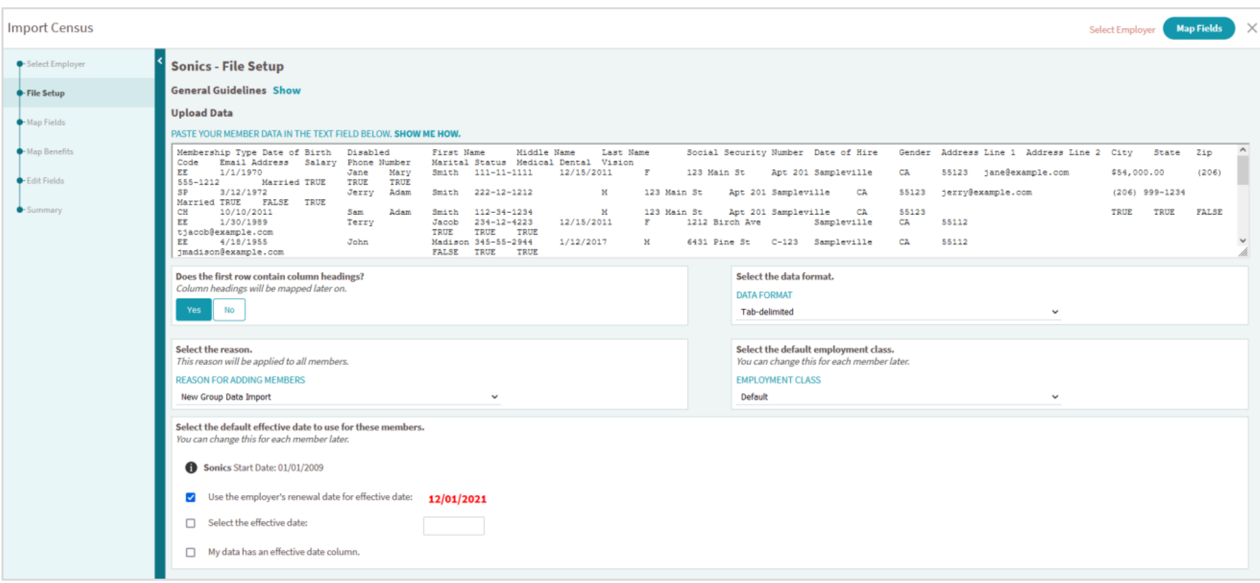


3. On the **Select Employer** page, enter the full or partial name of the employer you want, and then click **Search**.
4. In the search results, click the name of the employer you want.

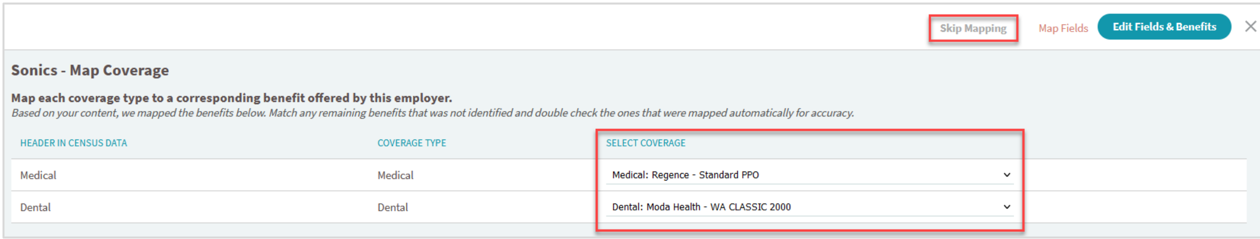
TIP: Click the divider line for the left sidebar to collapse it. This creates more space for the main work area.

5. At the top right of the page, click **File Setup**.
6. In your spreadsheet app, open the spreadsheet that contains the census data.

7. Save the spreadsheet in **Tab-delimited** or **Comma-delimited** format, and then reopen the file in that format.
8. Select all the data (press **Ctrl + A**), and then copy it (press **Ctrl + C**).
9. In Partner Portal, paste the data into the **Upload Data** area (press **Ctrl + V**).
10. Make the following selections:
    - **Does the first row contain column headings?**
    - **Select the data format**
        - *This should be detected automatically. If it doesn't match the format of your data, change it.*
    - **Select the reason**
    - **Select the default employment class**
        - *If you included an Employment Class column in your data, set to **None**.*
    - **Select the default effective date to use for these members**



11. At the top right of the page, click **Map Fields**, and then do the following:
    - Check the imported columns to see if any were not mapped correctly to the missing fields. On the left side of the data, if any field is marked with a **red X**, it was not identified automatically. Click **Select** at the top of any unmapped columns to map the missing fields to the correct columns. This must be resolved for all **Required** fields.
    - If no column exists in your data for a **Required** field, click **Add Required Field Column**, add the required information in the column, and then click **Select** at the top of that column to map it to the missing required field.
    - If your data is missing the required **Family ID** column, click **Add Family ID Column**, and then add the required values. See the [Required Columns](#) section of this document to learn more.



12. At the top right of the page, click **Map Benefits**.
    - If your data included columns for **Medical**, **Dental**, **Vision**, and **Other** benefit plans, if the plan names in your data match the plan names in SIMON, the correct plans should be selected. If your data does not match the plan names, you'll need to select the appropriate plans from the drop-down lists.
    - You can skip all or parts of this steps, if desired. You can map just one of the coverages to a plan and proceed to the next step. If you want to skip this step altogether, at the top right of the page, click **Skip Mapping**.
13. At the top right of the page, click **Edit Fields & Benefits**.
14. Make any final adjustments to the imported data.
    - Click **Add Employee** or **Add Dependent** to add additional rows to your imported data.
    - Click **Advanced Benefit Selection** to assign plans to members based on more specific criteria, such as:
        - Employees only
        - Employees and Dependents with a specific Employment Class
    - Click the heading of any column to change the mapping to another field.
    - Adjust the Employment Class assignment for any member.
15. At the top right of the page, click **View Summary**.
16. If the information on the summary looks good, click **Submit Census**.

You'll now see the submitted members on the employee's dashboard when you click **Demographics**, **Benefits**, or **Beneficiaries**.

The newly added employees will be listed in **Pending** status. Employees in **Pending** status cannot be changed. Once all new members have cleared audit (which may be performed manually or via automation), their status will change to **Active**.

MANAGE EMPLOYEE BENEFITS

VIEW EMPLOYEE BENEFIT ELECTIONS

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.

3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. Click **Benefits**.
   Active benefit elections for **active** members are shown.
   - To show **terminated** benefit elections for **active** and **terminated** members, including elections in previous years (as far back as 7 years), at the top of the list, select the **Show Benefit History** check box.
   - To filter the list by member, at the top of the list, click **Filter Members**.
   - To filter the list by benefit type (*Medical, Dental, Vision, etc*.), at the top of the list, click **Filter Benefits**.

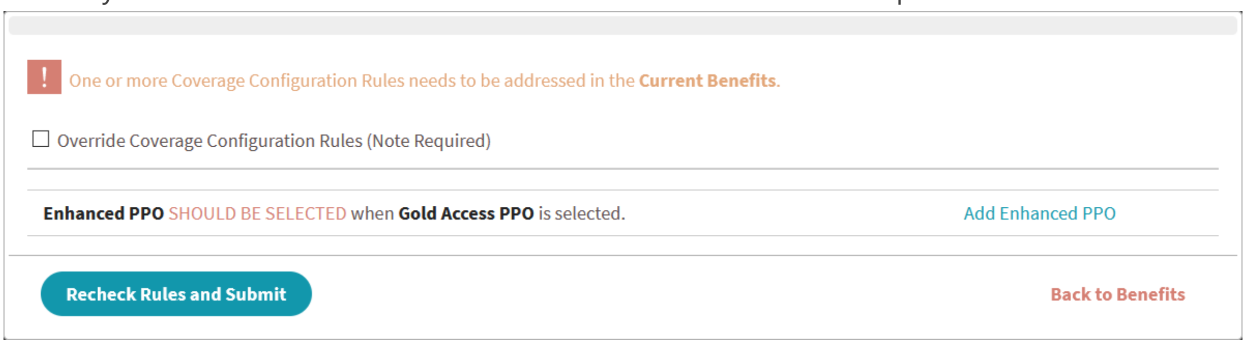
CHANGE EMPLOYEE BENEFIT ELECTIONS

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. On the left sidebar, click **Manage Benefits**.
5. Select the **Reason**, and then enter the **Date** of the event/reason you selected.
   When you do this, the **Effective Date** is calculated automatically, per the rules set for the employee's classification. If you need to override this date, select the **Override** checkbox, and then enter the reason for it.
6. Click **Continue**.
7. Scroll down to the **Current Benefits** section of the page and make the benefit election changes you want. If you remove a benefit election from the employee (the "Subscriber"), it will also be removed from any dependent that elected it.
8. If needed, you can also change the employee's information. However, additional changes might require additional time in audit.
9. If you selected **Benefit Change** as the **reason**, you must add a **note**. On the left sidebar, select the **Add Note** check box, and then enter a note that explains the reason for the benefit change.
10. When finished, at the bottom of the page, click **Submit**.
    If you forgot to save changes to a dependent, you won't be able to click **Submit** until you've clicked **Save** or **Cancel** in the **Dependents** section.

    If errors are found, or if required information is missing, you'll see a notification at the top of the left sidebar. Click the link in the notification to quickly locate the error in the form.

If you need to make an exception, you can enter a temporary value that satisfies the form requirement. Then, click the **Add Note** checkbox and add a note about the exception. The note will be visible when this entry is audited.

You may also see an alert like this one with further information and options to resolve the issue.



In this case, you'll need to either click **Add *[Plan Name]*** (in this example, the plan name is ***Enhanced PPO***) to add the required coverage, or you'll need to select the **Override** check box and enter a valid reason for review at audit. Then, you'll be able to click **Recheck Rules and Submit**.

Important notes:

- If you start to enter an address for a dependent that's different from the employee, the **Same Address as Subscriber?** checkbox will automatically be cleared. To quickly switch back to the employee's address, check the box again.
- When entering an address, SIMON will validate it with the USPS and recommend corrections. Also, if you enter the **ZIP Code** before you enter the **City** and **State**, SIMON will automatically identify and fill in the **City** and **State** from the ZIP Code.
- **Gender** is automatically set per your selection in the **Relation** box. If you select the **Partner** or **Other** relation, you'll be able to set the gender.
- If you enter a **Prior Coverage Carrier**, you can also enter the prior coverage's start and end dates. Note that only the 1st day of a month can be entered in the **Prior Coverage Start Date** box.
- If you select a **Relation** of **Husband**, **Wife**, or **Partner**, you'll be required to enter a valid **Date of Marriage**.

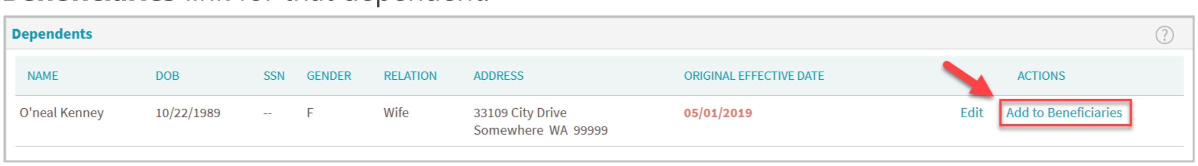
- If you enter a child that is over-age (per your carrier's underwriting policies), you won't be able to add the dependent unless they are **disabled**.

Once the changes are submitted, you'll see the employee listed in **Pending** status. Employees in **Pending** status cannot be changed. Once the changes have cleared audit (which may be performed manually or via automation), the status will change to **Active**.

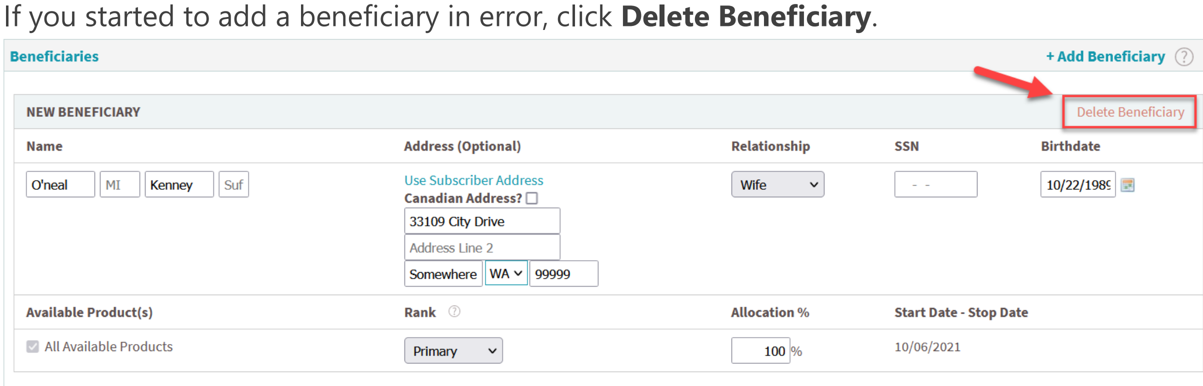
ADD OR CHANGE BENEFICIARIES

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. On the left sidebar, click **Add/Edit Beneficiaries**, and then scroll to the **Beneficiaries** section of the page.
5. Make the changes you want to existing beneficiaries.
   To add a new beneficiary, in the top right corner of the **Beneficiaries** section, click **+Add Beneficiary**.

