

Spreadsheet Enrollment Process for New Groups Enrolling through SIMON

Introduction

The new Spreadsheet Enrollment Process offers an alternate method of providing initial enrollment data to Vimly Benefit Solutions Inc (Vimly). Instead of each enrolling employee submitting an enrollment application on on-line via SIMON, the required enrollment data is entered into an Excel template. The information is then used by Vimly, the Carrier's Third Party Administrator, to upload member level data and complete the enrollment process in less time, with more accuracy.

***Please Note:** By providing this spreadsheet eligibility file, you acknowledge that you are responsible for the accuracy of the information contained in this spreadsheet and that the information provided is in compliance with participation rules as those requirements are outlined in your benefit program documents. You understand that Vimly will rely on the information provided by you to process enrollment as identified by you. Per the terms of your participation with the benefit program, all applicable supporting documentation must be obtained and retained by you. As a reminder, supporting documentation, i.e. applications, certifications, marriage/divorce records etc., must be made available for review and audit upon request at any time.*

Tab 1 - Instructions

Overview of the Spreadsheet Enrollment Process and instructions for how to enroll new groups using the process.

Tab 2 - Data Elements

Can be used as a reference guide. The information on this tab helps identify which fields are required versus optional. This tab also illustrates what type of value is expected in each field, i.e. the "city" field is required.

Tab 3 - Template Spreadsheet

Template where all the enrollment data is entered for each enrolling member. For groups using an HR System download, the template should be used as a guide to required enrollment data.

Directions for Groups Using the Spreadsheet Template:

- 1 Click on the "Spreadsheet Template" tab.
- 3 Select the first row preceding the column headers, and begin entering enrollment data for each enrolling member (dependents included).
- 4 **Enter each employee and his/her family members on consecutive rows on the spreadsheet. This order, (employee followed by spouse/dependent), is required**

5	The Colors (green, blue, and yellow) indicate required versus optional columns. Columns marked blue are optional and can be left blank.
6	Coverages: Please use consistent names or values if you offer more than one benefit plan, e.g., PPO 1000, PPO 500, Dental High Option, Dental Low Option. If more than 2 medical plan options are offered, add additional Medical plan columns as
7	Only employees who are eligible to enroll on the group's effective date should be listed on the spreadsheet. If an employee is serving a probationary period and is eligible in a month or two, the application must be submitted separately. The spreadsheet enrollment auto-load process is a one time event. Anyone not listed on the spreadsheet must be enrolled through an alternate method regardless of the situation.

Directions for Groups Using HR System Data:

Step 1	If much of the required enrollment data is in your HR system, please feel free to download the data onto an Excel spreadsheet. From there, add any additional information required as detailed on the Data Elements tab.
Step 2	Additionally the Spreadsheet Template tab can be used as a reference to indicate required versus optional data fields.
Step 3	Providing data which matches the format of each employee and his/her family members on consecutive rows on the spreadsheet enables data to be systematically imported by Vimly, ensuring a faster and more accurate turnaround.
Step 4	Only employees who are eligible to enroll on the group's effective date should be listed on the spreadsheet. If an employee is serving a probationary period and is eligible in a month or two, a paper application must be submitted. The spreadsheet enrollment auto-load process is a one time event. Anyone not listed on the spreadsheet must be enrolled through an alternate method regardless of the situation.
Step 5	Any additional information provided will not be uploaded but instead reviewed by Vimly for proper action.

Notes

1	No paper enrollment applications should be submitted if a group is using spreadsheet enrollment. Any employee and/or dependent who becomes eligible for coverage after the initial effective date, must be enrolled through an alternate method.
2	Please include the following information within the body of the secure email to Vimly: Total count of subscribers to be added, total count of dependents to be added, total count of waivers.