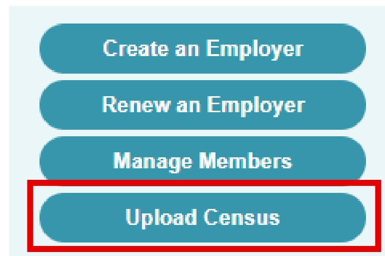
EMPLOYER WORKSPACE (UPLOAD CENSUS)

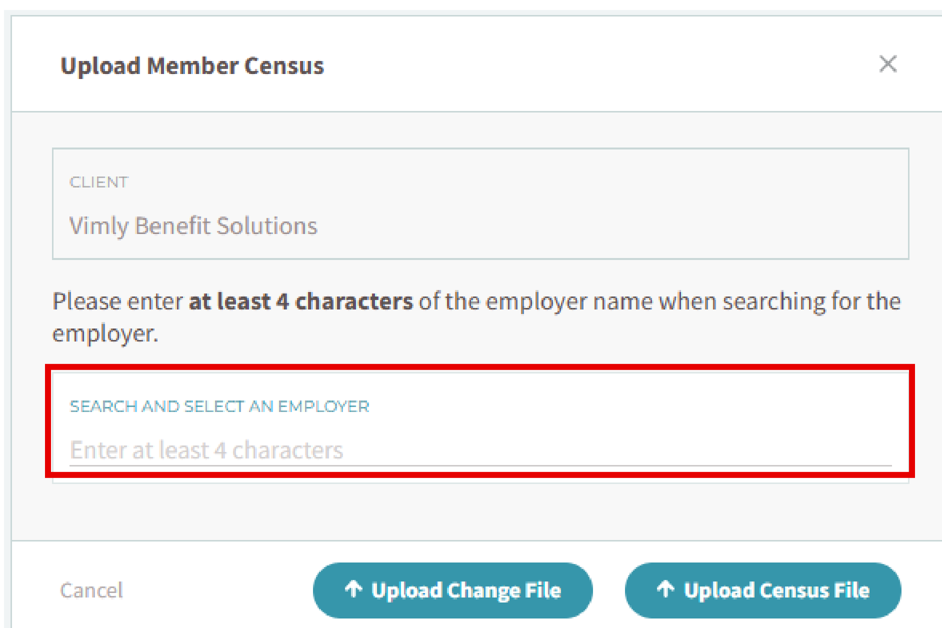
This document is a guide for Partner Portal Users to assist in managing members for a specific employer group within SIMON.

UPLOAD CENSUS (GENERAL NAVIGATION)

1. Login to the SIMON Partner Portal, and select the **Upload Census** button in the navigation menu on the left-side of the homepage screen.



2. Within the Upload Member Census pop-up, provide the following details:
    a. Employer Name



3. Once data is entered, select to **Upload Change File** or **Upload Census File** to continue.
    a. **Upload Change File** is available to download the existing Employer Census File and upload a Change File when bulk edits are needed for plan changes and/or member changes. This option directs the user through a five step process of the following.
        i. File Setup
        ii. Map Fields
        iii. Map Members

iv. Edit Members
v. Change Summary

b. **Upload Census File** is available to download the existing Employer Census File and upload a Census File when bulk member additions are needed for hiring sprees and new Employer Groups. This option directs the user through a four step process of the following.
   i. File Setup
   ii. Map Fields
   iii. Edit Fields
   iv. Change Summary