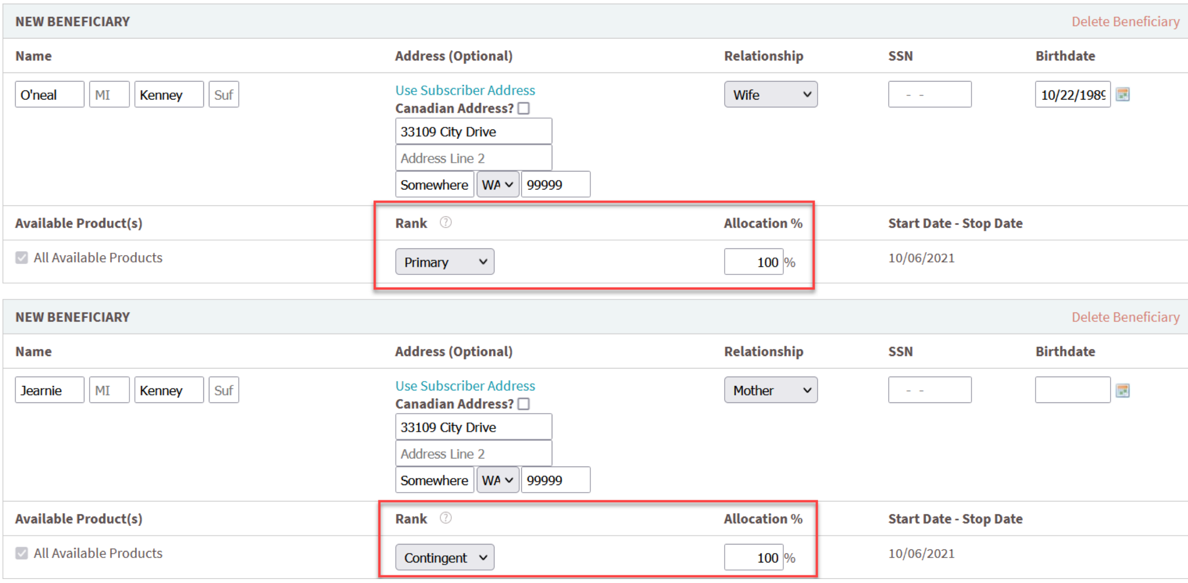
   If the beneficiary you want to add is already listed in the **Dependents** section, click the **Add to Beneficiaries** link for that dependent.



   If you started to add a beneficiary in error, click **Delete Beneficiary**.



6. Make sure you've set the **Rank** and **Allocation %** values correctly. For each **Rank** (***Primary*** and ***Contingent***), the sum of the allocation percentages for all beneficiaries must equal 100%.



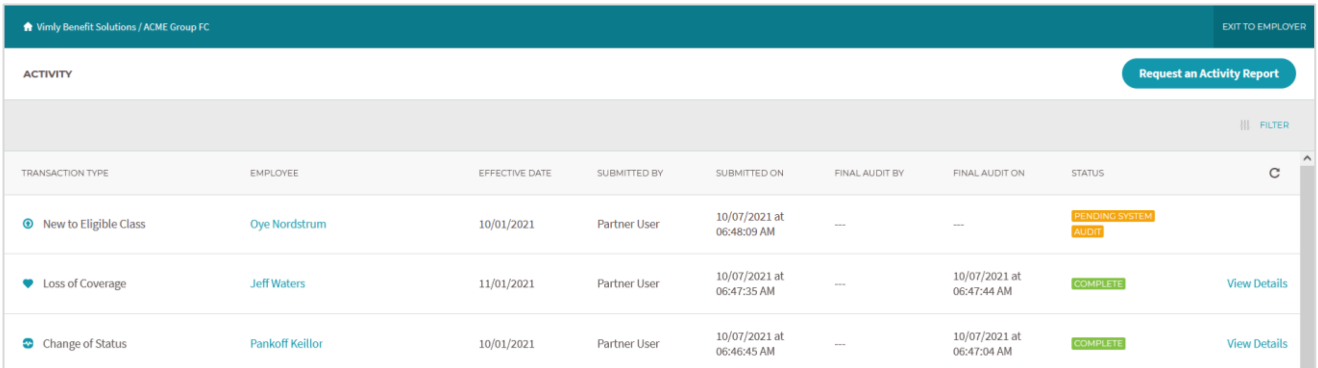
7. When you are finished, at the bottom of the page, click **Submit**.

If errors are found or required information is missing, you'll see a notification at the top of the left sidebar. Click the link in the notification to quickly locate the error in the form.

Once you've submitted the changes, you'll see that the employee appears on the Employees list in **Pending** status. Employees in **Pending** status cannot be changed. Once the changes have cleared audit (which may be performed manually or via automation), the employee's status will change to **Active**.

VIEW EMPLOYER ACTIVITY

VIEW ACTIVITY FOR A SPECIFIC EMPLOYER



On an employer's dashboard, you can view all recent enrollment and eligibility transaction activities for the employer. To do this:

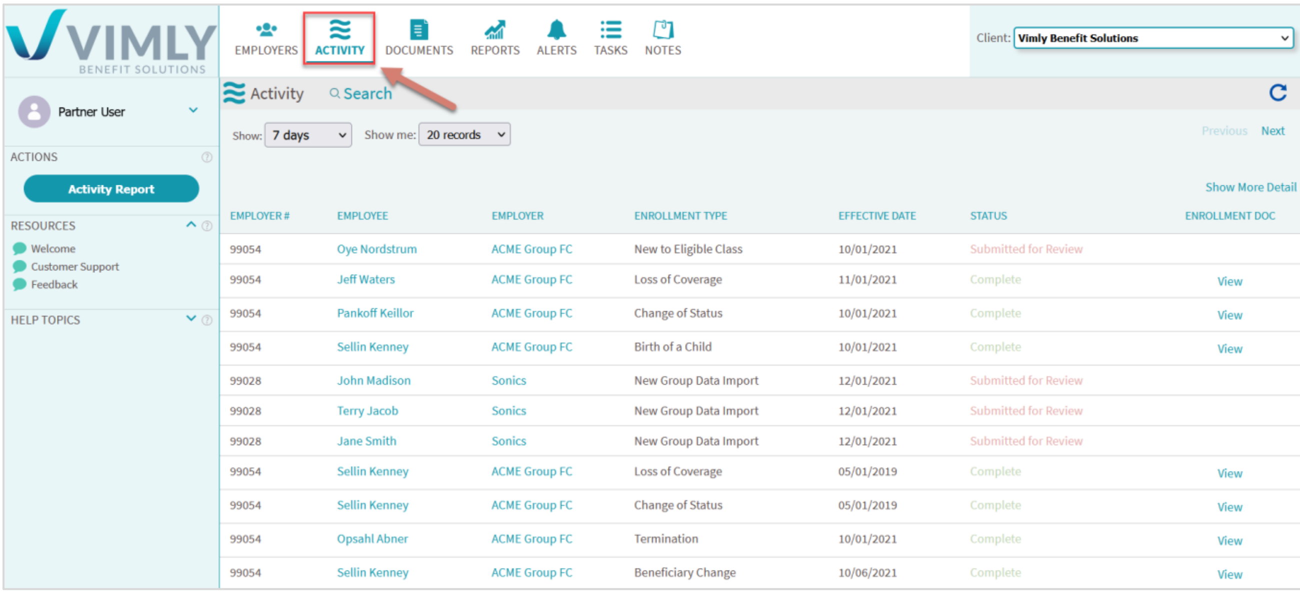
1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. Click **Activity**.

You can filter the list by status or change reason to show specific activity. You can also filter the list to show activity within a specific timeframe. To do this, at the top right of the list, click **Filter**.

You can view the enrollment summary PDF for a specific activity. To do this, in the rightmost column in the list, click **View Details**.

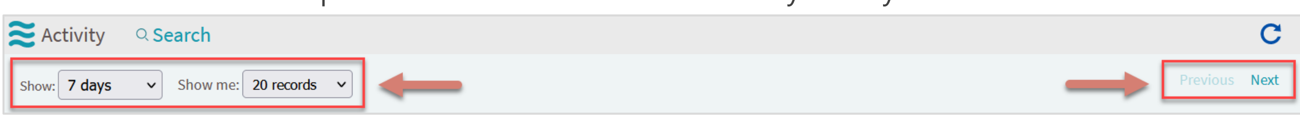
You can also produce a printable and downloadable report. To learn more, see the Activity Report section of this document.

VIEW ACTIVITY FOR ALL EMPLOYERS



On the **Activity** tab, you can view all recent enrollment and eligibility transaction activities for all employers. To do this, at the top of the page, click **Activity**.

By default, 7 days of activity history is shown at 20 records per page. At the top right of the activity list, click the **Previous** and **Next** buttons to move between pages. At the top left of the activity list, click the **Show** and **Show me** drop-down menus to show more activity history.

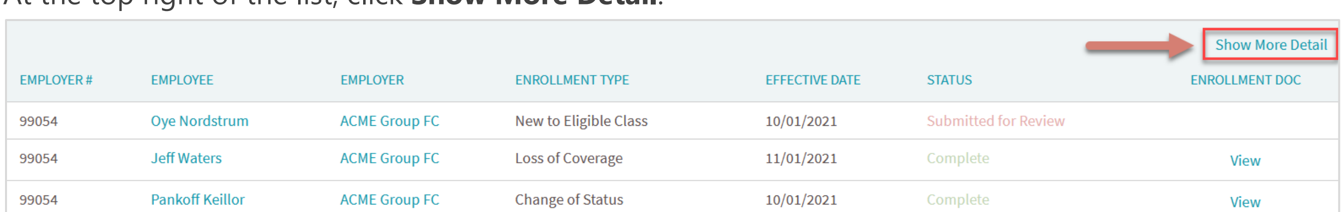


You can click a column heading to sort the activity list (A-Z) by that column. Click the column heading again to reverse the sort order (Z-A).

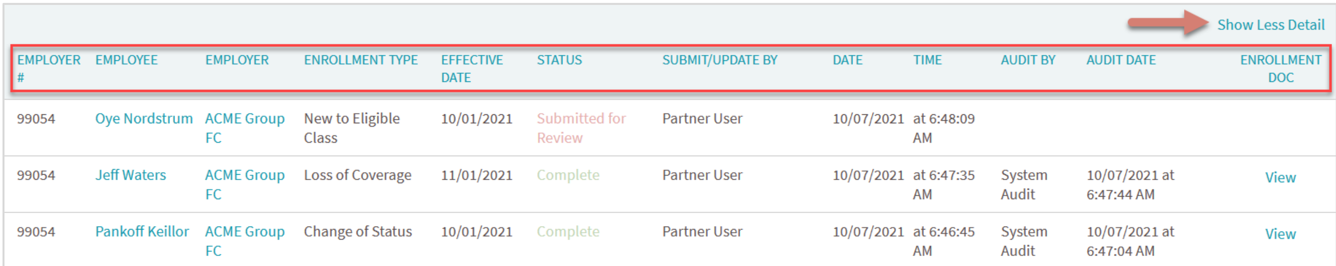
You can show additional columns in the list, including:

- The name of the user that generated the activity
- The date and time that the activity took place
- Audit information

At the top right of the list, click **Show More Detail**.

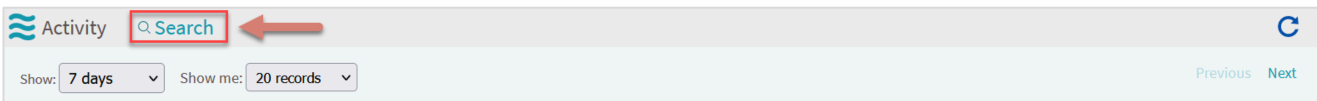


To switch back to fewer columns, click **Show Less Detail**.


