SIMON®

EMPLOYEE USER GUIDE

March 20, 2024

VIMLY
BENEFIT SOLUTIONS

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WHAT IS SIMON?

SIMON 3.0 is a sophisticated platform that makes benefit administration easy. As a user, you can quickly and easily access and enroll in your benefits from one place, online, anytime, anywhere.

SUPPORTED BROWSERS AND PLATFORMS

SIMON 3.0 will work on any browser, on any device of any size, and on any operating system, if the browser is:

- ✓ A standards-compliant browser and updated to its latest version

Now that most browsers have become "Evergreen Browsers" (automatically upgraded to their latest versions), we no longer support specific versions of browsers, but instead guarantee support for the latest version of spec-compliant browsers.

SUPPORTED BROWSERS

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

- ✓ Google Chrome
- ✓ Firefox
- ✓ Safari
- ✓ Microsoft Edge (the new Internet Explorer)
- ✓ Opera

SUPPORTED OPERATING SYSTEMS

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

- ✓ Windows
- ✓ macOS
- ✓ iOS
- ✓ Android
- ✓ Linux
- ✓ Windows Phone

SUPPORTED DEVICES

SIMON 3.0 is 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.

WHAT CAN I DO IN SIMON?

Within SIMON, you can manage your benefits for you and your dependents. Tasks you can perform in SIMON include:

- ✓ Viewing benefits for you and dependents
- ✓ Adding or changing benefits
- ✓ Adding or changing dependents
- ✓ Changing demographic information for you or a dependent
- ✓ Viewing and/or printing benefits-related forms and documents
- ✓ Using SIMON Tiles to access important websites and view important messages
- ✓ Receive alerts regarding important policies and administration changes

OVERVIEW OF THE SIMON USER INTERFACE

GENERAL FRAMEWORK

SIMON is divided into three sections: Menu, Work Space (includes Tiles), and Contact Support. The image below illustrates and identifies the location of each area.
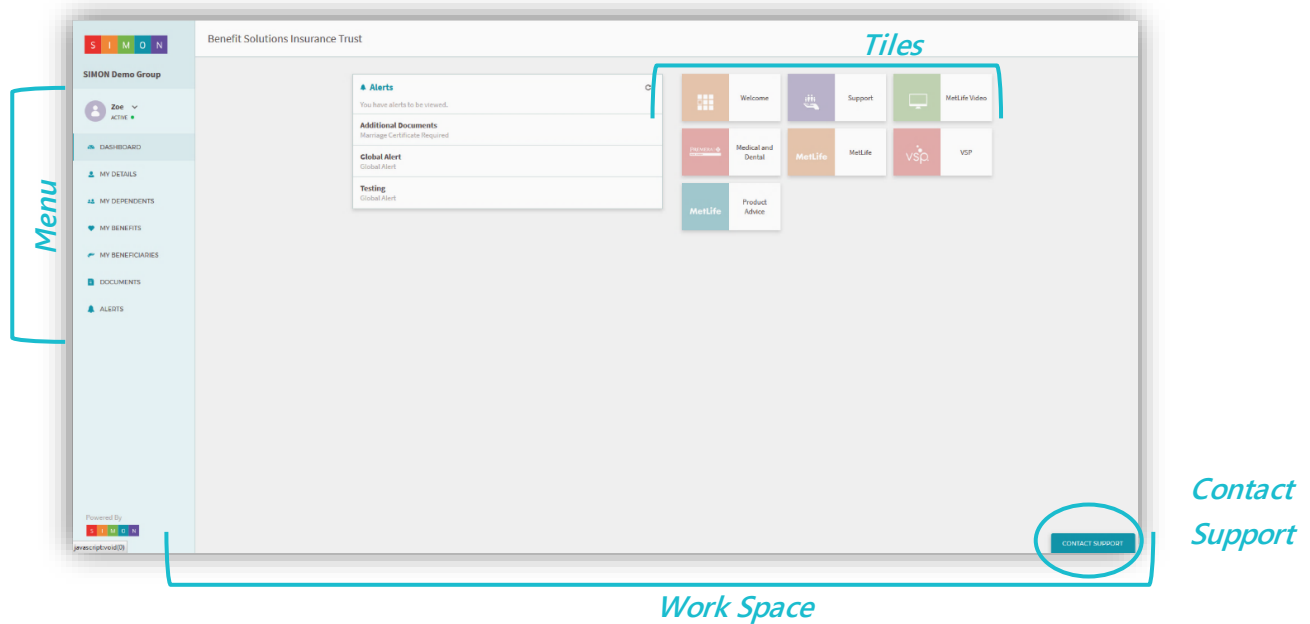
DASHBOARD