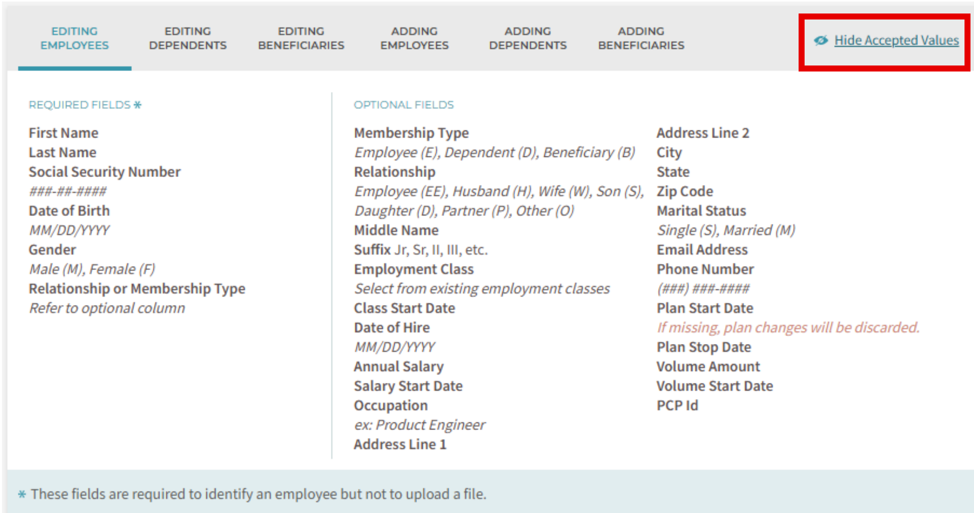
UPLOAD CHANGE FILE

1. Select **Upload Change File** to import changes and additions to all an Employees, Dependents, or Beneficiaries. This option is available when selecting Upload Census from the Employer Workspace. When uploading a Change File, the system provides the following instructions and functionality on the File Setup Page.
   a. Copy and Paste Data
   b. General Guidelines
   c. Required and Optional Fields Per Membership Type
   d. File Formatting

2. To obtain a copy of the Employer's Census File for import, select **Download Spreadsheet Template** in the General Guidelines section of the File Setup page. Open the downloaded .csv file and make applicable changes, as needed.

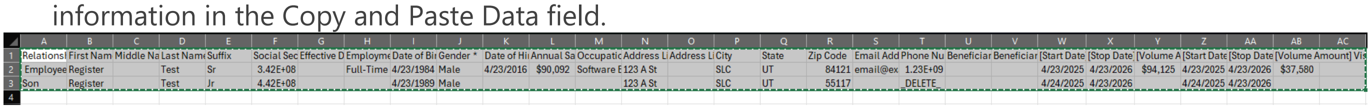
3. If utilizing an existing Census File and need to split columns to meet import requirements, select **Show Me How on Excel** for Splitting Columns in the General Guidelines section of the File Setup page.

4. Compare the Change File to the Required & Optional Fields per Membership type to ensure all required fields are captured and contain acceptable values. To view values that are accepted through this import, select to **View Accepted Values**. Navigate through the following tabs to validate import success.
   a. Editing Employees
   b. Editing Dependents
   c. Editing Beneficiaries
   d. Adding Employees
   e. Adding Dependents
   f. Adding Beneficiaries

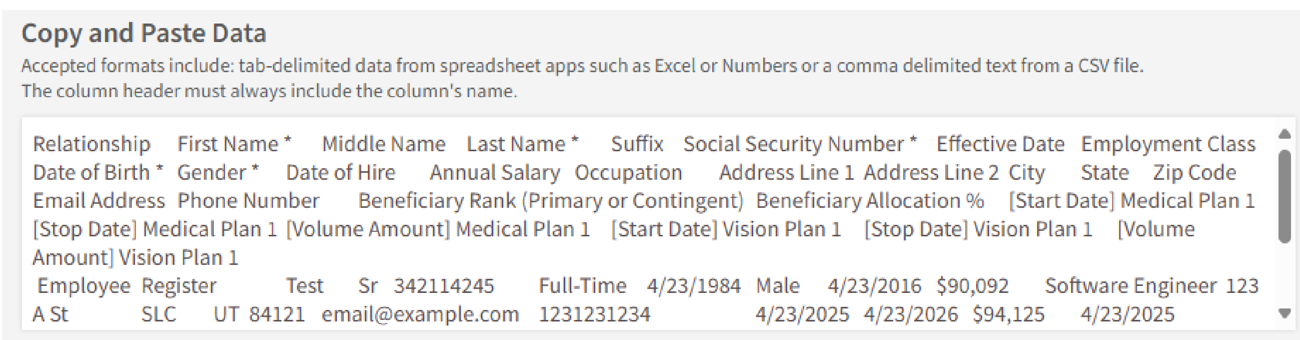


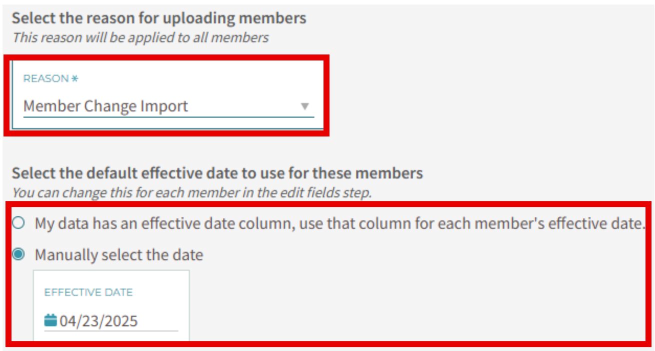
5. Validate file formatting by reviewing the steps provided in the File Formatting section of the File Setup page. These steps highlight Adding a Plan to the Sheet, Adding Multiple Plans to the Sheet, and Emptying Cells.

6. Once all changes have been completed/validated on the Change File, and the file is ready for import, scroll to the top of the page. Copy all headers, columns, and rows from the Change File and paste the information in the Copy and Paste Data field.