Show Less Detail

EMPLOYER #	EMPLOYEE	EMPLOYER	ENROLLMENT TYPE	EFFECTIVE DATE	STATUS	SUBMIT/UPDATE BY	DATE	TIME	AUDIT BY	AUDIT DATE	ENROLLMENT DOC
99054	Oye Nordstrum	ACME Group FC	New to Eligible Class	10/01/2021	Submitted for Review	Partner User	10/07/2021	at 6:48:09 AM			
99054	Jeff Waters	ACME Group FC	Loss of Coverage	11/01/2021	Complete	Partner User	10/07/2021	at 6:47:35 AM	System Audit	10/07/2021 at 6:47:44 AM	View
99054	Pankoff Keillor	ACME Group FC	Change of Status	10/01/2021	Complete	Partner User	10/07/2021	at 6:46:45 AM	System Audit	10/07/2021 at 6:47:04 AM	View

You can search for specific activity, by employer, employee, status, or change reason. You can also filter your search results to activity within a specific timeframe. To do this, at the top left of the list, click **Search**.



To view the enrollment summary PDF for a specific activity, in the **Enrollment Doc** column, click **View**.

You can also produce a printable and downloadable report. To learn more, see the [Activity Report] section of this document.

MANAGE DOCUMENTS AND LINKS

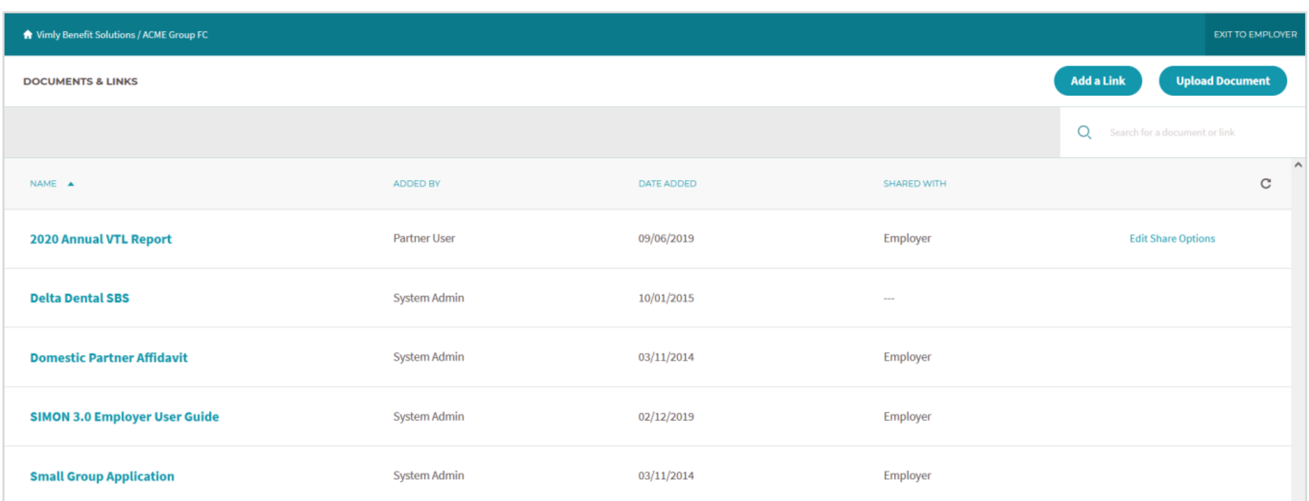
Partner Portal enables you to share documents and links to important websites with employers in your organization, and with their employees. Documents and links that are shared with employers become accessible to them in the **Resources > Documents & Links** area of the **Employer Portal**. Documents and links that are shared with employees become accessible to them in the **Documents & Links** area of the **Employee Portal**.

Documents and links can be shared with specific employees, specific employers, or with all employees under a specific employer.

NOTES:
You may not be able to perform all the steps described in this section. The permissions granted to your SIMON account determine what you can and cannot do. If you have questions about your account permissions, please contact the people managing this program for your organization.

If your organization has not enabled employee self-service in SIMON, selecting the Employee option won't matter as employees will not have access to a portal. If you have further questions, please contact Vimly for assistance.

MANAGE DOCUMENTS AND LINKS FOR A SPECIFIC EMPLOYER



On an employer's dashboard, you can view all the documents and links shared with the employer.

VIEW EMPLOYER-SPECIFIC DOCUMENTS AND LINKS

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.

2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Documents**.

You can search the list for specific documents and links (by name), and you can click a column heading to sort the list (A-Z) by that column. Click the column heading again to reverse the sort order (Z-A).

CREATE A NEW LINK TO AN IMPORTANT WEBSITE

1. Click **Add a Link**.
2. In the **Link Title** box, enter a proper title for the website that makes it easier for users to identify the link.
3. In the **Link URL** box, enter the complete website address.
4. If you want to add multiple links at one time, click **+Add Another Link**.
   If you clicked this option in error, click **Remove**.
5. Under **Share Link With**, select the portals where you want this link to appear.
   If you select only **Employer**, the link will only be visible in this employer's portal.
   If you select only **Employee**, the link will only be visible in portal for every employee under this employer.
6. Click **Add Link**.

NOTE: If your organization has not enabled employee self-service in SIMON, selecting the Employee option won't matter as employees will not have access to a portal. If you have further questions, please contact Vimly for assistance.

SHARE A NEW DOCUMENT

1. Click **Upload Document**.
2. In the **Document Title** box, enter a proper title for the document. It does not need to match the file's name. For example, if you have an IRS form, but the file name is something cryptic like ***X401453.xlsx***, you can enter ***IRS Form 401.453*** to make it easier for users to identify the document.
3. Click **Choose**, and then navigate to the document on your computer. And type of file can be selected. Alternatively, you can drag and drop the document into your browser.
4. If you want to add multiple documents at one time, click **+Add Another Document**.
   If you clicked this option in error, click **Remove**.
5. Under **Share Document With**, select the portals where you want this document to appear.
   If you select only **Employer**, the document will only be visible in this employer's portal.
   If you select only **Employee**, the document will only be visible in portal for every employee under this employer.
6. Click **Upload Document**.

CHANGE THE SHARING OPTIONS FOR AN EXISTING DOCUMENT OR LINK

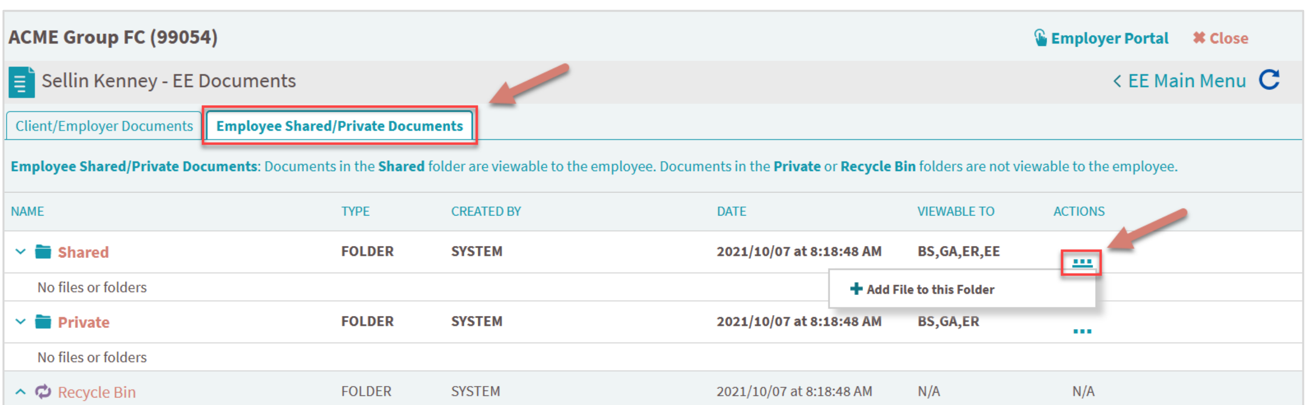
1. Click **Edit Share Options** for the document or link you want to change.
2. Select the portals where you want this document or link to appear.
   If you select only **Employer**, the document or link will only be visible in this employer's portal.
   If you select only **Employee**, the document or link will only be visible in portal for every employee under this employer.
3. Click **Save Changes**.

DELETE A SHARED DOCUMENT OR LINK

1. On the right side of the list, click **Delete** for the document or link you want to remove.
2. If you are sure, click **Delete Document/Link**.

NOTE: You cannot change the sharing options or delete documents and links that were added by other users. You can only change or delete the ones you added.

MANAGE DOCUMENTS AND LINKS FOR A SPECIFIC EMPLOYEE



On an employee's dashboard, you can view all the documents and links shared with the employee.

NOTE: If your organization has not enabled employee self-service in SIMON, these options won't matter because employees will not have access to a portal. If you have further questions, please contact Vimly for assistance.

VIEW EMPLOYEE-SPECIFIC DOCUMENTS AND LINKS

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.
4. Click **Documents**.

SHARE A DOCUMENT WITH A SPECIFIC EMPLOYEE

1. At the top of the list, click the **Employee Shared/Private Documents** tab.
2. In the Actions column (on the right side of the list), click the **...** menu for the **Shared** folder.
3. Click **Add File to this Folder**.
4. In the **File Title** box, enter a proper title for the document. It does not need to match the file's name. For example, if you have an IRS form, but the file name is something cryptic like ***X401453.xlsx***, you can enter ***IRS Form 401.453*** to make it easier for users to identify the document.
5. Click **Browse**, and then navigate to the document on your computer. And type of file can be selected.
6. If desired, enter additional information about the document in the **File Version Information** box.
   You can include whatever you want in this box. For example, you could enter a version/revision number, description, or any other information about the document that you want.
7. Click **Add Document**.

If you want to add a document to SIMON that is related to this employee, but you don't want the employee to see it, follow the same steps above, but use the **Private** folder. Documents stored in the Private folder cannot be seen by the employee.

EDIT OR DELETE A SHARED DOCUMENT

1. Click the name of the folder that contains the document you want to edit or delete. Clicking the folder name will expose the list of files inside the folder.
2. In the Actions column (on the right side of the list), click the **...** menu for the document you want to edit or delete.
3. To view the document's file version information, click **Version Information**.
4. To edit the document's properties, file version information, or to upload an updated version of the document, click **Edit File Properties**.
5. To delete the document, click **Move to Recycle Bin**.

NOTE: If you move a document to the Recycle Bin, you won't be able to move it out. To restore a document in the Recycle Bin, click it (to open it or download it), save it to your computer, and then follow the steps above to re-add it to its original folder.

SEE THE CLIENT-LEVEL AND EMPLOYER-LEVEL DOCUMENTS SHARED WITH A SPECIFIC EMPLOYEE

At the top of the Documents list, click the **Client/Employer Documents** tab.

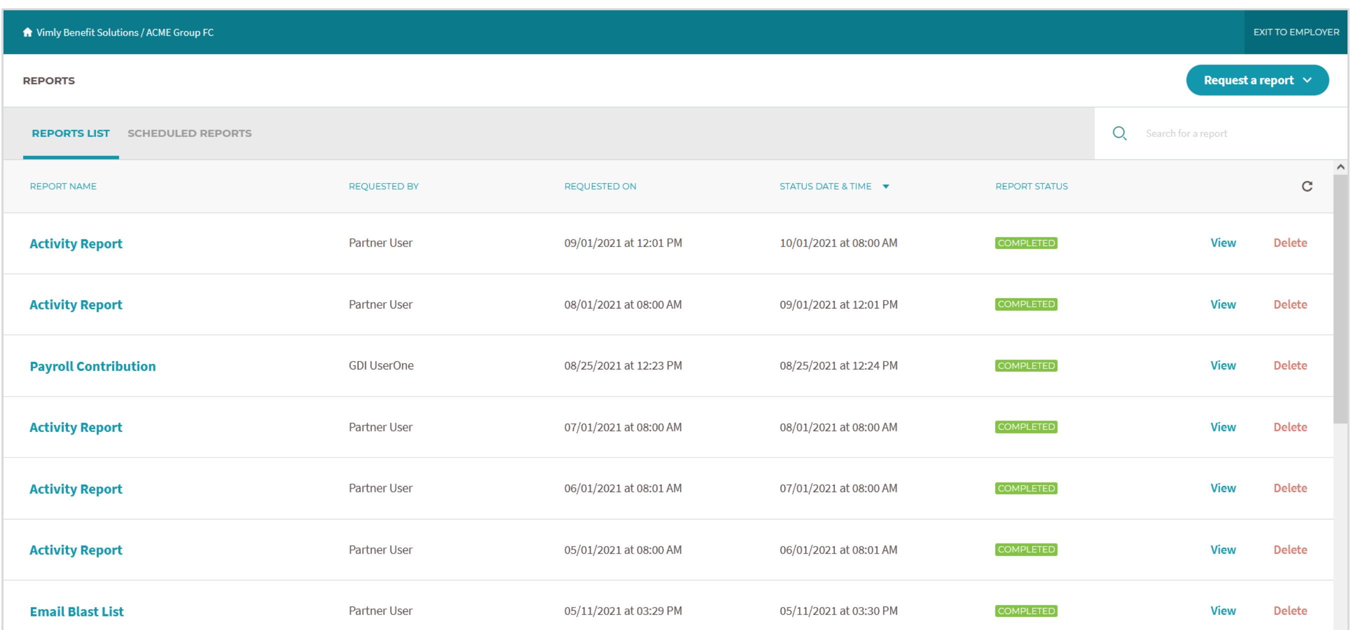
CREATE AND MANAGE REPORTS

Reports in SIMON 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.