When you login to SIMON you will be brought to the **Dashboard** menu, which highlights information that is important to managing your account (if applicable):

- ✓ Tiles
- ✓ Alerts
- ✓ Open Enrollment Period

SIMON TILES

Tiles contain one or more colored squares, each displaying a title and an icon. The general purpose of Tiles is to provide quick access to a variety of resources. Although the Tiles in your view of SIMON will likely be different from those shown below, this example illustrates a few types of resources that might be included (e.g. Vision, Contacts, MetLife, etc.).

The following are some of the possible behaviors of SIMON Tiles:

- ✓ Display a website—either within the SIMON Framework or in a new browser tab (depends on how the Tile is configured)
- ✓ Link to a video
- ✓ Display important content and messaging

PENDING STATUS

You will be in a **Pending** status after making any updates to your information (e.g. demographics change, managing benefits, adding a dependent, etc.). Once in a pending status no further changes can be made until they are reviewed and approved. Once approved, you will be in an **Active** status and additional changes can be made.
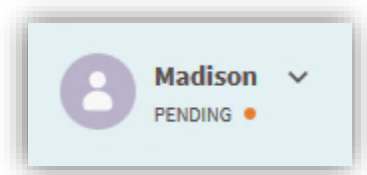
MY DETAILS

On your **My Details** menu are your demographics (i.e. **First Name, Last Name, SSN,** etc.), **Contact Information,** and **Employment** information.

If applicable, based on employer permissions, you can edit this information by clicking **Edit.** Most information is editable and required. If your information appears to be incorrect and you cannot **Edit,** please contact your employer.

MY DEPENDENTS

On your **My Dependents** menu are your dependents and their demographic information (i.e. **First Name, Last Name, SSN,** etc.).

If applicable, based on employer permissions, you can edit this information by clicking **Edit.** Most information is editable and required. If your information appears to be incorrect and you cannot **Edit,** please contact your employer.
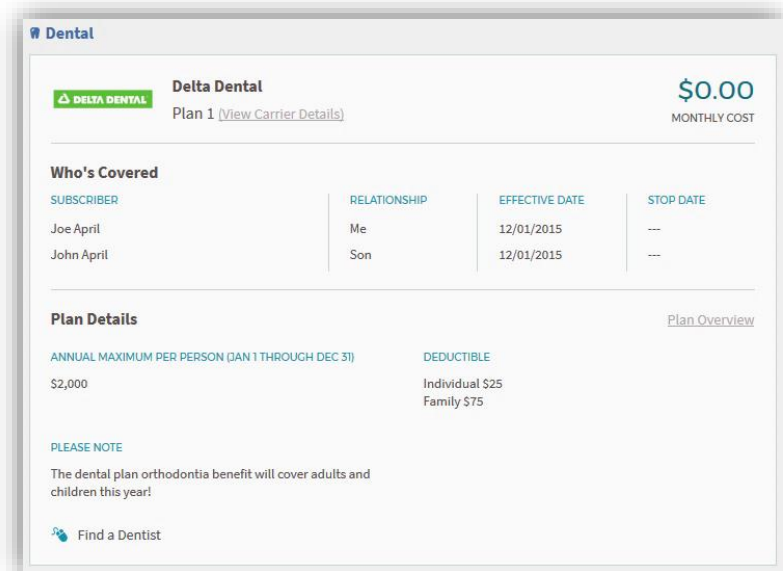
Also based on employer permissions, is your ability to add and terminate a dependent. If you do not have these permissions and need to update your information, please contact your employer.

MY BENEFITS

On your **My Benefits** menu are the benefits selected for both you and your dependents.
It is important to note that some features are only available based on employer permissions, such as, showing coverage rates. If you have further questions regarding specific features, please contact your employer.

