



SIMON®

EMPLOYER USER GUIDE – SUPPLEMENTAL

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## WHAT IS EMPLOYEE SELF SERVICE?

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.

As an employer you can extend the SIMON to your employees, which is known as Employee Self Service (ESS). This Employee Portal allows an employee to manage their benefits, access important notification and documents, edit their demographic information, etc. When utilizing ESS you can set employee permissions, approve transactions, and help employees select their benefits as efficiently and easily as possible.

## MANAGE USERS

The **Manage Users** menu allows employers to:

- ✓ Add a new employee to your SIMON database and invite those employees to access Employee Self Service (ESS).
- ✓ View a complete list of **Users** and their **Employment Status, Email** (e.g. Active, Terminated, etc.), and SIMON **User Status** (e.g. Invited, Accepted, Expired, etc.).
- ✓ Manage **Permissions** for self service to control the actions employees can take.

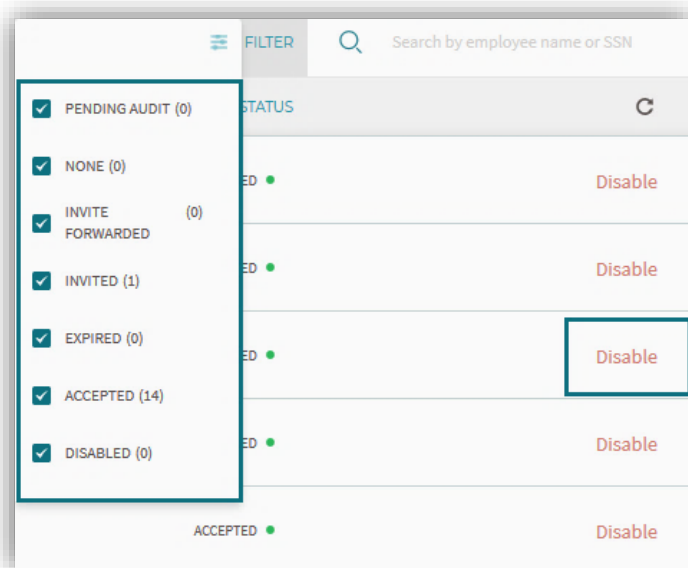
From the **Manage Users** menu, utilize the search bar to locate specific users by **Employee Name** or **SSN**. Additionally, filter the search based on **User Status** (e.g. None, Invited, etc.) by clicking the drop-down menu in the right corner of the search bar. Select the checkbox next to the status type to identify which users you want to view.

User statuses include:

- ✓ **Pending Audit:** Changes have been made to the employee that must be audited before any further actions can be made for this user, including inviting to self service.
- ✓ **None:** No action has occurred and this employee can be invited to self service.

**Invite Forwarded:** You sent the invite to yourself (employer) and then forwarded the self service invite to the employee.

- ✓ **Invited:** Self service registration email was sent to the potential user via SIMON, and the user has not registered.



*Click here to Disable*

- ✓ **Expired:** Self service invite was sent to the employee user via SIMON, and the 30-day window for registration has expired. A new invite must be resent to the employee if they still need access to SIMON.
- ✓ **Accepted:** The employee has accepted the self service invite and has registered in SIMON.
- ✓ **Disabled:** The employee's self service access is disabled.

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**Note 1:** To view user details, such as, **Invite Sent Date**, **Registered Date**, and **Last Sign-in Date**, click directly on the user's name.

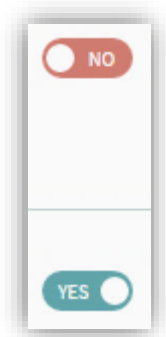
**Note 2:** To add an employee's email, click **+Add Email**. Add the **Email Address**, then click **Save Changes**. To change an existing email, click the edit icon to the right of the user's email. Update the **Email Address**, then click **Save Changes**.

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## SETTING PERMISSIONS FOR USERS

The **Permissions** tab enables you to change features available to your employees using SIMON (e.g. terminating a dependent, adding beneficiaries, etc.). To update permissions, complete the following:

1. Click the **Manage Users** menu on the left navigation.
2. Click the **Permissions** tab next to the **Users** tab at the top of the screen.
3. Listed are the following sections: **Demographic Change**, **Add Dependents**, **Terminate Dependents**, **Beneficiary Information** and **Manage Benefits**.
4. Read the descriptions to determine if you want your employees to add, update, delete, etc.
5. If you would like your employees to have permission to perform the described action, click the slider so that it reads **Yes**.
6. If you do not want your employees to have permission to perform the described action, click the slider so that it reads **No**.