When your report is ready, you'll receive an email notification. If your report does not complete within 24 hours, please contact Vimly staff for assistance.

Before you run a report, first determine the scope you need. Do you need a report for a specific employer, or one that covers all employers in your organization? SIMON has reports that are optimized for both.

VIEW OR CREATE REPORTS FOR ONE EMPLOYER



Some reports can only be run in the scope of a single employer. For these reports, follow these steps to navigate to the area of Partner Portal where you can view and create these reports.

1. Make sure you're in the **Employers** workspace by clicking the **Employers** icon at the very top of the page.
2. In the list, click the name of the employer you want. If you don't see the employer, search for it.
3. Click **Employees**, and then click the name of the employee you want. If you don't see the employee, search for them.

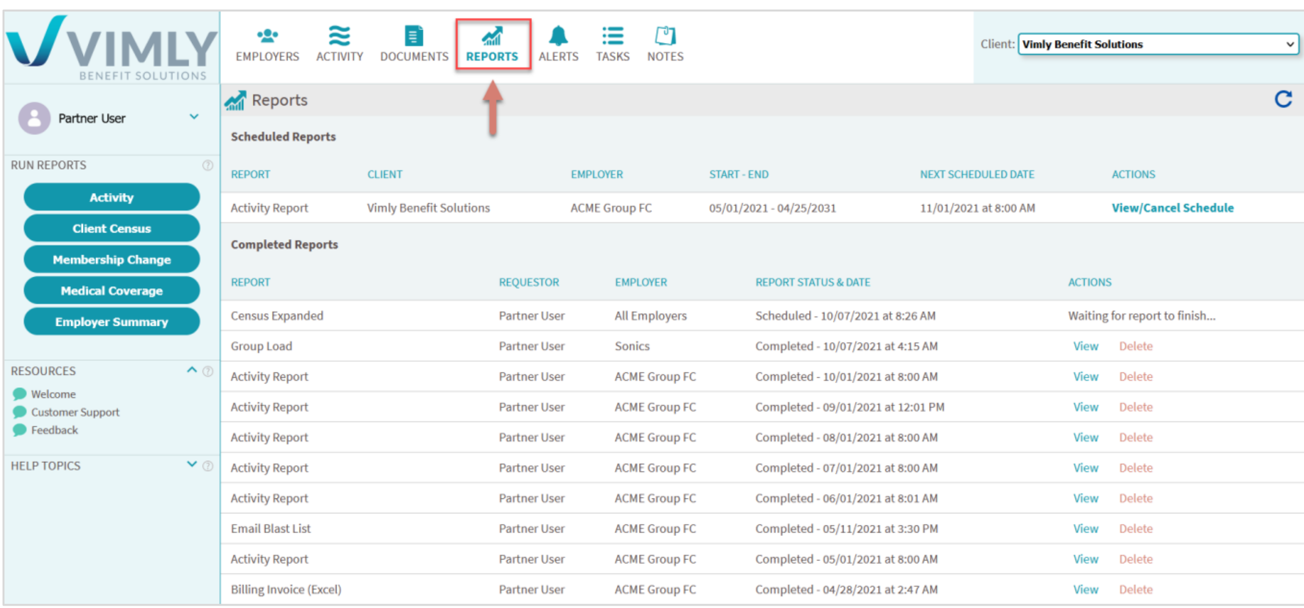
4. Click **Reports**.
5. At the top right of the page, click **Request a report**, click the report you want, and then select the options you want.
   To learn more about the available reports, see the Available Reports section of this document.
6. If you want this report to run on a regular schedule, select the **Schedule as a recurrent report** check box, and select the options you want.
7. Click **Request Report**.

When the report is ready, the status will change to **COMPLETED**, and you'll receive an email notification. Come back to this page, and then on the right side of the list, click **View** to download and view the 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 click **Delete Schedule** for that report.

VIEW OR CREATE REPORTS FOR ALL EMPLOYERS



On the **Reports** workspace, you can view, run, and schedule reports that cover all employers in your organization. Many of these reports can also be run for just one employer, if desired.

To run reports that cover all employers:

1. At the top of the page, click **Reports**.

2. On the left sidebar, click the report you want to run, select the options you want.
   To run a report for a specific employer, enter their name in the **Employer/Employer#** box, and then press **ENTER** to search for and select them.
   To run a report for all employers, leave the **Employer/Employer#** box empty.
3. If you want this report to run on a regular schedule, select the **Schedule this report** check box, and select the options you want.
4. Click **Request Report**.

You can click a column heading to sort the activity list (A-Z) by that column. Click the column heading again to reverse the sort order (Z-A).

- To view a report, in the **Actions** column, click **View**.
- To delete a report in the **Actions** column, click **Delete**.

When the report is ready, the status will change to **Completed**, and you'll receive an email notification. Come back to this page, and then on the right side of the list, click **View** to download and view the 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. Under **Scheduled Reports**, click **View/Cancel Schedule** for that report, and then click **Cancel Scheduled Report**.

All reports generated for all employers in your organization, including those that cannot be run from this workspace, will be listed and viewable here.

NOTE: You may not see all the reports described in this section in your instance of SIMON. If you have questions about this, please contact Vimly staff for assistance.

AVAILABLE REPORTS

ACTIVITY REPORT

Scope options: One Employer, All Employers

The Activity report displays, for a given period, all transactions processed for a specific employer. 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	Staus
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

CLIENT CENSUS REPORT

Scope options: One Employer, All Employers

The Client Census report displays demographic information and coverage elections for all members of a specific employer. 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 Carriers	EO
Baratheon	Emilt		Wife	Female	- -	1/1/1976	42		10536 SW 14th Dr		Portland	OR	97219-6467	Full-Time	Medical	Medical - Bronze	Blue Cross	
Baratheon	Emilt		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	

MEDICAL COVERAGE (ACA) REPORT

Scope options: One Employer, All Employers

The Medical Coverage report displays coverage by month for all employees of a specific employer. 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	D	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			
Pam	Beesly				123-18-1235	10/23/1984	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			
Andy	Bernard				123-22-1237	9/12/1982	X	X	X	X	X	X	X	X	X			

MEMBERSHIP CHANGE REPORT

Scope options: One Employer

The Membership Change report displays, for a given period, the *before* and *after* results of activities performed on all members of a specific employer. 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.

Session Item	Item Description	Is Changed	Before	After
		Employer:	SIMON Demo Group	
		Report Date:	08/17/2018 10:52:19	
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	Empoyee 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		Premera 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		Premera 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

Scope options: One Employer

The Payroll report shows cost by employee for all line 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

Scope options: One Employer

The Roster Report displays all demographic information for all employees and dependents under a specific employer. 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	SSN4	DOB	Gend	Marit	Occupation	Hire Dat	Effective D	Term Da	Address Line 1	Address	City	Stat	Zip Code	Phone	Email	Class	Annual Sala
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@dundermi	Full-Time	54000.00
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 membe	01/01/2021	01/01/2021		10536 SW 14th Dr		Portland	OR	97219-6467	(123) 456-7890	nottoday@example.c	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	Dohmnall			*****4654	05/13/1983	M	S	a occupation	04/01/2020	04/01/2020		2345 9th Ave		Seattle	WA	98121-1907	(263) 458-2604	mlynch@seahawk.co	Full-Time	365000.00
Self	Martin	Hank			*****5444	10/12/1986	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			Full-Time	78685.00
Self	Timmerman	Sam			*****1374	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			*****4311	02/05/1965	M	M	a occupation	05/01/2019	05/01/2019		121212 Harbour Re	Apartment	Mukilteo	WA	98275		shudson@dundermif	Full-Time	75000.00
Wife	Hudson	Terri			*****4544	01/01/1970	F				05/01/2019		121212 Harbour Re	Apartment	Mukilteo	WA	98275				
Daughter	Hudson	Lisa			*****4545	03/04/1994	F				09/01/2019		121212 Harbour Re	Apartment	Mukilteo	WA	98275				
Self	Test Iii	Testing			*****4567	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	Flenderson	Toby			*****1236	02/01/1970	M	S		08/01/2018	05/01/2019		6431 Pine St	C-123	Sampleville	CA	55112		tflenderson@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

Scope options: All Employers

The User List report displays all users with access to your organization in 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

MINIMUM PARTICIPATION REPORT

Scope options: All Employers

The Minimum Participation report displays current enrollment and participation for all lines of coverage. It provides a comprehensive view of all waived versus elected coverages, and it's particularly useful for compliance reporting. It includes:

- Carrier
- Coverage Type
- Minimum Enrollment Requirement
- Current Enrollment
- Participation Requirement
- Current Participation
- Group Size
- Employer Name
- Employer Locator ID
- Open Enrollment Start Date
- Open Enrollment Stop Date
- Plan Year Effective Date

Minimum Participation Report

Effective Date: 01/01/2017
As of Date: 08/17/2018

Carrier	Coverage Type	Minimum Enrollment Requirement	Current Enrollment	Participation Requirement	Current Participation	Group Size	Employer	Employer Locator ID	Open Enrollment Start Date	Open Enrollment Stop Date	Plan Year Effective Date
Blue Cross	Medical	0	1	0.00%	50.00%	2	Demo Group	000099047	01/01/2009		01/01/2017
Further	CDHP	0	1	0.00%	50.00%	2	Demo Group	000099047	01/01/2009		01/01/2017
Blue Cross	CDHP	0	1	0.00%	50.00%	2	Testopia	000099047	01/01/2009		01/01/2017
Blue Cross	Medical	0	1	0.00%	1.00%	55	Test Group	000099035	05/01/2014		01/01/2017
Further	CDHP	0	1	0.00%	1.00%	55	Test Group	000099035	05/01/2014		01/01/2017

EMPLOYER SUMMARY REPORT

Scope options: All Employers

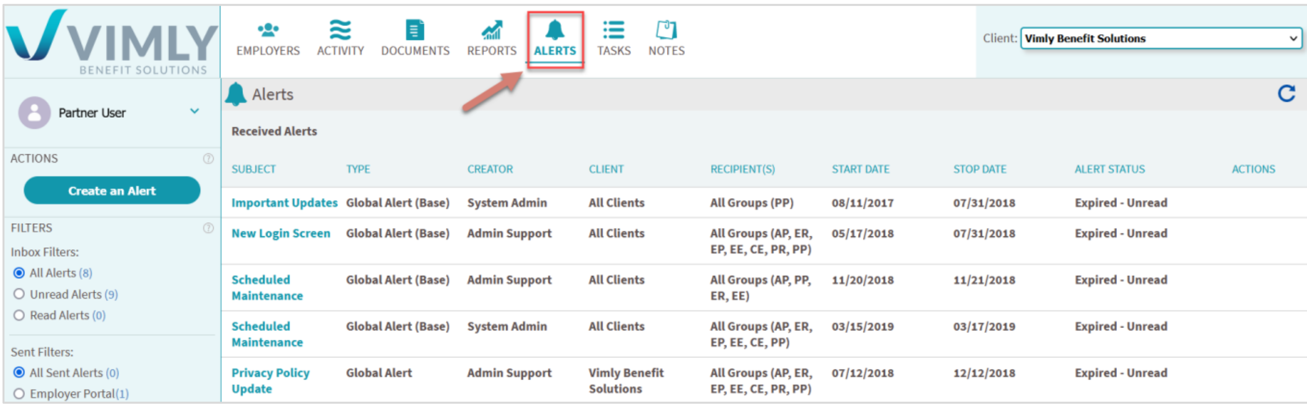
The Employer Summary report displays all *Active* employers under your organization. It includes:

- Broker
- Broker House
- Start Date
- Active Employee Count
- Active Dependent Count
- Total Active Member Count

