SIMON®

EMPLOYEE PORTAL USER GUIDE

Guide Version 3.0.6

Last updated June 15, 2022

VIMLY
BENEFIT SOLUTIONS

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WHAT IS THE SIMON EMPLOYEE PORTAL?

The Employee Portal gives you one place to access and enroll in benefits for you and your family. From here, you can:

- View benefits for you and your dependents
- Add to and change your benefits at open enrollment or during a qualifying event
- Add or change your dependents
- Change demographic information for you or your dependents
- View and/or print benefits-related forms and documents
- Access important websites and view important messages about your benefits
- Receive alerts regarding important policies and administration changes

SUPPORTED BROWSERS AND PLATFORMS

SIMON portals work on almost any browser, on any device of any size, and on any operating system if the browser is standards-compliant and updated to its latest version.

Since most browsers are "evergreen" (automatically upgraded to their latest versions), we support the latest version of these standards-compliant browsers.

NOTE: Microsoft Internet Explorer is not supported.

SUPPORTED BROWSERS

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

- Google Chrome
- Firefox
- Safari
- Microsoft Edge
- Opera

SUPPORTED OPERATING SYSTEMS

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

- Windows
- macOS
- iOS
- Android
- Linux

SUPPORTED DEVICES

SIMON portals are 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.

ACCESS

Access to the Employee Portal is granted by your employer. If you need help getting access to the portal, please contact your employer for assistance.

NAVIGATION

The Employee Portal user interface consists of the following distinct areas:

- User Menu
- Actions Bar
- Left Sidebar
- Workspace

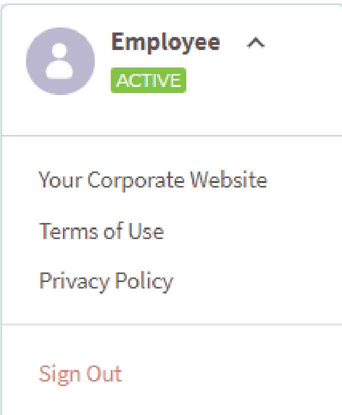
USER MENU

The **User** menu contains links to review Vimly's terms of use and privacy policy. It may also contain other helpful links that are specific to your organization, such as a link to your corporate website.

In addition, you'll see the **Status** of your SIMON account (*Active*, *Pending*, *Terminated*) reflected here. **Active** accounts have been audited and approved by your employer. **Pending** accounts have changes to your information, your dependents or beneficiaries, or your benefits that are in the process of being audited and approved. **Terminated** accounts indicate you are no longer employed with the employer, but you may be allowed to access your account and update your contact information, if necessary.

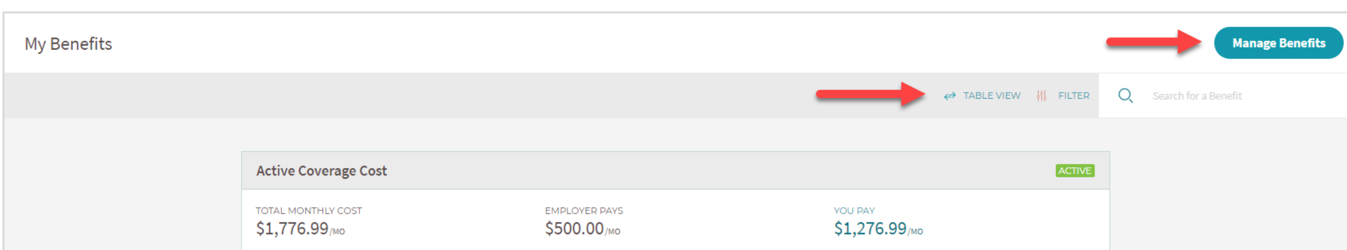
Also, the **Sign Out** command on User menu is the most secure way to log out of your Employee Portal account.

To open the User menu, on the left sidebar, click your name. In the following example, **Employee** is the name on the account.



ACTIONS BAR

The *Actions Bar* shows the actions you can take on the workspace page you are viewing. For example, if you're looking at the *My Benefits* workspace, you'll see a **Manage Benefits** button, a **Table View** button that toggles your view of the benefits, a **Filter** menu, and a search box.

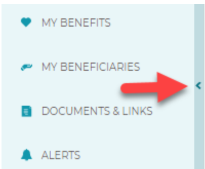


LEFT SIDEBAR

The left sidebar helps you quickly switch between the portal workspaces.

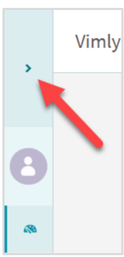
- Dashboard
- My Details
- My Dependents
- My Benefits
- My Beneficiaries
- Documents & Links
- Alerts

You can minimize the left sidebar by clicking the horizontal divider line between the sidebar and the main workspace area.



The minimized sidebar shows icons for each workspace. Click the icons to switch between workspaces. If you're not sure which icon corresponds with the workspace you want, rest your mouse pointer over the icons to see the name of the workspace it corresponds with.

To restore the sidebar to full size, click the arrow at the top of the minimized sidebar.



WORKSPACE

The *Workspace* is the portal's main work area. Each workspace is a little different, but all are designed to be simple and easy to use.

Most workspaces will display a list of items that you can sort, filter, search, and refresh.

SORT THE LIST

To sort the list, click any column heading that changes color when you move the mouse pointer over it. If the column heading does not change color, you cannot sort by it.

After you click a column heading, a ▲ (ascending order) or ▼ (descending order) indicator will appear next to the sorted column. Click the column heading again to reverse the sort order.

If you are in the *My Benefits* workspace, and you switch to **Table View**, use the **Sort By** menu to select a sort option. Note the arrows next to each option that indicate ▲ ascending or ▼ descending order.

FILTER THE LIST

To filter the list, near the top right of the page, click **Filter**, and then select the options you want. On most lists, you can filter by item type and item status. List items are filtered dynamically as you select and clear filter options.

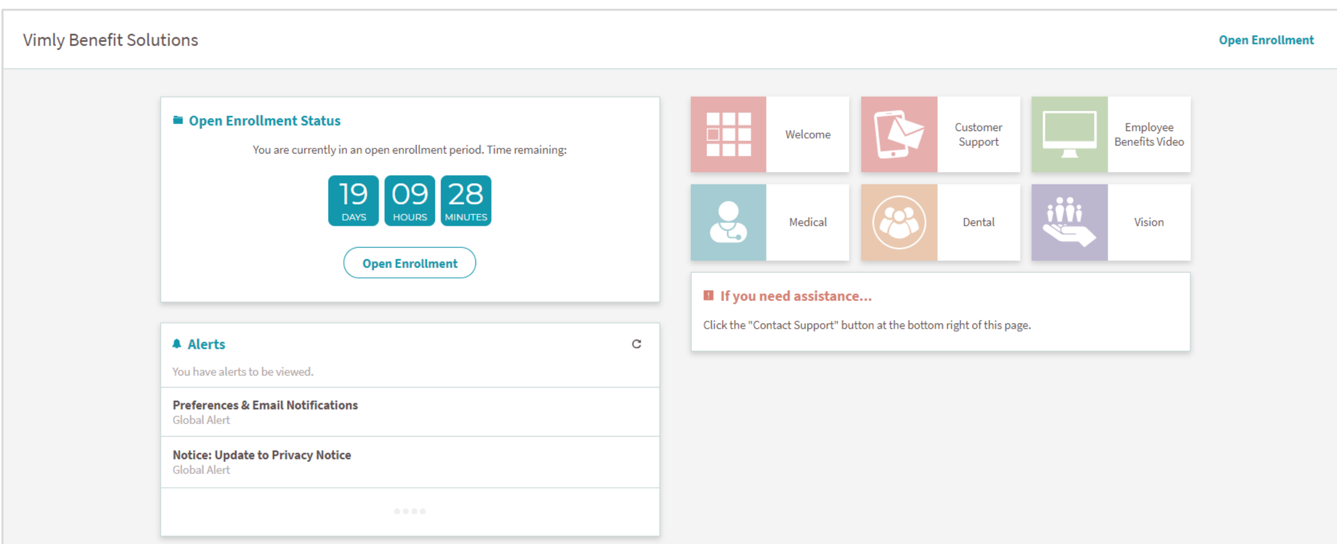
SEARCH THE LIST

To search for an item, use the search box near the top right of the page. Search results are returned as soon as you start typing.

