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FFM Plan Management Copy & Paste in Templates Guide

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1 Copying and Pasting in Plan Management Templates

Copy/Paste is permitted in all Plan Management templates required as part of the Qualified Health Plan (QHP) submission process. To ensure that users do not run into issues while preparing data for templates, there are a few key points to keep in mind when pasting data into macro-enabled templates.

1.1 General Copy/Paste Recommendations

Excel Pasting and Cell Validation: In Excel, pasting into templates causes cell-level validations to be overwritten, which could lead to validation errors. The **Data Traceability Matrix** of each QHP module documents the formats, allowable values, and required elements for all of the templates.

Recommendation: Ensure that the data you are pasting is the **correct** type of data for the cell. For example, if the template only accepts a text value, ensure the source data is text and not numeric. Errors that normally would be caught on manual entry will be checked when the template is validated. If possible, use the **Paste/Paste Special**, and select the **Values** radio button.

Note: If you have a numerical identifier with a leading zero, it is permissible to copy it as text and paste it into a numerical field. Excel automatically drops leading zeroes unless a field is specifically formatted. For example, if you have a TIN that starts with a zero, you may copy the number (formatted as text to keep the leading zero) and paste it into the template. Leading zeroes will not create validation errors.

1.2 Whole Template Copy/Paste Recommendations

Column headers of all the templates are locked: You cannot select an entire template, with headers, and paste into a new one. In some templates, there may be hidden columns that block you from pasting an entire row as in the Ratings template.

Recommendations: Select only the fields with user-entered data to copy and paste. If you receive an Excel error that you are trying to paste into a protected cell, look at the specific template guidelines in this document.

1.2.1 Column Level Copy/Paste Recommendations

Only copy user-entered data, and **do not include** the header columns or any gray-filled cells. There are new drop downs for all benefits, and users must confirm that the values being pasted are correct. Columns may **not** be deleted, but you can adjust the width of a column to better view data.

1.2.2 Row Level Copy/Paste Recommendations

Only copy user-entered data, and **do not include** any green label fields from a row. Entire rows can be deleted in most templates, but you cannot delete a row that has a locked cell or header.

1.2.3 Cell Level Copy/Paste Recommendations

In most templates, locked cells are gray, and users cannot paste into green header cells.

For any cells that are drop-downs, make sure you are pasting one of the options listed in the drop-down; otherwise, validation errors will occur. The **Validate** macro of all templates is not case

sensitive in regards to the drop-down values. However, some templates have automated functions that will not trigger if you paste values, or will not trigger properly if the wrong case is used. For example, in the Service Area template, if you paste “**yes**” instead of “**Yes**” into Partial County, it will not trigger the macro that un-hides the Partial County Zip Codes column. For best results, use the case that is given in the templates or Data Traceability Matrix.

Recommendation: For all unlocked cells, use the Paste Special > Values button.

2 NCQA, URAC, Network ID Templates

These three templates are simple tables and **have no locked cells** other than template headers and instructions. You may copy/paste into any of the data-entry cells, but be sure to paste the correct type of data. Check the **Data Traceability Matrix** for specific data formats.

NOTE: Make sure to select information starting from the row under the headers. Otherwise, you will be pasting into locked cells and will receive an Excel error. (Copy from the place of the highlighted cells in Figure 1.)

	A	B	C	D	E	F	G
1	2017 NCQA Template v6.0	All fields with an asterisk (*) are required. To validate the template, use the Validate button or Ctrl + Shift + I. To finalize the template, use the Finalize button or Ctrl + Shift + F.					
2	Validate	The information for the accredited products must be for the same legal entity as is submitting the QHP application.					
3	Finalize	Please follow the instructions provided in the Accreditation Chapter (Chapter 5) of the QHP Application Instructions Manual closely and carefully.					
4		The Department of Health and Human Services (HHS) will verify the information that you have provided about your existing accreditation with NCQA, URAC, or both.					
5		Only data that can be verified will be displayed on the website.					
6		It is only necessary to enter one accreditation entry per product/market type, using the product with the largest number of covered lives.					
7		HIOS Issuer ID*					
8	NCQA Org ID*	Market Type*	NCQA Sub ID	Product Type*	Product ID*	Accreditation Status*	Expiration Date*
9	Required: Enter the 2-5-digit NCQA Org ID number	Required: Select the Market Type from list	Required if Market is NOT Exchange: Enter the 2-5-digit NCQA Sub ID number	Required: Select the Product Type from list	Required: Enter the 10-character Product ID	Required: Select the Accreditation Status from list	Required: Enter a future date in mm/dd/yyyy format
10							
11							
12							

Figure 1: NCQA Template

3 Prescription Drug Template

The Prescription Drug Template has two types of worksheets: the **Formulary Sheet** and the **Drug List Sheet**.

