



**Centers for Medicare & Medicaid Services  
Federally Facilitated Exchange**

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**FFE 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 an Issuer ID 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 Rating Module templates.

***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 regard 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 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 Network ID Templates

This template is a simple table and **has 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
1	<b>2021 Network Template v10.0</b>	<i>All fields with an asterisk (*) are required.</i>
2	<input type="button" value="Validate"/>	<i>To validate the template, press Validate button or Ctrl + Shift + I. To finalize, press Finalize button or Ctrl + Shift + F.</i>
3		<i>Click Create Network IDs button (or Ctrl + Shift + N) to create network ids based on your state.</i>
4	<input type="button" value="Finalize"/>	<i>Network IDs will populate in the drop-down box in Network ID column.</i>
5		<i>Use each Network ID only once.</i>
6	<b>HIOS Issuer ID*</b>	
7	<b>Issuer State*</b>	
8		
9	<input type="button" value="Create Network IDs"/>	
10		
11	<b>Network Name*</b>	<b>Network ID*</b>
12	Required: Enter the Network Name	Required: Select the Network ID
13		
14		
15		

Figure 1: Network 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 Sheet

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; then select the drug list; and then 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 E.

**NOTE:** It is highly **UNADVISABLE** to copy columns F-P due to the removal of the Formulary URL column.

Formulary ID*	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 Month In Network Mail Order Pharmacy Copayment*	3 Month In Network Mail Order Pharmacy Coinsurance*	3 Month Out of Network Mail Order Pharmacy Benefit Offered?*	3 Month Out of Network Mail Order Pharmacy Copayment*	3 Month Out of Network Mail Order Pharmacy Coinsurance*
TXF001		5	1				No					No		
			2				No					No		
			3				No					No		
			4				No					No		
			5				No					No		

Figure 2: Prescription Drug Template – Formulary Tiers Worksheet

#### 3.2 Drug List Sheet

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 and Finalization 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 and the most recent version of the Service Area template is being used.**

	A	B	C	D	E	F	G
1	<b>2021 Service Area v10.0</b>	<i>All fields with an asterisk (*) are required</i>					
2	Validate	<i>To validate, press the Validate button or Ctrl + Shift + I. To finalize, press the Finalize button or Ctrl + Shift + F</i>					
3		<i>Click Create Service Area IDs button (or Ctrl + Shift + R) to Create Service Area IDs based on your state</i>					
4	Finalize	<i>Service Area IDs will populate in the drop-down box in Service Area ID column</i>					
5		<i>For each row, enter one County for that Service Area ID (unless the Service Area covers entire state)</i>					
6	HIOS Issuer ID:	12345					
7	Issuer State:	TX					
8							
9	Create Service Area IDs						
10							
11	<b>Service Area ID*</b>	<b>Service Area Name*</b>	<b>State*</b>	<b>County Name</b>	<b>Partial County</b>	<b>Service Area Zip Code(s)</b>	<b>Partial County Justification Filename</b>
12	<small>Required: Enter the Service Area ID</small>	<small>Required: Enter the Service Area Name</small>	<small>Required: Does this Service Area cover the entire state?</small>	<small>Required if State is "No": Select the County - FIPS this Service Area covers</small>	<small>Required if State is "No": Does this Service Area include a partial county?</small>	<small>Required if Partial County is "Yes": Enter the zip codes in this county that are covered by this Service Area</small>	<small>Required if Partial County is "Yes": Enter the filename of the partial county justification file you are uploading to SERFF or HIOS</small>
13	TXS001		Yes				
14			No	Angelina - 48005	No		
15			No		No		

Figure 3: Service Area Template

## 5 Rates Table Template

The Rates Table 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 Rates Table using the recommendations previously mentioned.

**Note:** The Rates Table 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 0-14 option is selected under the **Age** header in Column D. Selecting the 0-14 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 0-14 age band, the template will auto populate all the required age bands as well as the Plan ID, Rating Area ID(s), 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**.