## EMPLOYER APPROVAL

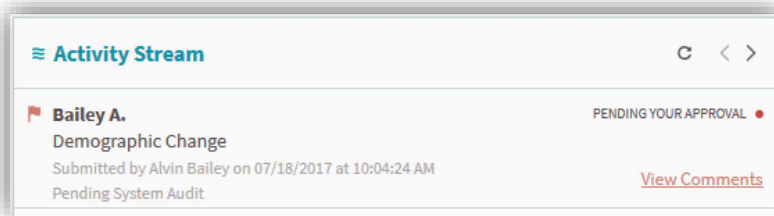
To setup **Employer Approval**, which allows you to **Approve** or **Deny** employee changes before they are audited by the BSI staff, complete the following:

1. Click **Settings** on the left navigation screen and click the **Transaction Approval** tab.
2. If you would like to **Approve Employee Transactions**, click the slider so that it reads **Yes**.
3. If you do not want to **Approve Employee Transactions**, click the slider so that it reads **No**.

If your **Approve Employee Transactions** is **Yes**, you can view the most recent transactions **Pending your Approval** on the **Activities Stream** of your **Dashboard**, or you can request an **Activity Report** (see *Reporting Menu* in the *SIMON Employer User Manual*), for which, you can specify the **Start Date**, **Stop Date**, **Status**, and **Change Reason** to view a more comprehensive list of transactions.

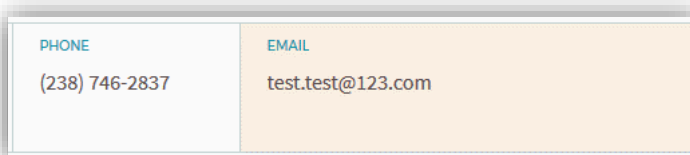
To initiate the **Employer Approval** process:

1. Locate the employee (see section *Searching for an Employee* in the *SIMON Employer*



*User Manual*) or click **View Comments** from the **Activity Stream**.

2. Click Review Pending Changes.
3. All changes made by the employee are highlighted. Click **View Original Data** to see the employee's information before changes were made and click **View Changes** to see the changes that the employee made.



4. After reviewing the changes, you have the option to **Approve** or **Deny**.
5. If you **Approve** the changes, the employee will be in a **Pending** status awaiting a system audit and will not be editable until they are in an Active status.
6. If you **Deny** the changes, you will be prompted to send a **Change Denied Alert** to the employee. From this module, you can:
  - ✓ Edit the **Alert Title**.
  - ✓ Compose a message informing the employee why you have denied their request and/or what the employee should do next in the **Alert Text** field (required).
  - ✓ Send an email to the employee to notify them of the alert by clicking the checkbox **Send an email notification about this alert as well**.

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**Note:** If you **Deny** the employee transaction, the employee will return to an **Active** status so they can make any necessary changes.

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## TRACKING USER CHANGES

All changes made by employees will be listed on the **Recent Activities** section of your employer **Dashboard** (see section *Dashboard* in the *SIMON Employer User Manual*): including the **Activities Report** and the **Membership Change Report** (see section *Reporting Menu* on in the *SIMON Employer User Manual*).

## DISABLING A USER

1. Click the **Manage Users** menu on the left navigation.
2. Use the search bar to locate the user to be disabled (see section *Manage Users* on page 3).
3. To disable the user, click **Disable** to the right of the **User Status** for that respective employee.
4. To confirm that the user account is disabled, click **Disable User**.
5. The top of the page will read **[User's Name] was successfully disabled**.

## HOW CAN EMPLOYEES ACCESS SIMON?

When your employees register for SIMON, ESS provides you and your employees the flexibility to select what options work best.

There are several options, and these vary based on whether you are inviting an existing employee or a new employee.

- ✓ Inviting an existing employee (the employee is already listed on your **Employees** menu in SIMON):
  - Option 1: The employer sends a registration email via SIMON to one or multiple existing employees.
  - Option 2: The employer provides a URL and Registration Code to the employee via the employer's preferred method (e.g. email, in person, etc.) to one or multiple existing employees.
  
- ✓ Inviting a new employee (the employee is not listed on your **Employees** menu in SIMON):
  - Option 1: The employer starts an "Add Employee" workflow from the **Employees** menu and completes a few additional fields to send the employee a registration email via SIMON.
  - Option 2: Is like Option 1 but starts from the **Manage Users** menu.
  - Option 3: Using the recommended CVS template, the employer sends a registration email to more than one new employee at once via SIMON.

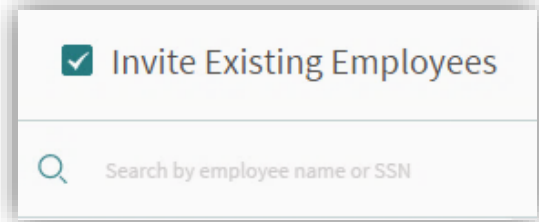
## INVITE AN EXISTING EMPLOYEE TO SIMON

### Option 1: Invite from the Manage Users Menu

1. Click the **Manage Users** menu on the left navigation.
2. Click **Invite User(s)** and select **Invite Existing Employee** from the drop-down menu.



