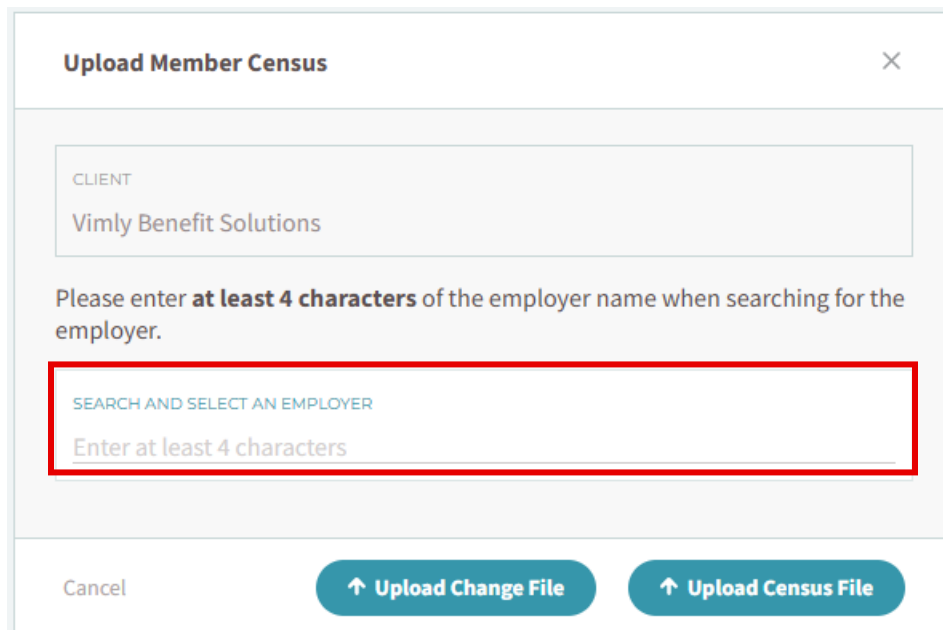
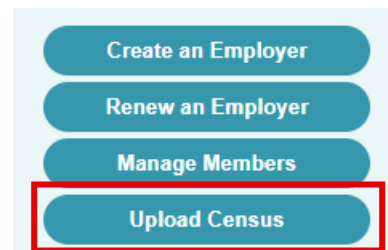


EMPLOYER WORKSPACE (UPLOAD CENSUS)

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

EDITING EMPLOYEES

EDITING DEPENDENTS

EDITING BENEFICIARIES

ADDING EMPLOYEES

ADDING DEPENDENTS

ADDING BENEFICIARIES

Hide Accepted Values

REQUIRED FIELDS *

First Name
Last Name
Social Security Number
###-##-####
Date of Birth
MM/DD/YYYY
Gender
Male (M), Female (F)
Relationship or Membership Type
Refer to optional column

OPTIONAL FIELDS

Membership Type
Employee (E), Dependent (D), Beneficiary (B)
Relationship
Employee (EE), Husband (H), Wife (W), Son (S), Daughter (D), Partner (P), Other (O)
Middle Name
Suffix Jr, Sr, II, III, etc.
Employment Class
Select from existing employment classes
Class Start Date
Date of Hire
MM/DD/YYYY
Annual Salary
Salary Start Date
Occupation
ex: Product Engineer
Address Line 1

Address Line 2
City
State
Zip Code
Marital Status
Single (S), Married (M)
Email Address
Phone Number
(###) ###-####
Plan Start Date
If missing, plan changes will be discarded.
Plan Stop Date
Volume Amount
Volume Start Date
PCP Id

* These fields are required to identify an employee but not to upload a file.