Employer Summary Report

Row No	Client ID	Client Name	Employer Name	Broker Type	Broker Name	Relationship Type	Employer Status	Start Date	Stop Date	Active Employees	Active Dependents	Active Members
1	4	Vimly Benefit Solutions	Atlanta Falcons				Active	01/01/2009		10	0	10
2	4	Vimly Benefit Solutions	Buffalo Bills				Active	01/01/2009		7	1	8
3	4	Vimly Benefit Solutions	Buffalo Bills	House	Sample Broker House		Active	01/01/2009		7	1	8
4	4	Vimly Benefit Solutions	Chicago Bears				Active	01/01/2009		9	0	9
5	4	Vimly Benefit Solutions	Cincinnati Bengals				Active	01/01/2009		7	1	8
6	4	Vimly Benefit Solutions	Cleveland Browns				Active	01/01/2009		9	0	9
7	4	Vimly Benefit Solutions	Denver Broncos				Active	01/01/2009		12	0	12
8	4	Vimly Benefit Solutions	Detroit Lions				Active	01/01/2009		10	0	10
9	4	Vimly Benefit Solutions	Green Bay Packers				Active	01/01/2009		6	0	6
10	4	Vimly Benefit Solutions	Houston Texans				Active	10/01/2009		9	0	9
11	4	Vimly Benefit Solutions	Jacksonville Jaguars				Active	01/01/2009		9	0	9
12	4	Vimly Benefit Solutions	Kansas City Chiefs				Active	01/01/2009		7	0	7
13	4	Vimly Benefit Solutions	Miami Dolphins				Active	01/01/2009		6	0	6
14	4	Vimly Benefit Solutions	New England Patriots				Active	01/01/2009		9	0	9
15	4	Vimly Benefit Solutions	New Orleans Saints				Active	01/01/2009		10	0	10
16	4	Vimly Benefit Solutions	New York Giants				Active	01/01/2009		9	0	9

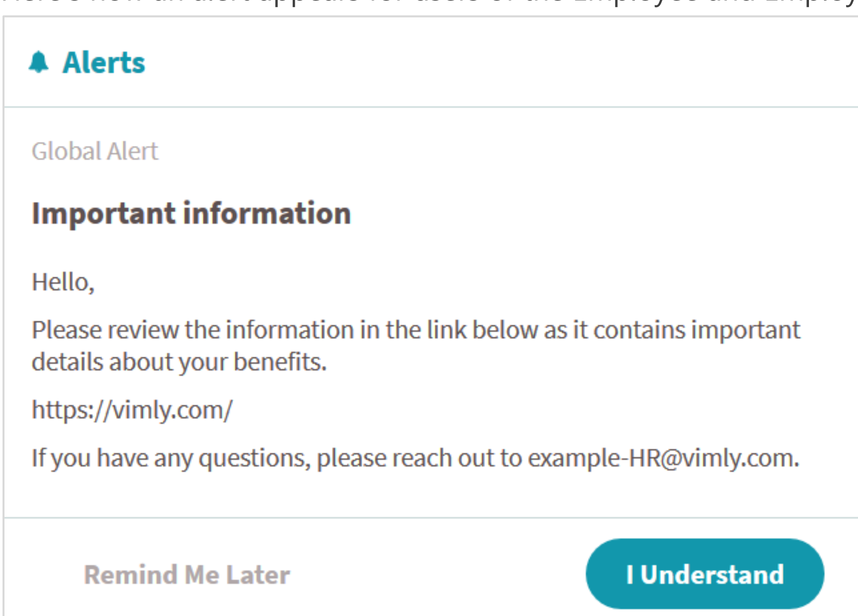
CREATE AND MANAGE ALERTS



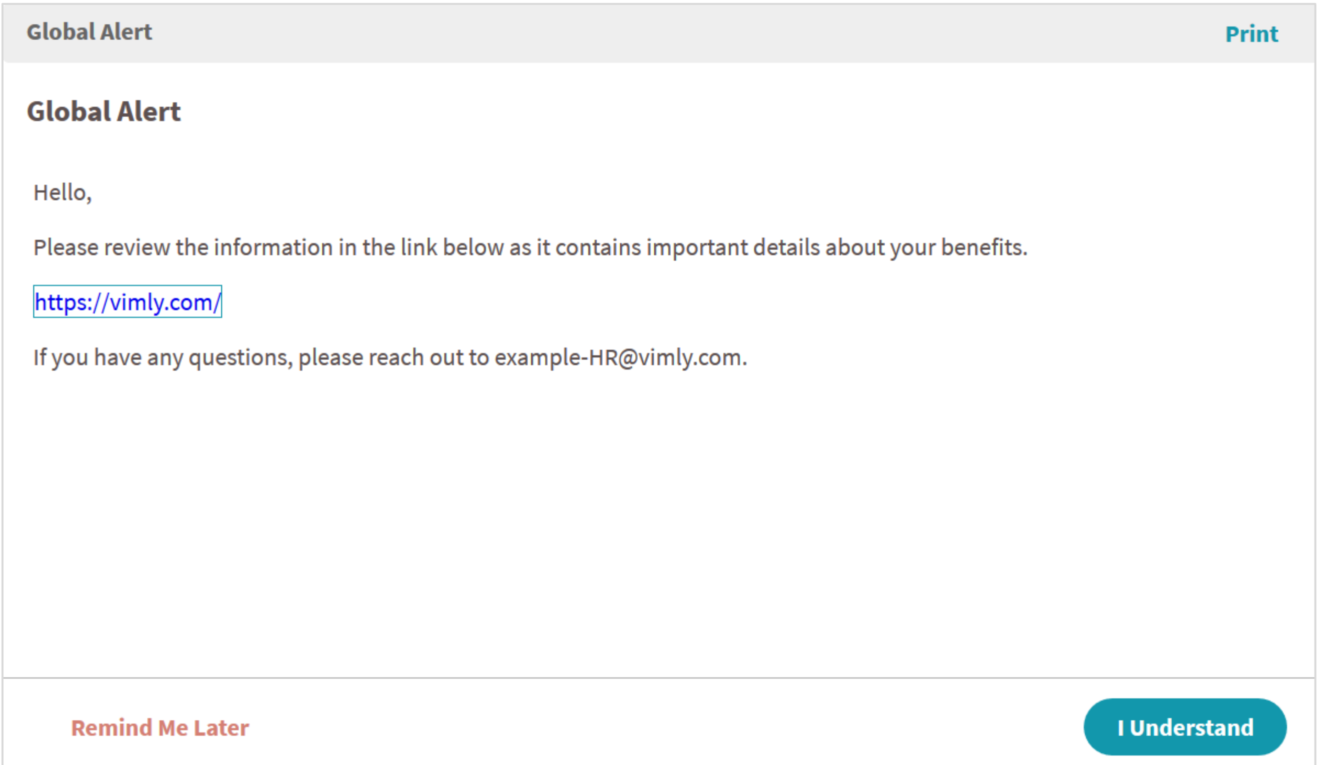
NOTE: You may not be able to perform all the steps described in this section. The permissions granted to your SIMON account determine what you can and cannot do. If you have questions about your account permissions, please contact the people managing this program for your organization.

When SIMON users within your organization need to be notified of critical information, such as new document availability, support information (guides/contact information), or regulation changes, **alerts** are a great way to get that message out. Alerts appear the moment your users login to SIMON, and email notifications can be sent automatically to prompt users to login immediately and get the message.

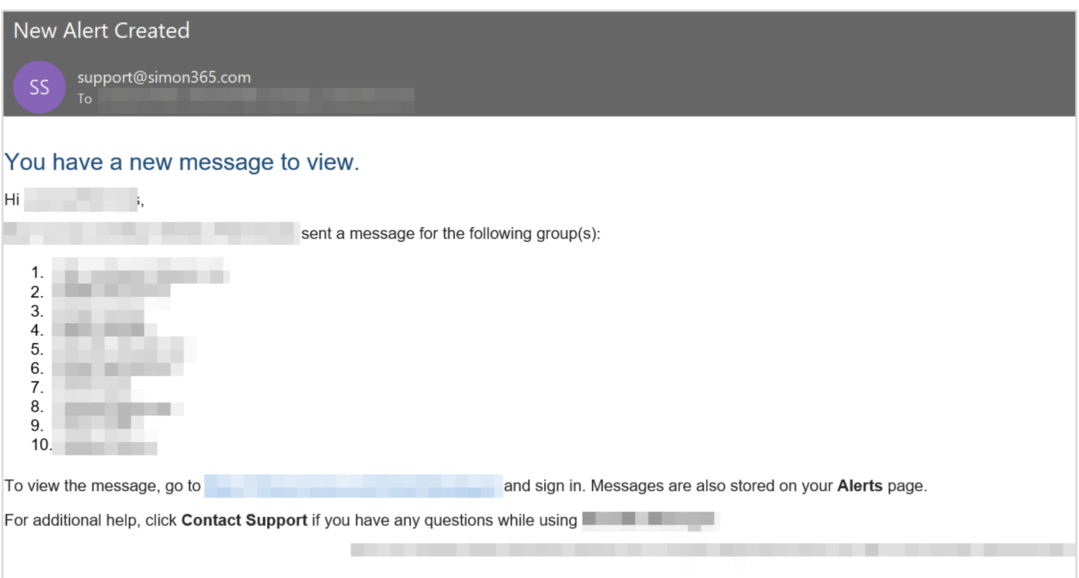
Here's how an alert appears for users of the Employee and Employer portals:



Here's how an alert appears for users of Partner Portal:

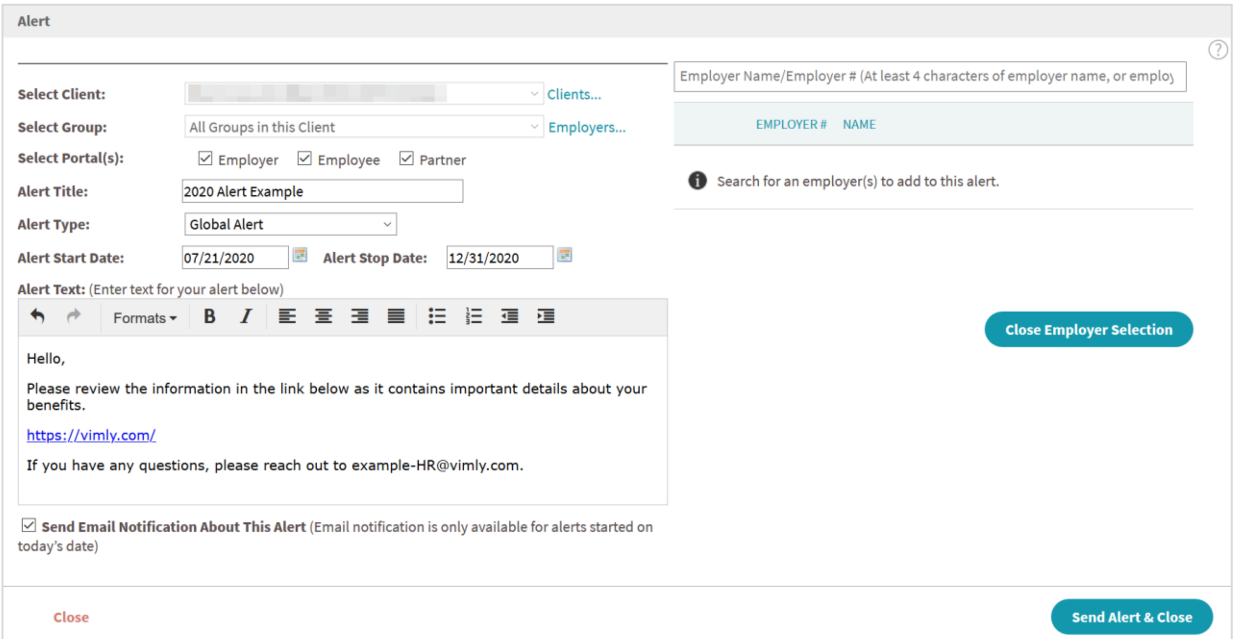


Here's how the email notification appears for all users:



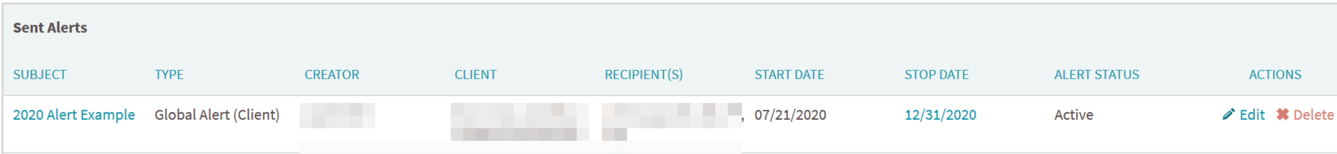
CREATE AN ALERT

Global alerts can be sent to a selection of employers, or to all employers in your organization.



