



SIMON®

EMPLOYER USER GUIDE

March 21, 2024



**VIMLY**  
BENEFIT SOLUTIONS

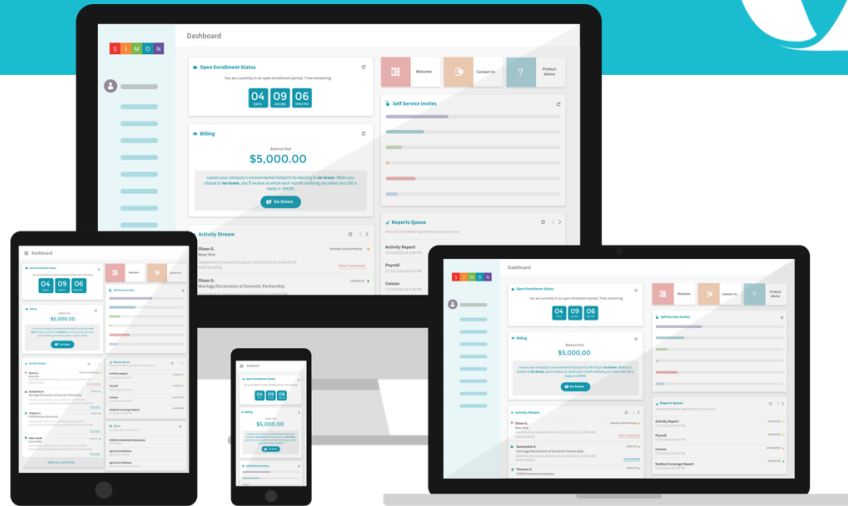
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# SIMON®

One Smart,  
Simple Solution



S I M O N

Accessible on any web browser on any device

[www.simon365.com](http://www.simon365.com)

## WHAT IS SIMON?

SIMON, is a sophisticated, yet user-friendly way to simplify the process of enrollment and benefits management. With the use of SIMON, you can access and manage employee benefits from one online platform — anywhere and anytime. The result? A much more streamlined and efficient process, which allows you to accomplish more in less time and to do so confidently knowing that the data is current, accurate, and secure with SIMON.



### ENROLL & MANAGE

- Administration tools that simplify managing employee benefits
- Add, term, and manage employees & dependents
- Comprehensive reporting
- Exportable Benefit Summaries
- Core, Ancillary, and Worksite benefits



### BILLING & PAYMENT

- Access and view your consolidated bill
- Make payments online
- Real-time bill adjustments
- Auto-Pay feature (ACH)
- Manage banking details
- Go Green notification options



### COMPLY

- Real-time Group-Level Reporting
- Rules based engine for eligibility, waiting periods, and all benefit changes
- Historical audit & change reporting
- Proprietary Audit Engine to ensure accuracy



### COMMUNICATE

- Create in-system alerts & announcements
- Upload & manage documents
- Access important group notifications
- Share documents with users



### USER INTERFACE

- Rich user experience
- Responsive mobile design
- Functional and intuitive toolbars
- Customizable tiles with links to important resources



### EMPLOYEE SELF-SERVICE

- Allows employees to login and enroll via SIMON's employee portal
- Helps employees shop for plans based upon coverage details and estimated costs

## 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 centrally administer and manage your company's employee benefits programs. Tasks you can perform in SIMON include:

- ✓ Enroll new employees
- ✓ View benefits data for an existing employee
- ✓ Add or changing benefits for an existing employee
- ✓ Add dependents for an existing employee
- ✓ Change demographic data for an existing employee
- ✓ View and/or printing benefits-related forms and documents
- ✓ View and paying invoices
- ✓ Use SIMON Tiles to access important websites and view important messages
- ✓ Communicate with employee users via alerts
- ✓ Request and schedule reports
- ✓ Store documents

## HOW DO I GET HELP WHEN USING SIMON?

If you need information about how to accomplish a task within SIMON, check this guide first. If you cannot find the information you need or if you experience technical difficulties with SIMON, please access the Contact Support tab located on every page to reach out to a SIMON Support member.

A teal-colored rectangular button with rounded corners and a subtle drop shadow, containing the text 'CONTACT SUPPORT' in white, uppercase, sans-serif font.

**CONTACT SUPPORT**

# OVERVIEW OF THE SIMON USER INTERFACE

This section explains the contents of the different screens you will use when working in SIMON (For details on how to perform actual procedures, see Using SIMON on page 12).

## 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. The SIMON Menu is where you will do the bulk of your navigating. Simply click the menu item you'd like to view to access more information. You may also see Sub-Menu's pop-up – these will display sub-pages with information.

## DASHBOARD

In the **Dashboard** menu, you can view highlighted information which is important to managing your benefit plan:

- ✓ Open Enrollment
- ✓ Activity Stream
- ✓ Tiles
- ✓ Alerts
- ✓ Billing & Payment information
- ✓ Reporting Queue
- ✓ Self-Service Invites

## SIMON TILES

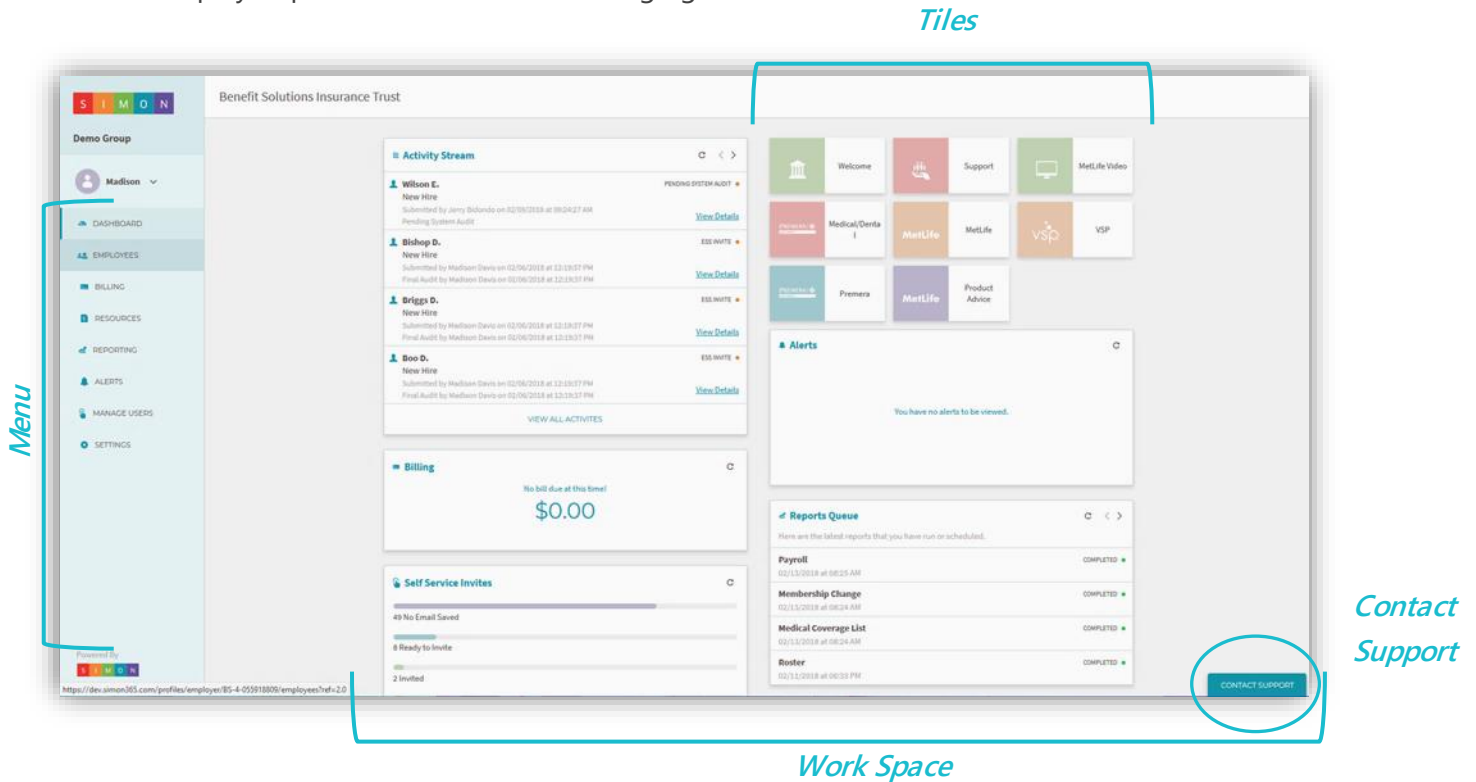
Tiles are one or more colored squares, each displaying a title and an icon. Tiles provide quick access to a variety of resources. Although the Tiles in your view of SIMON will likely be different from those shown above, this example illustrates a few types of resources that might be included.