3.1 Formulary Tiers Worksheet

In the Formulary Tiers worksheet (see Figure 2), each formulary is designed to always take up 7 rows. Unused tiers in the formulary are gray-filled and locked based on the “**Number of Tiers**” column. It is recommended to first create Formulary IDs; then select a Formulary ID from the drop-down list; and then enter the URL and select the drug list and number of tiers from the drop-down. This will lock the remaining cells for which input is not required. You can paste data into any cells that are **not** gray.

NOTE: DO NOT copy and paste column F.

NOTE: It is highly **UNADVISABLE** to copy columns G-Q due to the removal of the Cost Share Type columns.

NOTE: “**Not Applicable**” has been included as a drop down option version 5+ of the Prescription Drug Template. This is different from “**No Charge**.” It is highly recommended that you review your data to verify that you have accurately chosen between “**No Charge**” and “**Not Applicable**.”

Formulary ID*	Formulary URL*	Drug List ID*	Number of Tiers*	Drug Tier ID*	Drug Tier Type*	1 Month In Network Retail Pharmacy Copayment*	1 Month In Network Retail Pharmacy Coinsurance*	1 Month Out of Network Retail Pharmacy Benefit Offered?*	1 Month Out of Network Retail Pharmacy Copayment*	1 Month Out of Network Retail Pharmacy Coinsurance*	3 Months Out of Network Retail Pharmacy Copayment*	3 Months Out of Network Retail Pharmacy Coinsurance*
Required: Select the Formulary ID	Required: Enter the Formulary URL	Required: Select the Drug List ID (from Drug Lists sheet)	Required: Select the number of Tiers	Required: The template will populate a Drug Tier ID 1-7	Required: Select all the Drug Types included in this tier	Required: Enter a copayment amount	Required: Enter a coinsurance amount	Required: Does this tier offer 1 Month Out of Network Mail Order Pharmacy benefits?	Required if Offered: Enter a copayment amount	Required if Offered: Enter a coinsurance amount		
KSF001	www.amazon.com	1	3	1 Preferred Generic	No Charge	20.00%	No	No Charge	20.00%	No		
				2 Preferred Brand	No Charge	25.00%	No	No Charge	25.00%	No		
				3 Non-Preferred Brand	\$10.00	No Charge	No	\$10.00	No Charge	No		

Figure 2: Prescription Drug Template – Formulary Tiers Worksheet

3.2 Drug List Worksheet

When working with the Drug List worksheet, you may paste a list of RxCUIs into column A from your previous template. You may also paste the **Prior Authorization Required** Field (column C) and **Step Therapy Required** field (column D).

There can be no duplicate RxCUIs: Duplicate RxCUIs will cause an error message announcing the cell location of the duplicate. Validation will check that the tier you have selected for a drug exists in the formularies that reference the drug.

For example, if your first formulary uses Drug List 1 and has 5 tiers, you cannot mark any RxCUIs in that drug list as tier 6 or 7. You can select them as “**NA**” if those drugs are used in a different Drug List.

In order to avoid producing a validation error when pasting **Tier Levels** (column B) from an older template, paste the Tier Levels using **Match Destination Formatting**. This is done by copying the Tier Level cells and then selecting the **Match Destination Formatting** under Paste Options, or by manually selecting the correct level from the dropdown for each row.

4 Service Area Template

The Service Area template, shown in Figure 3, will lock and gray-fill cells based on options selected in the columns. There also are hidden columns that only display if you have a service area that covers a partial county.

If a cell is gray, you will not be able to paste into it. Please make sure, if you are pasting in a long list of Zip Codes for the Service Area Zip Code(s) column, that they are **separated by a comma and a space**. You only need to list Zip Codes if the service area covers a partial county (Partial County = YES). If Partial County = NO, the Service Area Zip Code(s) column is gray and locked, so nothing can be pasted because Zip Codes are not needed for service areas covering entire counties.