	A	B	C	D	E
1	<b>2021 Rates Table Template v10.0</b>				
2	<i>All fields with an asterisk (*) are required. To validate press Validate button or Ctrl + Shift + I. To finalize, press Finalize button or Ctrl + Shift + F.</i>				
3	Validate	<i>If you are in a community rating state, select Family-Tier Rates under Rating Method and fill in all columns.</i>			
4	Finalize	<i>If you are not in a community rating state, select Age-Based Rates under Rating Method and provide an Individual Rate for every age band.</i>			
5	<i>If Tobacco is Tobacco User/Non-Tobacco User, you must give a rate for Tobacco Use and Non-Tobacco Use.</i>				
6	<i>To add a new sheet, press the Add Sheet button, or Ctrl + Shift + H. All plans must have the same dates on a sheet.</i>				
7	HIOS Issuer ID*	12345			
8	Rate Effective Date*	1/1/2021			
9	Rate Expiration Date*	12/31/2021			
10	Rating Method*	Age-Based Rates			
11	Add Sheet				
12	Plan ID*	Rating Area ID*	Tobacco*	Age*	Individual Rate*
13	<b>Required:</b> Enter the 14-character Plan ID	<b>Required:</b> Select the Rating Area ID	<b>Required:</b> Select if Tobacco use of subscriber is used to determine if a person is eligible for a rate from a plan	<b>Required:</b> Select the age of a subscriber eligible for the rate	<b>Required:</b> Enter the rate of an Individual Non-Tobacco or No Preference enrollee on a plan
14	12345TX0010001	Rating Area 1	No Preference	0-14	
15	12345TX0010001	Rating Area 1	No Preference	15	
16	12345TX0010001	Rating Area 1	No Preference	16	
17	12345TX0010001	Rating Area 1	No Preference	17	
18	12345TX0010001	Rating Area 1	No Preference	18	

**Figure 4: Rates Table Template with Age Bands and No Preference Tobacco Option**

**Scenario 2:** If you select “**Tobacco User/Non-Tobacco User,**” the **Individual Tobacco Rate** column will unhide and show the Rates Table 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).

	A	B	C	D	E	F
1	<b>2021 Rates Table Template v10.0</b>	<i>All fields with an asterisk (*) are required. To validate press Validate button or Ctrl + Shift + I. To finalize, press Finalize button or Ctrl + Shift + F.</i>				
2	Validate	<i>If you are in a community rating state, select Family-Tier Rates under Rating Method and fill in all columns.</i>				
3	Finalize	<i>If you are not in a community rating state, select Age-Based Rates under Rating Method and provide an Individual Rate for every age band.</i>				
4		<i>If Tobacco is Tobacco User/Non-Tobacco User, you must give a rate for Tobacco Use and Non-Tobacco Use.</i>				
5		<i>To add a new sheet, press the Add Sheet button, or Ctrl + Shift + H. All plans must have the same dates on a sheet.</i>				
6	HIOS Issuer ID*	12345				
7	Rate Effective Date*	1/1/2021				
8	Rate Expiration Date*	12/31/2021				
9	Rating Method*	Age-Based Rates				
10	Add Sheet					
11						
12	Plan ID*	Rating Area ID*	Tobacco*	Age*	Individual Rate*	Individual Tobacco Rate*
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	Required: Enter the rate of an individual tobacco enrollee on a plan
14	12345TX0010001	Rating Area 1	Tobacco User/Non-Tobacco User	0-14		
15	12345TX0010001	Rating Area 1	Tobacco User/Non-Tobacco User	15		
16	12345TX0010001	Rating Area 1	Tobacco User/Non-Tobacco User	16		
17	12345TX0010001	Rating Area 1	Tobacco User/Non-Tobacco User	17		
18	12345TX0010001	Rating Area 1	Tobacco User/Non-Tobacco User	18		

Figure 5: Rates Table Template with Age Bands and Tobacco/Non-Tobacco Option

## 5.2 Issuers in Family Tiered States

You may copy into selected cells for plans in states with Family Tiering. If you select “**Family Option**” from the dropdown in the Rating Method field in the header, 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 Rates Table template with Family Tiering columns displayed.