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)



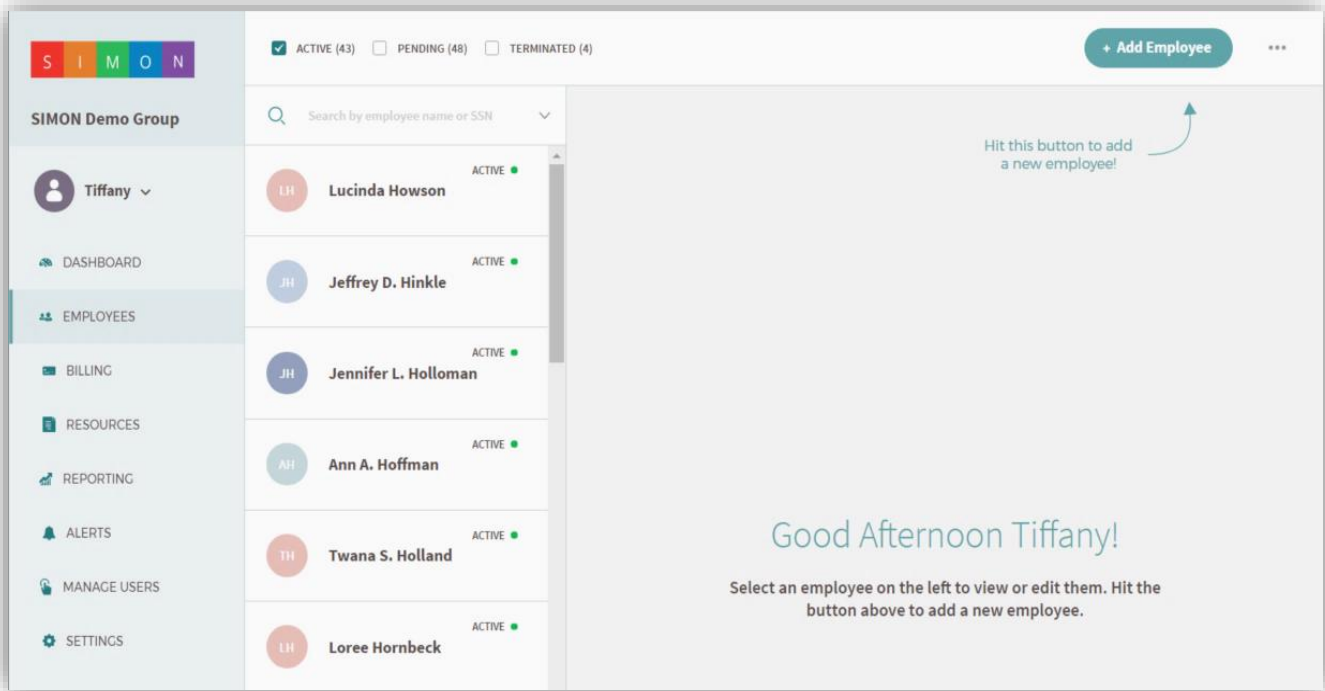
- ✓ Link to a video
- ✓ Display important content and messaging



## EMPLOYEES MENU

The **Employees** menu is where you will manage eligibility and enrollment. From here, you can perform the following tasks:

- ✓ Add/enroll a new employee
- ✓ View contact, employment, existing coverage, and prior coverage data about an employee and his or her dependents
- ✓ Terminate an employee's coverage
- ✓ Add/Terminate a dependent
- ✓ Edit an employee's demographic data and manage benefit changes




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Note: The Employees menu contains several additional screens (displayed when adding an employee and when working with the data of an existing employee). These screens are discussed in the section titled Using SIMON.

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Additionally, by clicking the ellipsis on the **Employees** page, a drop-down menu provides you two options:

- ✓ **Over Age Dependent Audit:** Allows you to view dependents who are, and who will be, eligible for termination of benefits based on age.
- ✓ **Print Enrollment Summary:** Allows you to print enrollment summaries for all employees or for a specific subset. This is helpful during open enrollment for employees to verify their benefits selection.

## BILLING MENU

From the **Billing** menu, you can perform the following tasks:

- ✓ View billing and payment history
- ✓ View and pay the current bill
- ✓ View recent activity, including recent enrollment changes
- ✓ Setup autopay
- ✓ Go Green (i.e. paperless billing)
- ✓ Get Excel bill
- ✓ Manage banking details

Billing / Summary

10491 <a href="#">PDF</a> <span style="float: right;"><a href="#">Request Excel</a></span>	
Nov 2015	
BALANCE FORWARD	\$83,442.29
MONTHLY CHARGES	\$15,003.66
FEES	\$0.00
<b>TOTAL BILLED AMOUNT</b>	<b>\$98,445.95</b>
TOTAL RECENT ACTIVITY	-\$31,409.31
RECENT PAYMENTS	-\$113,442.29
<b>TOTAL BALANCE DUE</b>	<b>-\$46,405.65</b>

No bill due at this time!

**Billing Info** [Manage Accounts](#)

**MD**  
Checking

ROUTING NUMBER: \*\*\*\*\*1545      ACCOUNT NUMBER: \*\*\*\*\*7897

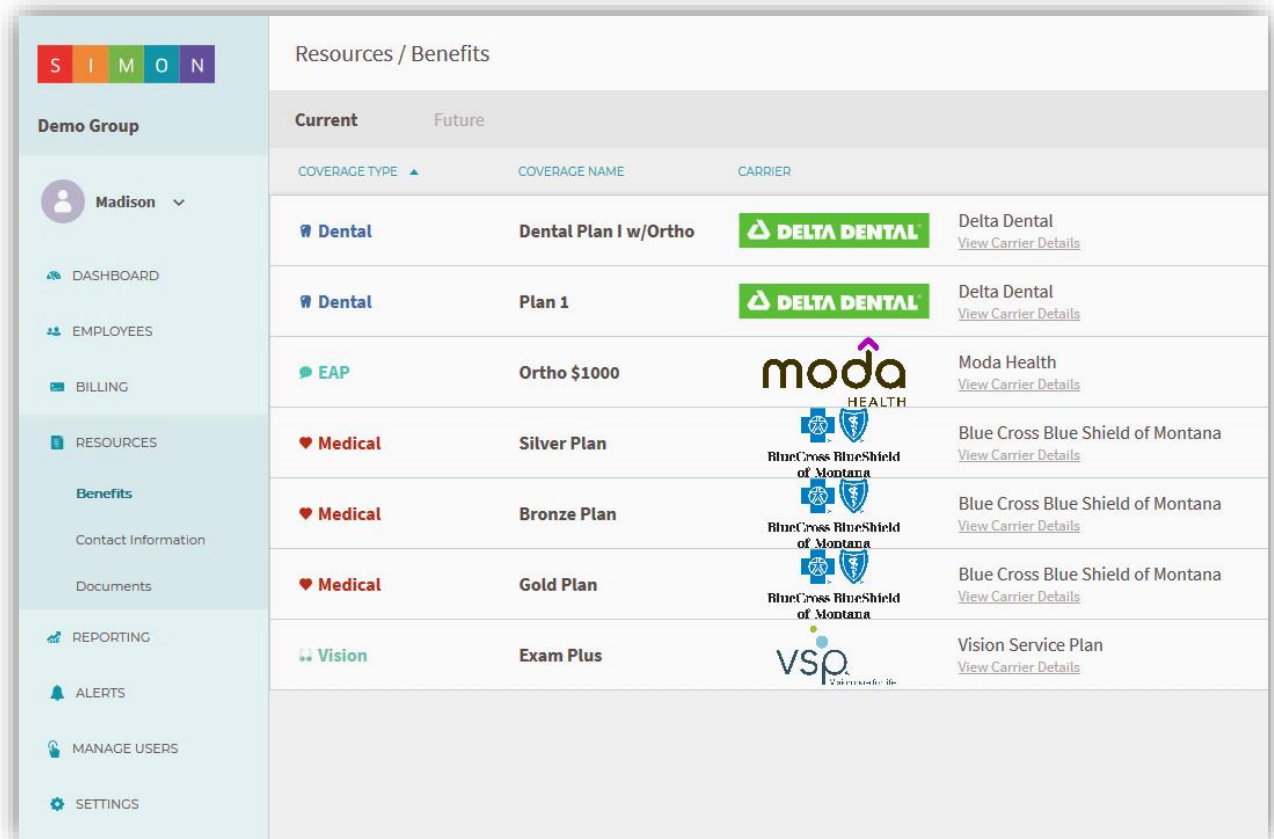
✓ DEFAULT 🔄 AUTO PAY








**Recent Activity: -\$31,409.31** [Print](#) [Refresh](#)

Group	TRANSACTION TYPE	Amount
Demo Group 10/01/2015	Unreported Payment -	\$14,000.00
Demo Group 10/01/2015	Unreported Payment -	\$16,000.00
Demo Group 10/01/2015	Unreported Payment -	\$83,442.29
Lynna Bowie 12/22/2015	Employee - Dental	\$38.41