REFRESH THE LIST

To ensure you're seeing the most up-to-date information, you can manually refresh some lists. Near the top right of the page, just below the search box, click **Refresh** ↻.

DASHBOARD



The **Dashboard** highlights information that is important for managing your account, such as:

- The status of your open enrollment period. Click **Open Enrollment** to get started!
- Alerts about benefits, policy updates, and other important information
- Icons that link to additional information about your benefits

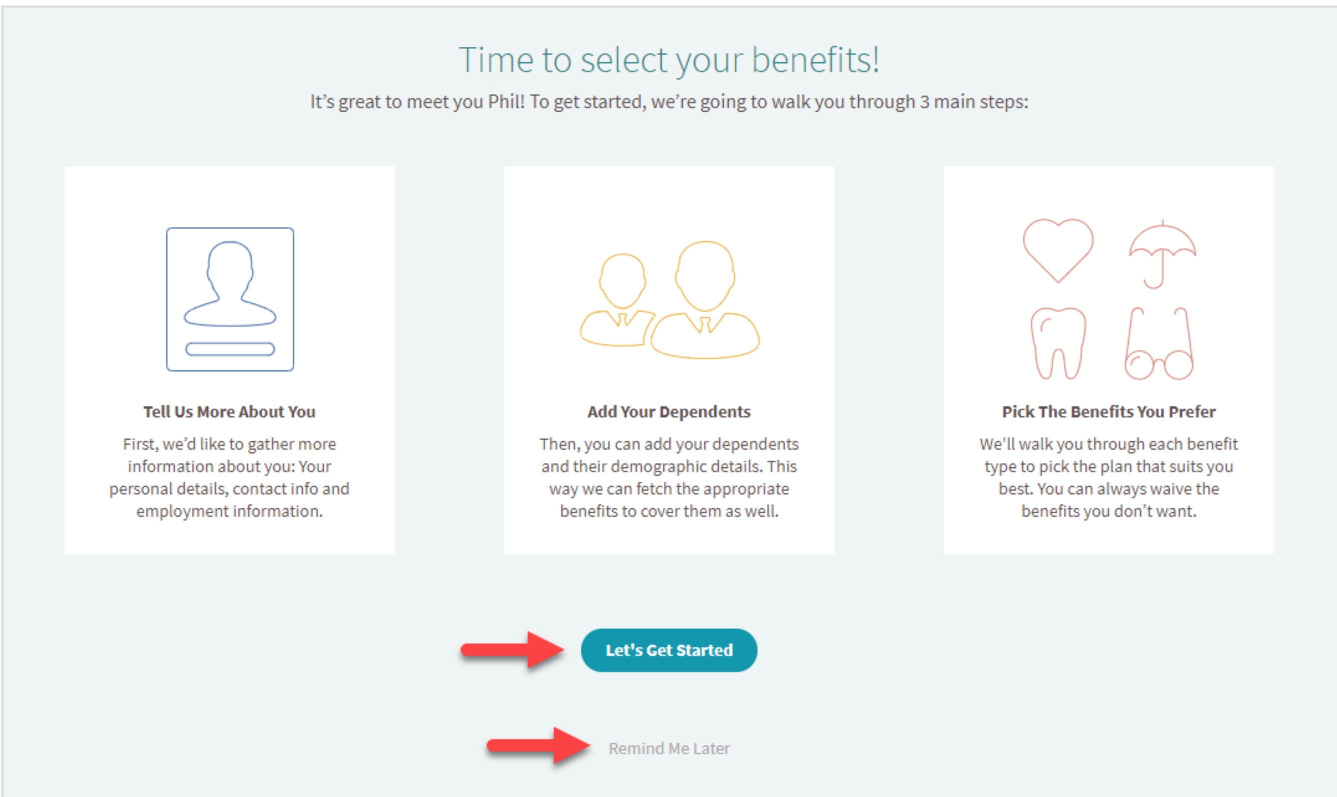
Click an icon to open a window with additional information (including videos) or open another website. If the icon opens another website, Employee Portal will alert you.

Click an alert to see its full details. You can also see the full details by clicking **Alerts** on the left sidebar.

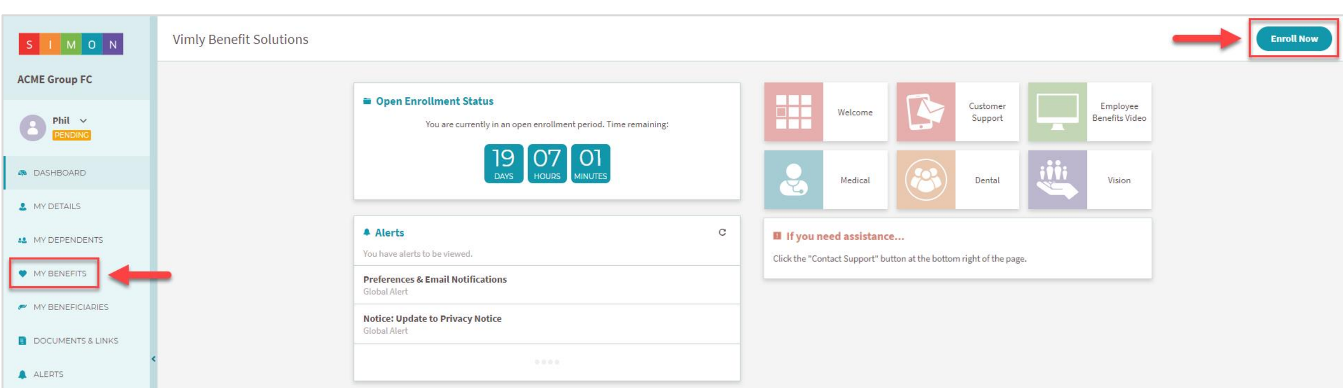
ENROLL IN BENEFITS

Whether you are a **new employee** signing up for the first time, or a **current employee** making changes during open enrollment, your guided experience in Employee Portal will generally be the same.

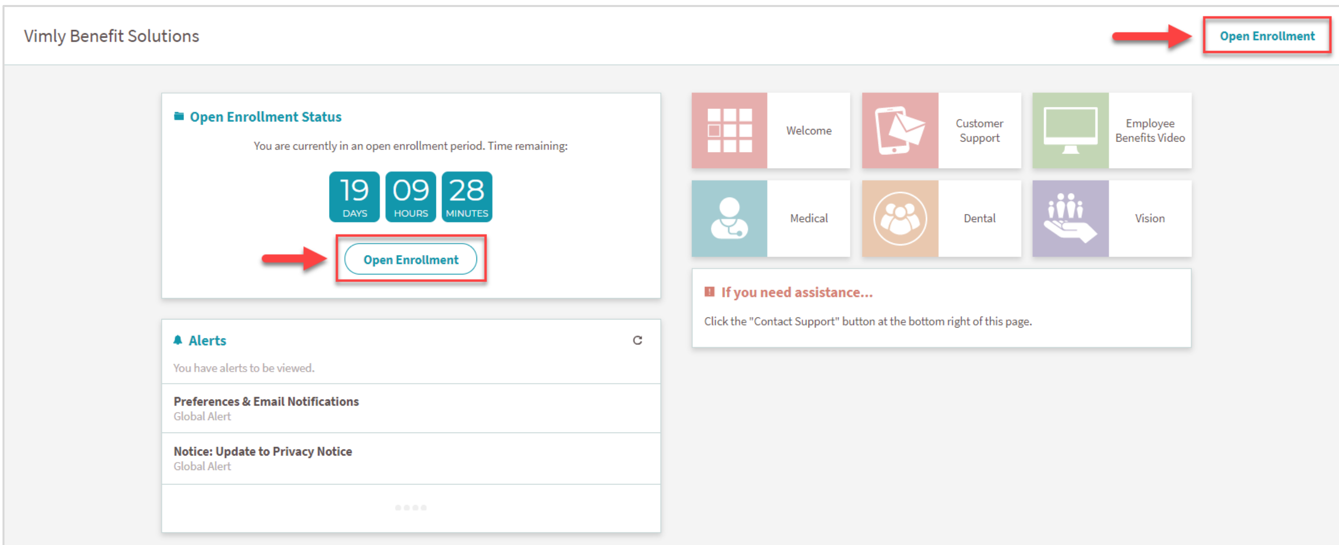
If you are a **new employee**, you'll be prompted to start the process the first time you login. Click **Let's Get Started** to begin.