Each **Benefit Card** (i.e. Medical, Dental, etc.) will include the following information: **Carrier Name** (i.e. Delta Dental), **Plan Name, Who's Covered** (i.e. Subscriber and/or dependents), **Relationship** to the subscriber (you), **Effective Date,** and **Stop Date.**
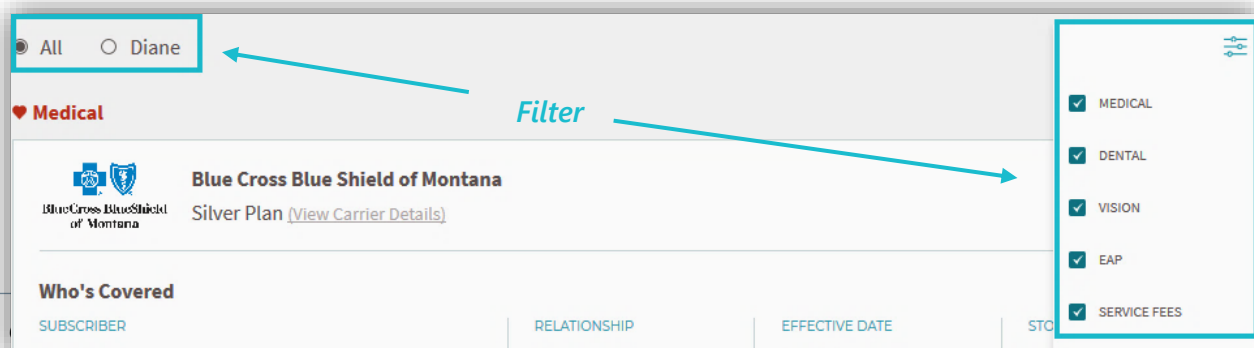
You can view more information about the carrier by clicking **View Carrier Details** next to the **Plan Name.** This will provide the carrier's **Website, Phone, Email, Address,** and **Fax** (if applicable).

All documents, links, and additional information about your coverages is located under Plan Details. This could include a plan summary and/or helpful health plan tools. To access information simply click the link. For example, you might click on 2017 Sterling 1000 Plan Summary or Find a Dentist, and then be directed to a new window.

If desired, filter this page by coverage type (i.e. Medical, Dental Vision, Life, CDHP, etc.) and/or member to view specific benefit plans.

MY BENEFICIARIES

Based on the benefits you selected there may have been an additional step to add beneficiaries. If you did not do so initially but would like to go back and add your beneficiary information later, start on your **My Beneficiary** menu. This is also where you can update and remove your beneficiaries.

DOCUMENTS

The **Documents** menu includes important documents provided by your employer and/or documents that you have uploaded.
To view a document, click on the document name. You can also print the document from this screen.

ALERTS

By clicking on the **Alerts** menu on the left navigation, you can view both **Expired** and **Active** alerts. To open an alert simply click on that respective alert tab. All alerts include the **Creator** (i.e BSI Staff, Employer, etc.)**, Start Date, End Date, Alert Type, Subject,** and **Alert Text.**

> **Note**: When viewing an alert on the **Alert** menu, the alert you select will highlight.
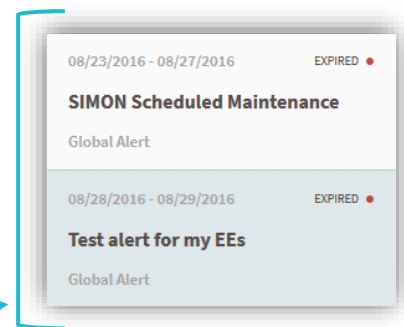
Alerts are messages from the SIMON support team and your employer to inform you about new platform capabilities and/or important information.
When an alert has been posted, it will pop-up automatically upon signing into SIMON.

By clicking **I Understand**, you acknowledge that you agree and understand the alert, after which, the alert will no longer pop-up when you login. If you click **Remind Me Later**, the alert will continue to pop-up every time you login.

All recent alerts will be listed on your Dashboard in the Alerts section. Examples of alerts you could receive include: **Changes Required, Complete E of I Form,** and **Certificate Required,** among others.
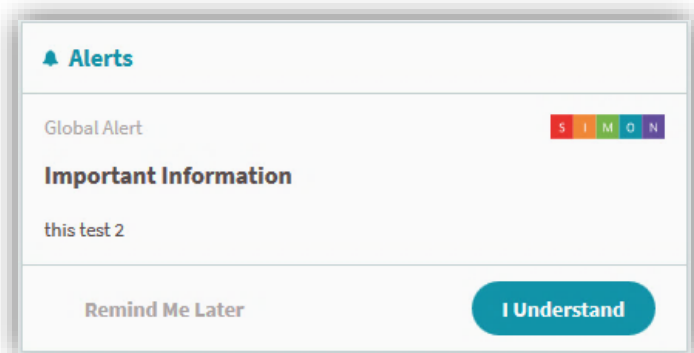
USING SIMON

The following are detailed descriptions of the typical tasks performed on SIMON.