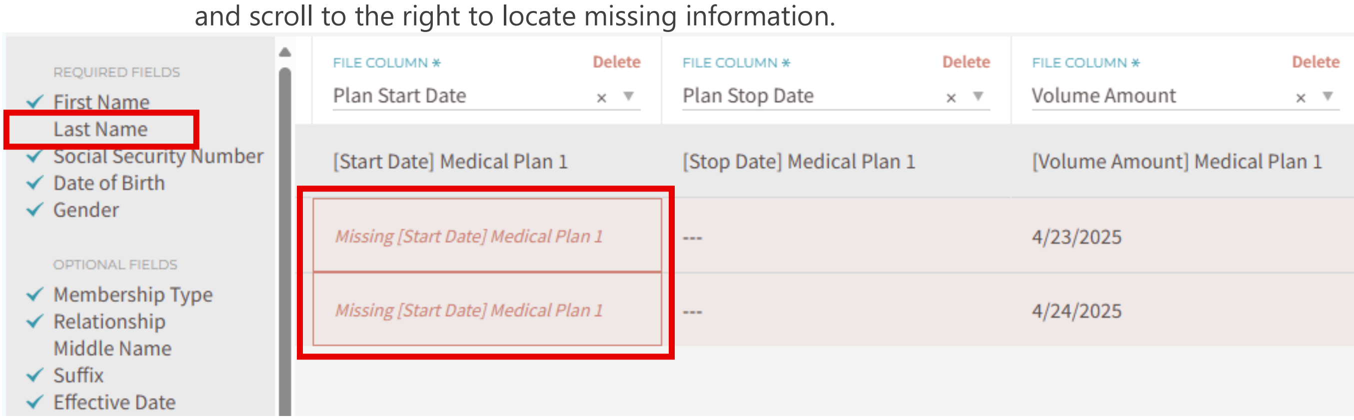
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Relationsl	First Nam	Middle Na	Last Name	Suffix	Social Sec	Effective D	Employme	Date of Bi	Gender *	Date of Hi	Annual Sa	Occupatic	Address Li	Address Li	City	State	Zip Code	Email Add	Phone Nu	Beneficiar	Beneficiar	[Start Date	[Stop Date]	[Volume A	[Start Date	[Stop Date	[Volume Amount] Vis	
2	Employee	Register		Test	Sr	3.42E+08		Full-Time	4/23/1984	Male	4/23/2016	$90,092	Software E	123 A St		SLC	UT	84121	email@ex	1.23E+09			4/23/2025	4/23/2026	$94,125	4/23/2025	4/23/2026	$37,580	
3	Son	Register		Test	Jr	4.42E+08			4/23/1989	Male				123 A St		SLC	UT	55117		_DELETE_			4/24/2025	4/23/2026		4/24/2025	4/23/2026		
4																													





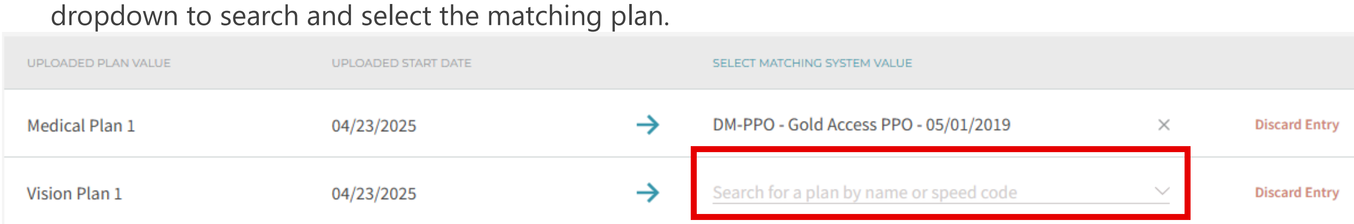
7. Scroll to the bottom of the page and select The Reason for Uploading Members and The Default Effective Date to Use for These Members. Then, select **Next: Map Fields**.

8. On the Map Fields page, the system will display columns pasted from the .csv file with matched census field. Identify missing columns and missing fields, and make corrections as needed. If changes need to be made to the Change File and re-imported, select **Back: File Setup** to return to the previous page.
    a. Missing Columns: To identify missing columns, refer to the Required Fields and Optional Fields Checklist. All items without a checkmark were unable to be identified on the import.
    b. Missing Required Fields: To identify missing required fields, locate the rows highlighted in red and scroll to the right to locate missing information.