However, if you choose to click **Remind Me Later**, you can get back to this process by clicking **Enroll Now** in the **Actions Bar** at the top right of the page, or by clicking **My Benefits** on the left sidebar.



If you are a **current employee** making changes during open enrollment, click **Open Enrollment** to get started. You'll see this button on the dashboard, and you'll also see it in the *Actions Bar* at the top right of the page.



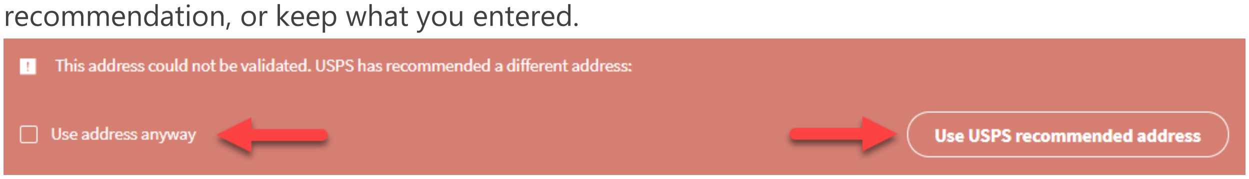
TELL US MORE ABOUT YOU

On the **Employee** step, please do the following:

1. Make sure your **First Name**, **Last Name**, **Date of Birth**, **Social Security Number (SSN)**, and any other required information is correct and complete.

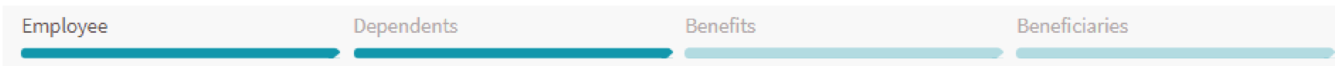
NOTE: If there's an issue with your SSN, please contact your employer for assistance with getting it corrected.

2. Enter your **Address** (or update it, if necessary).
   When you do this, Employee Portal checks with the United States Postal Service to make sure it's an actual, valid address. This is done to check for possible typos. However, USPS may recommend a slightly variation on the address you entered. You can choose to accept the USPS recommendation, or keep what you entered.



3. Enter any **Optional** information you want to include. For example, it can be helpful to the insurance carriers to have your **Phone** number and **Email** address in case they need to contact you.
4. When you are finished, near the top right of the page, click **Next: Edit Dependent**.

ADD YOUR DEPENDENTS



On the **Dependents** step, please do the following:

1. If you don't have any dependents, you can skip this step. To do that, at the top right of the page, click **Next: Benefits**.
2. Make sure the dependent's **First Name**, **Last Name**, **Date of Birth**, **Social Security Number (SSN)**, **Relationship** to you, and any other required information is correct and complete.
   - If the dependent's **Address** is different from your address, clear the **Use Subscriber Address?** check box, and then enter the address.
   - If the dependent is disabled, be sure to select the **This dependent is disabled** check box. This is an important factor in maintaining eligibility for older dependent children.
3. If you need to add additional dependents, click **+Add Another Dependent** at the bottom of the list.

NOTE: If you're going thru open enrollment, **you cannot remove existing dependents** during this process. See the Remove a Dependent section of this document for more information. Also, if there's an **issue with an existing dependent's SSN**, please contact your employer to correct it.

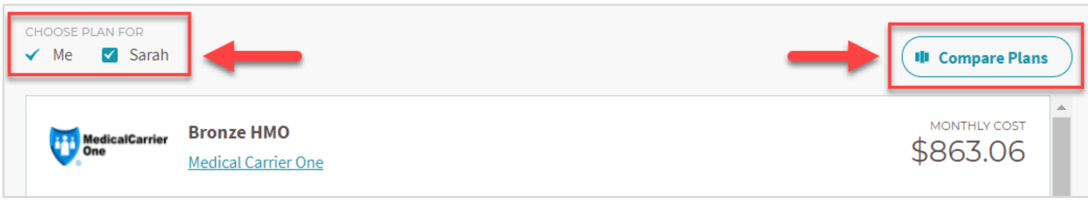
4. When you are finished, near the top right of the page, click **Next: Benefits**.

PICK THE BENEFITS YOU PREFER

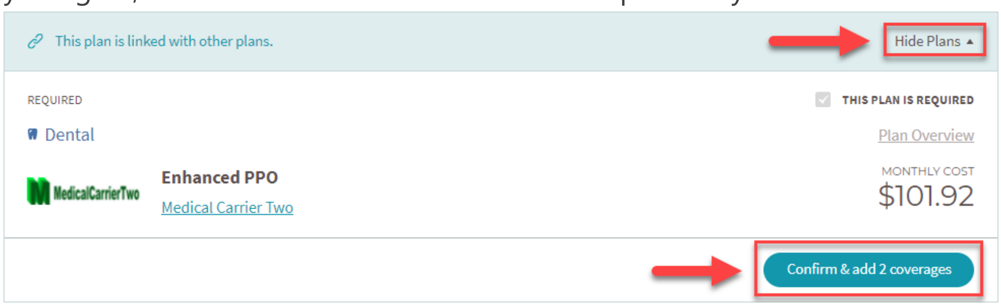
On the **Benefits** step, please do the following:

1. Work down the list of coverages listed on the left side of the page. Once you've made or changed a plan selection, click the **Next** button at the bottom of the page.
2. Use the **Choose Plan For** check boxes at the top of the plan list to update the total monthly cost of each plan.

If more than one plan is offered for a coverage, click **Compare Plans** at the top of the plan list to see a side-by-side comparison of plan details.



3. When you find the plan you want, click **Add to Cart**. Or, click **Remove plan** to remove one.
   - Some plans may be **required**, which means they cannot be removed from your cart.
   - Some plans may be **linked** to other plans. When you see this, it means that to elect the plan, you must also elect all the linked plans. If you choose the plan, all the linked plans are automatically added to your cart. Click the **View/Hide Plans** toggle to show them. If you agree, click the **Confirm** button to add the plans to your cart.



4. If you want to waive a coverage, click the **Waive** button at the bottom of the page. When you do this, some coverages may ask you to provide a waiver reason. Others (like CDHP) can simply be skipped if not needed (you won't see a Waive button). If you change your mind, clear the check box in the **Waive** button, and then select a plan.
5. Review the **Cart Summary**. In the summary list, click a plan to show which dependents (if any) will be enrolled in it. Clear the check box for any dependent that should not be enrolled in a plan.

6. Once you've made all required election and waiver decisions, you'll be able to click the **Next** button to move to the next step.
   - If you selected a coverage that takes beneficiaries, click **Next: Beneficiaries**.
   - Otherwise, click **Next: Review Summary**.

ADD BENEFICIARIES (IF APPLICABLE)

NOTE: If you did not elect a coverage (such as Basic Life) that takes beneficiaries, you won't see this step.

On the **Beneficiaries** step, please do the following:

1. If you don't have any beneficiaries, or if you don't want to define beneficiaries at this time, you can skip this step. To do that, at the top right of the page, click **Next: Review Summary**.
2. Enter or change the **First Name**, **Last Name**, and **Relationship** to you for each beneficiary.
3. Enter or change the **Rank** (primary or contingent) and **Allocation** percentage for each beneficiary. If you're not sure what these options mean, click the ? icons to learn more.
4. If the beneficiary's **Address** is different from your address, clear the **Use Subscriber Address?** check box, and then enter the address.
5. If you need to add additional beneficiaries, click **+Add Another Beneficiary** at the bottom of the list.
6. If you need to remove a beneficiary, click **Terminate Beneficiary**. The current date will appear as the **Stop Date** for the beneficiary. If you change your mind, click **Undo Terminate**.