TO ACCESS SIMON FOR THE FIRST TIME:

Your employer will provide you access to SIMON one of two ways:

1. Option 1: Via **Self Service Invite**, when a registration link is sent to the employee via email.
2. Option 2: Via **Self Registration**, when the employer provides a SIMON URL and Registration Code to the employee.

OPTION 1: SELF SERVICE INVITE REGISTRATION

If you receive a registration email, click Register or copy and paste the URL into your browser.
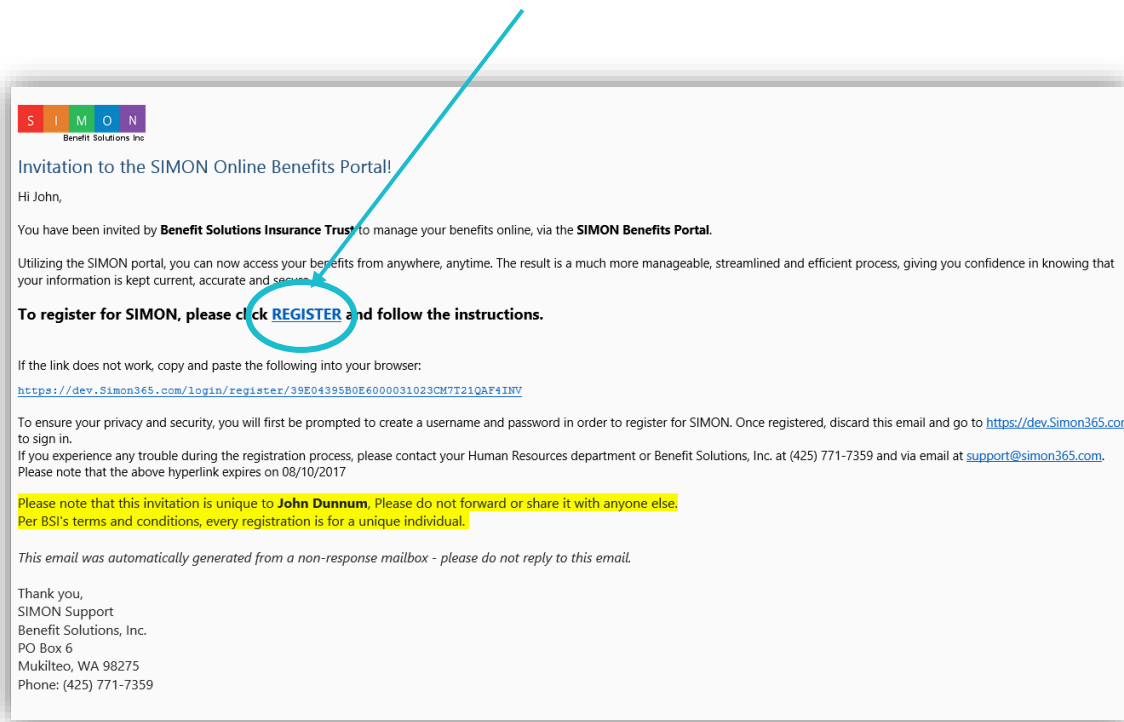
Then complete the following:

1. Verify the last four digits of you Social Security Number (**SSN**) and **Date of Birth.**

2. Create a unique **Username** that is at least 6 characters.

3. Create a **Password** that is a minimum of eight characters and includes at least 1 uppercase letter, 1 lowercase letter, and 1 symbol.

4. **Verify Password** by entering it a second time.

5. Once complete, click **Register & Sign-In.**

6. Please read the **SIMON Terms of Use**.

7. If you understand and agree to the terms select the checkbox indicating, **I, [employee's name] agree to the above BSI terms**, and click **I Understand.**

8. If you have further questions or do not agree to the terms, click **Decline.**

9. If you accept the terms and conditions, you can start selecting benefits through SIMON by clicking **Let's Get Started** (see section *Enrolling in your Benefits* on page 9) or choose **Remind Me Later** if you wish to select benefits at another time.

> **Note 1: SIMON Terms of Use** appear the first time you sign in. Once you have agreed to the Terms and Conditions, this page no longer displays when logging in.
>
> **Note 2:** If you **Decline** the Terms and Conditions, you will not be able to access SIMON.