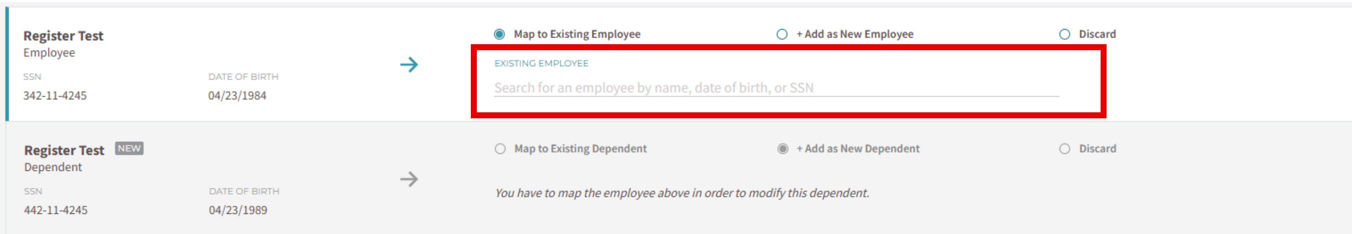
9. Once all fields have been mapped and columns are matched, select **Next: Map Benefits**.

10. On the Map Benefits page, the system will display plan columns pasted from the .csv file. Select the plan dropdown to search and select the matching plan.



11. Once all plans have been mapped to their column headers, select **Next: Map Members**.

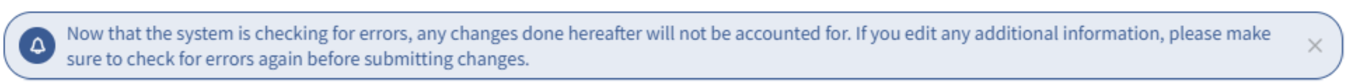
12. On the Map Members page, the system will display all member rows pasted from the .csv file. Validate that all existing members, dependents, and beneficiaries are mapped appropriately and link members as needed utilizing the **Existing** dropdown. Actions on this page include the following.
    a. Map to Existing
    b. + Add as New
    c. Discard



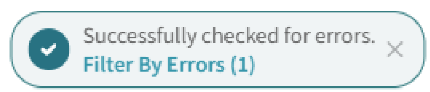
13. Once all members have been identified and mapped, select **Next: Edit Members**.

14. On the Edit Members page, the system will display all headers, columns data, and member rows with the applied mapping from previous pages. Validate that all members, dependents, and beneficiaries are mapped appropriately. All fields highlighted in green represent changes/new information. Update and make any final modifications, as needed, by selecting the necessary cell to make the required changes.

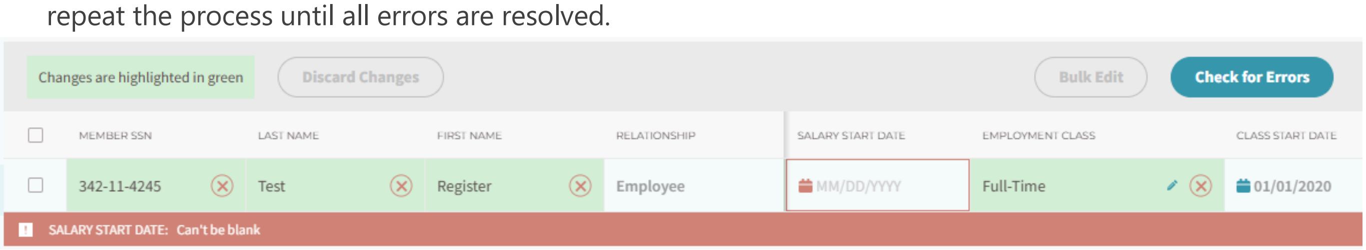
15. When all fields have been updated and/or confirmed as accurate, select **Check for Errors** to audit the current information displayed for all members prior to submitting changes.



16. Once the audit is complete and errors have been identified, select to **Filter By Errors**.



17. Make the appropriate changes to the member information according to the errors displayed below each member row. Once all fields have been updated and/or confirmed as accurate, select **Check for Errors** and repeat the process until all errors are resolved.



18. Select **Next: Change Summary** when all errors are resolved, and the Check for Errors returns with no members with errors.

19. On the Change Summary page, the system will display all members with a side by side comparison of all old and new values for demographic, employment, and benefit information. Review to ensure all information is accurate before submitting changes. If a plan value was associated to a member that is not applicable, select to **Discard Entry**.

20. Once all values have been confirmed, select to **Submit Changes**. When changes are submitted, all changes finalized on the Change Summary page are sent to the Audit Engine for processing.

UPLOAD CENSUS FILE

1. Select **Upload Census File** to import changes and additions to all an Employees, Dependents, or Beneficiaries. This option is available when selecting Upload Census from the Employer Workspace. When uploading a Census File, the system provides the following instructions and functionality on the File Setup Page.
    a. General Guidelines
    b. Required and Optional Fields Per Membership Type
    c. Copy and Paste Data
    d. File Formatting

2. To obtain a copy of the Employer's Census File for import, select **Download Spreadsheet Template** in the General Guidelines section of the File Setup page. Open the downloaded .csv file and make applicable changes, as needed.