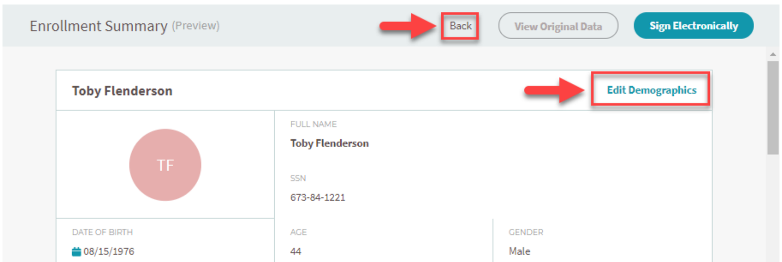
IMPORTANT: If you remove a beneficiary, make sure you adjust the **Allocation** percentages. For more information, see the Rank and Allocation section of this document.

7. When you are finished, near the top right of the page, click **Next: Review Summary**.

REVIEW AND SIGN

On the **Enrollment Summary** step, please do the following:

1. If you need to make more changes, click the **Back** button in the Actions Bar near the top right of the page, or click the **Edit** or **Manage** button in the section of information you need to change.



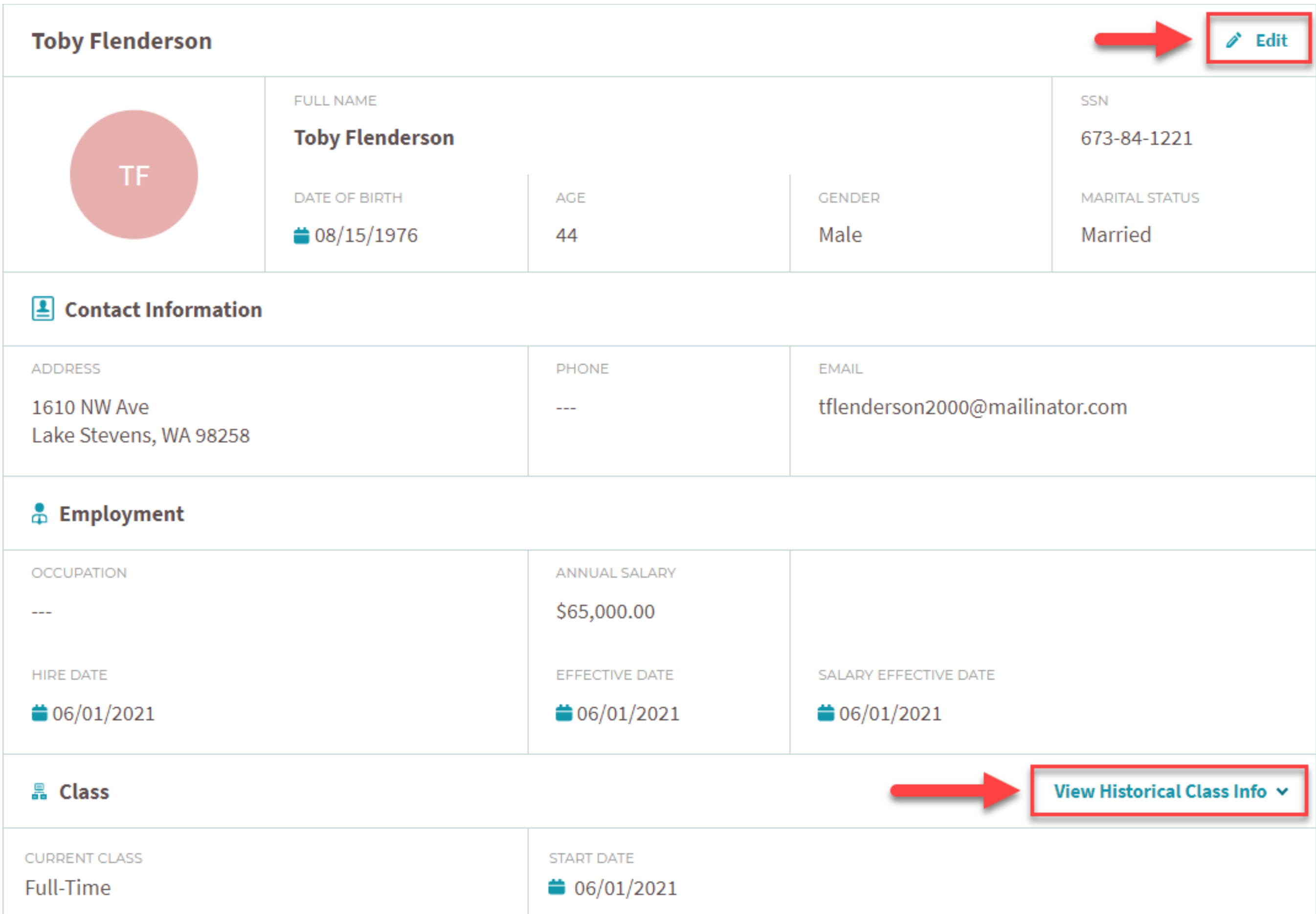
2. Click the **View Original Data / View Changes** button to toggle highlighting of the changes.
3. If everything looks good, click **Sign Electronically**.
4. Read and respond to the Disclosure and Consent form.
5. If you agreed, select a signature, or use the mouse pointer or your finger to write your signature, and then click **Sign Electronically and Submit**.

Once changes are submitted, your account will change to **Pending** status. You'll see this reflected on the *User menu*.

Pending accounts are in the process of being audited and approved. During this period, no further changes can be made to your personal information, dependents, benefits, or beneficiaries.

Once your employer has approved your enrollment, your account will change to **Active** status, and you'll be able to make further changes, if necessary.

MANAGE YOUR PERSONAL INFORMATION



To view your personal information, on the left sidebar, click **My Details**.

If you want to see your previous (or future, if changing) employee classifications, click **View Historical Class Info**. This information cannot be changed. If you have questions about it, please contact your employer.

UPDATE YOUR PERSONAL INFORMATION

If your account is in **Active** status and your employer has given you permission to edit information in Employee Portal, you can update your personal information.

<u>To update your personal information:</u>

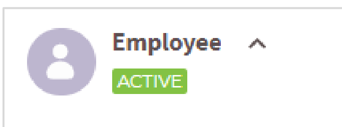
1. On the left sidebar, click **My Details**, and then click **Edit**.
2. When you are finished, near the top right of the page, click the **Next** button to move to the next step.

- If you have dependents, click **Next: Edit Dependents**. Update the information, if necessary.
- If you don't have dependents, or if no updates are needed, click **Next: Review Summary**.

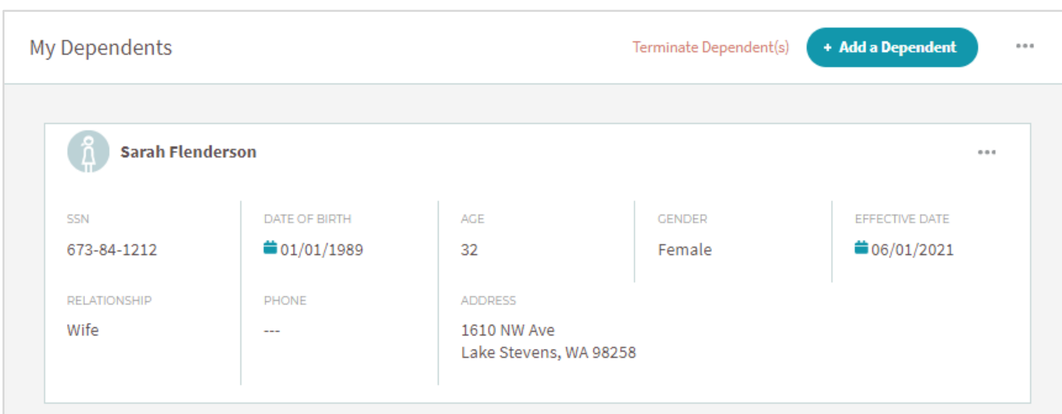
3. If everything looks good, click **Save Changes**.