3. When inviting existing employees you can select all by clicking the checkbox next to **Invite Existing Employees**. Optionally, you can invite specific user(s) by entering the employee(s) name in the search bar. Then select the checkbox next to their name.
4. If you want to write a personalized email rather than sending the invite directly from SIMON, check the box **Send invites to me instead and I will forward to my employees**. You will receive an email that can be forwarded to the selected employees.
5. If you would like to remove an employee from the list, click **Remove**.
6. If you need to add an email for a selected employee, edit directly in the email box from this page.
7. After reviewing and editing, click **Send Self Service**.
8. Once this is completed, at the top of the screen you will see **Employee Successfully Invited**.




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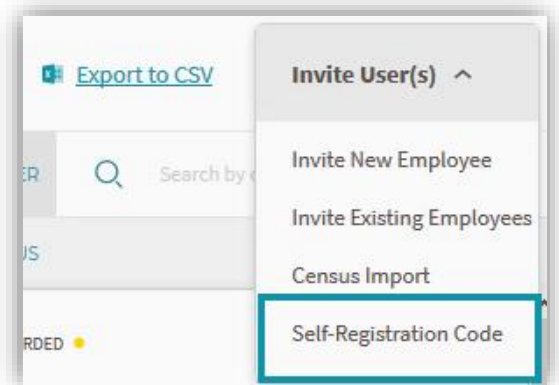
**Note:** After inviting an employee, the **User Status** will read **Invited**. Once the employee has registered, the **User Status** changes to **Accepted**. If a user does not register within 30 days, the **User Status** will then **Expire** and another invite can be sent.

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### Option 2: Employee Self Service Registration

If you have **Employee Self-Registration**, you have the option to allow existing employees to self register for employee self service in SIMON. To allow existing employees to self register, complete the following steps:

1. Request an **Employer Registration Code** from your SIMON Account Team.
  - a. The **Registration Code** is located on the **Manage Users** menu. Once on the **Manage Users** page click **Self-Registration Code** located in the **Invite User** drop-down.
2. Add all employees in SIMON who are eligible for self service **prior** to distributing the Employer Registration Code.



3. Distribute the **Employer Registration Code** to your **Active** employees.

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**Note 1:** A saved email address is not required. Employees can use any email they want, if there is not an active invite pending for the same email address already saved in SIMON.

**Note 2:** This option is only available to employees. If you are an employer who needs SIMON access, please contact your SIMON Account Team.

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## INVITE A NEW EMPLOYEE TO SIMON

When adding a new employee, there are multiple ways to start the enrollment process and send a Registration email to the employee, which are detailed below.

### Option 1: Invite from the Employees Menu

When adding a new employee from the **Employees** menu, you can **Send Self Service Invite**. To enroll an employee, see section *Enrolling a New Employee* in the *SIMON Employer User Manual*, and click **Send Self Service Invite**. Complete the following additional information:

1. **First Name, Last Name, Date of Birth, Gender, Email** (all fields are required), and **Annual Salary** (optional).
2. Review the information and ensure that is correct (Note: If any of the required information is inaccurate the user will receive an error when registering with their self service invite).
3. Once complete, click **Send Self Service Invite**.

After the employee registers, you can:

- ✓ Locate the employee on the **Employees** menu (see section *Searching for an Employee* in the *SIMON Employer User Manual*) and click **Continue Enrollment**.
- ✓ Or, the employee can enroll in benefits via Self Service.

Once enrolled in benefits, the employee will be **Pending** status and no further action can be made until the changes are approved. After which point, the employee will be **Active** and is editable.

### Option 2: Invite from the Manage Users Menu- One Employee

1. Click the **Manage Users** menu on the left navigation.
2. Click **Invite User(s)** and select **Invite New Employee** from the drop-down menu.
3. Enter the **SSN**.
4. Select a **Qualifying Event** from the drop-down menu. Based on the **Qualifying Event** SIMON may require additional information (e.g. past coverage, loss of coverage date, a note, etc.).
5. Manually enter or select from the drop-down calendar the appropriate date. The **Probationary Date** and **Effective Date** will automatically be calculated. To change the **Probationary Date**, click the edit icon in the corner of the **Probationary Date** box.
6. Select the **Class**.
7. Complete the employee's demographic information, including, **First Name, Last Name, Date of Birth, Gender** and **Email** (all required). Optionally, complete the **Annual Salary** for the employee.
8. Review and click **Send Self Service Invite**.
9. Once complete, at the top of the screen will read **Employee self service invite successfully sent to [User's Name]**.

