



SIMON Partner and Employer Portal Reports

Reporting in SIMON

This guide provides an outline of the standard reporting capabilities available in the SIMON Partner and Employer Portals, along with a description of the report and notable fields. Vimly Benefit Solutions is continuously working to bring behind-the-scenes capabilities into SIMON for our customers to leverage within the Partner and Employer Portals, and reporting is no exception. Keep an eye out as new reports are becoming available in SIMON regularly.

SIMON Partner Portal Reports:

AUDIT REPORTS			
Report	Description	Criteria Required	Data Elements/Fields
Medical Coverage	Displays medical enrollment and premium information for members, by month. Use this to help fill required forms for Affordable Care Act (ACA) requirements, such as Forms 1094-C and 1095-C.	• 'One Employer' Group only • Date Range • 'Active' or 'COBRA' • Option to schedule recurring	• Employee/Dependent Name • Employee/Dependent Demographic Data (Relationship to Employee, SSN, and DOB) • Annual Eligibility • Gross Premium
Minimum Participation	Displays enrollment participation information for each employer and coverage type. Use this to determine if employers are meeting the minimum enrollment participation requirement for their available plans.	• Plan Year Start Date (As-of) • Transactions Entered Date (As-of) • Option to schedule recurring	• Carrier • Coverage Type • Minimum Enrollment Requirement • Current Enrollment • Participation Requirement Percentage • Current Participation Percentage • Number of Active Employee • Employer Group Name • Open Enrollment Start and End Date • Plan Year Effective Date
User List	Displays a list of SIMON® users, their status, and their available permission(s).	• 'All Employers' or 'One Employer' • Option to schedule recurring	• User/Contact Name • User Registration Email • SIMON Invite Status and Registration Date/Time • User ID/Username • Portal and Role Type Access • Last Login Date • Employer Group Name(s)
BILLING REPORTS			
Report	Description	Criteria Required	Data Elements/Fields
Client Billing Report	Displays billing amounts and payment statuses for all employers, by month and by coverage type.	• 'All Employer' Groups only • Year and Month	• Bill Type • Employer Group Names • Paid • Eligibility Month • Benefit • Grand Total

CENSUS REPORTS

Report	Description	Criteria Required	Data Elements/Fields
Client Census	Displays detailed census and enrollment information for all employers.	'All Employer' Groups only - Show Dependents (Yes or No) - Start Date (As-of) - Option to schedule recurring	- Employee/Dependent Demographic Data (Name, Relationship to Employee, Gender, SSN, DOB, Age, Martial Status, Address, Occupation, Hire Date, Salary, and Class) - Coverage Data (Product, Plan Name, Carrier, Election Tier, Start and Stop Date, and Volume Amount)
COBRA Detail Report	Displays COBRA member demographic information and their associated payments, plans, rates, and carriers.	'All Employer' Groups only - Exact Date (As-of) - Option to schedule recurring	- Employer Group Name/ID - COBRA Admin - Employee/Dependent Demographic Data (Name, DOB, Relationship to Employee, SSN, Election Type, Status, COBRA Start and Stop Date, Class, and Address) - Coverage Data (Carrier, Plan Name, COBRA Net Amount, and Plan Effective and Stop Date) - COBRA Data (Last Bill Date/Amount, Last Paid Date/Amount, COBRA Termination Date/Reason, Qualifying Event and Date, and Notice Sent Date)

EMPLOYER REPORTS

Report	Description	Criteria Required	Data Elements/Fields
Employer Summary	Displays basic summary information for all active employers.	'All Employers' - Option to schedule recurring	- Employer Group Name/ID - Broker Name/Type - Employer Status (Start and End Date) - Active Employees, Dependents, and Total Members - COBRA Employees, Dependents, and Total Members

ENROLLMENT REPORTS

Report	Description	Criteria Required	Data Elements/Fields
Activity Report	Displays recent member enrollment transactions, for one or all employers.	'All Employers' or 'One Employer' - Date Range - Auditing Status - Change Reason(s) - Option to schedule recurring	- Employer Group Name/ID - Employee/Dependent Name - Submitted By User Details - Submitted By Date/Time - Enrollment Reason - Effective Date - Employee/Dependent Coverage Change - Audit Engine Data
Membership Change	Displays detailed before/after information for recent member enrollment transactions. Differences are automatically highlighted.	'All Employers' or 'One Employer' - Date Range - Auditing Status - Change Reason(s) - Option to schedule recurring	- Employee/Dependent Name - Change Reason - Audit Engine Status - Before/After Data - Submitted By User Details - Submitted By Date/Time