	A	B	E	G	H	I	J	K	L	M
1	<b>2021 Rates Table Template v10.0</b>	<i>All fields with an asterisk (*) are required. To validate press Validate button or Ctrl + Shift + I. To finalize, press Finalize button or Ctrl + Shift + F.</i>								
2	Validate	<i>If you are in a community rating state, select Family-Tier Rates under Rating Method and fill in all columns.</i>								
3	Finalize	<i>If you are not in a community rating state, select Age-Based Rates under Rating Method and provide an Individual Rate for every age band.</i>								
4		<i>If Tobacco is Tobacco User/Non-Tobacco User, you must give a rate for Tobacco Use and Non-Tobacco Use.</i>								
5		<i>To add a new sheet, press the Add Sheet button, or Ctrl + Shift + H. All plans must have the same dates on a sheet.</i>								
6	HIOS Issuer ID*									
7	Rate Effective Date*									
8	Rate Expiration Date*									
9	Rating Method*	Family-Tier Rates								
10	Add Sheet									
11										
12	Plan ID*	Rating Area ID*	Individual Rate*	Couple*	Primary Subscriber and One Dependent*	Primary Subscriber and Two Dependents*	Primary Subscriber and Three or More Dependents*	Couple and One Dependent*	Couple and Two Dependents*	Couple and Three or More Dependents*
13	Required: Enter the 14-character Plan ID	Required: Select the Rating Area ID	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	Required: Enter the rate of a family based on a couple with one dependent	Required: Enter the rate of a family based on a couple with two dependents	Required: Enter the rate of a family based on a couple with three or more dependents
14										
15										
16										
17										
18										

Figure 6: Rates Table 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).

Rating Area ID*	Individual Rate*	Couple*
<b>Required:</b> Select the Rating Area ID	<b>Required:</b> Enter the rate of an Individual Non-Tobacco or No Preference enrollee on a plan	<b>Required:</b> Enter the rate of a couple based on the pairing of a primary enrollee and a secondary subscriber (e.g. husband and spouse)
Rating Area 1		

Figure 7: Rates Table Template – Individual Rate and Couple Fields

## 6 Rating Business Rules Template

The Rating Business Rules template requires population of the ‘Medical, Dental, or Both?’ field in cell B8 before populating the template below the header (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 (see Figure 9). 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.

**Note:** The Business Rules template was re-designed as part of Plan Year 2021; copy-pasting values across columns may not be effective. Verify each row has the ‘Medical or Dental Rule?’ column populated or template validation will fail.

	A	B	C	D	E	F	G	H
1	<b>2021 Business Rules Template v10.1</b>		<i>All fields with an asterisk (*) are required. To validate the template, press Validate button or Ctrl + Shift + I. To finalize the template, press Finalize button or Ctrl + Shift + F.</i>					
2	Validate		<i>Enter the Issuer Rule on the first row (no Product ID or Plan ID).</i>					
3			<i>For each Product rule, enter only the Product ID and the business rules that differ from the Issuer Rule.</i>					
4			<i>For each Plan rule, enter only the Plan ID and the business rules that differ from the Product or Issuer Rule.</i>					
5	Finalize		<i>Issuer level rule will apply only to plan type indicated in cell C10.</i>					
6								
7	HIOS Issuer ID*							
8	Medical, Dental, or Both?*							
9	Product ID	Plan ID (Standard Component)	Medical or Dental Rule?*	What is the maximum number of rated underage dependents on this policy?*	Is there a maximum age for a dependent?*	How is age determined for rating and eligibility purposes?*	How is tobacco status determined for subscribers and dependents?*	What relationships between primary and dependent are allowed, and is the dependent required to live in the same household as the primary subscriber?*
10								
11								
12								
13								