## RESOURCES MENU

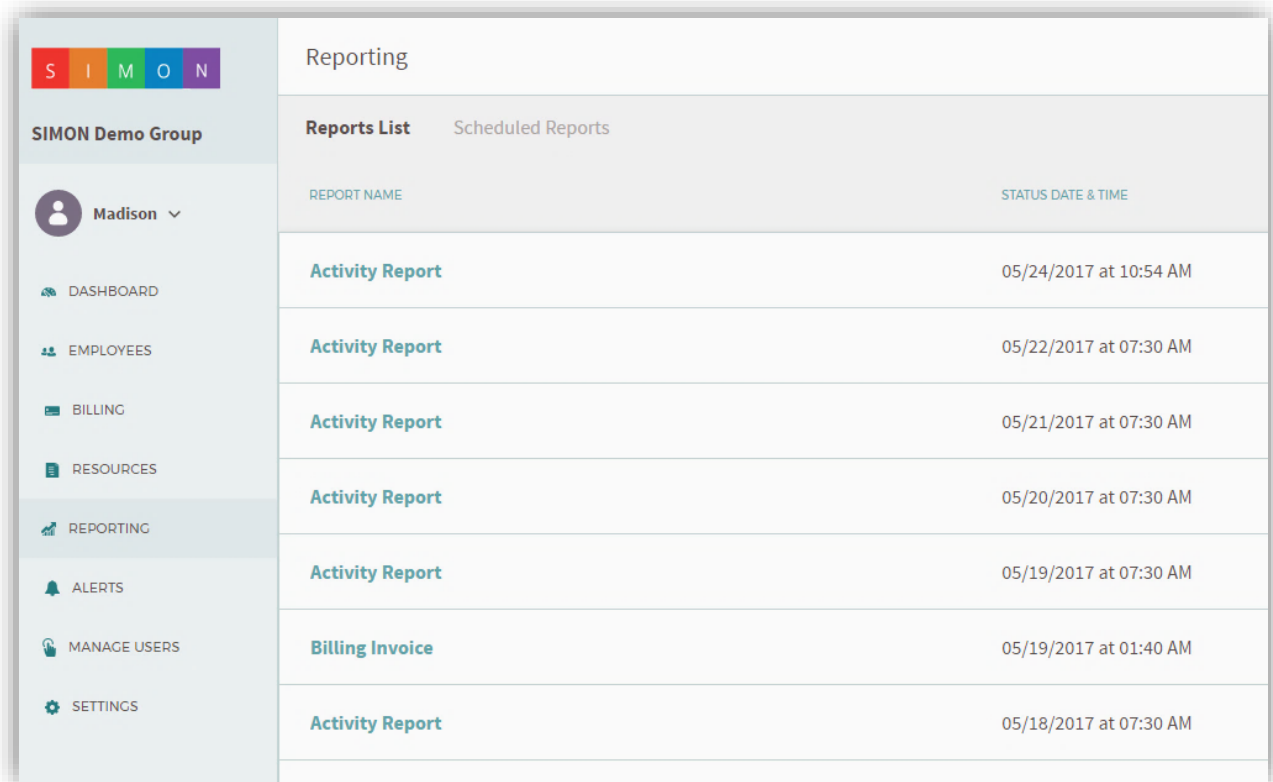
The **Resource** menu allows you to access several tabs such as **Benefits**, **Contact Information**, and **Documents**. These sections will detail your existing coverages, current contacts, and any document links that have been added to SIMON, among other things.




Resources / Benefits			
Current		Future	
COVERAGE TYPE	COVERAGE NAME	CARRIER	
Dental	Dental Plan I w/Ortho		Delta Dental <a href="#">View Carrier Details</a>
Dental	Plan 1		Delta Dental <a href="#">View Carrier Details</a>
EAP	Ortho \$1000		Moda Health <a href="#">View Carrier Details</a>
Medical	Silver Plan		Blue Cross Blue Shield of Montana <a href="#">View Carrier Details</a>
Medical	Bronze Plan		Blue Cross Blue Shield of Montana <a href="#">View Carrier Details</a>
Medical	Gold Plan		Blue Cross Blue Shield of Montana <a href="#">View Carrier Details</a>
Vision	Exam Plus		Vision Service Plan <a href="#">View Carrier Details</a>

## REPORTING MENU

The Reporting menu enables you to view and download all historical reports. There are added details regarding your reports such as, the Status Date or Report Status. Also, within this menu new reports can be requested (see *Viewing and Requesting Reports* on page 28).



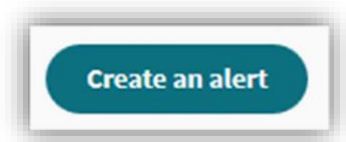
Reporting	
REPORT NAME	STATUS DATE & TIME
Activity Report	05/24/2017 at 10:54 AM
Activity Report	05/22/2017 at 07:30 AM
Activity Report	05/21/2017 at 07:30 AM
Activity Report	05/20/2017 at 07:30 AM
Activity Report	05/19/2017 at 07:30 AM
Billing Invoice	05/19/2017 at 01:40 AM
Activity Report	05/18/2017 at 07:30 AM

Note: All requested reports can be found on the **Reports List** tab of the **Reporting** menu. The status of the report will show as **Pending** or Completed. If the report has not been updated to completed, refresh the page by clicking  .

## ALERTS MENU

Alerts are messages from the SIMON support team or partners to inform you about latest information, platform capabilities, and/or valuable information.

- ✓ Alerts can be accessed from the Dashboard, or open **Alerts** on the left navigation menu, which will automatically open your **Inbox**.
- ✓ Any current alerts that you have received, or that are marked unread, will be listed in your **Inbox**.
- ✓ To view historical alerts, open the **Alerts** section on the left navigation menu and click **Sent** (located next to **Inbox**).



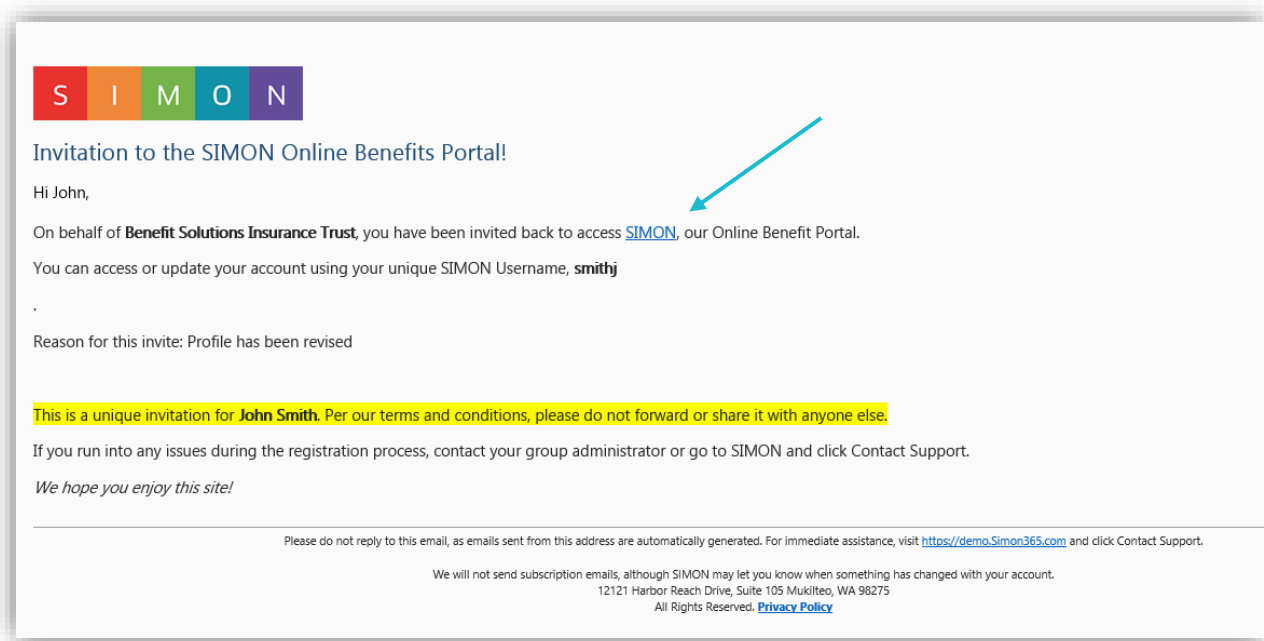
## USING SIMON

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

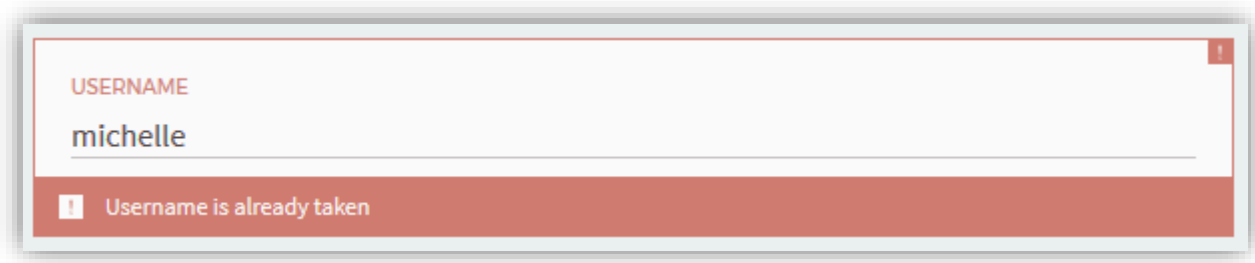
### ACCESSING SIMON

#### TO ACCESS SIMON FOR THE FIRST TIME:

1. Your initial access to SIMON is established via email invitation sent by our system. As directed, click the link in the message that says *Please Click Here to Register*. If this link does not work, copy and paste the URL into your browser.