<u>If you don't see the **Edit** option:</u>

- Your employer may prefer to have you contact them to edit this information. Contact your employer for further assistance.
- If you know you have permission to edit this info, your account may be in a **Pending** status. This means other changes are moving thru audit and must first be approved by your employer. Before you can make further changes, you'll need to wait for that process to complete. When it's completed, your account status will change to **Active**, and then you can make further changes. Your account status is displayed under your name on the *User Menu*.



MANAGE YOUR DEPENDENTS



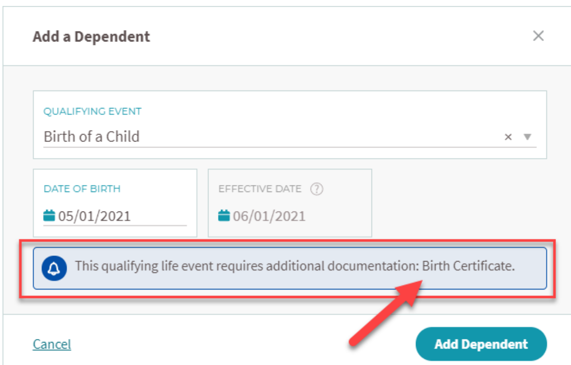
To view your dependents, on the left sidebar, click **My Dependents**.

ADD A DEPENDENT

If your account is in **Active** status and your employer has given you permission to edit information in Employee Portal, you'll see the option to add new dependents.

NOTE: This process opens the full enrollment experience, so you could change your personal information, existing dependents, benefit elections, and beneficiaries at the same time. If you do this, **more time will be needed for the audit and approval process.** To learn more about the other steps of the enrollment experience, see the Enroll in Benefits section of this document.

1. On the left sidebar, click **My Dependents**.
2. On the *Actions Bar*, near the top right of the page, click **+Add a Dependent**.
3. Select a **Qualifying Event** from the drop-down menu, and then enter the requested **Date**. Employee Portal uses the event and date you enter, along with federal/state regulations and employer policy, to automatically calculate the coverage **Effective Date** for the dependent. Also, some qualifying events require additional documentation, such as a birth certificate. Please contact your employer with any questions about the effective date or required documentation.



4. Click **Add Dependent**, and then enter all required information for the dependent.
   - If the dependent's **Address** is different from your address, clear the **Use Subscriber Address?** check box, and then enter the address.
   - If the dependent is disabled, be sure to select the **This dependent is disabled** check box. This is an important factor in maintaining eligibility for older dependent children.
   - If the dependent is an adopted child, please select the **This dependent is adopted** check box. This ensures that that correct required documentation is requested.
5. If you need to add additional dependents, click **+Add Another Dependent** at the bottom of the list.

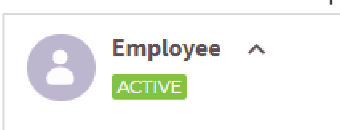
IMPORTANT: If you add additional dependents, **they must all qualify under the same qualifying reason and date you specified in step 2**. If they don't, your changes will be delayed in audit. **If you need to add dependents with different qualifying reasons and dates**, start with one, wait for the audit to complete and then follow these steps again to enter the next one.

6. When you are finished, near the top right of the page, click the **Next: Benefits**.
7. On the **Benefits** page, the dependent(s) you added are **automatically enrolled** in your eligible benefit plans. If you need to remove the dependent(s) from some of your plans, in the **Cart Summary**, click the plans, and then clear the check box next to their name(s).

8. When you are finished, near the top right of the page, click the **Next** button to move to the next step.
   - If you have a coverage that takes beneficiaries, click **Next: Beneficiaries**. If you need to add your dependents as beneficiaries, follow the instructions in the Beneficiaries section of this document.
   - Otherwise, click **Next: Review Summary** and follow the instructions in the Review and Sign section of this document.

If you don't see the **Add** option:

- Your employer may prefer to have you contact them to add this information. Contact your employer for further assistance.
- If you know you have permission to add this info, your account may be in a **Pending** status. This means other changes are moving thru audit and must first be approved by your employer. Before you can make further changes, you'll need to wait for that process to complete. When it's completed, your account status will change to **Active**, and then you can make further changes. Your account status is displayed under your name on the *User Menu*.

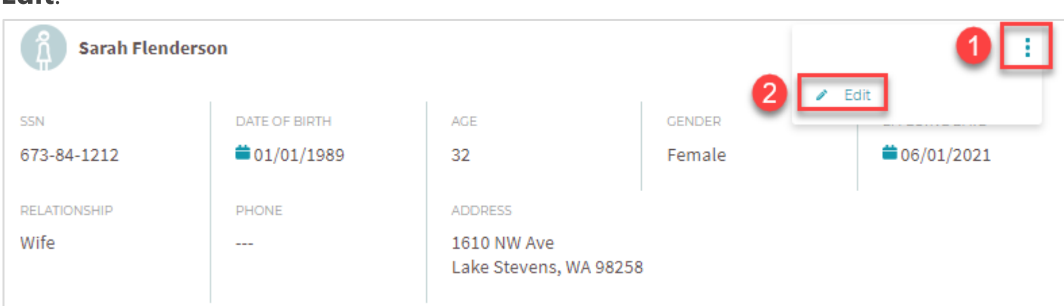


UPDATE A DEPENDENT'S INFORMATION

If your account is in **Active** status and your employer has given you permission to edit information in Employee Portal, you can update your dependent's information.

To update your dependent's information:

1. On the left sidebar, click **My Dependents**.
2. At the top right corner of the dependent's information, click the **More** ⋮ button, and then click **Edit**.



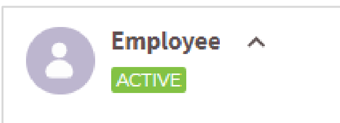
3. Make the changes you want to the dependent's information.

If you also want to make changes to your personal information, click the **Back** button near the top right corner of the page (by the *Next* button) and make the changes you want.

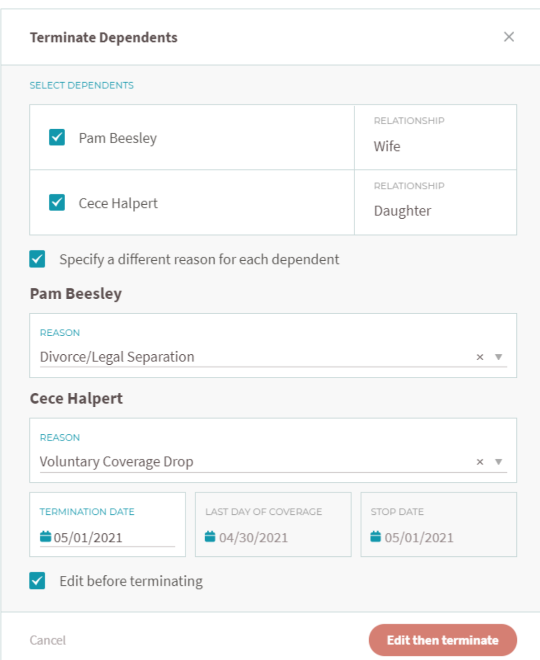
4. When you are finished, near the top right of the page, click the **Next** button until you are on the **Review Summary** step.
5. If everything looks good, click **Save Changes**.

<u>If you don't see the **Edit** option:</u>

- Your employer may prefer to have you contact them to edit this information. Contact your employer for further assistance.
- If you know you have permission to edit this info, your account may be in a **Pending** status. This means other changes are moving thru audit and must first be approved by your employer. Before you can make further changes, you'll need to wait for that process to complete. When it's completed, your account status will change to **Active**, and then you can make further changes. Your account status is displayed under your name on the *User Menu*.



REMOVE A DEPENDENT



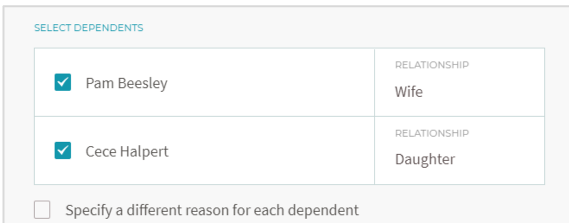
If your account is in **Active** status and your employer has given you permission to terminate dependents in Employee Portal, you can remove dependents from all your benefits.

If you are keeping the dependent, but need to remove them from specific benefits, see the Change Your Benefits section of this document.