Figure 8: Rating Business Rules Template

X

Relationship to Primary Subscriber

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

<input checked="" type="checkbox"/> Self	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Collateral Dependent	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Spouse	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Ex-Spouse	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Child	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Foster Child	<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"/> Ward	<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"/> Sponsored Dependent	<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"/> Other Relationship	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Life Partner	<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Other Relative	<input type="radio"/> Yes	<input type="radio"/> No
<input type="checkbox"/> Nephew or Niece	<input type="radio"/> Yes	<input type="radio"/> No			

**Figure 9: Rating Business Rules Template – Relationship to Primary Pop-up**

## 7 Plans & Benefits Template

In the Plans & Benefits template, shown in Figure 10, 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-AF). Do not copy and paste directly from the last Plan Year’s template because some columns have been removed. It is recommended to copy by columns, and not by rows.

	A	B	C	D	E	F	G	H	I	J
1	<b>2021 Plans &amp; Benefits Template v10.0</b>			<i>To use this template, please review the user guide and instructions. All fields with an asterisk (*) are required</i>						
2	HIOS Issuer ID*			<i>You will need to save the latest version of the add-in file (PlansBenefitsAddIn.xlam) on your machine.</i>						
3	Issuer State*			<i>To create the cost share variance worksheet and enter the cost sharing amounts for both individual and SHOP (small group) markets, use the</i>						
4	Market Coverage*			<i>To create additional Benefits Package worksheets, use the Create New Benefits Package macro.</i>						
5	Dental Only Plan*			<i>To populate the benefits on the Benefits Package worksheet with your State EHB Standards, use the Refresh EHB macro.</i>						
6	<b>Plan Identifiers</b>									
7	HIOS Plan ID* (Standard Component)	Plan Marketing Name*	HIOS Product ID*	Network ID*	Service Area ID*	Formulary ID*	New/Existing Plan?*	Plan Type*	Level of Coverage*	Design Type*
8										
9										
10										

Figure 10: Plan & Benefits Template – Plan Level Data

The bottom table in the Benefits Package sheet contains benefit information and EHB data (see Figure 11). The benefits and the EHB 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 that allows 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.**

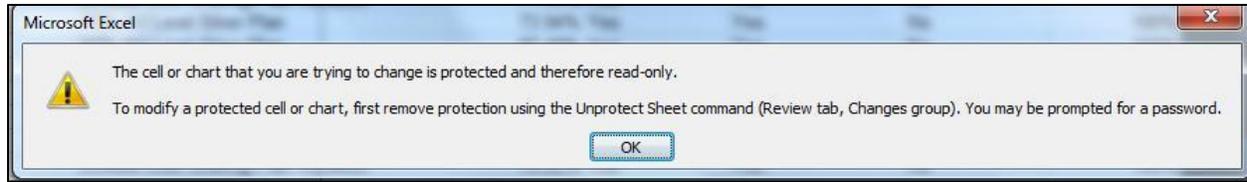
	A	B	C	D	E	F	G	H	I	J	K
59	<b>Benefit Information</b>			<b>General Information</b>							<b>Out of Poo</b>
60	Benefits	EHB	Is this Benefit Covered?	Quantitative Limit on Service	Limit Quantity	Limit Unit	Exclusions	Benefit Explanation	EHB Variance Reason	Excluded from 1 Network MOOP	
61	Primary Care Visit to Treat an Injury or Illness										
62	Specialist Visit										
63	Other Practitioner Office Visit (Nurse, Physician Assistant)										
64	Outpatient Facility Fee (e.g., Ambulatory Surgery Center)										
65	Outpatient Surgery Physician/Surgical Services										

Figure 11: Plan & Benefits Template – EHB Table

### 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 for editing 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 12.