- 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.
- 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	Relationship	First Name	Middle Name	Last Name	Suffix	Social Sec	Effective D	Employment	Date of Birth	Gender	Date of Hire	Annual Sa	Occupation	Address Line 1	Address Line 2	City	State	Zip Code	Email	Add Phone Nu	Beneficiary	Beneficiary	[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@example.com	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

```

Select the reason for uploading members
This reason will be applied to all members

REASON *

Member Change Import

Select the default effective date to use for these members
You can change this for each member in the edit fields step.

☐ My data has an effective date column, use that column for each member's effective date.

☒ Manually select the date

EFFECTIVE DATE

04/23/2025

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.
- 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.
 - Missing Required Fields: To identify missing required fields, locate the rows highlighted in red and scroll to the right to locate missing information.

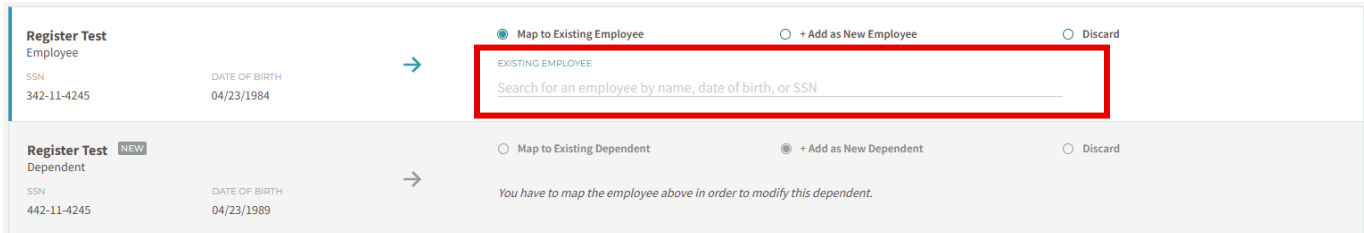
REQUIRED FIELDS	FILE COLUMN *	Delete	FILE COLUMN *	Delete	FILE COLUMN *	Delete
☒ First Name	Plan Start Date	x	Plan Stop Date	x	Volume Amount	x
☒ Last Name	[Start Date] Medical Plan 1		[Stop Date] Medical Plan 1		[Volume Amount] Medical Plan 1	
☒ Social Security Number	Missing [Start Date] Medical Plan 1		---		4/23/2025	
☒ Date of Birth	Missing [Start Date] Medical Plan 1		---		4/24/2025	
☒ Gender						
OPTIONAL FIELDS						
☒ Membership Type						
☒ Relationship						
☒ Middle Name						
☒ Suffix						
☒ Effective Date						

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.

UPLOADED PLAN VALUE	UPLOADED START DATE		SELECT MATCHING SYSTEM VALUE	
Medical Plan 1	04/23/2025	→	DM-PPO - Gold Access PPO - 05/01/2019	×
Vision Plan 1	04/23/2025	→	Search for a plan by name or speed code	▼
				Discard Entry

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.
- Map to Existing
 - + Add as New
 - Discard



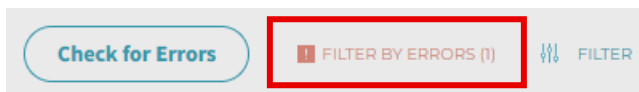
The screenshot shows the 'Map Members' interface. At the top, there are three radio buttons: 'Map to Existing Employee' (selected), '+ Add as New Employee', and 'Discard'. Below these, there is a search bar labeled 'EXISTING EMPLOYEE' with the placeholder text 'Search for an employee by name, date of birth, or SSN'. The search bar is highlighted with a red rectangle. Below the search bar, there is a section for a 'Register Test' Employee. It shows the SSN '342-11-4245' and the Date of Birth '04/23/1984'. Below this, there is a section for a 'Register Test' Dependent. It shows the SSN '442-11-4245' and the Date of Birth '04/23/1989'. Below the dependent section, there is a message: 'You have to map the employee above in order to modify this dependent.'

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.

Now that the system is checking for errors, any changes done hereafter will not be accounted for. If you edit any additional information, please make sure to check for errors again before submitting changes.

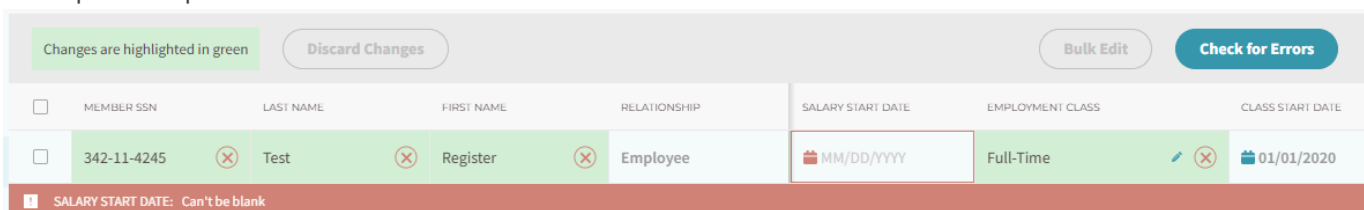
16. Once the audit is complete and errors have been identified, select to **Filter By Errors**.

Successfully checked for errors.
Filter By Errors (1)



The screenshot shows the 'Edit Members' interface. At the top, there are three buttons: 'Check for Errors', 'FILTER BY ERRORS (1)' (highlighted with a red rectangle), and 'FILTER'. Below these buttons, there is a table with columns: MEMBER SSN, LAST NAME, FIRST NAME, RELATIONSHIP, SALARY START DATE, EMPLOYMENT CLASS, and CLASS START DATE. The table contains one row with the following data: MEMBER SSN: 342-11-4245, LAST NAME: Test, FIRST NAME: Register, RELATIONSHIP: Employee, SALARY START DATE: MM/DD/YYYY, EMPLOYMENT CLASS: Full-Time, CLASS START DATE: 01/01/2020. The first three columns are highlighted in green. Below the table, there is a message: 'SALARY START DATE: Can't be blank'.

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.



The screenshot shows the 'Edit Members' interface. At the top, there are three buttons: 'Check for Errors', 'Bulk Edit', and 'Check for Errors'. Below these buttons, there is a table with columns: MEMBER SSN, LAST NAME, FIRST NAME, RELATIONSHIP, SALARY START DATE, EMPLOYMENT CLASS, and CLASS START DATE. The table contains one row with the following data: MEMBER SSN: 342-11-4245, LAST NAME: Test, FIRST NAME: Register, RELATIONSHIP: Employee, SALARY START DATE: MM/DD/YYYY, EMPLOYMENT CLASS: Full-Time, CLASS START DATE: 01/01/2020. The first three columns are highlighted in green. Below the table, there is a message: 'SALARY START DATE: Can't be blank'.

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



There are no members with errors on this page.

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

- 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	Relationship	First Name	Middle Name	Last Name	Suffix	Social Sec	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]	Medical Plan 1 [Stop Date]	Medical Plan 1 [Volume Amount]
2	Employee Register	Test	Sr			3.42E+08	Full-Time	4/23/1984	Male		4/23/2016	\$90,092	Software Engineer	123 A St		SLC	UT	84121	email@example.com	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

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