OPTION 2: SELF REGISTRATION

If you receive a SIMON Registration Code and URL, you can Self Register, which includes the following steps:

1. Enter the **URL** into your browser.

2. Click **Register** located next to **Don't have an account?**

3. Enter your **SSN, Date of Birth, First Name, Last Name, Email**, and **Employee Registration Code** (provided by your employer).

4. Review the information and if it is correct, click **Send Registration Request.**

5. ***You will then receive a Registration Email*** (see section *To Access SIMON for the First Time, Option 1* on page 7).
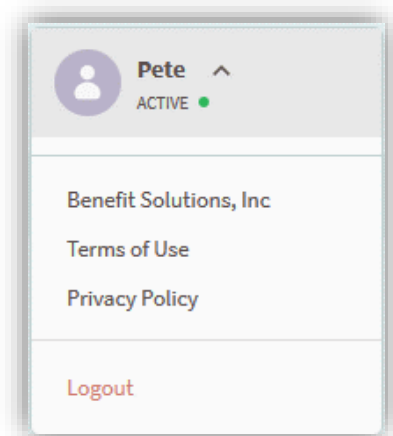
To sign in to SIMON:

1. Access SIMON through your browser on any desktop, tablet, or mobile device at https://www.simon365.com.

2. Enter your **Username** and **Password**, and then click **Sign In**.

TO SIGN OUT OF SIMON:

Select the drop-down menu on the User Profile (i.e. your name). Click Logout at the bottom of the drop-down menu.

ENROLLING IN YOUR BENEFITS

It is important to note, that if you are new to SIMON and your employer started managing your benefits prior to you registering for SIMON, you may not have the **Enroll Now** option. Instead, see section *Making Changes to your Current Benefits* on page 12.
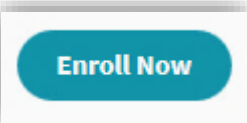
If you are new to SIMON and have no current benefits, you must click the **Enroll Now** button to select your benefits. Then complete the following:

1. Complete/review your demographic information by filling in your current **Address** and review all other information to ensure that it is correct (e.g. **First Name, Last Name, Date of Birth, Gender, SSN,** etc.).

   > ***Note1: SIMON will verify your address using USPS to confirm the address provided is valid.***
   > ***Note2:*** Benefits available from your employer may differ than those in this example.

2. Once complete, click **Next: Edit Dependent.**

3. If you do not have dependents, click **Skip and continue to Benefits** or **Next: Benefits.**

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4. If you have dependents, click **+Add a Dependent:**

a. Required information when adding a dependent includes: **First Name, Last Name, Date of Birth, Gender,** and **Relationship.**

b. To add more than one dependent, click **+Add Another Dependent.**

c. Once complete, click **Next: Benefits.**

5. To start electing coverages, click **Let's Start with Medical.**

> **Note:** If you added a dependent, utilize the checkboxes at the top of the screen to compare your rates based on who is covered (not all employers show rates). All dependents with the checkbox selected will appear in your **Cart Summary** after you select **Add to Cart.**
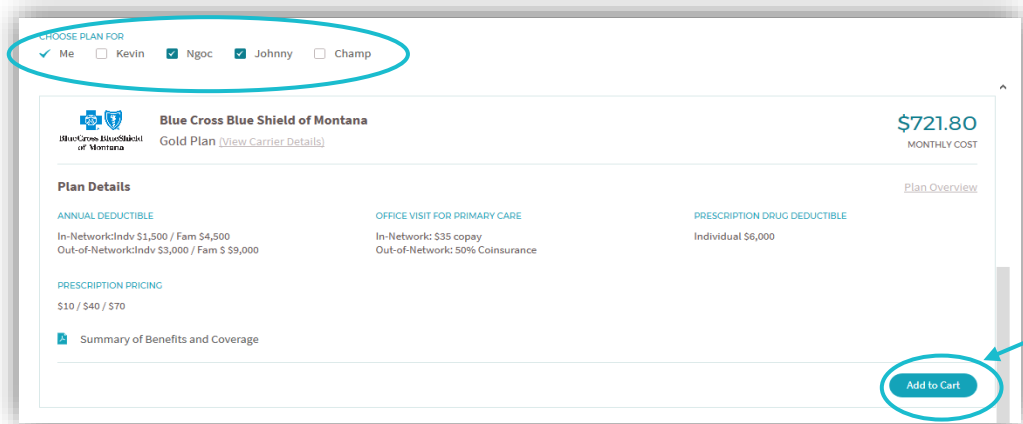
6. To add a coverage, click **Add to Cart.** To remove a coverage from your **Cart Summary,** click **Remove Plan.**