Note: Zip & FIPS commonly change throughout the year. **Please confirm that your Zip-codes & FIPS-codes are accurate and have not changed from previous years.**

Note: Due to data validation settings, when copying/pasting Yes/No values from the State and/or Partial County columns from an old template, the appropriate columns, including the Service Area Zip Code(s) column, will not automatically gray out. Other hidden columns may also appear. For the worksheet to function correctly, manually select Yes/No from the dropdown. If desired, paste the values in, for reference, and then go through and manually re-select the correct options in each dropdown.

State*	County Name	Partial County	Service Area Zip Code(s)	Partial County Justification
Required: Does this Service Area cover the entire state?	Required if State is "No": Select the County - FIPS this Service Area covers	Required if State is "No": Does this Service Area include a partial county?	Required if Partial County is "Yes": Enter the zip codes in this county that are covered by this Service Area	Required if Partial County is "Yes": Enter a Justification of why all of the zip codes are not included in this service area.
Yes				
No	Alleghany - 37005	No		
No	Alleghany - 37005	Yes		

Figure 3: Service Area Template

5 Rate Tables Template

The Rate Tables template is designed to support issuers submitting for both Individual Rated and Family Tiering States.

5.1 Issuers in Individual Rated States

Rate information may be copied and pasted into Rate Tables using the recommendations previously mentioned.

Note: The Rate Tables template is designed with significant automation to help users fill in valid information. For example, the macros automatically create all Age Bands required for a plan when the 0-20 option is selected under the **Age** header in Column D. Selecting the 0-20 option will gray and lock a large portion of the cells below the first three columns. There are a few different scenarios to keep in mind.

Scenario 1: If you use “**No Preference**” for Tobacco and select the 0-20 age band, the template will auto populate all the required age bands as well as the Plan ID, Rating Area ID, and Tobacco (see Figure 4). In this scenario, the only cells that can be pasted into are the **Individual Rate** column cells. While the **Age** column is not grayed or locked, the **age bands are auto-populated and should not be edited**.

	Plan ID*	Rating Area ID*	Tobacco*	Age*	Individual Rate*
12					
13	Required: Enter the 14-character Plan ID	Required: Select the Rating Area ID	Required: Select if Tobacco use of subscriber is used to determine if a person is eligible for a rate from a plan	Required: Select the age of a subscriber eligible for the rate	Required: Enter the rate of an Individual Non- Tobacco or No Preference enrollee on a plan
14	12345NC0012222	Rating Area 1	No Preference	0-20	
15	12345NC0012222	Rating Area 1	No Preference	21	
16	12345NC0012222	Rating Area 1	No Preference	22	
17	12345NC0012222	Rating Area 1	No Preference	23	
18	12345NC0012222	Rating Area 1	No Preference	24	
19	12345NC0012222	Rating Area 1	No Preference	25	
20	12345NC0012222	Rating Area 1	No Preference	26	
21	12345NC0012222	Rating Area 1	No Preference	27	
22	12345NC0012222	Rating Area 1	No Preference	28	
23	12345NC0012222	Rating Area 1	No Preference	29	
24	12345NC0012222	Rating Area 1	No Preference	30	
25	12345NC0012222	Rating Area 1	No Preference	31	
26	12345NC0012222	Rating Area 1	No Preference	32	
27	12345NC0012222	Rating Area 1	No Preference	33	
28	12345NC0012222	Rating Area 1	No Preference	34	

Figure 4: Rate Tables Template with Age Bands and No Preference Tobacco Option

Scenario 2: If you select “**Tobacco Use/Non-Tobacco Use**,” the **Individual Tobacco Rate** column will unhide and show the Rate Tables template with separate rates for non-tobacco and tobacco users. In this instance, the cells you will be able to paste into are the Individual Rate and Individual Tobacco Rate (see Figure 5).