```

Does the first row of your data include headings?
If so, SIMON will attempt to map your column headings to the data later on.

Select the reason for uploading members ⓘ
This reason will be applied to all members

REASON *
New Group Data Import ▼

Select the default effective date to use for these members
You can change this for each member in the edit fields step.

☐ My data has an effective date column, use that column for each member's effective date.
☒ Manually select the date

EFFECTIVE DATE
04/01/2025

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.

Match your file's columns to their respective fields

Some columns in your file were automatically matched to census fields. Match any remaining columns that were not identified.
To map a header, pick the field name that matches each column's content.
You can delete a whole column, this action is irreversible.

[+ Add Another Column](#)

REQUIRED FIELDS	FILE COLUMN *	Delete	FILE COLUMN *	Delete	FILE COLUMN *	Delete	FILE COLUMN *	Delete	FILE COLUMN *	Delete	FILE COLUMN *	Delete
✓ Family ID	Medical Benefit	✕ ▼	Vision Benefit	✕ ▼	Dental Benefit	✕ ▼	STD/LTD Benefit	✕ ▼	Life Benefit	✕ ▼	Life Benefit	✕ ▼
✓ First Name	Effective Date *		Bronze HMO		Enhanced PPO		Choice A		Life and AD&D		FSA	
✓ Last Name	COLUMN REPRESENTS 1 PLAN	NO YES	COLUMN REPRESENTS 1 PLAN	NO YES	COLUMN REPRESENTS 1 PLAN	NO YES	COLUMN REPRESENTS 1 PLAN	NO YES	COLUMN REPRESENTS 1 PLAN	NO YES	COLUMN REPRESENTS 1 PLAN	
✓ Employment Class	---		X		X		X		X		X	
✓ Social Security Number	---		---		---		---		---		---	
✓ Date of Birth	---		---		---		---		---		---	
✓ Gender	---		---		---		---		---		---	
✓ Date of Hire	---		---		---		---		---		---	
Annual Salary	---		---		---		---		---		X	
✓ City												
✓ State												
✓ Zip Code												
✓ Effective Date												

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**.