1. At the very top of the page, click the **Alerts** icon.
2. On the left sidebar, click **Create an Alert**.
3. If you have access to more than one client, click **Clients**, and then select the client for this alert.
4. If the alert is meant for a specific employer or set of employers, click **Employers**, and then search for and select the check box next to each employer you want.
   If this alert is meant for all employers under the selected client, leave the **Select Group** field blank.
5. Select the portals that should see the alert.
6. Enter a title for the alert. The title will be prominently displayed, so try to make it clear and concise.
7. If the alert is related to a specific situation, such as billing, enrollment, or other issues, select an appropriate **Alert Type**. Otherwise, leave it set to **Global Alert**.
8. Select a start and stop date for when this alert should be displayed.
9. Enter the text of your alert. Again, try to make it clear and concise. Use the formatting options to make it easier to read.
10. If you want users to also receive notification of this alert in email, select the **Send Email Notification About This Alert** checkbox. Users will be prompted to login to SIMON to see the alert.
11. If everything looks good, click **Send Alert & Close**.

MANAGE SENT ALERTS



Sent Alerts

SUBJECT	TYPE	CREATOR	CLIENT	RECIPIENT(S)	START DATE	STOP DATE	ALERT STATUS	ACTIONS
2020 Alert Example	Global Alert (Client)				07/21/2020	12/31/2020	Active	Edit Delete

1. At the very top of the page, click the **Alerts** icon.
2. Scroll down to the **Sent Alerts** section of the page.
3. To view a sent alert, under the **Subject** column on the left side of the list, click the alert title. To see viewership numbers and other metrics related to the alert, click **Alert Report**. A report will be added to queue for you, and you'll receive an email notification when the report is ready.
4. To edit a sent alert, under the **Actions** column on the right side of the list, click **Edit**. Make the changes you want, and then click **Save Alert**.
5. To delete a sent alert, under the **Actions** column on the right side of the list, click **Delete**. If you're sure you want to delete it, click **Delete Alert Now**.

MANAGE TASKS AND NOTES

Tasks and Notes give you a straightforward way to capture important and actionable information in SIMON about the employers and members within your organization. They are not visible to your members. **They are only visible to the administrative staff within your organization, and to Vimly internal staff that support you.**

- **Notes** are ideal for capturing important and critical information about an employer, employee, or dependent, such as special interests, eligibility issues, related documents, or recaps of contact and communication. Notes are available for use by all organizations.
- **Tasks** (if enabled for your organization) are ideal for capturing actionable information, such as reminders to follow up with an employer or member. Tasks can be assigned to members of your administrative staff, track status, and can be given a due date for completion.

VIEW TASKS AND NOTES

Tasks and Notes can be viewed for a specific employer, a specific employee, or a specific dependent. When you're working on an employer or member with an associated Task or Note, you can see just the Tasks and Notes that are related to them. For example, if you are working on a specific employer, you can see all Tasks and Notes associated with the employer, or any member of that employer. If you are working on a specific employee, you can see all Tasks and Notes associated with the employee and any of their dependents.

Tasks and Notes can also be attached at the organization level. At this top level, all Tasks and Notes can be seen regardless of the employer or member you're working on.

VIEW ALL TASKS OR NOTES FOR YOUR ORGANIZATION

At the top of the Partner Portal page, click **Tasks** or **Notes**. These buttons are available on every screen in Partner Portal.

VIEW ALL TASKS OR NOTES FOR AN EMPLOYER

1. At the top of the Partner Portal page, click **Employers**.
2. Locate and click the employer you want, and then click **Tasks** or **Notes**.

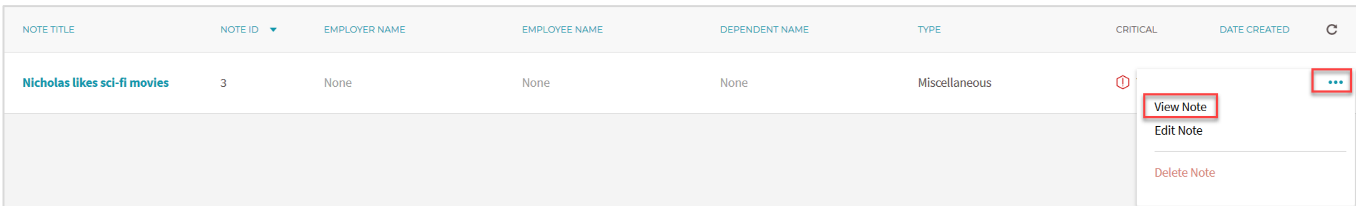
VIEW ALL TASKS OR NOTES FOR AN EMPLOYEE

1. At the top of the Partner Portal page, click **Employers**.
2. Locate and click the employer you want, and then click **Employees**.
3. Locate and click the employee you want, and then click **Tasks** or **Notes**.

OPEN A TASK OR NOTE

To open a task or note, click the title of the task or note in the list.

You can also click the **More** button for the task or note you want, and then click **View Task** or **View Note**.



SORT THE LIST

To sort a list, click any column heading that becomes **bold** when you move the mouse pointer over it. If the column heading does not become bold, you cannot sort by it.

You'll see a ▲ (ascending order) or ▼ (descending order) indicator next to the sorted column. Click the column heading again to reverse the sort order.

SEARCH THE LIST

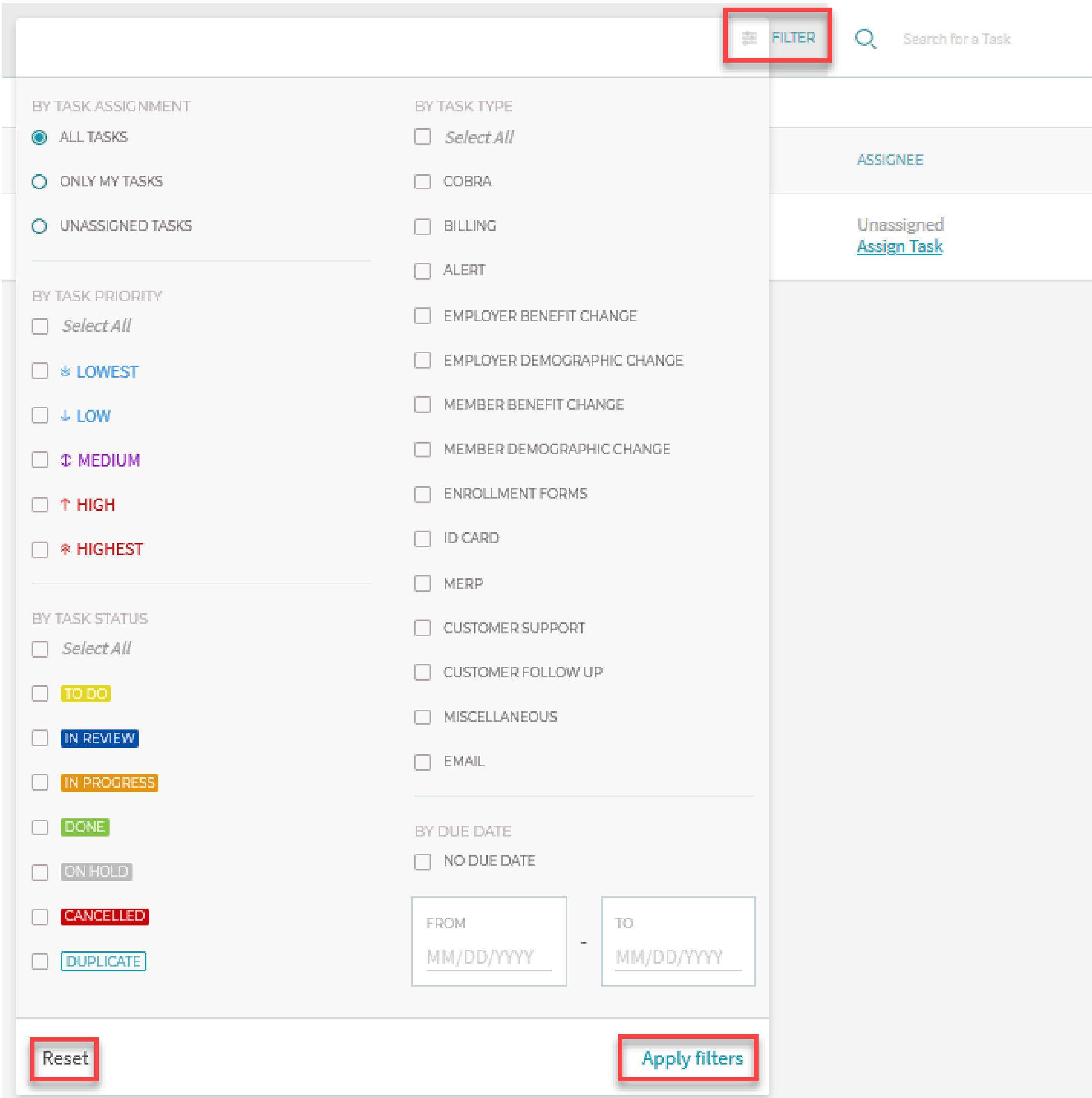
To search for a specific task or note, use the search box near the top right of the page. Search results are returned as soon as you start typing.

TIP: To find a task or note, search for words in the title, the ID number, or the name of an employer, employee, or dependent. You cannot search for text in the description, attached documents, or any other part of a task or note.

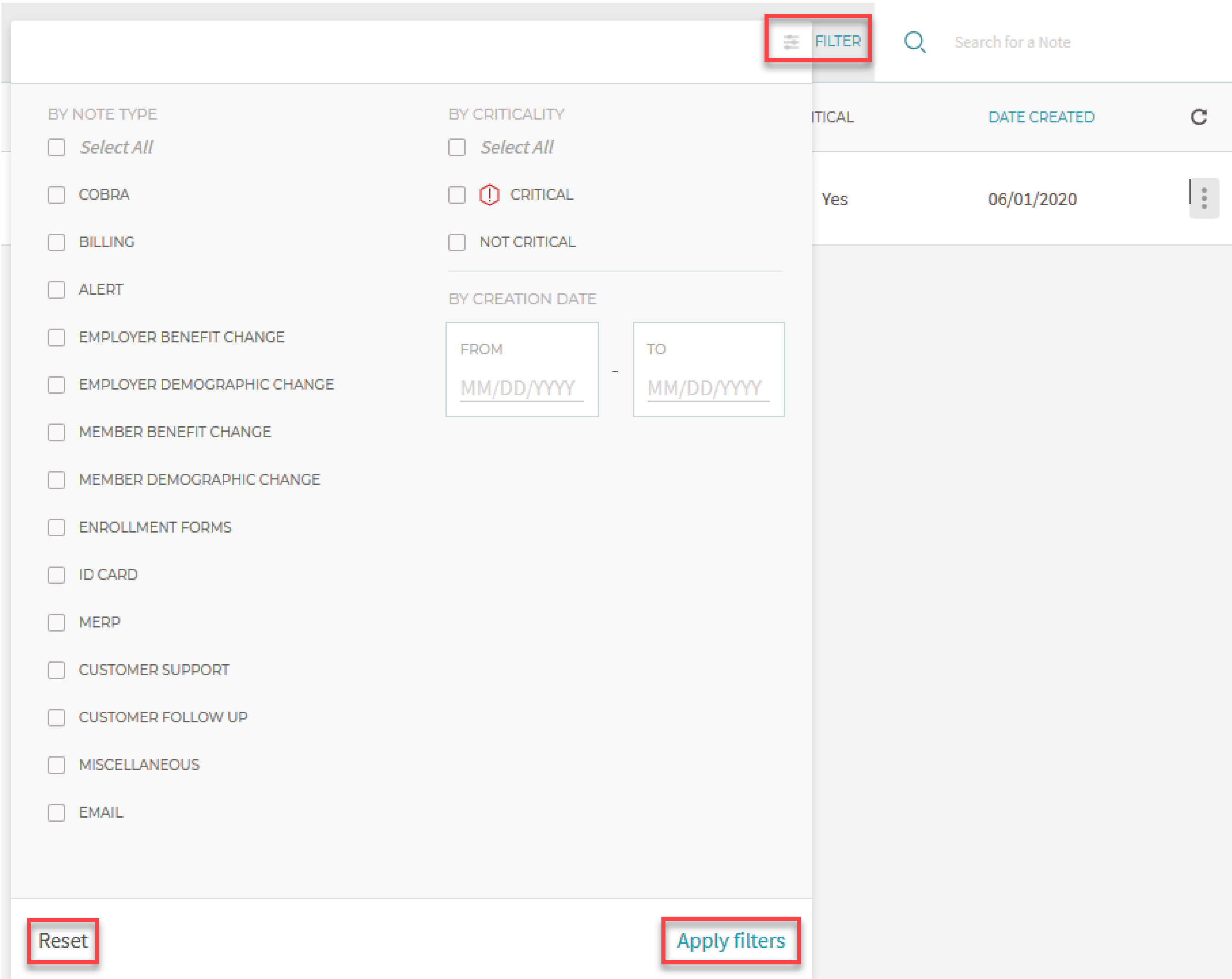
FILTER THE LIST

To filter the list, near the top right of the page, click **Filter**, and then select the options you want.