**Figure 12: 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 13 shows Benefits Template Sample columns for Primary Care Visit to Treat an Injury or Illness with Copay and Coinsurance columns.

DH	DI	DJ	DK	DL	DM
Primary Care Visit to Treat an Injury or Illness					
Copay			Coinsurance		
In Network (Tier 1)	In Network (Tier 2)	Out of Network	In Network (Tier 1)	In Network (Tier 2)	Out of Network
\$101.00	Not Applicable	No Charge	100.00%	Not Applicable	No Charge after deductible
\$101.00	Not Applicable	No Charge	100.00%	Not Applicable	No Charge after deductible
\$503.00 Copay with deductible		\$603.00	10.00% Coinsurance after deductible		13.00% Coinsurance after deductible
\$503.00 Copay with deductible		\$603.00	10.00% Coinsurance after deductible		13.00% Coinsurance after deductible
\$104.00	No Charge	\$94.00 Copay after deductible	0.00% Coinsurance after deductible	No Charge	14.00% Coinsurance after deductible
\$0.00		\$95.00 Copay with deductible	No Charge		15.00%
\$0.00		\$95.00 Copay with deductible	No Charge		15.00%
\$0.00	\$0.00	Not Applicable	No Charge	0.00% Coinsurance after deductible	Not Applicable

**Figure 13: 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, and I in each row that you want to paste data into, as shown in Figure 14. This will clear out any locked cells on that row.

G	H	I
<b>Medical &amp; Drug Deductibles Integrated?*</b>	<b>Medical &amp; Drug Maximum Out of Pocket Integrated?*</b>	<b>Multiple In Network Tiers?*</b>

**Figure 14: Subsection of Benefits Template**

2. Select and copy the block of data that you want to paste into the template (see Figure 15). 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	Ind
\$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 15: 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 16.)

BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU
<b>Combined Medical &amp; Drug EHB Deductible</b>									
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 16: 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 17.) 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.

<b>Other Practitioner Office Visit (Nurse, Physician Assistant)</b>					
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 17: 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 Sheet

In the **Facility 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 F, J, and M through P. However, Columns B through D, columns G through I, and columns K through L cannot be edited using copy and paste.

**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.

	A	B	C	D	E	F
1			Select All	Clear All	Remove Selected ECPs and Blank Rows	To select all ECPs, press the 'Select All' button or Ctrl To clear all ECPs, press 'Clear All' button or Ctrl + Shift To select an ECP, navigate to the corresponding row in To remove selected ECPs, press the Remove Selected
2	Remove ECP?	Row Number	National Provider Identifier (NPI)*	Facility Name*	Provider Name*	ECP Category (General ECP Standard Issuers Only)*
3						
4						
5						
6						

Figure 18: ECPNA Template – Facility ECPs Tab

### 8.2 Individual ECPs Sheet

In the **Individual ECPs** worksheet (see Figure 19) 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 I through J, L, P, and Columns S through U. However, Columns A through C, G, K, M through O, and Q through R cannot be edited using copy and paste.

**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.

	A	B	C	G	I	J
1			Select All	Clear All	Remove Selected ECPs and Blank Rows	To select all ECPs, press the 'Select All' button or Ctrl To clear all ECPs, press 'Clear All' button or Ctrl + Shift To select an ECP, navigate to the corresponding row in To remove selected ECPs, press the Remove Selected
2	Remove ECP?	Row Number	National Provider Identifier (NPI)*	Name of Provider*	Physician/Non Physician*	Specialty Type (area of medicine)*
3						
4						
5						

Figure 19: ECPNA Template – Individual ECPs Tab

### 8.3 Individual Providers Sheet

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

	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 20: ECPNA Template – Individual Providers Tab

### 8.4 Facilities & Pharmacies Sheet

In the **Facilities & Pharmacies** worksheet (see Figure 21) you will be able to copy and paste into all columns.

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

Figure 21: ECPNA Template – Facilities & Pharmacies Tab