3. If utilizing an existing Census File and need to split columns to meet import requirements, select **Show Me How on Excel** for Splitting Columns in the General Guidelines section of the File Setup page. To link members, dependents and beneficiaries can be linked to employees by either placing them in the row directly below the employee in the file, or by grouping them using the same Family ID.

4. Compare the Change File to the Required & Optional Fields per Membership type to ensure all required fields are captured and contain acceptable values. To view values that are accepted through this import, select to **View Accepted Values**. Navigate through the following tabs to validate import success.
    a. For Employees
    b. For Dependents
    c. For Beneficiaries

FOR EMPLOYEES FOR DEPENDENTS FOR BENEFICIARIES

Hide Accepted Values

REQUIRED FIELDS *

Family ID to ensure members are properly linked
ex: 001, 002
First Name
Last Name
Employment Class
Select from existing employment classes
Social Security Number
###-##-####
Date of Birth
MM/DD/YYYY
Gender
Male (M), Female (F)
Date of Hire
MM/DD/YYYY
Annual Salary
Address Line 1
City
State
Zip Code
Relationship or Membership Type
Refer to optional column

OPTIONAL FIELDS

Membership Type
Employee (E), Dependent (D), Beneficiary (B)
Middle Name
Suffix Jr, Sr, II, III, etc.
Relationship
Employee (EE), Husband (H), Wife (W), Son (S), Daughter (D), Partner (P), Other (O)
Marital Status
Single (S), Married (M)
Occupation
ex: Product Engineer
Address Line 2
Email Address
Phone Number
(###) ###-####
Medical Benefit
Dental Benefit
Vision Benefit
Life Benefit
STD/LTD Benefit
Plan name in the column header, salary in the rows
Ancillary Benefit
Plan name in the column header, employee contribution amount in the rows

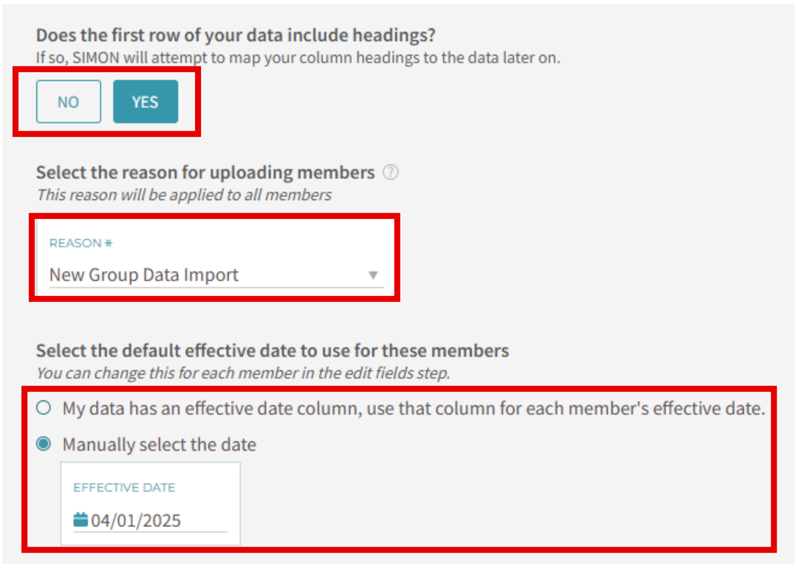
5. Once all changes have been completed/validated on the Change File, and the file is ready for import, scroll to the bottom of the page. Copy all headers, columns, and rows from the Change File and paste the information in the Copy and Paste Data field.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Relationsh	First Nam	Middle Na	Last Name	Suffix	Social Sec	Effective D	Employme	Date of Bir	Gender *	Date of Hi	Annual Sa	Occupatio	Address Li	Address Li	City	State	Zip Code	Email Add	Phone Nu	Beneficiar	Beneficiar	[Start Date	[Stop Date]	[Volume A	[Start Date	[Stop Date	[Volume Amount] Vis	
2	Employee	Register		Test	Sr	3.42E+08		Full-Time	4/23/1984	Male	4/23/2016	$90,092	Software E	123 A St		SLC	UT	84121	email@ex	1.23E+09			4/23/2025	4/23/2026	$94,125	4/23/2025	4/23/2026	$37,580	
3	Son	Register		Test	Jr	4.42E+08			4/23/1989	Male				123 A St		SLC	UT	55117		_DELETE_			4/24/2025	4/23/2026		4/24/2025	4/23/2026		
4																													

Copy and Paste Data

Accepted formats include: tab-delimited data from spreadsheet apps such as Excel or Numbers or a comma delimited text from a CSV file.
The column header must always include the column's name.