To remove a dependent from ALL benefits:

1. On the left sidebar, click **My Dependents**.
2. In the *Actions Bar*, near the top right corner of the page, click **Terminate Dependent(s)**.

3. Select the check box next to each dependent you want to remove.

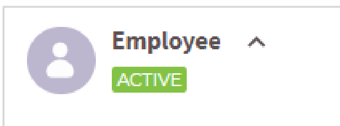


4. Select a **Reason** from the drop-down menu. If you need to select different reasons for each dependent, select the **Specify a different reason for each dependent** check box.
5. In the **Termination Date** box, enter the date the dependent(s) should be removed from your benefits.
    - If you need to enter different dates for each dependent, you'll need to go through this process for one dependent at a time.
    - If the date you need to enter is in the past, there's a limit to how far back you can go. This limit is set by your employer, and Employee Portal will notify you if the date you enter exceeds the limit. If you still need to exceed the limit, contact your employer for further assistance.
    - Employee Portal uses the event and date you enter, along with federal/state regulations and employer policy, to automatically calculate the **Last Day of Coverage** and the **Stop Date**. for the dependent. If you have questions about these dates, please contact your employer.
6. If you don't need to change a dependent's information, such as their mailing address or other contact information, as part of this change, clear the **Edit before terminating** check box.
7. When you are finished, click the **Edit then Terminate** or **Preview then Terminate** button.
8. Review the changes. If everything looks good, follow the instructions in the Review and Sign section of this document to complete the removal.

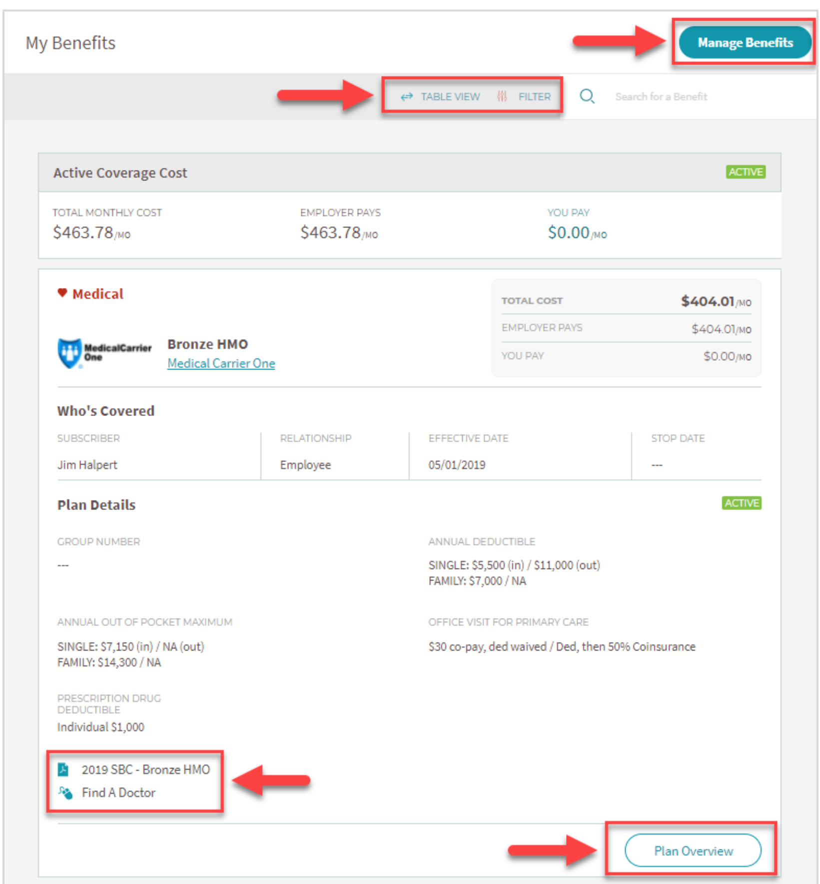
Once completed, you'll continue to see removed dependents listed in the *My Dependents* workspace, but you'll now see a **Stop Date** for them in the list.

<u>If you don't see the **Terminate** option:</u>

- Your employer may prefer to have you contact them when you need to remove dependents. Contact your employer for further assistance.
- If you know you have permission to terminate dependents, your account may be in a **Pending** status. This means other changes are moving thru audit and must first be approved by your employer. Before you can make further changes, you'll need to wait for that process to complete. When it's completed, your account status will change to **Active**, and then you can make further changes. Your account status is displayed under your name on the *User Menu*.



MANAGE YOUR BENEFITS



To view your benefit elections, on the left sidebar, click **My Benefits**. Here, you'll find additional information about each plan. Explore the links under each plan to see all the information available to you.

If you want a more compact list of your benefits, in the **Actions Bar**, click **Table View**. To switch back, click **Card View**. You can also search and filter this list. Learn more about searching and filtering lists in the Workspace section of this document.

NOTE: Not all plans will look exactly like the pictures in this document. If you have questions about plan information shown here that's not shown in your Employee Portal, please contact your employer.

CHANGE YOUR BENEFITS

If your account is in **Active** status and you've experienced a qualifying event, you can request a change to your benefits. For more information about events that qualify for a benefits change, please contact your employer.

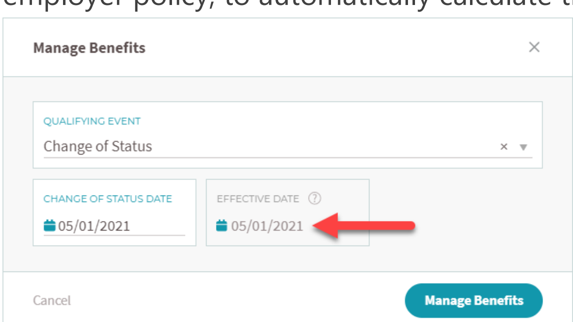
In this process, you can:

- Change your plan for a current benefit
- Remove plans
- Remove dependents from plans

You cannot add dependents or add new benefits. To learn how to add dependents, see the Add a Dependent section of this document. To add new benefits, you must be in an open enrollment period.

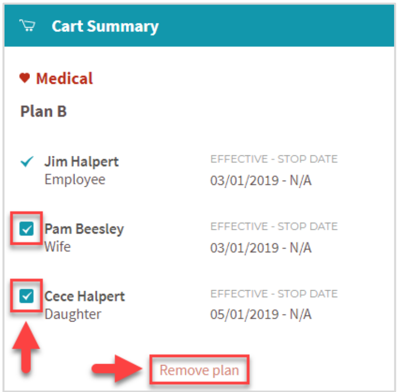
NOTE: This process opens the full enrollment experience, so you could change your personal information, dependent information, and beneficiaries at the same time. If you do this, **more time will be needed for the audit and approval process.** To learn more about the other steps of the enrollment experience, see the Enroll in Benefits section of this document.

1. On the left sidebar, click **My Benefits**.
2. On the *Actions Bar*, near the top right of the page, click **Manage Benefits**.
3. Select a **Qualifying Event** from the drop-down menu, and then enter the requested **Date**. Employee Portal uses the event and date you enter, along with federal/state regulations and employer policy, to automatically calculate the coverage **Effective Date** for the change.

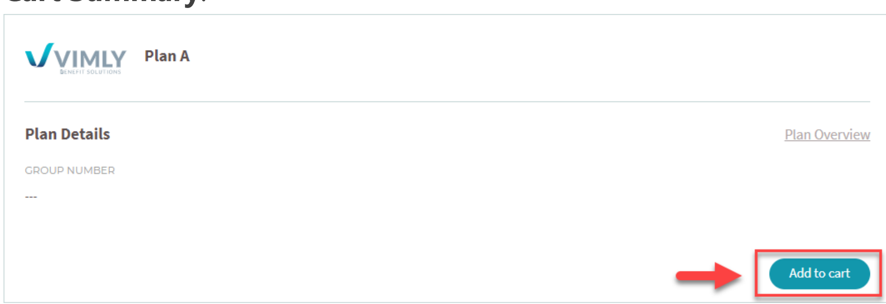


4. Click **Manage Benefits**.

5. On the **Benefits** page, in the **Cart Summary**, click the plan you want to change.
    - To remove a dependent from the plan, clear the check box next to their name.
    - To remove the plan entirely, click **Remove Plan**.