Plan ID*	Rating Area ID*	Tobacco*	Age*	Individual Rate*	Individual Tobacco Rate*
Required: Enter the 14-character Plan ID	Required: Select the Rating Area ID	Required: Select if Tobacco use of subscriber is used to determine if a person is eligible for a rate from a plan	Required: Select the age of a subscriber eligible for the rate	Required: Enter the rate of an Individual Non-Tobacco or No Preference enrollee on a plan	Required: Enter the rate of an Individual Tobacco enrollee on a plan
12345NC0012222	Rating Area 1	Tobacco User/Non-Tobacco User	0-20		
12345NC0012222	Rating Area 1	Tobacco User/Non-Tobacco User	Required: Select Age from List		
12345NC0012222	Rating Area 1	Tobacco User/Non-Tobacco User			
12345NC0012222	Rating Area 1	Tobacco User/Non-Tobacco User	23		
12345NC0012222	Rating Area 1	Tobacco User/Non-Tobacco User	24		
12345NC0012222	Rating Area 1	Tobacco User/Non-Tobacco User	25		
12345NC0012222	Rating Area 1	Tobacco User/Non-Tobacco User	26		

Figure 5: Rate Tables Template with Age Bands and Tobacco/Non-Tobacco Option

You may copy into selected cells for plans in states with Family Tiering. If you select **“Family Option”** from the dropdown in the Age column, the template will unhide the family tiers column. Tobacco **must** be **“No Preference”** in this case, so the Individual Tobacco Rate column will be hidden. Figure 6 shows the Rate Tables template with Family Tiering columns displayed.

Plan ID*	Rating Area ID*	Tobacco*	Age*	Individual Rate*	Couple*	Primary Subscriber and One Dependent*	Primary Subscriber and Two Dependents*	Family Tier and Three or More Dependents*
Required: Enter the 14-character Plan ID	Required: Select the Rating Area ID	Required: Select if Tobacco use of subscriber is used to determine if a person is eligible for a rate from a plan	Required: Select the age of a subscriber eligible for the rate	Required: Enter the rate of an Individual Non-Tobacco or No Preference enrollee on a plan	Required: Enter the rate of a couple based on the pairing of a primary enrollee and a secondary subscriber (e.g. husband and spouse)	Required: Enter the rate of a family based on a single parent with one dependent	Required: Enter the rate of a family based on a single parent with two dependents	Required: Enter the rate of a family based on a single parent with three or more dependents
2345NC0012222	Rating Area 1	No Preference	Family Option					

Figure 6: Rate Tables Template – Family Tiering Columns

In this scenario, because there is a hidden column, you **will not be able to paste into the whole row all at once**. You can still paste rates into the **Individual Rate** column (Column E) and in all the family tier columns (Columns G-M), but not in these two adjacent cells at once (see Figure 7).

Age*	Individual Rate*	Couple*	Primary S and One D
Required: Enter the age of a subscriber eligible for the rate	Required: Enter the rate of an Individual Non-Tobacco or No Preference enrollee on a plan	Required: Enter the rate of a couple based on the pairing of a primary enrollee and a secondary subscriber (e.g. husband and spouse)	Required: Enter the rate based on a single parent with one de
Family Option			

Figure 7: Rate Tables Template – Individual Rate and Couple Fields

6 Rating Business Rules Template

The Rating Business Rules template is a simple table (see Figure 8). The first row is considered the **Issuer** rule, and the **Plan** and **Product ID** columns are therefore grayed and locked. Data must be entered in every column in the first row (except for Plan/Product ID). For subsequent rows, you may paste in the Plan **OR** Product IDs and any columns that have different rules from the first **Issuer** rule.

The last column, “What relationships between primary and dependent are allowed, and is the dependent required to live in the same household as the primary subscriber?” is a large pop-up. It is **advisable to always use the pop-up** for this column because of the complexity of the data elements. It is not necessary to enter the same rules repeatedly; for example, if Plans within a Product have the same answer to this column, then the plan rules can be left blank. If you are copying data from an older version of the template, you may copy and paste this cell.

Relationship to Primary

For each relationship between primary and dependant that are allowed, put a checkmark next to the relationship. For every checked relationship, select yes if the dependant is required to live in the same household as the primary subscriber, otherwise select No.

<input type="checkbox"/> Spouse	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Stepparent	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Father or Mother	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Stepson or Stepdaughter	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Grandfather or Grandmother	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Self	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Grandson or Granddaughter	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Child	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Uncle or Aunt	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Sponsored Dependent	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Nephew or Niece	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Dependent on a Minor Dependent	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Cousin	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Ex Spouse	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Adopted Child	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Guardian	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Foster Child	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Court Appointed Guardian	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Son-in-Law or Daughter-in-Law	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Collateral Dependent	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Brother-in-Law or Sister-in-Law	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Life Partner	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Father-in-Law or Mother-in-Law	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Annuitant	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Brother or Sister	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Trustee	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Ward	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Other Relationship	<input type="radio"/> Yes	<input type="radio"/> No
			<input type="checkbox"/> Other Relative	<input type="radio"/> Yes	<input type="radio"/> No

Ok Cancel

Figure 8: Rating Business Rules Template – Relationship to Primary Pop-up

7 Plans & Benefits Template

In the Plans & Benefits template, shown in Figure 9, the top table in the Benefits Package sheet contains high-level plan information. You will find the Cost Share Variance for each plan on the second tab.