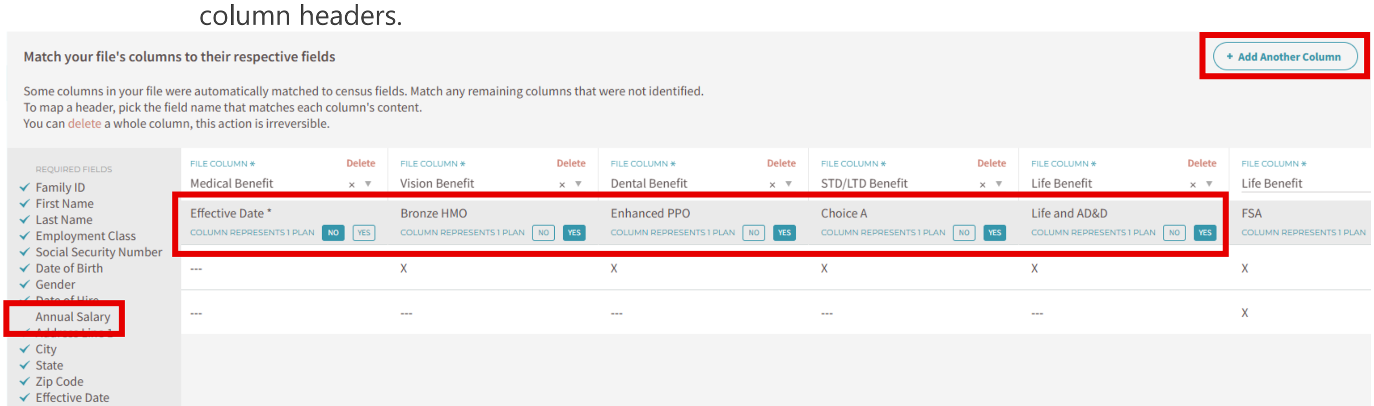
Relationship First Name * Middle Name Last Name * Suffix Social Security Number * Effective Date Employment Class Date of Birth * Gender * Date of Hire Annual Salary Occupation Address Line 1 Address Line 2 City State Zip Code Email Address Phone Number Beneficiary Rank (Primary or Contingent) Beneficiary Allocation % [Start Date] Medical Plan 1 [Stop Date] Medical Plan 1 [Volume Amount] Medical Plan 1 [Start Date] Vision Plan 1 [Stop Date] Vision Plan 1 [Volume Amount] Vision Plan 1
Employee Register Test Sr 342114245 Full-Time 4/23/1984 Male 4/23/2016 $90,092 Software Engineer 123 A St SLC UT 84121 email@example.com 1231231234 4/23/2025 4/23/2026 $94,125 4/23/2025



6. Next, indicate whether the pasted data includes headers by selecting **Yes** or **No.** Then, select The Reason for Uploading Members.