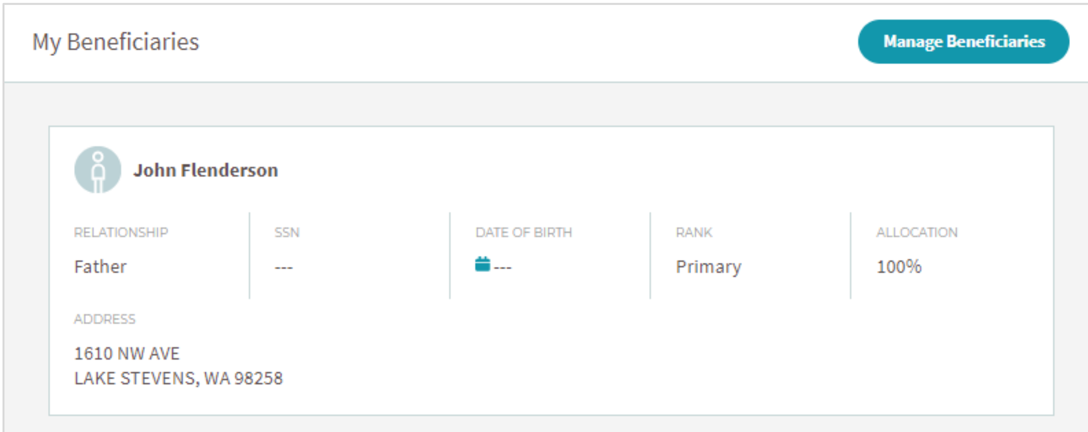


    - To change plans, you must first remove the current plan. Then, find another plan in the plan list and click **Add to Cart**. Once added, make sure the correct dependents are selected in the **Cart Summary**.



6. When you are finished, near the top right of the page, click the **Next** button to move to the next step.
    - If you have a coverage that takes beneficiaries, click **Next: Beneficiaries**. If you need to add your dependents as beneficiaries, follow the instructions in the Beneficiaries section of this document.
    - Otherwise, click **Next: Review Summary** and follow the instructions in the Review and Sign section of this document.

MANAGE YOUR BENEFICIARIES



If you've elected a coverage (such as Basic Life) that takes beneficiaries, you'll need at least one beneficiary on this list. Otherwise, this list will be empty.

To view your beneficiaries, on the left sidebar, click **My Beneficiaries**.

ADD, CHANGE, OR REMOVE A BENEFICIARY

If your account is in **Active** status and your employer has given you permission to edit information in Employee Portal, you can add, change, or remove beneficiaries.

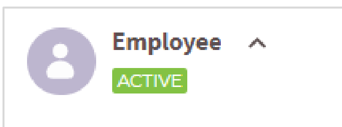
1. On the left sidebar, click **My Beneficiaries**, and then click **Manage Beneficiaries**.
2. If you are entering your first beneficiary, click **+Add a Beneficiary**.
3. Enter or change the **First Name**, **Last Name**, and **Relationship** to you for each beneficiary.
4. Enter or change the **Rank** (primary or contingent) and **Allocation** percentage for each beneficiary. If you're not sure what these options mean, click the ? icons to learn more.
5. If the beneficiary's **Address** is different from your address, clear the **Use Subscriber Address?** check box, and then enter the address.
6. If you need to add additional beneficiaries, click **+Add Another Beneficiary** at the bottom of the list.
7. If you need to remove a beneficiary, click **Terminate Beneficiary**. The current date will appear as the **Stop Date** for the beneficiary. If you change your mind, click **Undo Terminate**.

IMPORTANT: If you remove a beneficiary, make sure you adjust the **Allocation** percentages. For more information, see the Rank and Allocation section of this document.

8. When you are finished, near the top right of the page, click **Next: Review Summary**, and then follow the instructions in the Review and Sign section of this document.

<u>If you don't see the **Manage Beneficiaries** option:</u>

- Your employer may prefer to have you contact them when you need to manage beneficiaries. Contact your employer for further assistance.
- If you know you have permission to manage beneficiaries, your account may be in a **Terminated** or **Pending** status. *Terminated* means you no longer have coverage under the employer. If this is an error, contact your employer for assistance. *Pending* means other changes are moving thru audit and must first be approved by your employer. Before you can make further changes, you'll need to wait for that process to complete. When it's completed, your account status will change to **Active**, and then you can make further changes. Your account status is displayed under your name on the *User Menu*.



RANK AND ALLOCATION

When you have multiple beneficiaries, you'll need to pay attention to the **Allocation** percentage total for all that have the **Primary** rank, and the total for all that have the **Contingent** rank. The allocation percentage total must add up to 100% for all **Primary** beneficiaries, and it must add up to 100% for all **Contingent** beneficiaries.

For example, if you have 7 beneficiaries:

Beneficiary	Rank	Allocation
Beneficiary 1	Primary	50%
Beneficiary 2	Primary	50%
Total	**Primary**	**100%**
Beneficiary 3	Contingent	20%
Beneficiary 4	Contingent	20%
Beneficiary 5	Contingent	20%
Beneficiary 6	Contingent	20%
Beneficiary 7	Contingent	20%
Total	**Contingent**	**100%**

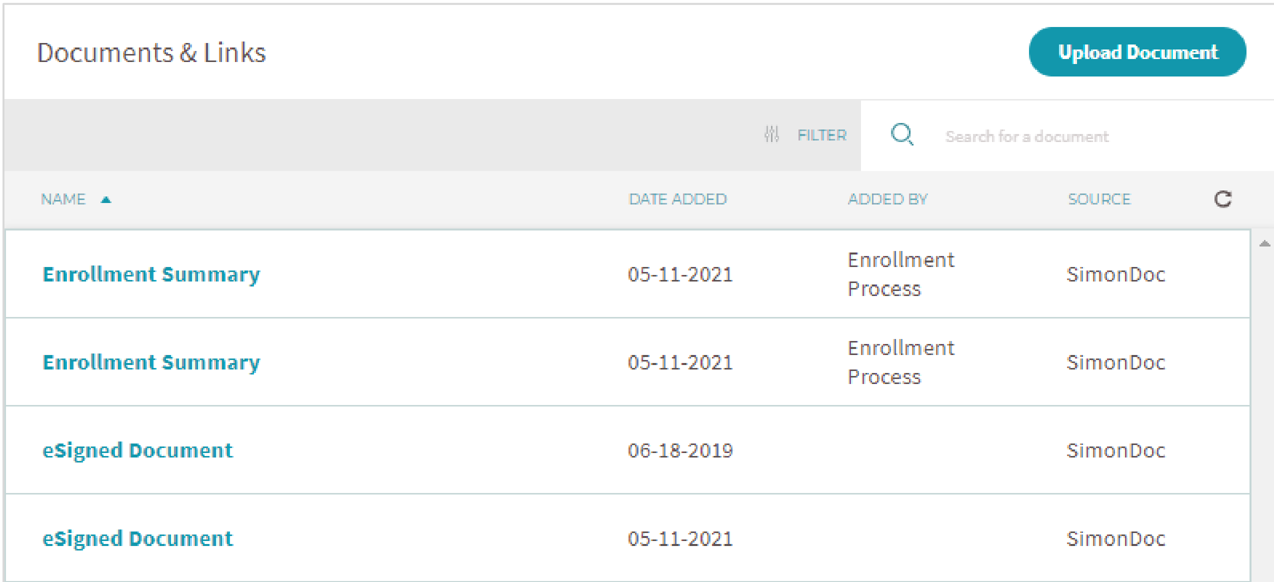
And you remove two beneficiaries – one **Primary** and one **Contingent**:

Beneficiary	Rank	Allocation
Beneficiary 1	Primary	50%
~~Beneficiary 2~~	~~Primary~~	~~50%~~
Total	**Primary**	**100%**
Beneficiary 3	Contingent	20%
Beneficiary 4	Contingent	20%
Beneficiary 5	Contingent	20%
Beneficiary 6	Contingent	20%
~~Beneficiary 7~~	~~Contingent~~	~~20%~~
Total	**Contingent**	**100%**

You must adjust the Allocation percentages for all remaining beneficiaries so that the total equals 100%

Beneficiary	Rank	Allocation
Beneficiary 1	Primary	100%
Total	**Primary**	**100%**
Beneficiary 3	Contingent	25%
Beneficiary 4	Contingent	25%
Beneficiary 5	Contingent	25%
Beneficiary 6	Contingent	25%
Total	**Contingent**	**100%**

VIEW OR UPLOAD DOCUMENTS AND LINKS



The **Documents & Links** workspace lists important documents and links to websites that are related to your benefits. They are provided by your employer.