7.1 Benefits Package Sheet

The top table in the Benefits Package Tab allows any information to be pasted including the header rows (Rows A-Q). Please **do not copy rows Z-AC from the 2016 template, as they are now found in the Plan Variant Level**. Similarly, **Column I** has a newly added field for **Design Type** and **requires** new data.

2017 Plans & Benefits Template v6.1										
HIOS Issuer ID*	12345	To use this template, please review the user guide and instructions. All fields with an asterisk (*) are required								
Issuer State*	AL	You will need to save the latest version of the add-in file (PlansBenefitsAddIn.xlam) on your machine.								
Market Coverage*	SHOP (Small Group)	To create the cost share variance worksheet and enter the cost sharing amounts for both individual and SHOP (small group) markets, use the Create Cost Share Variances macro.								
Dental Only Plan*	No	To create additional Benefits Package worksheets, use the Create New Benefits Package macro.								
TIN*	12-1234567	To populate the benefits on the Benefits Package worksheet with your State EHB Standards, use the Refresh EHB macro.								
Plan Identifiers										
HIOS Plan ID* (Standard Component)	Plan Marketing Name*	HIOS Product ID*	HPID	Network ID*	Service Area ID*	Formulary ID*	New/Existing Plan?*	Plan Type*	Level of Coverage*	Design Type*

Figure 9: Plan & Benefits Template – Plan Level Data

The bottom table in the Benefits Package sheet contains benefit information and EHB data (see Figure 10). The benefits and the EHB/State Mandate columns are locked cells. It is **NOT possible to paste information into these columns**. The Add Benefit Macro will assist you in adding extra benefits, but you will be unable to paste over any listed benefits. From column E onward, it is possible to paste data **based on the table found at the end of the section**. The Limit Unit column is a pop-up with two drop-down fields that allow you to select various units of limitation. **Be aware that if you paste a limit unit that is not in the pop-up, you will receive a validation error.**

Benefit Information			General Information						Out of Pouch/Excluded from Network MOOP
Benefits	EHB	Is this Benefit Covered?	Quantitative Limit on Service	Limit Quantity	Limit Unit	Exclusions	Benefit Explanation	EHB Variance Reason	Excluded from Network MOOP
Primary Care Visit to Treat an Injury or Illness									
Specialist Visit									
Other Practitioner Office Visit (Nurse, Physician Assistant)									
Outpatient Facility Fee (e.g., Ambulatory Surgery Center)									
Outpatient Surgery Physician/Surgical Services									

Figure 10: Plan & Benefits Template – Bottom EHB Table

Table 1 describes some changes made to the Benefits Package sheet that affect copy & paste functionality.

Table 1: Benefits Package Sheet- Column Locations

Copy/Paste	Old Template Location	New Template Location
DO NOT COPY	N/A	Column K – Design Type is a new field
Allowable in new location	Columns K-Y	Columns L-Z
DO NOT COPY	Column Z-AC	Plan Variant Level

Copy/Paste	Old Template Location	New Template Location
Allowable in new location	Columns AD-AK	Columns AA-AH

7.2 Cost Share Variances Sheet

Columns A, C, D, and F are protected and read-only. The macros will populate this information, and it is not editable. Based on answers to columns G, H, and I, rows that are not applicable will lock and gray-fill. To verify that the appropriate rows gray out, manually select “No” from the dropdown.

If you are trying to paste any information into a row that has a gray cell, you will receive the Excel error message, shown in Figure 11.

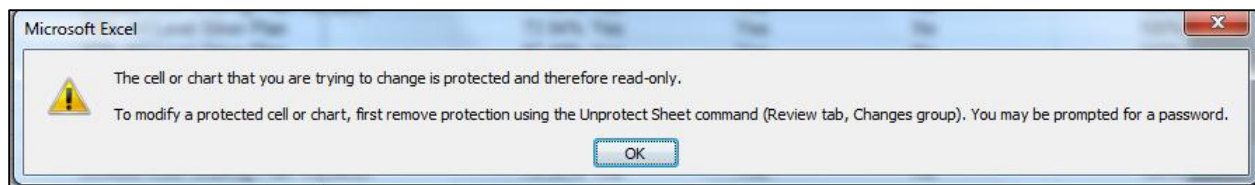


Figure 11: Sample Excel Error Message

You **can** paste values into any adjacent cells that are not gray, but be very careful to paste the right type of data. Each of the benefits listed on this sheet contains a copayment and coinsurance section.