2. Next, create a username and password. In the **Username** field type a username. The username can contain letters, numbers, periods, and the @ symbol, and can be no longer than 60 characters. If the username you selected is not available SIMON will notify you that the **Username is already taken**. If this occurs, repeat this process until the username you enter is valid.



USERNAME  
michelle

Username is already taken

Then fill in **Password** and **Verify Password**. Passwords must be at least eight characters long, must contain at least one uppercase, one lowercase, and one number. Once complete, click **Register & Sign in**.

3. At that point, the **SIMON Terms of Use** will appear. Please read this document. If you understand and agree to the terms check the box indicating, **I, [employer's name] agree to the above terms**, and click **I Understand**. If you have further questions or do not agree to the terms, click **Decline**.

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Note: This page appears the first time you sign in. Once you have agreed to the Terms and Conditions, the page no longer displays.

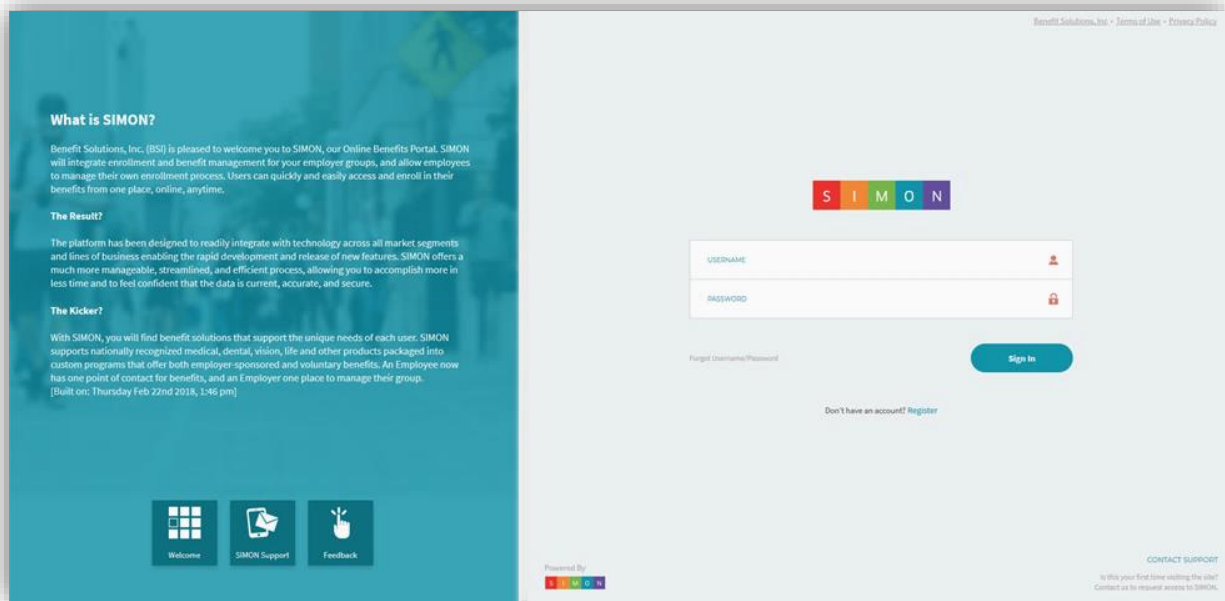
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4. You will then be directed to the **Dashboard** (see *Dashboard* on page 5).



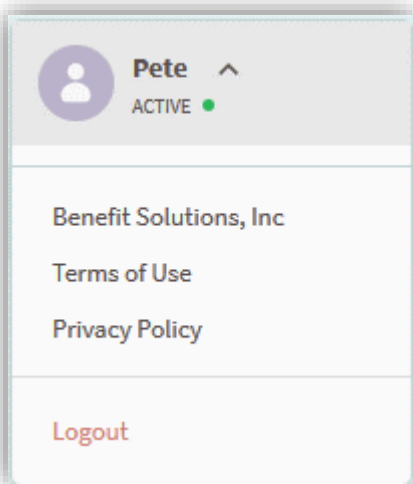
## TO SIGN IN TO SIMON:

1. Access SIMON<sup>®</sup> 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:

1. Select the drop-down menu on the User Profile. Click **Logout** at the bottom of the drop-down menu.

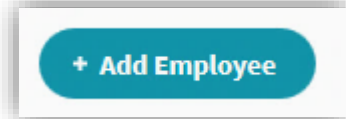
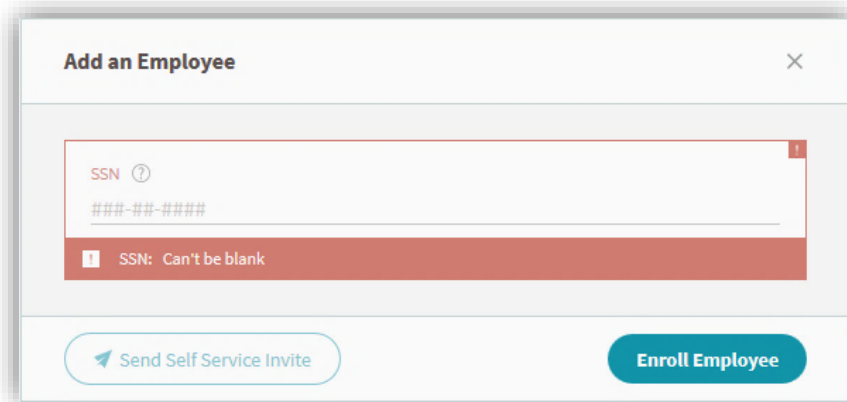


## ENROLLING A NEW EMPLOYEE

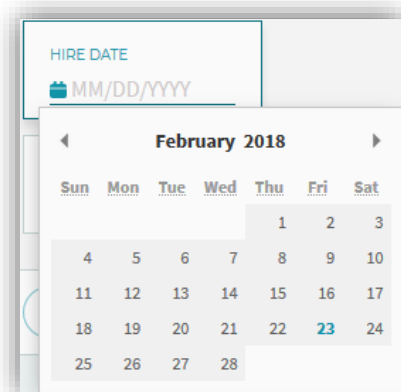
One of the key tasks you will perform within SIMON is enrolling a new employee. This task is performed on the **Employees** section, which can be located under the left navigation menu.

*To enroll a new employee:*


1. From within the **Employees** menu, click **+ Add Employee**.
2. The **Add an Employee** module appears:
3. Enter the **SSN**.

4. Select the **Reason for Change**. Depending on your group, your choices may include **New Hire**, **New to Eligible Class**, **Loss of Coverage**, and/or **Open Enrollment**.
5. Enter the event date, either by typing it in or selecting it from the calendar option. Required fields are **Hire Date** and **Class**.



6. Complete the fields in the **Personal Information** area. Required fields are **First Name**, **Last Name**, **Relationship**, **Gender**, and **Birth Date**.

	<b>FIRST NAME</b> <input type="text" value="Stannis"/>	<b>MIDDLE NAME (Optional)</b> <input type="text" value="Middle Name"/>	<b>LAST NAME</b> <input type="text" value="Baratheon"/>	<b>SUFFIX (Optional)</b> <input type="text" value="Suffix"/>
	<b>DATE OF BIRTH</b> <input type="text" value="02/02/1960"/>	<b>GENDER</b> <input type="text" value="Male"/>	<b>MARITAL STATUS (Optional)</b> <input type="text" value="Married"/>	<b>SSN</b> ⓘ <input type="text" value="231-65-4875"/>

- Complete the Address & Contact Information. Required fields are **Address, City, State,** and **Zip**.