SIMON Employer Portal Reports:

Report	Description	Criteria Required	Data Elements/Fields
Activity Report	Displays recent member enrollment transactions.	• Date Range • Auditing Status • Change Reason(s) • Option to schedule recurring	• Employee/Dependent Name • Submitted By User Details • Submitted By Date/Time • Enrollment Reason • Effective Date • Employee/Dependent Coverage Change • Audit Engine Data
Census Report	Displays detailed census and enrollment information.	• Census Date (As-of) • Show Dependents (Yes or No) • SSN Display Options (No SSN, Masked SSN, Full SSN) • Option to schedule recurring	• Employee/Dependent Demographic Data (Name, Relationship to Employee, Gender, SSN, DOB, Age, Martial Status, Address, Occupation, Hire Date, Salary, and Class) • Coverage Data (Product, Plan Name, Carrier, Election Tier, Start and Stop Date, Volume Amount, and CDHP Deduction/Contribution)
User List Report	Displays a list of SIMON® users, their status, and their available permission(s).	• As-of run date • Option to schedule recurring	• User/Contact Name • User Registration Email • SIMON Invite Status and Registration Date/Time • User ID/Username • Portal and Role Type Access • Last Login Date • Employer Group Name • Profile Status
Payroll Report	Displays cost by employee for all lines of coverage.	• Report Date (As-of) • Show Dependents (Yes or No) • SSN Display Options (No SSN, Masked SSN, Full SSN) • Option to schedule recurring	• Employee/Dependent Name • Demographic Data (Relationship to Employee, Gender, SSN, DOB, Age, Martial Status, Address, Occupation, Hire Date, Class, and Salary) • Coverage (Product, Plan Name, Carrier, Election Tier, Premium Amount by Plan, Start and Stop Date, and Volume Amount) • CDHP Deduction/Contribution
Contribution Payroll Report	Displays a breakdown of cost sharing between Employer and Employee for all available benefits.	• Contribution Report Date (As-of) • Show Dependents (Yes or No) • SSN Display Options (No SSN, Masked SSN, Full SSN) • Option to schedule recurring	• Employee/Dependent Name • Demographic Data (Relationship to Employee, SSN, Class, and Pay Cycle) • Contribution Data (Total Coverage Contribution Amount, Employer and Employee Contribution Amounts, Credits, Strategy, Pre- and Post-Tax Totals, Employer and Employee Shares, and Costs) • Coverage (Plan Name and Election Tier)

Roster Report	Displays all demographic information for all employees and dependents.	• Roster Date (As-of) • Show Dependents (Yes or No) • SSN Display Options (No SSN, Masked SSN, Full SSN) • Option to schedule recurring	• Employee/Dependent Name • Relationship to Employee • Demographic Data (Gender, SSN, DOB, Age, Martial Status, Address, Occupation, Hire Date, Salary, Effective and Term Date, Phone, Email, and Class)
COBRA Detail Report	Displays COBRA member demographic information and their associated payments, plans, rates, and carriers.	• COBRA Detail Date (As-of) • Option to schedule recurring	• Employer Group Name/ID • COBRA Admin • Employee/Dependent Demographic Data (Name, DOB, Relationship to Employee, SSN, Election Type, Status, COBRA Start and Stop Date, Class, and Address) • Coverage Data (Carrier, Plan Name, COBRA Net Amount, and Plan Effective and Stop Date) • COBRA Data (Last Bill Date/Amount, Last Paid Date/Amount, COBRA Termination Date/Reason, Qualifying Event and Date, and Notice Sent Date)
Membership Change Report	Displays detailed before/after information for recent member enrollment transactions. Differences are automatically highlighted.	• Date Range • Auditing Status • Change Reason(s) • Option to schedule recurring	• Employee/Dependent Name • Change Reason • Audit Engine Status • Before/After Data • Submitted By User Details • Submitted By Date/Time
Medical Coverage Report (ACA)	Displays medical enrollment and premium information for members, by month. Use this to help fill required forms for Affordable Care Act (ACA) requirements, such as Forms 1094-C and 1095-C.	• Year and Date Range • 'Active' or 'COBRA' • SSN Display Options (No SSN, Masked SSN, Full SSN) • Option to schedule recurring	• Employee/Dependent Name • Employee/Dependent Demographic Data (Relationship to Employee, SSN, and DOB) • Annual Eligibility • Gross Premium
Coverage Rate Report	Displays all coverage offerings available.	• Date Range	• Employer Group Name/ID • Coverage Offerings (Carriers, Plans, Start and Stop Dates, Tiers, and Gross Rates)