Figure 12 shows Benefits Template Sample columns for Primary Care Visit to Treat an Injury or Illness with Copay and Coinsurance columns.

	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM
	Primary Care Visit to Treat an Injury or Illness					Specialist Visit				
	Copay			Coinsurance			Copay			Coi
	In Network (Tier 1)	In Network (Tier 2)	Out of Network	In Network (Tier 1)	In Network (Tier 2)	Out of Network	In Network (Tier 1)	In Network (Tier 2)	Out of Network	In Network (Tier 1)
0	\$25		\$25	25%		25%	\$25		\$25	25%
0	\$25		\$25	25%		25%	\$25		\$25	25%
0	\$0		\$0	0%		0%	\$0		\$0	0%
0	\$25		\$25	25%		25%	\$25		\$25	25%
0	\$25		\$25	25%		25%	\$25		\$25	25%
0	\$25		\$25	25%		25%	\$25		\$25	25%
0	\$25		\$25	25%		25%	\$25		\$25	25%

Figure 12: Cost Share Variance Sheet – Benefits Template Sample Columns

Be sure to paste the correct data type and format (dollar amount: \$xx.xx or percentage: xx.xx %) to reduce error messages when you validate.

If you need to paste a large block of data, it is easiest to do before the template locks cells that are not applicable. For example, if you have an older version of the Benefits template from which you want to paste data:

1. On the desired Cost Share Variance sheet, delete values from columns G, H, I and F in each row that you want to paste data into, as shown in Figure 13. This will clear out any locked cells on that row.

Medical & Drug Deductibles Integrated?*	Medical & Drug Maximum Out of Pocket Integrated?*	Multiple In Network Tiers?*

Figure 13: Subsection of Benefits Template

2. Select and copy the block of data that you want to paste into the template (see Figure 14). If you are using an older version of the Benefits template, remember that you will not be able to copy the entire row, because the first four columns are locked. Also, remember that columns or data elements may be in different places. **It is permissible to copy gray cells, as long as you paste values only.**

Combined Medical & Drug EHB Deductible											
In Network			In Network (Tier 2)			Out of Network		Combined In/Out Network			
Individual	Family	Default Coinsurance	Individual	Family	Default Coinsurance	Individual	Family	Individual	Family	Individual	Family
\$850	\$800	10%				\$600	\$600	\$600	\$600		
		10%				\$600	\$600	\$600	\$600		
		0%				\$0	\$0	\$0	\$0		
		10%				\$600	\$600	\$600	\$600		
		10%				\$600	\$600	\$600	\$600		
		10%				\$600	\$600	\$600	\$600		
		30%				\$600	\$600	\$600	\$600		
		30%				\$1,200	\$1,200	\$1,200	\$1,200		
\$1,000	\$1,200	30%				\$1,200	\$1,200	\$1,200	\$1,200		
\$0	\$0	0%				\$0	\$0	\$0	\$0		
\$1,000	\$1,200	30%				\$1,200	\$1,200	\$1,200	\$1,200		

Figure 14: Benefits Template Deductible Columns Selected for Copy

3. Paste Special > Values into the destination workbook (either on the Home tab or with the right click). Repeat as many times necessary. (See Figure 15.)

BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU
Combined Medical & Drug EHB Deductible									
In Network			In Network (Tier 2)			Out of Network		Combined In/Out Network	
Individual	Family	Default Coinsurance	Individual	Family	Default Coinsurance	Individual	Family	Individual	Family
\$850	\$800	10%				\$600	\$600	\$600	\$600
		10%				\$600	\$600	\$600	\$600
Required if Integrated: If Deductibles are integrated, enter the In			0%	\$0	\$0	0%	\$0	\$0	\$0
		10%				\$600	\$600	\$600	\$600

Figure 15: Benefits Template Deductible Columns After Paste Values

- When you have finished pasting, go back to columns G, H, and I and make necessary selections from the drop-downs. Cells that are not applicable based on these values will gray and lock.
- It is permissible to have a value in a cell before it is gray/locked.** For example, each of the benefits has an In Network Tier 2 column (see Figure 16.) You may fill out all cells with values. When you select Multiple In Network Tiers = NO, all In Network Tier 2 cells will gray and lock. Any values in them will still be present, but the template ignores any cells with a gray fill for both Validate and Finalize macros.