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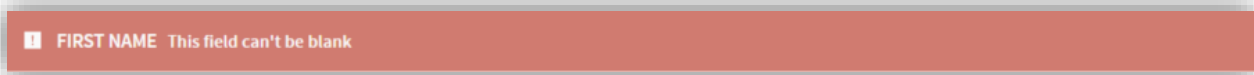
**Note 1:** SIMON automatically validates the address. After entering information in the **Address** field, we recommend entering the **Zip** code next. SIMON then fills in the **City** and **State** fields for you—a nice shortcut.

**Note 2:** If you do not want SIMON to validate the address, select the **Don't Validate Address?** checkbox. For example, if you have entered an address you know to be correct, and SIMON will not accept it, select this checkbox to bypass the validation operation.

**Note 3:** SIMON automatically removes punctuation from addresses. It is okay to enter the punctuation, but when SIMON validates the address, it removes the punctuation to ensure it is formatted per USPS standards.

---

- If applicable, complete the **Prior Coverage** section. Since this information does not apply to new employees, these fields are optional.
- Click **Next: Add Dependents**.
- If a required field is left blank, it turns red and won't allow you to advance beyond this screen until this information is complete. Once filled in, click **Next: Add Dependents**.



- If not applicable, click Skip and continue to **Benefits**.
- To complete the **Dependent** section the following information is required: **First Name, Last Name, Date of Birth, Gender,** and **Relationship**.

- If applicable, dependents may be assigned a unique address. Uncheck the **Use Subscriber Address** button and enter the address. Otherwise, the subscriber address will be used for the dependent.

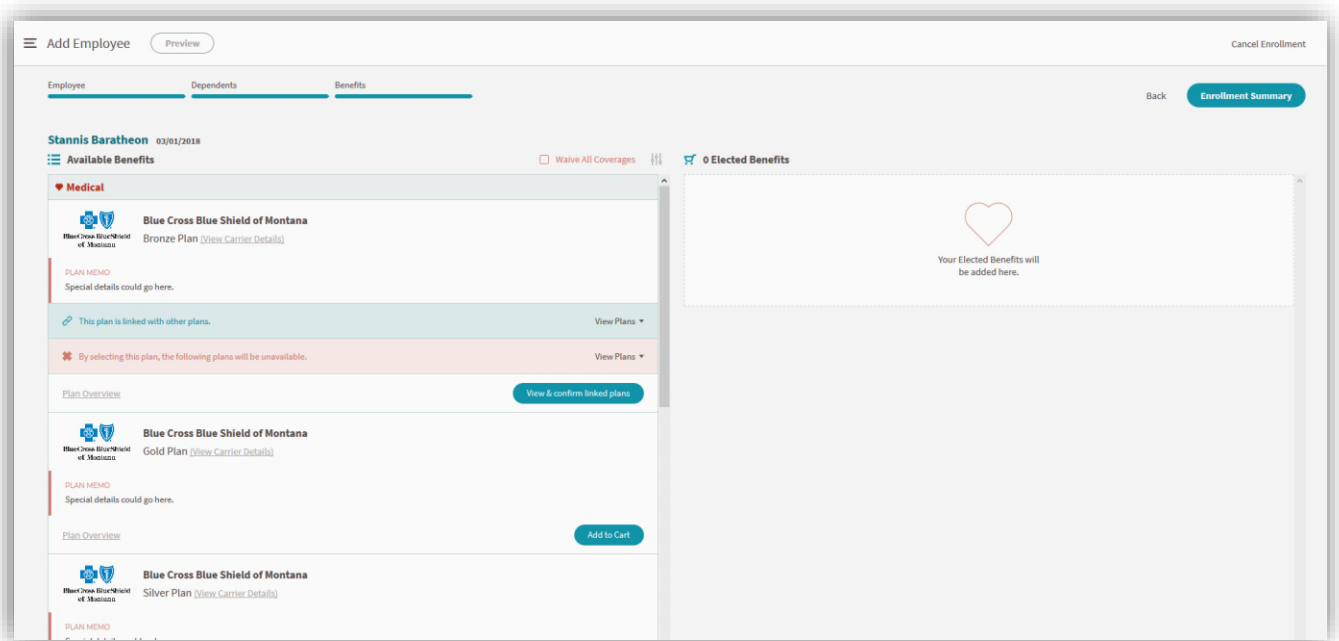


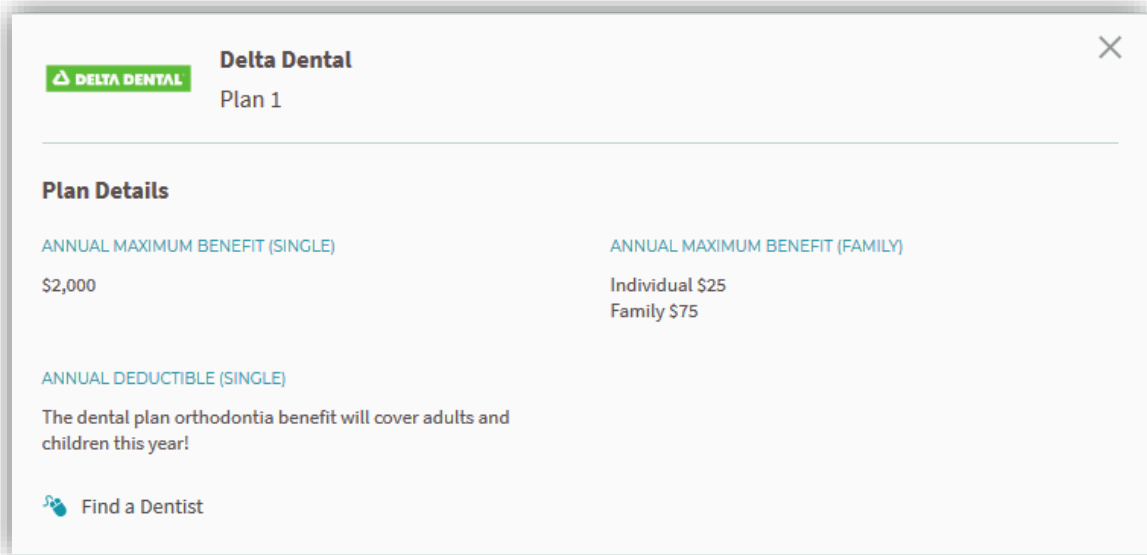
- To add any additional dependents, click **+ Add Another Dependent** in the bottom left of the Dependent section.

## APPLYING BENEFITS

From here, you can:

- ✓ View the coverage by category (by clicking Medical, Dental, Life, and so on). The default view is ALL, which displays all benefits available to this employee.
- ✓ Add coverage by selecting the **Enroll** button. Selected benefits will be listed in the **Elected Benefit** box and will also be indicated by a green checkmark to the left of the **Subscriber** listed.
- ✓ View Summary of Benefits and Coverage documents and corresponding resource links. Meaning, listed under each plan you will find any applicable documents. To open, click the name of the document. After opening the document, you can print as needed.





1. After adding the employee's benefits, click **Enrollment Summary**.
2. You are now on the last step — where you confirm that the employee's information and benefits are correct, and then click **Submit**.

---

Note: A copy of the Enrollment.pdf can be retrieved under the Documents tab under the Employee's Life space.

---

3. The employee will be in **Pending** status and cannot be edited. Once the enrollment has been reviewed and processed through the audit engine the record will change to **Active** status and after this point the employee is editable.

## MANAGING EXISTING EMPLOYEES

After adding employees to the system, you may need to change their information at some point in the future. Perhaps they are adding a dependent or changing their coverage due to a qualifying event. This section details the procedures for managing existing employee data. All management of employee data occurs in the **Employees** section from the left navigation menu.

## SEARCHING FOR AN EMPLOYEE

To review or change an employee's data, you must first locate that employee in the system.

*To locate an employee in the system:*

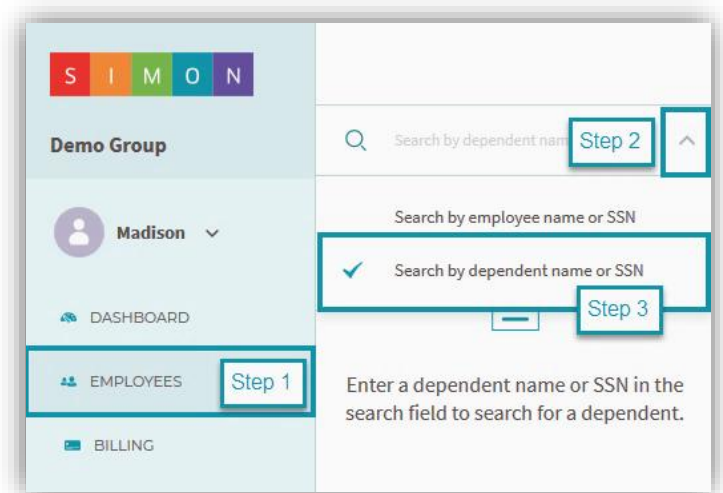
1. Expand the Employees section in the left navigation menu.