7. To remove a specific dependent from a plan you have selected, uncheck the box next to the respective dependent in your **Cart Summary.**

8. The **Effective Date** is the date that the coverage will start or when it previously started, which can vary based on when the subscriber and/or dependent was enrolled. The **Stop Date** is the date that you elect to end the coverage (see *Nygoc Pham* who was unchecked and now has a **Stop Date**), or when the plan year ends. When only **N/A** appears next to the dependent, this means the coverage is not currently elected for that dependent.

9. To continue to the next coverage type, click **Next: Dental, Next: Vision,** and so on, following the same procedure as listed above.
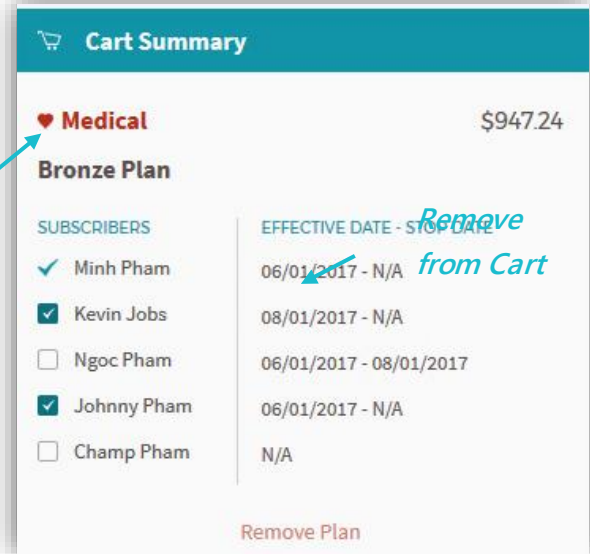
> **Note:** Based on your employer, the bottom of your **Cart Summary** may include: **Total Monthly Cost, Employer Contribution,** and the amount **You Pay** each month.

10. Once you have gone through all coverage types, click **Enrollment Summary.**

11. Review the information. If you need to make changes you can do so by clicking one of the following: **Edit Demographics, + Edit Dependents, Manage Benefits,** or **Back.**

12. If the information is correct, click **Sign Electronically.**

13. Read the **Electronic Signature Disclosure and Consent.** If you agree, click **I Agree and Consent.** If you do not agree, click **I Decline Consent** (by declining you agree to enroll for benefits via paper method and will be prompted to give a **Reason for Declining Consent**).

14. Either **Select a Signature** or **Draw your Own** by clicking the respective radio button**,** and click **Sign Electronically and Submit.**

WAIVING COVERAGES

Based on your employer, you may have the option to **Waive Coverages**. If this option is available and you would like to waive a specific coverage, complete the following:

1. Select the checkbox for **Waive Medical Coverage** (or Dental, Vision, etc.) at the bottom of the benefits page.
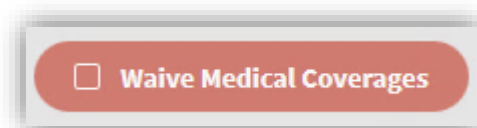
2.   Select a **Reason for Waiving** from the drop-down menu, or click the checkbox for a **Custom Reason** (a reason is required to continue).

3.   Click **Waive Medical Coverages** (or Dental, Vision, etc.).

4.   The waived coverage will not appear in your **Cart Summary** and all plans for that coverage type will no longer be visible.

5.   If you would like to remove the waive coverage selection, uncheck the box for **Waive Medical Coverages** (or Dental, Vision, etc.).

> **Note 1:** Based on employer rules, specific plans may be **linked.** For example, if you **Waive** a specific Medical coverage then you must also **Waive** a specific Vision coverage.
>
> **Note 2**: Based on employer rules, some coverages are **Required**. Meaning, if you **Waive** a **Required** coverage, then you must also **Waive ALL** other coverages.

MAKING CHANGES TO YOUR CURRENT BENEFITS

To manage your current benefits, locate the **My Benefits** menu on the left navigation, and complete the following (see section *Pending Status* for information about when changes can be made on page 4):

1.   Click **Manage Benefits.**

2.   Select the **Qualifying Event** from the drop-down menu.

3.   Enter the **Qualifying Event Date**, either by manually entering or selecting it from the drop-down calendar. The **Effective Date** of your coverages will automatically populate based on the coverage rules.

