

# Spreadsheet Enrollment User Guide

## General Information:

- The file should **ALWAYS** be saved with the **.xlsm (Excel macro)** extension.
- The spreadsheet template should be used for 1-100 employee **Ancillary** only product groups.
- Due to state restrictions and underwriting guidelines, only certain size **Medical** groups are eligible to be enrolled via List Enrollment, please contact your Sales Executive for details.
- Note there are labeled tabs in the bottom left-hand side of the worksheet. The four tabs are titled: Helpful Hints, Enrollment Worksheet, Beneficiary Designation, and Waiver. To move to another sheet, simply click on the desired tab.
- The Beneficiary Sheet and Waiver forms can be printed and completed if you have an Employer or Employee that desires a paper document.

## Navigation & Completing the Fields:

- **Group Information User Form**
  - All information needs to be entered in order to continue. This information will feed to the appropriate fields of the List Enrollment and allow for the correct options to appear.
- **Line of Coverage User Form**
  - Medical and Dental will allow you to enter the number of plans that the group is electing. After the number is entered, fields will appear in which you can name the plans to help ensure that the members are assigned correctly. Entering Plan 1, Plan 2, etc., will match to the order in which the plans are elected on the Employer Group Application (EGA).
- **Enrollment Spreadsheet**
  - ALL Green highlighted column headers indicate columns that must be completed for each enrollee in order to **save** the file. If not completed, a pop-up message will appear and you must click OK then complete the field. The spreadsheet will take you to the field that needs your attention based on the error.
  - The plum/purple fields will highlight the fields required based on the relationship in Column B.
  - If a field is not needed (address for a spouse or other non-employee relationship, for example), the cell will be white. White fields should not contain membership information and can be left blank.
  - If the information entered is longer than the cell allows, an error will appear indicating the number of characters allowed.
  - If data requires any special characters (dashes, slashes, etc.) the column header will indicate. Otherwise, the data will be entered without special characters or spaces.

## General Information:

- When initially accessing the template, select File – Save As and save the file to your desktop or drive using the .xlsm extension default.
- Use the Customize Spreadsheet button to hide product columns your client is not interested in.
- It may be easier to complete all of the green fields for an enrollee and then the purple fields.
- Please do not insert blank rows between employees.