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Note: By default, the employee list is sorted first by Status and then in alphabetical order by Last Name.

---

2. Select the status type by clicking the respective boxes next to **Active**, **Pending**, or **Terminated** to customize your search.
3. You can also specify whether you are searching for an employee or a dependent by clicking the right arrow within the **Search by employee name or SSN** box.
4. In the **Search** field, type some form of identifying data for the employee you wish to locate. The SIMON search engine searches each field in the database for the literal string of data you type in this field. For example, you can search on the employee's last name or first name, but not both. You can also search on the full or partial Social Security number.

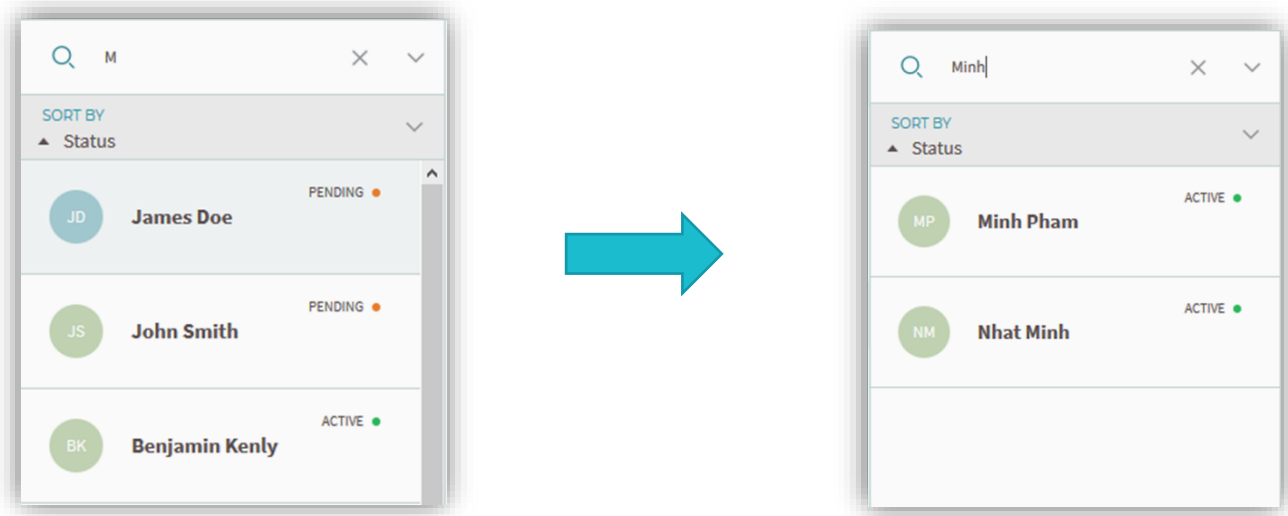



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Note: The search occurs immediately. You do not have to press Enter or tab away from the Search field.

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In the following example, we locate Minh Pham:



- To view the employee's information, click anywhere in the employee's respective tab (Note: the name will highlight in blue once the employee is selected).

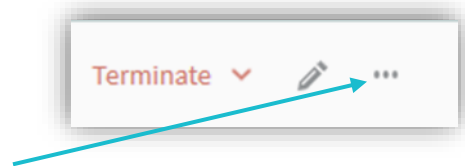
The employee's information appears automatically. On the screen, you can find the employee's Demographic and Contact information, Dependent(s), Benefits, Beneficiaries, and Documents. All sections are easily accessible from this screen and are editable.

## ADDING A DEPENDENT TO AN EXISTING EMPLOYEE

If an employee has an appropriate qualifying event (such as the birth of a child), you may need to add a dependent to the employee's existing coverage.

### *To add a dependent:*

- Locate the employee (see *Searching for an Employee* on page 18).
- There are two options to add a dependent.
  - Option one, you can scroll down to the **Dependent** section and click **Add Dependent**.
  - Option two, click the ellipsis located in the top right and click **Add Dependents** on the drop-down menu.
- On the **Adding a Dependent** module click the **Qualifying Event** for a drop-down menu and select from the listed options. Depending on your plan rules, your options may include:
  - ✓ New to Eligible Class



- ✓ Loss of Coverage
  - ✓ Marriage/Declaration of Domestic Partnership
  - ✓ Birth of a Child (selected in our example)
  - ✓ Adoption/Legal Guardianship
  - ✓ Court Order
  - ✓ CHIP/Premium Assistance
  - ✓ Placement in Anticipation of Adoption
4. Enter the **Effective Date**, by either manually entering or by selecting it from the drop-down calendar option.
  5. Based on the information you provided and your plan rules, SIMON will list any **additional documents required**. After reviewing this, click **Add Dependent**.
  6. Enter the dependent's **First Name, Last Name, Date of Birth, Gender, and Relationship**. If the dependent has a different address than the employee unchecks **Use Subscriber Address**. If you want to add another dependent before selecting benefits, click **Add Another Dependent** in the bottom left. All fields are required.
  7. Click **Next: Benefits**.
  8. Select the appropriate coverage for the dependent (see *Applying Benefits*, on page 17), click **Enroll** to add coverages and click **Remove** if the coverage is not applicable.
  9. When you have finished configuring the dependent's lines of coverage, click **Enrollment Summary**. You can also **Cancel Enrollment**.
  10. Review the information to confirm that it is correct, click **Next: Add Dependent** to review the dependent's data and click **Submit**.
  11. The employee's status will be **Pending**, once reviewed the employee will be **Active** and editable.

## ADDING OR CHANGING COVERAGE FOR AN EXISTING EMPLOYEE

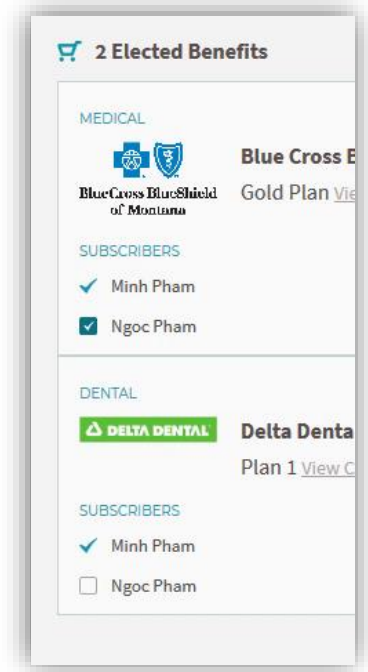
Whether you are adding or changing an employee's coverage, the process is the same.

*To add or change coverage:*

1. Locate the employee (see *Searching for an Employee* on page 18).
2. There are two options to edit Benefits.
  - a. Option one, you can scroll down to the **Elected Benefits** section and click **Manage Benefits** in the top right.



- b. Option two, click the ellipsis located in the top right corner and click **Manage Benefits** (see *To add a dependent* on page 20).
3. In the **Qualifying Event** field, select the appropriate reason, such as **Benefits Change**.
4. Enter the **Qualifying Event Date** by manually entering or selecting the date in the drop-down calendar. If applicable, complete any additional information, which is based on the qualifying event selected.
5. Once completed and reviewed, click **Manage Benefits**.
6. From the benefits page you can do the following:
  - ✓ Delete coverage by clicking **Remove**.
  - ✓ Add coverage by clicking **Enroll**.
  - ✓ View the details of each type of coverage by clicking the coverage name.
  - ✓ Apply all benefit changes to all dependents by clicking the **blue check box** next to the respective dependent's name.
7. After completing your changes, click **Enrollment Summary**.
8. Review the benefit changes, click **Save Changes**.
9. Even though this was a dependent change, it will lock the employee's status to **Pending**. Once reviewed the employee will be **Active** and editable.



## CHANGING DEMOGRAPHIC INFORMATION FOR AN EXISTING EMPLOYEE

*To change an employee's demographic data:*

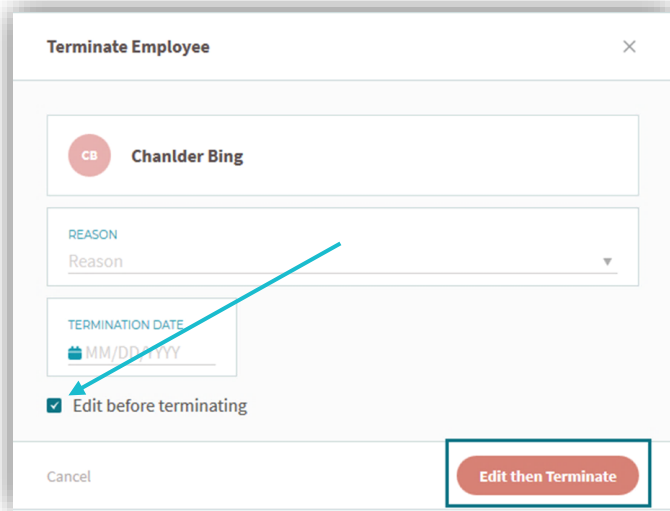
1. Locate the employee (see Searching for an Employee on page 18).
2. Click the icon in the top right to edit.
3. Make the necessary changes and click Enrollment Summary.
4. Review the changes, click Save Changes.