You can search and filter this list. Learn more about searching and filtering lists in the Workspace section of this document.

This is also where you'll find your **Enrollment Summaries** and other electronically signed documents. These documents are records of your previous enrollments and changes.

Finally, you can also upload required documents to this workspace, such as birth certificates, certificates of marriage, and other documents requested as part of your enrollment. Your employer can securely access these documents when reviewing and approving your enrollments and changes.

To view a document, click its name. Once opened, you can print or download the document, if desired.

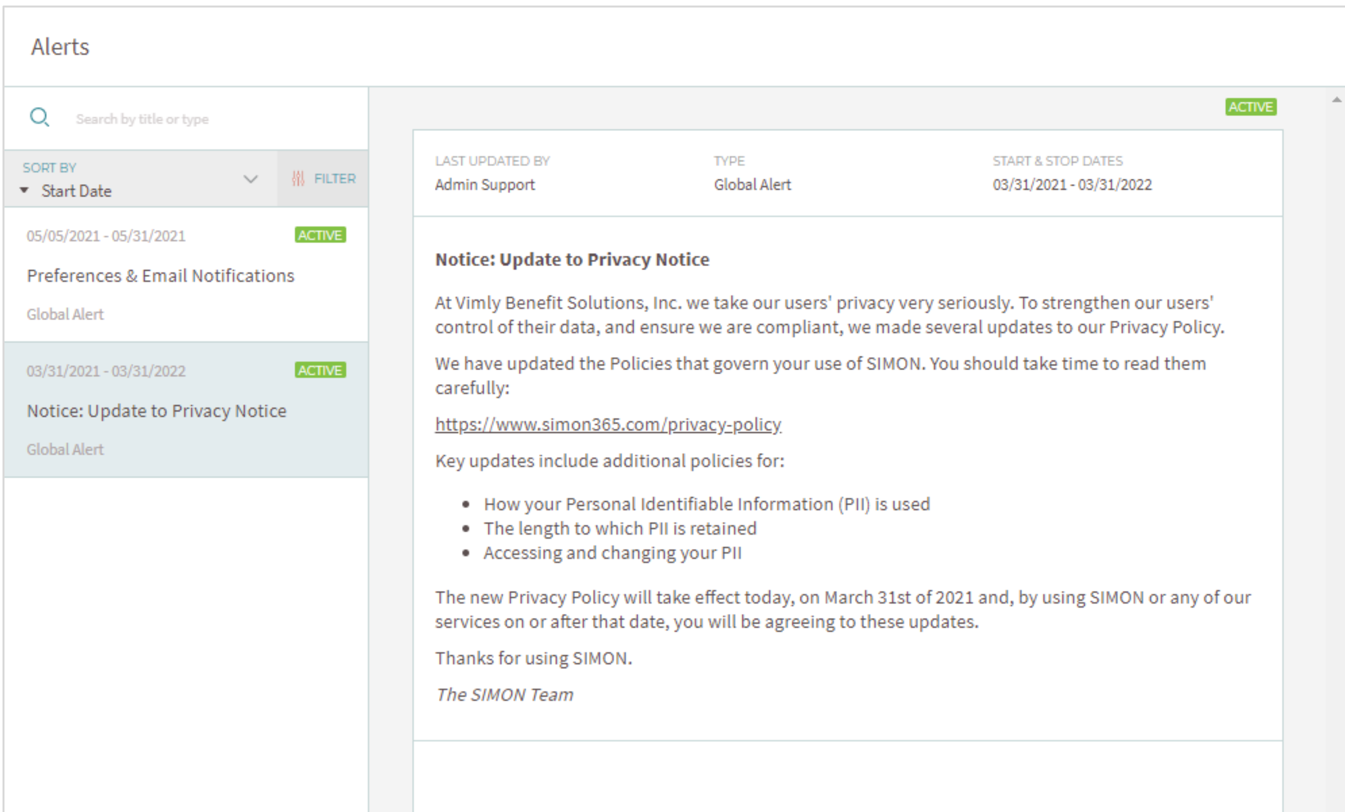
<u>To upload a document:</u>

1. On the left sidebar, click **Documents & Links**.
2. On the *Actions Bar*, at the top right of the page, click **Upload Document**.
3. Enter a helpful title for the document (for example, "Marriage Certificate").
4. Select the document file by doing one of the following:
    - Drag the file from a file folder and drop it on the **Choose (or drag and drop) file** box.
    - Click the **Choose (or drag and drop) file** box, and then use the **Open** window to navigate to the file on your computer.

NOTE: If the document you want to upload is in an email, first save the document to a folder on your computer. After you do that, you'll be able to complete step 4.

5. If you need to upload more than one document, click **+Add Another Document**.
6. When you are finished, click **Upload Document(s)**.

VIEW AND DISMISS ALERTS



The **Alerts** workspace lists important notifications from your employer. It also lists notifications that are important for all users of Employee Portal. Alerts are also listed on the Dashboard.

When you first login to Employee Portal, you're presented with alerts. If you dismiss them, this workspace is where you can view them again.

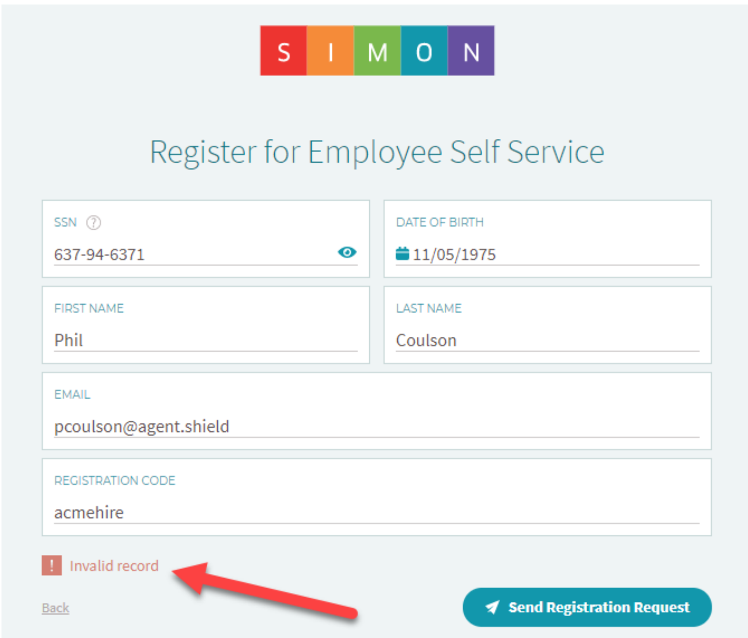
To view alerts, on the left sidebar, click **Alerts**, and then click the alert you want to read.

Once you've viewed or acknowledged an alert, you'll no longer see it at login.

You can search and filter this list. Learn more about searching and filtering lists in the Workspace section of this document.

TROUBLESHOOTING

"INVALID RECORD" ERROR



If you see this error, please do the following:

1. Confirm with your employer that the information you enter matches the information they entered for you in SIMON:
    - First Name
    - Last Name
    - Date of Birth
    - Social Security Number (SSN)
    - Email Address
2. If you are asked to enter a **Registration Code**, confirm with your employer that the code you received is correct.

DID NOT RECEIVE THE INVITATION EMAIL

If you did not receive the invitation email from SIMON, please do the following:

1. Check your **Junk Mail** folder.
2. If you are using a work email address, ask your employer to make sure your mail server and network are not blocking emails from the **vimly.com** and **simon365.com** domains.

GET HELP

If you need further assistance, click **Contact Support** at the bottom right of the page.