Other Practitioner Office Visit (Nurse, Physician Assistant)					
Copay			Coinsurance		
In Network (Tier 1)	In Network (Tier 2)	Out of Network	In Network (Tier 1)	In Network (Tier 2)	Out of Network
\$0	\$0	\$0	0%		

Figure 16: Benefits Template Tier 2 Benefit Columns

For best results, **do not** paste your answers into columns G, H or I. If you do, Excel will not lock the columns that do not apply. If a cell is **not** gray, you **must** enter data into it.

For example, if you paste in “Yes” for Medical & Drug Deductibles Integrated, the template will not block out the separate Medical and Drug deductible groups, and you will have to enter “**Not Applicable**” for each column under those groups. **It is very important to double-check all your data after pasting into the Cost Share Variance sheet.**

8 ECP / Network Adequacy Template

The ECP / Network Adequacy Template has four types of worksheets: Facility ECPs, Individual ECPs, Individual Providers, and Facilities & Pharmacies.

8.1 Facility ECPs worksheet

In the **Facility ECPs** worksheet (see Figure 17) providers can be added either using the **Select ECPs** tab, or manually as a write-in. You will be able to copy and paste into Columns C through P. However, Columns A and B cannot be edited using copy and paste. Columns O and P are new columns for Market Year 2017 and are **required**.

NOTE: A write in ECP cannot duplicate a provider in the **Select ECPs** tab so you will not be able to copy and paste these providers.

NOTE: For **Facility Type** and **ECP Category** the available options have changed for this market year, and it is strongly recommended not to copy and paste a previous year’s template data into these fields.

	A	B	C	D	E	F	G
1			Select All	Clear All	Remove Selected ECPs		
2	Remove ECP?	Flow Number	National Provider Identifier (NPI)*	Facility Name*	Facility Type*	Provider Name*	ECP Category (General ECP Standard Issues Only)*
3							
4							
5							
6							

Figure 17: Facility ECPs Tab

8.2 Individual ECPs Tab

In the **Individual ECPs** worksheet (see Figure 18) providers can be added either using the **Select ECPs** tab, or manually as a write-in. You will be able to copy and paste into Columns C through U. However, Columns A and B cannot be edited using copy and paste. Columns T and U are new columns for Market Year 2017 and are **required**.

NOTE: A write in ECP cannot duplicate a provider in the **Select ECPs** tab so you will not be able to copy and paste these providers.

NOTE: For **Specialty Type** and **ECP Category** the available options have changed for this market year, and it is strongly recommended not to copy and paste a previous year’s template data into these fields.

	A	B	C	D	E	F	G	H	I	J
1			Select All	Clear All	Remove Selected ECPs					
2	Remove ECP?	Flow Number	National Provider Identifier (NPI)*	Name of Provider*	Physician/Non Physician*	Specialty Type (area of medicine)*				
3										
4										
5										
6										

Figure 18: Individual ECPs Tab

8.3 Individual Providers Tab

In the **Individual Providers** worksheet (see Figure 19) you will be able to copy and paste into all columns.

NOTE: For **Specialty Type** the available options have changed for this market year, and it is strongly recommended not to copy and paste a previous year’s template data into these fields.

	A	B	C	D	E	F	G	H
2	National Provider Number (NPI)*	Provider Name Prefix	First Name of Provider*	Middle Initial of Provider	Last Name of Provider*	Suffix of Provider	Physician / Non-Physician*	Specialty Type (area of medicine)*
3								
4								
5								
6								

Figure 19: Individual Providers Tab

8.4 Facilities & Pharmacies Tab

In the **Facilities & Pharmacies** worksheet (see Figure 20) you will be able to copy and paste into all columns.

NOTE: For **Facility Type** the available options have changed for this market year, and it is strongly recommended not to copy and paste a previous year’s template data into these fields.

	A	B	C	D
2	National Provider Number (NP)	Facility Name*	Facility Type*	Street Address*
3				
4				
5				
6				

Figure 20: Facilities & Pharmacies Tab