## TERMINATING AN EMPLOYEE'S COVERAGE

To terminate an employee's coverage:

1. Locate the employee (see Searching for an Employee on page 18).

- Click Terminate near the top right of the page.
- A **Termination** module will require you to complete the **Reason** and **Termination Date**. Click **Reason** and select an appropriate option within the drop-down menu. Select the **Termination Date** by manually entering or selecting it in the drop-down calendar. These fields are required.



**Terminate Employee** [X]

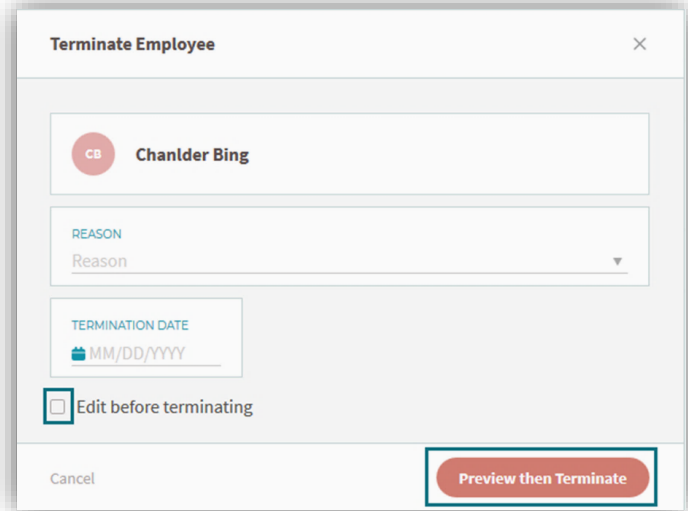
CB Chanlder Bing

REASON  
Reason

TERMINATION DATE  
MM/DD/YYYY

Edit before terminating

Cancel Edit then Terminate



**Terminate Employee** [X]

CB Chanlder Bing

REASON  
Reason

TERMINATION DATE  
MM/DD/YYYY

Edit before terminating

Cancel Preview then Terminate

- Complete any additional information, which is based on the reason for termination previously selected.
- After you enter a termination date, the **Last Day of Coverage** and **Stop Date** will prepopulate.
- If applicable, you can edit the employee's demographic information by clicking the box to the left of **Edit before terminating**.
- If you do not need to edit the employee's demographic information, then do not select the box next to **Edit before terminating** checkbox and click **Preview then Terminate**.
- Review the employee's information and any changes made and click **Enrollment Summary**.
- After reviewing and editing, click **Save and Terminate**.
- Even though this was a dependent change, it will lock the employee's status to **Pending**. Once reviewed the employee will be **Active** and editable.

## TERMINATING A DEPENDENT'S COVERAGE

- Locate the dependent (see *Searching for an Employee* on page 18).
- Scroll to the **Dependents** section on the respective employee's summary page.

3. Click **Terminate Dependent(s)**.
4. Select the dependent(s) that are being terminated by clicking the box to the left of the dependent's name.
5. Click the **Reasons** drop-down for termination options. This is a required field.
6. Select the **Termination Date** by manually entering or selecting from the drop-down calendar. The **Last Day of Coverage** and **Stop Date** will prepopulate. These are required fields.
7. If applicable, you may change demographic information now, by clicking the box to the left of Edit before terminating.
8. Click **Edit then Terminate** (if applicable) or **Preview then Terminate** (see section *Terminating an Employee's Coverage* on page 23 for a visual).
9. If applicable and you are making changes to the dependent's demographic information, edit and click **Next: Benefits**. Review benefits and click **Enrollment Summary** (If not applicable, see next step).
10. Review **Stop Date** and click **Terminate Dependents**.
11. The employee's status will show **You can only view this employee's information until changes are approved** at the top of the employee screen.
12. Even though this was a dependent change, it will lock the employee's status to **Pending**. Once reviewed the employee will be **Active** and editable.

## MANAGING YOUR BILLING

You can view your billing and payment history in SIMON as well as pay a specific bill.

### *Go Green*

To Go Green, means that instead of receiving a paper bill each month, you will receive an email notifying you when your bill is ready to be viewed online.

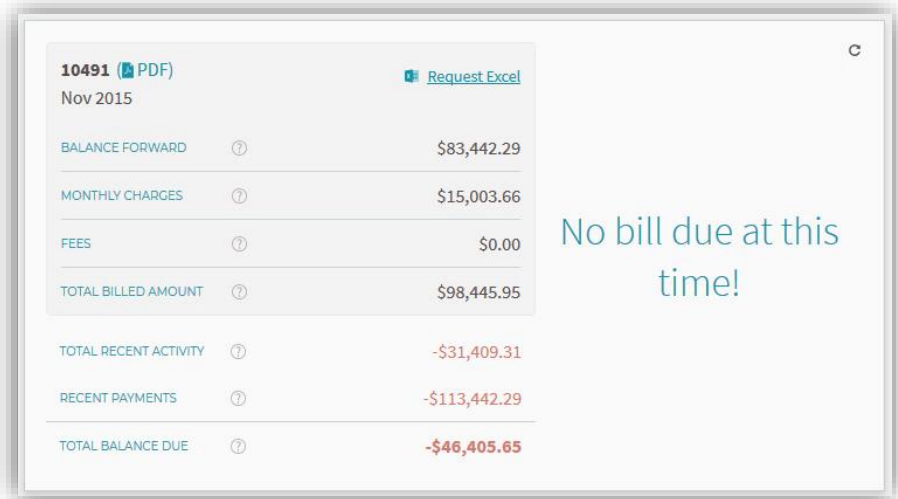
1. You can find the **Go Green** options on the **Dashboard** or the **Billing** sections.
2. To get started, click the **Go Green** button at the top of the page.
3. The **Bill Preference** module will then prompt you to read the **Go Green Terms and Conditions**.
4. After reading the **Go Green Terms and Conditions** click the 'X' in the top left to exit.
5. If you would like to **Go Green**, select the boxes next to **Paperless- Go Green** and **Go Green Terms and Conditions** (By clicking this you state that you have read and understand the terms and conditions).


6. Click **Save Preferences**.

## VIEW YOUR CURRENT AND RECENT BILLING SUMMARIES

This page makes it easy to:

- ✓ View your current balance and print your current bill. Simply click **PDF** and print.
- ✓ View your current bill in Excel spreadsheet by clicking **Request Excel**.
- ✓ Pay your current bill (see *To Pay a Bill*: on page 26).
- ✓ View your recent activity by clicking the arrows on the **Recent Activity** section.
- ✓ Print out your recent billing history by clicking the print icon on the **Recent Activity** section.
- ✓ View your current billing account information.
- ✓ Edit or add a new account by clicking **Manage Account**.



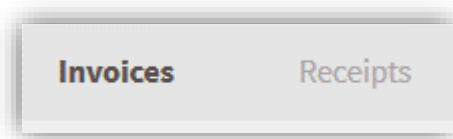
10491  <a href="#">Request Excel</a>	
Nov 2015	
BALANCE FORWARD	\$83,442.29
MONTHLY CHARGES	\$15,003.66
FEES	\$0.00
TOTAL BILLED AMOUNT	\$98,445.95
TOTAL RECENT ACTIVITY	-\$31,409.31
RECENT PAYMENTS	-\$113,442.29
TOTAL BALANCE DUE	-\$46,405.65

No bill due at this time!



## VIEWING INVOICES AND RECEIPTS

1. To view invoices and receipts, click the **Billing** section on the left navigation menu and click **History**.
2. You will automatically view the **Invoices** tab.
3. Each invoice has the **Invoice number, Month/Year, Balance Forward, Monthly Charges, Fees, Total Billed Amount,** and **Status** listed and are listed in chronological order by date (most recent at the top).
4. To print an invoice, click **PDF** next to the **Invoice Number**.
5. To view and print an invoice in Excel, click **Request Excel** to the right of each invoice listed. This will appear on your **Documents** section.
6. To view your past receipts, click on the **Receipts** tab, which is located next to the **Invoices** tab. (Follow the same instructions as listed for **Invoices**). Receipts only appear if the bill was paid online through SIMON.