Match your file's benefits to their respective values

VISION BENEFITS VALUES IN FILE	SELECT MATCHING SYSTEM VALUE
X	DM-VCA Choice A
DENTAL BENEFITS VALUES IN FILE	SELECT MATCHING SYSTEM VALUE
Enhanced PPO	DM-EPPO Enhanced PPO
STD/LTD BENEFITS VALUES IN FILE	SELECT MATCHING SYSTEM VALUE
Choice A	DM-STD STD
LIFE BENEFITS VALUES IN FILE	SELECT MATCHING SYSTEM VALUE
Life and AD&D	Select a system value 100KTV Life and AD&D DM-LIFE Plan A -Basic Life / AD&D
FSA	

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

Now that the system is checking for errors, any changes done hereafter will not be accounted for. If you edit any additional information, please make sure to check for errors again before submitting changes.

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

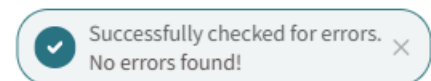
Successfully checked for errors.
Filter By Errors (1)



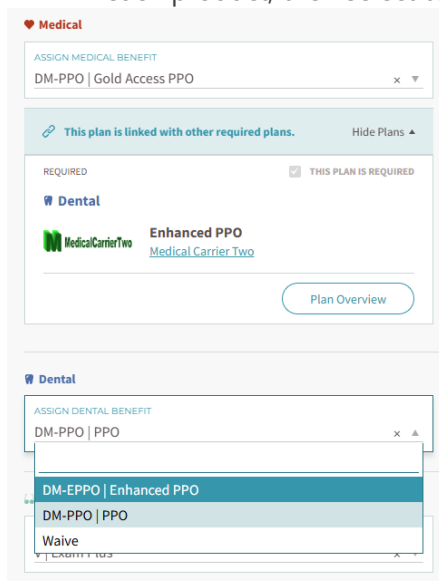
15. Make the appropriate changes to the member information according to the errors displayed below each member row. Once all fields have been updated and/or confirmed as accurate, select **Check for Errors** and repeat the process until all errors are resolved.

TOTAL EMPLOYEES		TOTAL DEPENDENTS		Check for Errors Filter by Errors 1 DELETE ALL MEMBERS MANAGE FIELDS						
1		1								
FAMILY ID	FIRST NAME	LAST NAME	DATE OF BIRTH	GENDER	DATE OF HIRE	ANNUAL SALARY	OCCUPATION	ADDRESS LINE 1	ADDRESS LINE 2	
FAM-1	Register	Test	04/24/1978	Male	04/24/2020		Software Engineer	126 VANCE AVE S	1002 MAIN ST	
ANNUAL SALARY: Can't be blank										

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 to **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.

Now that the system is checking for errors, any changes done hereafter will not be accounted for. If you edit any additional information, please make sure to check for errors again before submitting changes.

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

Successfully checked for errors.
Filter By Errors (1)



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.

Check for Errors

FILTER BY ERRORS 1

FILTER

Bulk Assign Benefits

TOTAL EMPLOYEES: 1 TOTAL DEPENDENTS: 1

MEMBERS	ASSIGN MEDICAL BENEFIT	ASSIGN DENTAL BENEFIT	ASSIGN VISION BENEFIT	ASSIGN LIFE BENEFIT
☐ Register Test, Sr 342-11-4245	DM-PPO Gold Access PPO x v	DM-EPP0 Enhanced PPO x v	Vision Benefit v	Life Benefit v
VISION BENEFIT: Can't be blank. Please select a plan or waive product.				
☐ Register Test, Jr 442-11-4245	DM-PPO Gold Access PPO x v	DM-EPP0 Enhanced PPO x v	Select for the employee first	Select for the employee first

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.