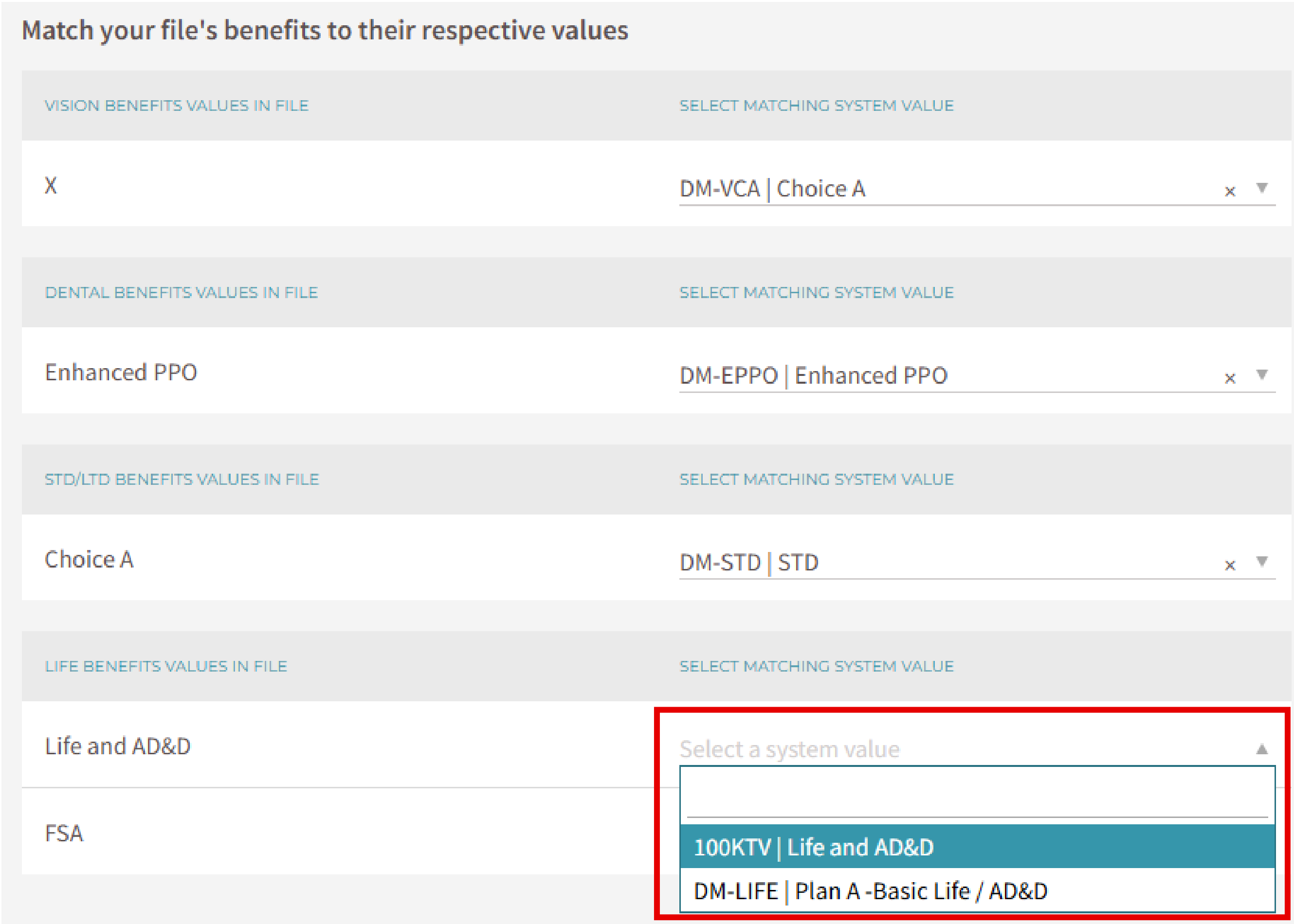
7. Once a reason is selected, Select the Default Effective Date to Use for These Members displays. Indicate whether or not the pasted date includes an effective date and provide, as needed. Then, select **Next: Map Fields**.

8. On the Map Fields page, the system will display columns pasted from the .csv file with matched census field. Identify missing and incorrectly matched columns, and make corrections as needed. If changes need to be made to the Change File and re-imported, select **Back: File Setup** to return to the previous page.
   a. Missing Columns: To identify missing columns, refer to the Required Fields and Optional Fields Checklist. All items without a checkmark were unable to be identified on the import.
   b. Adding Columns: To add another column, whether required or optional, select **+ Add Another Column**. Scroll to the right of the table to locate the column added. **Select Column Content** in the File Column Header to assign the field.
   c. Mapping Columns: **Select Column Content** in the File Column Header to assign the fields, as needed. Plan columns contain plan representation clarifications. To indicate that the column is correctly or incorrectly mapped, select **Yes** or **No** in the grey highlighted row found under the column headers.



9. Once all fields have been mapped and columns are matched, select **Next: Map Benefits**.

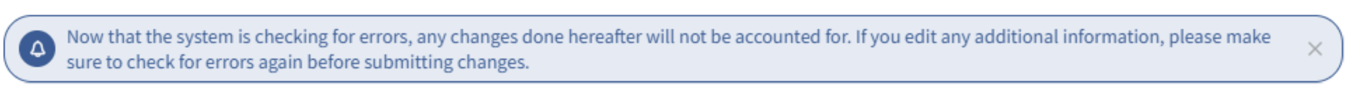
10. On the Map Benefits page, the system will display plan columns pasted from the .csv file. Select the plan dropdown to search and **Select a System Value**.



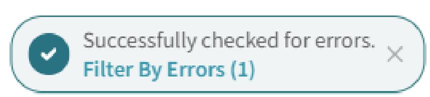
11. Once all plans have been mapped to their column headers, select **Next: Edit Fields**.

12. On the Edit Fields page, the system will display all demographic and employment headers, column data, and member rows with the applied mapping from previous pages. Validate that all members, dependents, and beneficiaries are mapped appropriately. Update and make any final modifications, as needed, by selecting the necessary cell to make the required changes.