4.   Complete any additional information needed based on the **Qualify Event.**

5.   Once complete, click **Manage Benefits.**

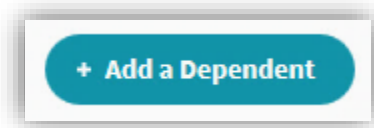6.   See section *Enrolling in your Benefits* steps 6-14 on page 10.

> **Note:** During this workflow, you can click **Back** to access your demographic information or your dependent's information.

ADDING A DEPENDENT

To add a dependent, locate the **My Dependents** menu on the left navigation and complete the following:

1. Click **+ Add a Dependent.**

2. Select a **Qualifying Event** from the drop-down menu.

3. Either manually enter, or select from the drop-down calendar, a **Qualifying Event Date.** The **Effective Date** will automatically populate.

> **Note:** Based on the **Qualifying Event** that was selected, any additional documentation or information needed will be listed here.

4. Click **Add Dependent.**

5. Complete the following information for the new dependent: **First Name, Last Name, Date of Birth, Gender, Relationship,** and **Address** (all fields are required).

6. Optionally, you can complete the dependent's **Middle Name, Suffix,** and **Phone Number.**

7. Note that the **Address** has a checkbox automatically selected to **Use Subscriber Address.** If the dependent has a different address than you, please uncheck the box and complete the new **Address** for the dependent.

8. If you have additional dependents, click **+ Add Another Dependent** and repeat step 5 through 7.

9. Once complete, click **Next: Benefits.**

10. See section *My Benefits: Enrolling in your Benefits* steps 6-14 on page 10.

> **Note:** During any dependent workflow (i.e. editing, adding, etc.), you can click **Back** to access your demographic information as well.

TERMINATING A DEPENDENT

If you wish to terminate a current dependent and cancel <u>ALL </u>their coverages, locate the **My Dependents** menu on the left navigation and complete the following (see note below for removing one coverage):

> **Note:** To remove the dependent from ONE coverage instead of ALL coverages, you need to **Edit** instead of **Terminate**, see section *Making Changes to an Existing Dependent* below.

1. Click **Terminate Dependents** at the top of the page.

2. **Select Dependents** that you wish to terminate by selecting the checkbox next to the respective dependent's name.

Terminate Dependent(s)

3. Select a **Reason** from the drop-down menu.

4. If applicable, when you are terminating multiple dependents, you can select the checkbox to **Specify a different reason for each dependent.**

5. Manually enter or select from the drop-down menu the **Termination Date.** The **Last Day of Coverage** and **Stop Date** will automatically populate.

6. If you wish to edit the dependent's demographic information, click **Edit then Terminate.** If you do not wish to edit the dependent's demographic information before terminating, uncheck the box next to **Edit Before terminating** and click **Preview then Terminate.**

7. Review the **Enrollment Summary** and ensure that the dependent(s) have the correct **Stop Date** next to their name.

8. If you need to make further changes, click **Back.**

9. If the information is correct, click **Sign Electronically** (see section *Enrolling in your Benefits* steps 13 and 14 on page 11).
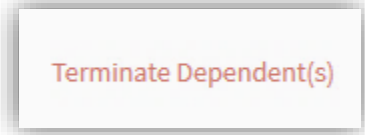
MAKING CHANGES TO AN EXISTING DEPENDENT

If you wish to make changes to an existing dependent, locate the **My Dependents** menu on the left navigation and complete the following:

1. Click the ellipsis in the top right corner of the page or the <u>ellipsis</u> in that respective dependent's

Diane Lynn Carroll   ...

section.

2. Click **Edit.**

3. Change or add any information.

4. Once complete, click **Enrollment Summary.**

5. Review all changes. If you need to make additional changes, click **Back.** If the information is correct click **Save Changes.**

6.   At the top of your screen you will be notified that the **Changes have been successfully saved.** (see section *Pending Status* regarding your status on page 4).

ADDING A BENEFICIARY

To add a beneficiary, locate the **My Beneficiaries** menu on the left navigation (if applicable) and complete the following:

1.   Click **Manage Beneficiaries.**

2.   Click **+Add a Beneficiary.**

3.   Complete the beneficiary's **First Name, Last Name, Relationship** (i.e. Mother, Partner, etc.)**, Rank** (Primary or Contingent), and **Allocation** (all fields are required).