The **Tasks** list can be filtered by assignment, priority, status, type, and due date.


FILTER
Search for a Task
ASSIGNEE
Unassigned
Assign Task
BY TASK ASSIGNMENT
ALL TASKS
ONLY MY TASKS
UNASSIGNED TASKS
BY TASK PRIORITY
Select All
LOWEST
LOW
MEDIUM
HIGH
HIGHEST
BY TASK STATUS
Select All
TO DO
IN REVIEW
IN PROGRESS
DONE
ON HOLD
CANCELLED
DUPLICATE
BY TASK TYPE
Select All
COBRA
BILLING
ALERT
EMPLOYER BENEFIT CHANGE
EMPLOYER DEMOGRAPHIC CHANGE
MEMBER BENEFIT CHANGE
MEMBER DEMOGRAPHIC CHANGE
ENROLLMENT FORMS
ID CARD
MERP
CUSTOMER SUPPORT
CUSTOMER FOLLOW UP
MISCELLANEOUS
EMAIL
BY DUE DATE
NO DUE DATE
FROM
MM/DD/YYYY
TO
MM/DD/YYYY
Reset
Apply filters

The **Notes** list can be filtered by type, criticality, and creation date.



Next, click **Apply Filters**.

When filters are applied, you'll see the applied filters reflected at the top of the list. You can remove applied filters by clicking the **X** next to ones you want to remove.

If you want to switch back to the default filter settings for the list, click **Filter**, and then click **Reset**.

EXIT THE LIST

Near the top right of the page, click **Exit to Client**, **Exit to Employer**, or **Exit to Employee**.

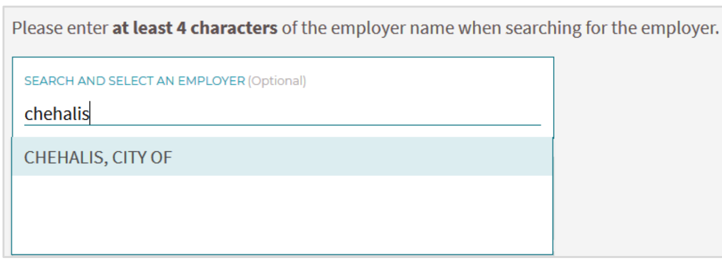
CREATE TASKS AND NOTES

From any Tasks or Notes list, you can create a new Task or a new Note.

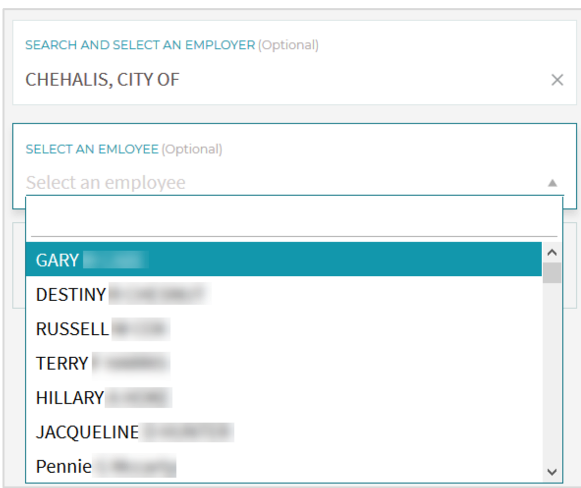
CREATE A TASK

1. In the **Tasks** list, near the top right corner of the page, click **Add a New Task**.
2. On the **Task Hierarchy** step, enter the name of employer (aka "client") you want to associate the task with, and then click the name in the search results.

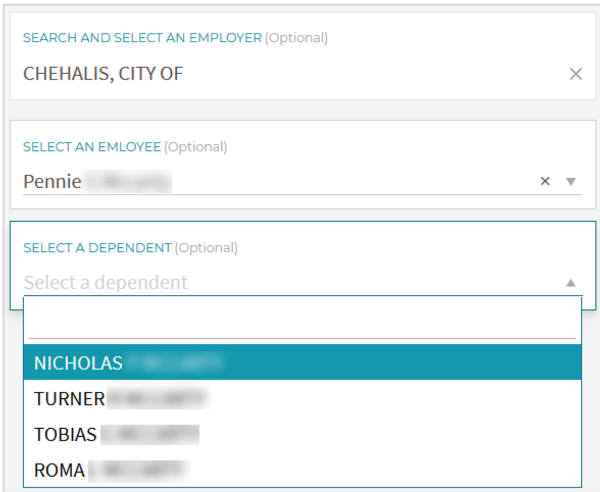
   If you are viewing the Tasks list for a specific employer, the employer is filled in automatically.



3. If you want to associate the task with a specific employee under the employer, enter the name of an employee, and then click the name in the search results.



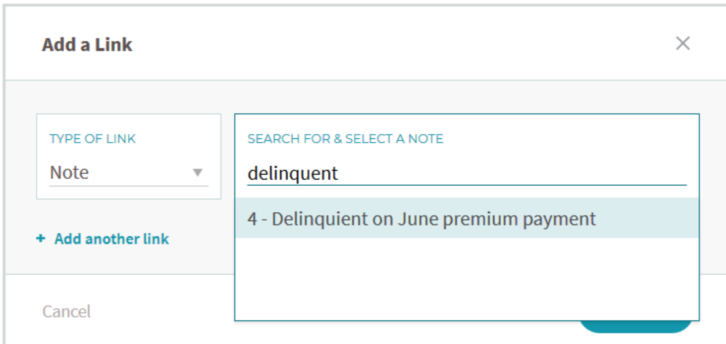
4. If the employee you selected has dependents, and you want to associate the task with a specific dependent under the employee, enter the name of the dependent, and then click the name in the search results.



5. Near the top right corner of the page, click **Next: Task Details**.
6. On the **Task Details** step, enter a **Title** and **Description** for the task. You must enter something into both entry boxes.
7. If desired, select a **Type** from the drop-down list.

   NOTE: The Type list cannot be customized. You must select from the options in the list.
8. Select a **Priority** for the task. You must select a priority when creating a task.
9. If desired, search for a member of your team in the **Assignee** box, and then click their name in the search results.
10. If desired, select a **Due Date** for the task.

11. If there are other tasks or notes that are related to this task, click **+ Add a link**, select the type of link (Task or Note), and enter the title of the task or note you want to link. Then, select the task or note from the search results.

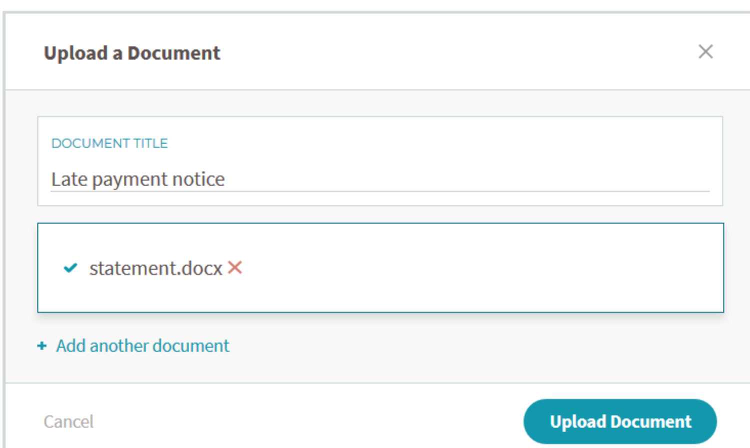


12. If there are documents (or any file on your computer) that you'd like to store with this task, click **Upload a Document**, enter a title for the document or file, and then locate the file on your computer that you want to upload.

    You can drag-and-drop the file onto the web page, or you can click the box to open a dialog and navigate to the file location on your computer.

    To add more than one document or file, click **+ Add another document**. You can add as many documents or files as you want. All file types are supported.

    Once you're finished, click **Upload Document**.



13. Near the top right corner of the page, click **Next: Summary**.
14. Review the information for the task. If you need to change anything, click the **Edit** links.

15. Click **Create Task**.

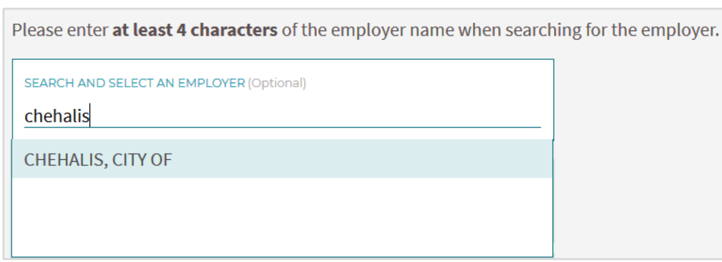
    If you decide that you don't want to create this task, click the **X** at the top right corner of the page, and then click **Leave and discard**.

You'll now see all the details of your task, and you can make further changes to it, if desired.

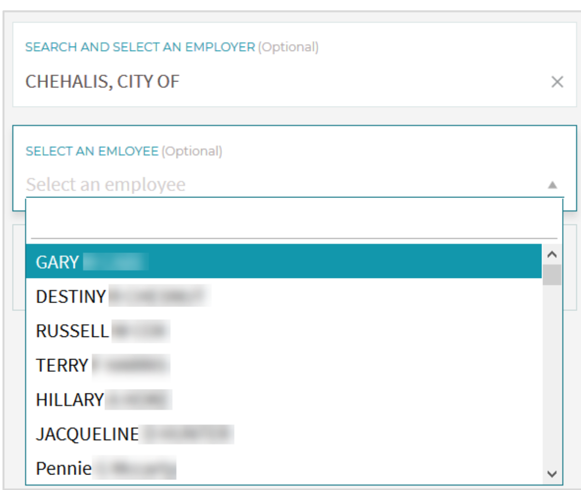
CREATE A NOTE

1. In the **Notes** list, near the top right corner of the page, click **Add a New Note**.
2. On the **Note Hierarchy** step, enter the name of employer (aka "client") you want to associate the note with, and then click the name in the search results.

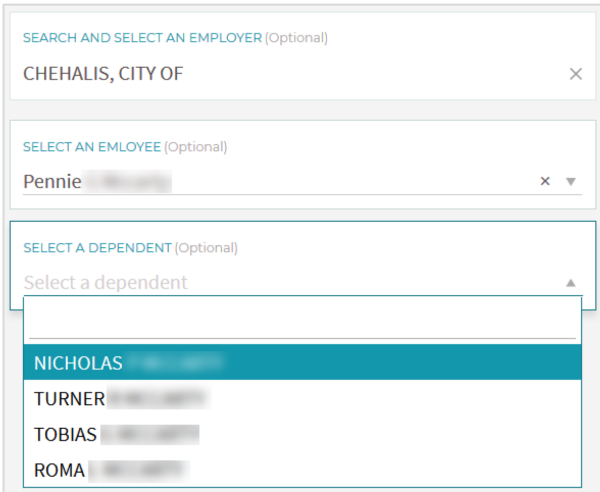
   If you are viewing the Notes list for a specific employer, the employer is filled in automatically.



3. If you want to associate the note with a specific employee under the employer, enter the name of an employee, and then click the name in the search results.

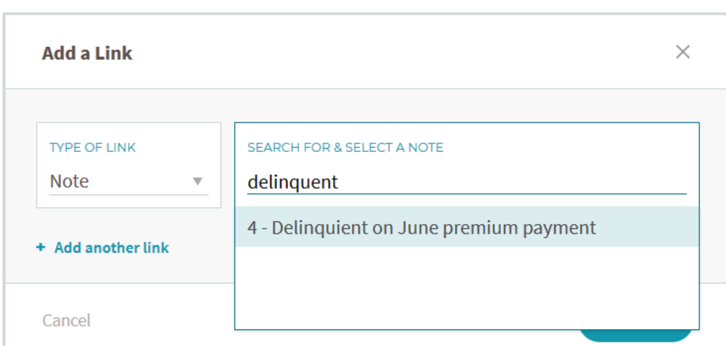


4. If the employee you selected has dependents, and you want to associate the note with a specific dependent under the employee, enter the name of the dependent, and then click the name in the search results.



5. Near the top right corner of the page, click **Next: Note Details**.
6. On the **Note Details** step, enter a **Title** and **Description** for the note. You must enter something into both entry boxes.
7. If desired, select a **Type** from the drop-down list.