## MANAGING BILLING ACCOUNTS

From the **Settings** screen within the **Billing** section of the left navigation menu you can:

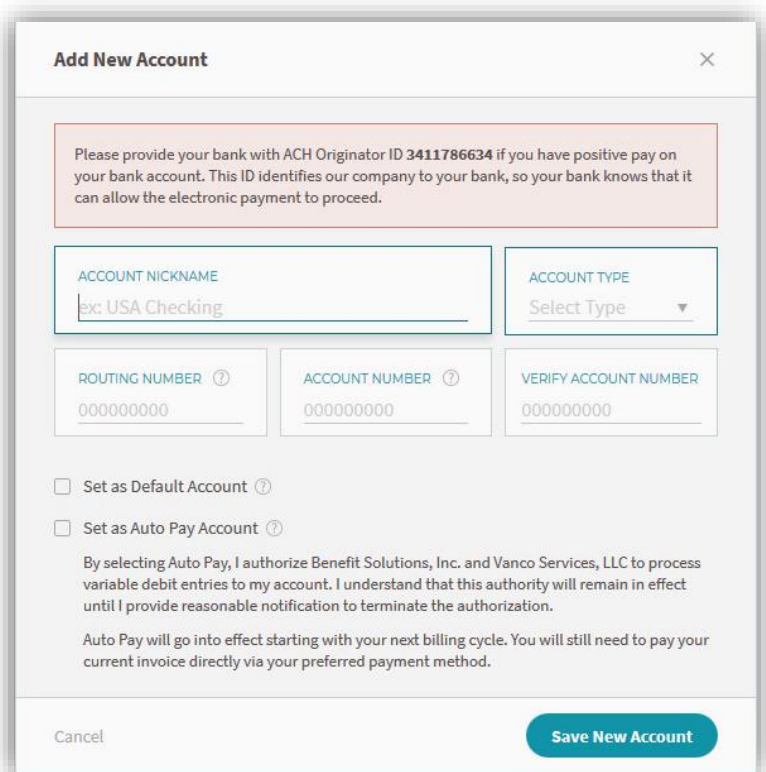
- ✓ View your existing accounts listed under **Billing Info**.
- ✓ Add new accounts and/or remove and edit existing accounts.

### *Adding a new Account*

1. Click the **Billing** section on the left navigation menu and click **Settings**.
2. To add a new account, click **Add New Account** at the top of the **Billing Info** section.
3. The **New Account** module will have you complete the following information: **Account Nickname**, **Account Type**, **Routing Number**, **Account Number**, and **Verifying Account Number**. All fields are required.
4. If applicable, you can click the box to the left of **Set as Default Account** or **Set Auto Pay Account**.
5. Click **Save New Account**.

## TO PAY A BILL:

1. Open the **Billing** section on the left navigation menu and click **Summary**.
2. You can view your **Total Balance Due**, view when your balance is due, and pay your current balance.
3. To pay your bill, click **Pay Now**.
4. The **Pay Now** module will allow you to select an **Existing Account** with a drop-down menu or click **Use a New Account** to create a new account.
5. If creating a new account, see *Adding a New Account* above.
6. Click **Pay Bill Now**.
7. Confirm the payment information and then click **Save Payment**.



**Add New Account** [X]

Please provide your bank with ACH Originator ID **3411786634** if you have positive pay on your bank account. This ID identifies our company to your bank, so your bank knows that it can allow the electronic payment to proceed.

ACCOUNT NICKNAME  
ex: USA Checking

ACCOUNT TYPE  
Select Type ▼

ROUTING NUMBER ⓘ  
00000000

ACCOUNT NUMBER ⓘ  
00000000

VERIFY ACCOUNT NUMBER  
00000000

Set as Default Account ⓘ

Set as Auto Pay Account ⓘ

By selecting Auto Pay, I authorize Benefit Solutions, Inc. and Vanco Services, LLC to process variable debit entries to my account. I understand that this authority will remain in effect until I provide reasonable notification to terminate the authorization.

Auto Pay will go into effect starting with your next billing cycle. You will still need to pay your current invoice directly via your preferred payment method.

Cancel Save New Account

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Note: If there are past due bills, the **Total Balance Due** will be the cumulative of all bills owed. To pay a previous past due bill, click **Pay MONTH Only** (the month specified will be the oldest past due bill), which is located below **Pay Now** on the **Billing Summary** page.

Past due bills can only be paid one at a time. After paying the oldest bill, the **Pay MONTH Only** will update to the next oldest bill on the Billing Summary page (e.g. if **Pay May Only** was paid, the button would now read **Pay June Only**, and so on until there are no past due bills, at which point, **Pay Now** would be the only option displayed on the **Billing Summary** page for the most current bill.

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## ACCESSING RESOURCES

From the **Resources** menu you can:

- ✓ View all current and past benefit plans.
- ✓ View plan specific documents.
- ✓ View your group information, such as, DBAs, physical address, contacts, etc.
- ✓ View your group broker information.

## VIEWING CURRENT AND PAST PLANS

1. Click the **Resources** menu on the left navigation menu, which will automatically bring you to the **Benefits** tab.
2. Listed here are the **Plan, Start Date** and **Stop Date**. If this is your current plan there will be no **Stop Date** listed.
3. If applicable, to view any additional documents (e.g. benefit summary, booklet, etc.), by clicking the plan name. Any attached documents will be listed here.
4. To print the document, click the document name and print.

## MANAGING FORMS AND DOCUMENTS

SIMON makes links available to relevant forms and documents. The documents you can access are dependent upon the document links that have been added for your group's profile in SIMON.

*To view and print forms and/or documents that are group specific:*

1. Open the **Resources** menu on the left navigation menu and click **Documents**.

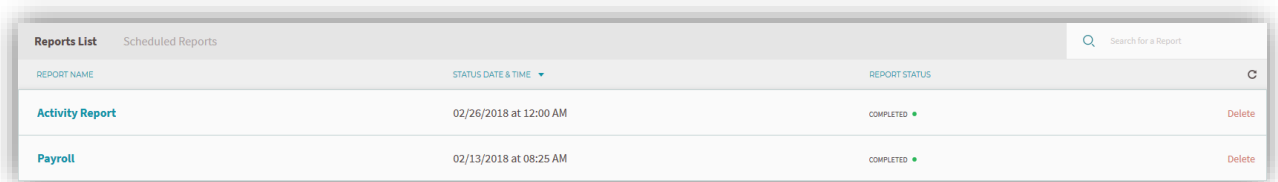
2. From here you can click directly on the document name listed to open the respective document and print if desired.
3. To add documents click **Upload Document**.
4. To remove click **Delete** on the far right.
5. Confirm on the next screen and click **Delete Document**.

*To view and print forms and/or documents that are employee specific:*

1. Locate the employee (see *Searching for an Employee* on page 18).
2. Scroll down to the **Documents** section.
3. To open the document, click **Preview** or the document name.

## VIEWING AND REQUESTING REPORTS

1. Open the **Reporting** section on the left navigation menu.
2. The **Report List** will be displayed, including: **Report Name, Status Date & Time, Report Status,** and the **Delete** option.
3. To view scheduled reports, click on the **Scheduled Reports** tab next to the **Report List** tab. **Scheduled Reports** will display: **Report Name, Start and End Date, Time of Day, Frequency, Next Report Date,** and the **Delete** option.



REPORT NAME	STATUS DATE & TIME	REPORT STATUS	
Activity Report	02/26/2018 at 12:00 AM	COMPLETED	Delete
Payroll	02/13/2018 at 08:25 AM	COMPLETED	Delete

4. To request a report, click **Request a report**. The drop-down menu will allow you to select from the following options:
  - a. **Activity Report** - Enrollment activity for a specified period, status, and change reason.
  - b. **Census Report** - Coverage and demographics as of a specified date for each employee with the option to include or exclude dependents.
  - c. **SIMON® User List Report** – A list of SIMON® users who have been set up to view your group.
  - d. **Roster Report** - A list of all employees, their demographics, and effective date of coverage.
  - e. **Membership Change Report** - Detailed changes to coverage information across members for a specified date range.



Request a report

- f. **Medical Coverage (ACA) Report** - Year-long monthly medical coverage for each employee to assist you in completing forms for IRS reporting requirements under the Affordable Care Act.
- g. **Payroll Report** – Requires contribution strategy setup, and captures employer and employee contributions for all elected coverage(s) by employee.



## TROUBLESHOOTING SIMON

- Resetting your password:
  - Click on **Forgot/Reset password?** (Located in the Sign In box).
  - Enter your username OR email address and click on **Click Here to Find Your Account Now.**
  - Follow the link emailed to you to reset your password.
- Password criteria are as follows:
  - ✓ Minimum length of 8 characters
  - ✓ Maximum length of 10 characters
  - ✓ Must contain an uppercase character, a lowercase character, and a number
- If your original email invitation to register for a SIMON account has expired, please use the **Contact Support** button to request a new invite.
- Invitations are unique to each individual and cannot be shared.
- For further assistance, please access **Contact Support** to the SIMON Support Team.