4.   Optionally, complete the beneficiary's **Middle Name, Suffix, SSN, Date of Birth** and **Address.** The subscriber's address will automatically be used, if you do not want to use the subscriber's address uncheck the box for **Use Subscriber Address?**

5.   If you have more than one beneficiary, click **+Add Another Beneficiary.**

6.   If you would like to remove a beneficiary, click **Remove Beneficiary** for that respective beneficiary.

> **Note:** When adding multiple beneficiaries, the **Allocation** for **Primary** and **Contingent** will not be added together. Meaning, the **Allocation** for **Primary** must equal 100%, and separately, the **Allocation** for **Contingent** must also equal 100%.
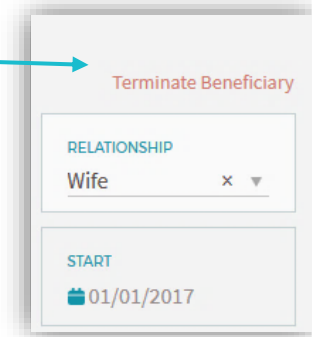
7.   Once complete, click **Enrollment Summary.**

8.   Review the information and ensure that it is correct. If you need to make additional changes, click **Back.** If the information is correct, click **Sign Electronically** (see section *Enrolling in your Benefits* steps 13 and 14 on page 11).

TERMINATING A BENEFICIARY

To terminate a beneficiary, locate the **My Beneficiaries** menu on the left navigation (if applicable) and complete the following:

1.   Click **Manage Beneficiaries.**

2. Locate the beneficiary you wish to terminate, click **Terminate Beneficiary.**

3. The **Stop Date** will appear automatically.

4. Readjust all other **Allocations,** so that, both **Primary** and **Contingent** equal 100%.

5. Once complete, click **Enrollment Summary.**

6. Review the information and ensure that it is correct. If you need to make additional changes, click **Back.** If the information is correct, click **Sign Electronically** (see section *Enrolling in your Benefits* steps 13 and 14 on page 11).

MAKING CHANGES TO AN EXISTING BENEFICIARY

To make changes to an existing beneficiary, locate the **My Beneficiaries** menu on the left navigation (if applicable) and complete the following:

1. Click **Manage Beneficiaries.**

2. Locate the beneficiary you wish to make changes for and edit as needed.

3. Once you have made all your changes, click **Enrollment Summary.**

4. Review the information and ensure that it is correct. If you need to make additional changes, click **Back.** If the information is correct, click **Sign Electronically** (see section *Enrolling in your Benefits* steps 13 and 14 on page 11).

UPLOAD A DOCUMENT

Locate the **Documents** menu on the left navigation and complete the following:

1. Click **Upload Document.**

2. Complete the **Document Title.**

3. Add the document by dragging the file or by clicking on **Choose (or drag and drop) file.**

4. If applicable, you can add multiple documents at one time by click, **+Add Another Document.**

5. Once complete, click **Upload Documents.**

TROUBLESHOOTING SIMON

It is important to note that based on employer permission not all features on SIMON will be available to all self service users. If you have questions regarding a specific feature that you believe you should have access to, please contact your employer.

OPTION 1: SELF SERVICE INVITE REGISTRATION

RECEIVE A SELF-SERVICE INVITE REGISTRATION ERROR?

If you receive an error regarding Invalid User information during the SIMON Registration process, (invited via Self Service Registration Email):
1. Confirm that the information you enter matches the information your employer in SIMON:
   a. First and Last Name
   b. Date of Birth
   c. SSN
   d. Email Address

DID NOT RECEIVE THE SELF SERVICE INVITE REGISTRATION EMAIL?

If you don't see the Self-Service Invite Registration email consider the following:

1. Check your Junk mail.

2. If using a work email, check with your internal infrastructure team to ensure that your internal firewall can receive emails from addresses with the domain bsitpa.com.

OPTION 2: SELF REGISTRATION

RECEIVE A SELF REGISTRATION ERROR?

*If you receive an error regarding **Invalid User** information during the **Self Register** process:*

1. Confirm that the information you enter matches the information your employer in SIMON:
   a. First and Last Name
   b. Date of Birth
   c. SSN
   d. Email Address

2. Confirm that the **Registration Code** is correct.

If you experience technical difficulties with SIMON, please access the **Contact Support** tab located on every page.