   NOTE: The Type list cannot be customized. You must select from the options in the list.
8. If the note contains critical information, click the **Yes** button.
9. If there are other tasks or notes that are related to this note, click **+ Add a link**, select the type of link (Task or Note), and enter the title of the task or note you want to link. Then, select the task or note from the search results.

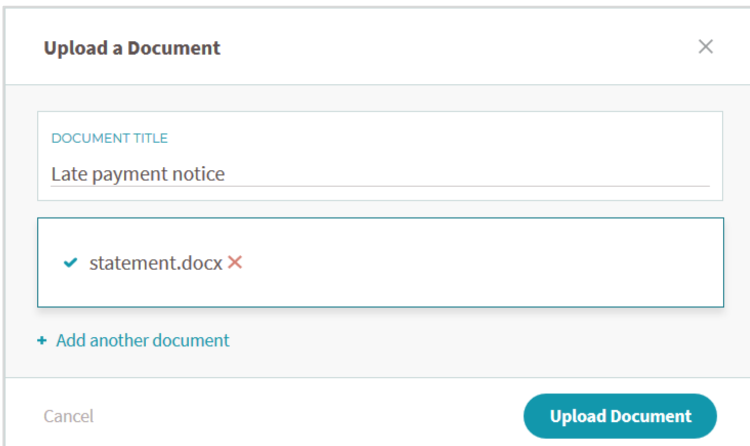


10. If there are documents (or any file on your computer) that you'd like to store with this note, click **Upload a Document**, enter a title for the document or file, and then locate the file on your computer that you want to upload.

    You can drag-and-drop the file onto the web page, or you can click the box to open a dialog and navigate to the file location on your computer.

    To add more than one document or file, click **+ Add another document**. You can add as many documents or files as you want. All file types are supported.

    Once you're finished, click **Upload Document**.



11. Near the top right corner of the page, click **Next: Summary**.
12. Review the information for the note. If you need to change anything, click the **Edit** links.
13. Click **Create Note**.

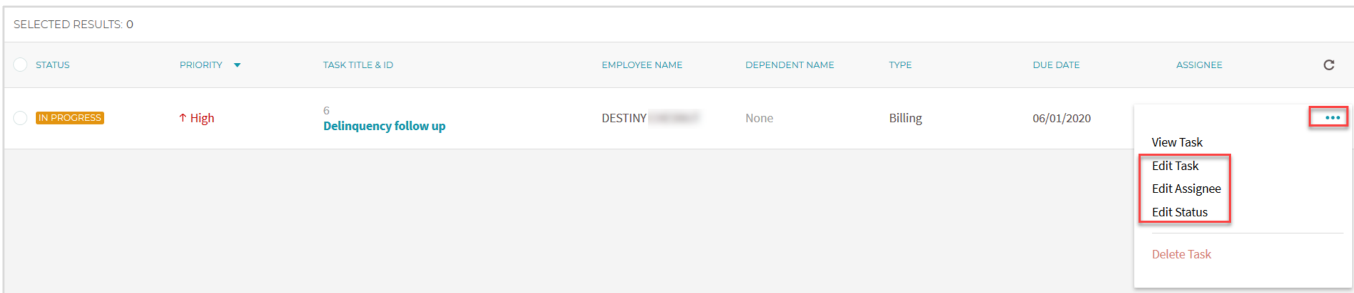
    If you decide that you don't want to create this note, click the **X** at the top right corner of the page, and then click **Leave and discard**.

You'll now see all the details of your note, and you can make further changes to it, if desired.

EDIT OR DELETE TASKS AND NOTES

EDIT OR DELETE A TASK

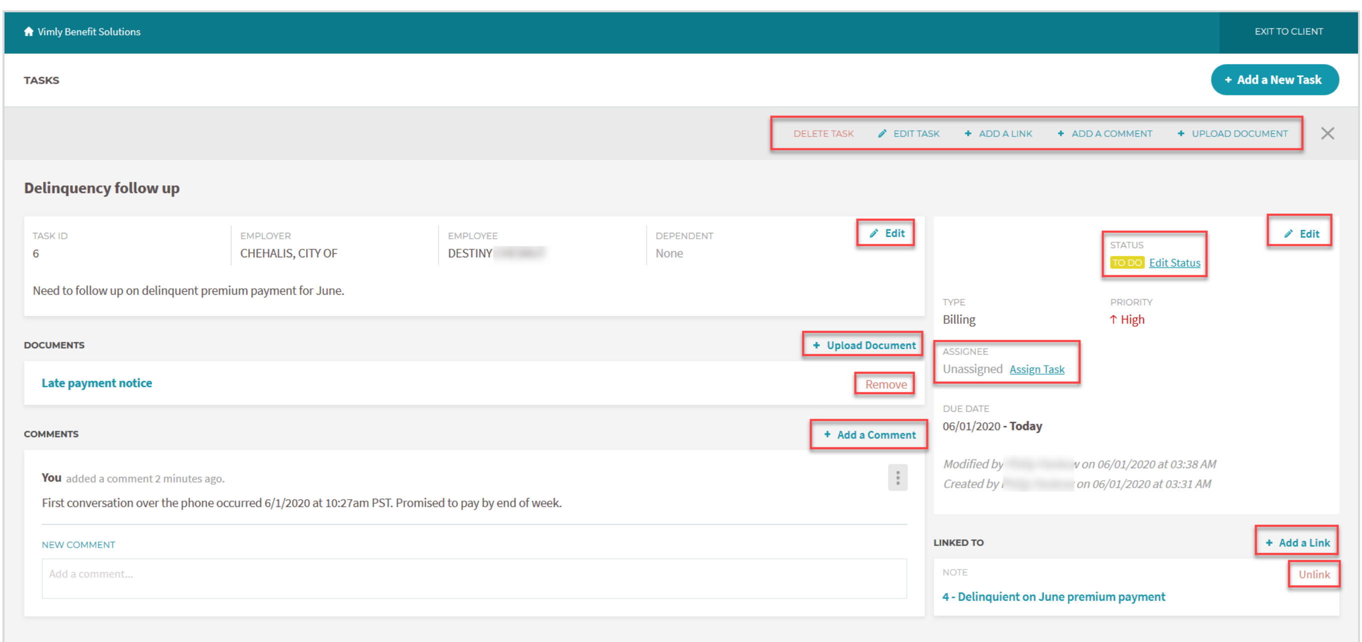
In the **Notes** list, click the **More** ⋮ button for the task you want to change, and then click **Edit Task**.



If all you need to do is change the status or assignee for the task, click **Edit Assignee** or **Edit Status**.

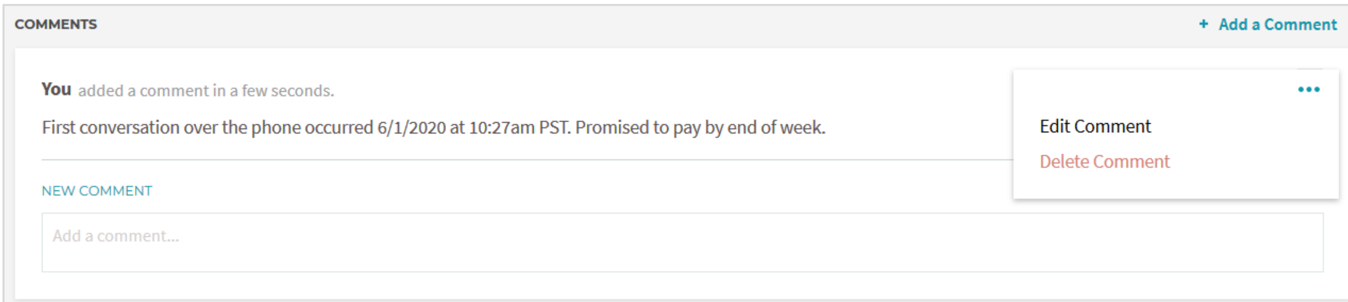
If you want to delete the task, click **Delete Task**.

Alternatively, you can select **View Task** to see all details, and then edit just the parts of the task you need to change. You can also add comments to the task.



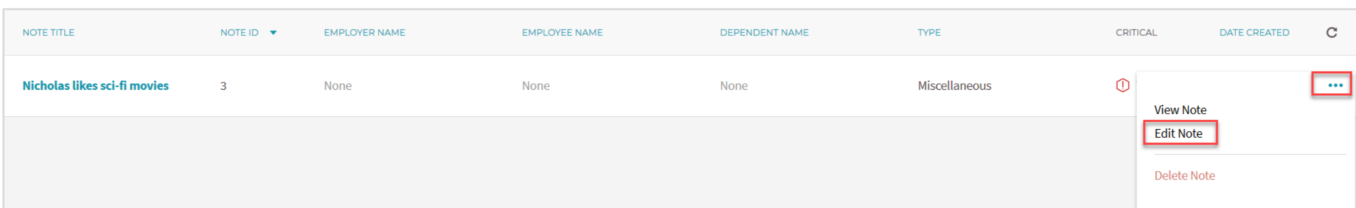
From here, you can click the **Edit** links to change the title, description, or other details of the task. You can also add documents/files, remove documents/files, add links to other tasks or notes, and unlink any links you no longer want associated with this task.

Tasks also support a **Comments** feature. To add a comment, click **+ Add a Comment**. To edit or delete a comment, click the **More** button, and then click **Edit Comment** or **Delete Comment**.



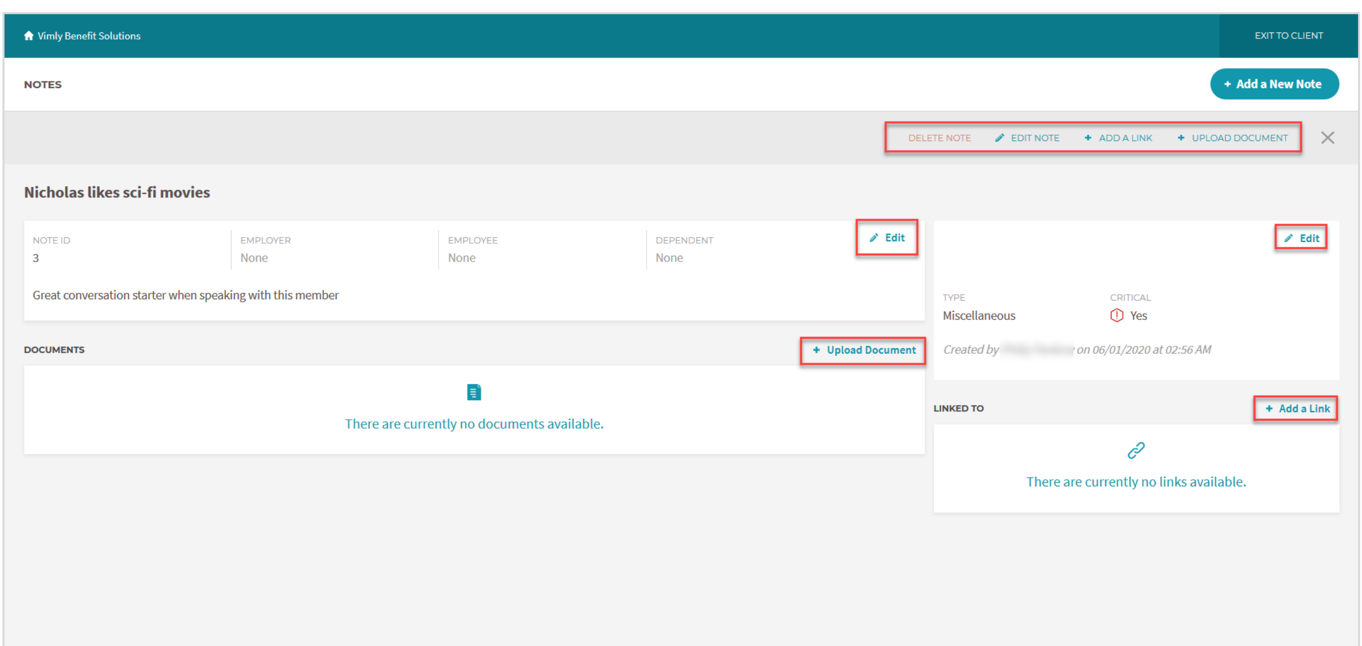
EDIT OR DELETE A NOTE

In the **Notes** list, click the **More** button for the note you want to change, and then click **Edit Note**.



If you want to delete the note, click **Delete Note**.

Alternatively, you can select **View Note** to see all details, and then edit just the parts of the note you need to change.



From here, you can click the **Edit** links to change the title, description, or other details (such as the criticality) of the note. You can also add documents/files, remove documents/files, add links to other tasks or notes, and unlink any links you no longer want associated with this task.