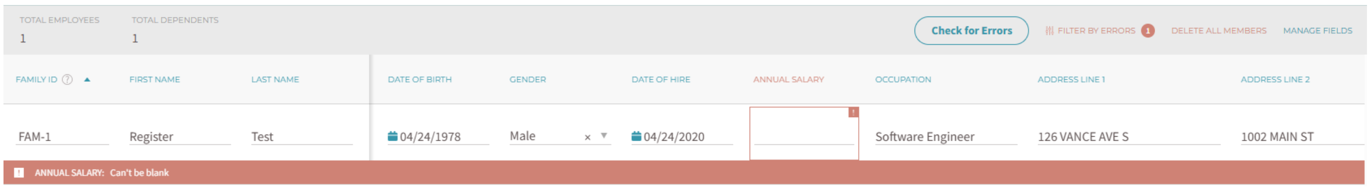
13. When all fields have been updated and/or confirmed as accurate, select **Check for Errors** to audit the current information displayed for all members prior to submitting changes.



14. Once the audit is complete and errors have been identified, select to **Filter By Errors**.

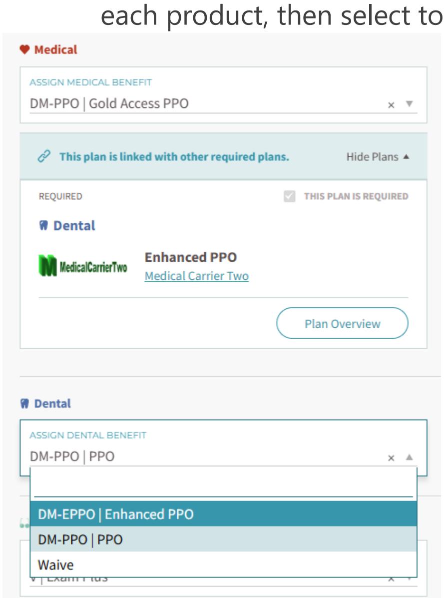


15. Make the appropriate changes to the member information according to the errors displayed below each member row. Once all fields have been updated and/or confirmed as accurate, select **Check for Errors** and repeat the process until all errors are resolved.



16. Select **Next: Assign Benefits to Members** when all errors are resolved, and the Check for Errors returns with no errors found.

17. On the Assign Benefits to Members page, the system will display all members with the benefit headers, column data, and member rows with the applied mapping from previous pages. Update the benefit information, as needed, for each employee by manually modifying each row and column or by bulk assigning benefits. Once complete, review to ensure all information is accurate before submitting members.
    a. Manual Benefit Changes: Assign a plan associated to an employee, dependent, or beneficiary by selecting the **Benefit** dropdown under the desired plan column.
    b. Bulk Assign Benefits: To apply benefits in bulk, select the checkboxes for all employees that require assigning in bulk. Then, select **Bulk Assign Benefits**. Select the benefits associated to each product, then select **Bulk Assign**.

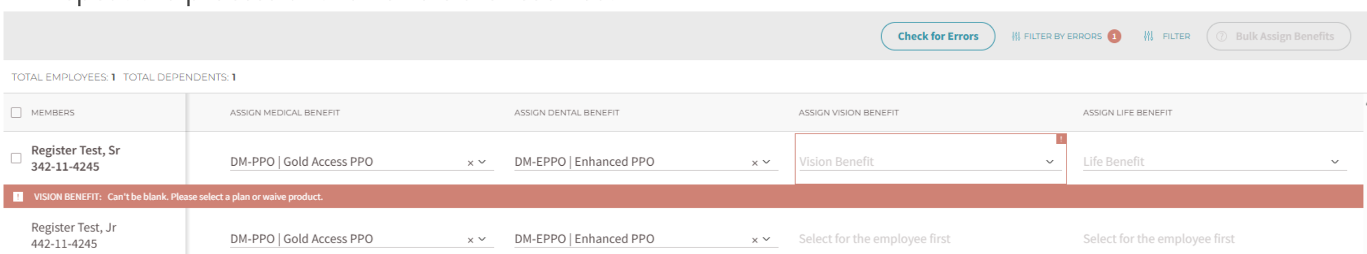


i. Plan Links: If a plan selected is linked with other required plans, a pop-up will display with a notification stating the link and the plan associated with the link. Once the required linked plan is also selected in following fields, the pop-up will close, indicating that the requirement has been met.

18. When all fields have been updated and/or confirmed as accurate, select **Check for Errors** to audit the current information displayed for all members prior to submitting changes.

19. Once the audit is complete and errors have been identified, select to **Filter By Errors**.

20. Make the appropriate changes to the member information according to the errors displayed below each member row. Once all fields have been updated and/or confirmed as accurate, select **Check for Errors** and repeat the process until all errors are resolved.



21. Once all values have been confirmed, select to **Submit Members**. When submitted, all member additions finalized through this process are sent to the Audit Engine for processing.