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**Note:** After inviting an employee, the **User Status** will read **Invited**. Once the employee has registered, the **User Status** changes to **Accepted**. If a user does not register within 30 days, the **User Status** will then **Expire** and another invite can be sent.

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### Option 3: Bulk Employee Invite from the Manage Users Menu

Utilizing census import enables you to add multiple new employees at once.

1. Click the **Manage Users** menu on the left navigation.
2. To import a census click **Invite User(s)**. In the drop-down menu click **Census Import**.
3. Click or drag file to **Choose (or drag and drop) the CSV file** to attach the excel spreadsheet. The required fields for the imported excel spreadsheet includes: **First Name, Last Name, SSN, Email, Date of Birth, Date of Hire, and Gender**. Additionally, other optional fields can be added.
4. If applicable, click **the first row in my file is a column header, do not import it**.
5. Enter the **Qualifying Event** and **Class**, which are both optional to complete.

6. Click **Next: Mapping**.
7. To map, click **Specify Column Content** and select the appropriate option from the drop-down menu. Once complete click **Next: Edit**.
8. If applicable, complete any additional data that is missing (i.e. SSN, Date of Hire, etc.) manually, which will be highlighted in red.
9. Once reviewed click **Next: Reason and Class**.
10. Review the **Reason for Adding Employees** and **Employment Class**. Once complete click **Next: Summary**.
11. An import summary will display the total number of **Imported Employees**, and will specify the number of employees being imported based on **Reason for Adding Employees** and **Employment Class** (e.g. *Employment Class: 8 Class 2- All other employees, 10 Class 1- Mangers*).
12. If the summary needs to be further edited, click **Back** and follow the process as described above. If the information does not need to be further edited, click **Import & Invite**.
13. To confirm that the census was imported, the top of the page will read, **Employees have been successfully invited**.

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**Note:** When importing a census, the spreadsheet must be saved as a **CSV** format. To do this in Excel, click **File, Save As**, and select the **Save** format from the drop-down menu [e.g. Excel Workbook (\*.xlsx), Excel 97-2003 Workbook (\*.xls), etc.] and select **CSV (Comma delimited) (\*.csv)**.

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## TROUBLESHOOTING

### YOU RECEIVE AN ERROR WHEN SENDING AN EMPLOYEE INVITE

If you receive an error when sending an invite to an employee, check the following:

- ✓ The employee's current **Employment Status**, under certain statuses an employee cannot be sent an invite (e.g. if the employee is **Pending Audit**) (see section *Managing Users* on page 3).
- ✓ Has this employee had SIMON self service in the past? If yes, confirm that your self service invite is being sent to the original email that was used by the employee. If the employee doesn't have access to the original email utilize the **Contact Support** button in SIMON.

### EMPLOYEE RECEIVES A REGISTRATION ERROR

If you have an employee that receives an error when they try to self register in SIMON, check with the employee to confirm their information is correct on the **Employees** menu and/or try one of the following:

1. Login to SIMON.
2. Click the **Employees** menu on the left navigation.
3. Locate the employee (see *Searching for an Employee* in the *SIMON Employer User Manual*).
4. From this page, confirm the following information:
  - a. The employee's **First Name, Last Name, Date of Birth,** and **SSN** to ensure it matches the information that will be used to verify them and confirm this with the employee.
  - b. The employee is showing under your **Active Employees List**.
5. Navigate to **Manage Users** and:
  - a. Check that an invite has already been sent to the employee.
  - b. Check that the employee is using the correct **Self Registration Code**.

## EMPLOYEE RECEIVES AN ERROR AFTER A SELF SERVICE INVITE IS SENT FROM SIMON

If you have an employee that is having an issue registering after you sent them a self service invite via SIMON. First, complete the following:

1. Click the **Employees** menu on the left navigation.
2. Locate the employee (see *Searching for an Employee* in the *SIMON Employer User Manual*).
3. From this page, confirm the following information:
  - a. The spelling of the employee's **First Name** and **Last Name** to ensure it matches the information that will be used to verify them and confirm this with the employee.
  - b. The **Date of Birth** and **SSN** for the employee are both accurate.

If all information appears accurate, then complete the following:

1. Click the **Manage Users** menu on the left navigation.
2. Locate the employee (see *Managing Users* on page 3).
3. Confirm that the employee's **Email** is not blank and/or accurate.
4. If your previously sent invite was over 24 hours ago, send the employee another invite (see section *Option 1: Invite from the Manage Users Menu* page 7).

## EMPLOYEE DOES NOT RECEIVE THE SELF SERVICE INVITE

If an employee reports that they have not received their invite, complete the following:

1. Confirm the employee's email is correct (see section *Employee receives an Error after a Self Service Invite is Sent* above).
2. Confirm the email is not in the employee's Junk mail.
3. 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.