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HEALTH CARE REFORM-COMPLIANCE SOLUTIONS

Benefit Import Template - Macro enabled

Companion guide

Table of Contents

Getting Started:

Downloading and opening the Template

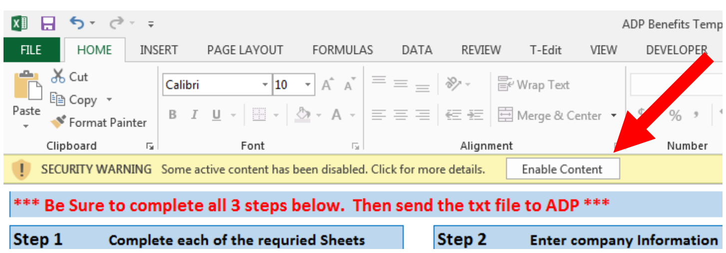
This document is to be used with the ADP Macro Enabled Benefit template. The purpose is to provide additional information related to the use of the template and the different elements within the file, including best practices related to the varying scenarios that one might encounter within their employee population.

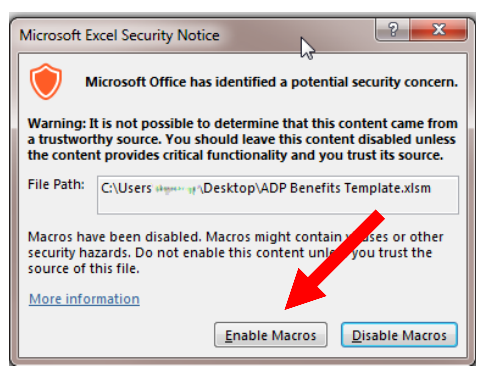
The “Benefit Import Template – Macro Enabled” may be downloaded from the http://communications.adpinfo.com/health-compliance-files website. It will be located toward the bottom of the page.

The template will match each Employee with the offered plans, selected coverage and any dependents and create a file formatted to import into the ADP health compliance platform.

If you have any security applications that stop Macros from running, you many need to trust the file.

A security warning may popup when you open the file. You will want to make sure you “Enable content” or “Enable Macros” to allow the macros to run.

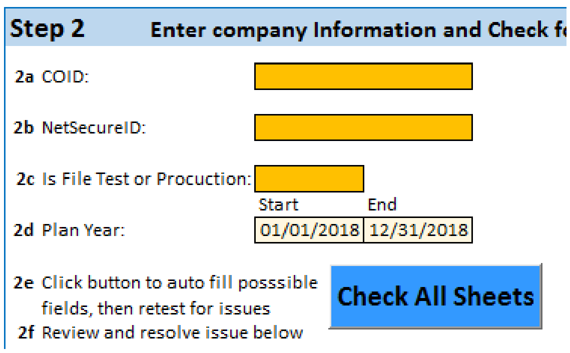


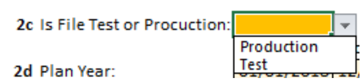


Dashboard

Basic Info

While your company information is officially in step 2 we recommend going ahead and entering your COID, NetsecureID, and your plan year first to set the stage of creating your ADP file. You can also enter if this will be a test or production file now or wait right before you create the file.



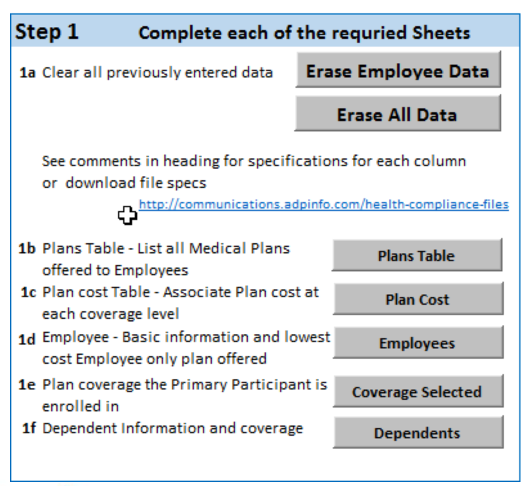


Step 1 – Filling in the data

There are shortcut buttons that will take you to each tab enabling you to fill in the data.

If you are reusing the template and have previous data you have 2 options to erase it:

- ”Erase Employee Data” will keep your Plan data and only erase the Employee, Coverage, and Dependent tabs.
- “Erase All Data” will erase all the tabs including the plan data without erasing your COID or NetSecureID



Benefit Plans

Plans Table

AutoFill/Check	Medical Plan	Minimum Essential Coverage	Minimum Value Plan	Coverage Available		Self-Insured Plan	Coverage
Code	Description			Dependent	Spouse		Population
BCBS-Example	Blue Cross Blue Shield Example	Y	Y	Y	Y	Y	
KaiserTest-CA	Kaiser Example for California	Y	Y	Y	Y	Y	California
KaiserTest	kaiser Example for Non-California	Y	Y	Y	Y	Y	Non-CA
	Eample of.Description-over_20 characters	Y	Y	Y	Y	Y	Test
Test Plan		Y	Y	Y	Y	Y	Test
	Example under 20						Test
UHCEx	United Healthcare Example	Y	Y	Y	Y	Y	

Dashboard | Plans | PlanCost | Employee | Coverage | Dependents

The plan table is where you enter all your plans and their attributes. You will enter only your plans, and associate the coverage levels on the "PlanCost" tab. When entering the plans you will be asked for the Plan Code and the description, but you do not have to enter both. Once you click the Autofill/check button it will automatically either create a code or the description depending on which is needed.

A	B	C	D	E	F	G	H
AutoFill/Check	Medical Plan	Minimum Essential Coverage	Minimum Value Plan	Coverage Available		Self-Insured Plan	Coverage
Code	Description			Dependent	Spouse		Population
BCBS-Example	Blue Cross Blue Shield Example	Y	Y	Y	Y	Y	
KaiserTest-CA	Kaiser Example for California	Y	Y	Y	Y	Y	California
KaiserTest	kaiser Example for Non-California	Y	Y	Y	Y	Y	Non-CA
EoDoc 20	Eample of.Description-over_20 characters	Y	Y	Y	Y	Y	Test
Test Plan	Test Plan	Y	Y	Y	Y	Y	Test
Example under 20	Example under 20						Test
UHCEx	United Healthcare Example	Y	Y	Y	Y	Y	

Dashboard | Plans | PlanCost | Employee | Coverage | Dependents

If you have different plans associated with different populations, salary bands, or locations, you can enter a population associated with that plan. We will cover "Populations" in more depth later in the document.

Take note of the color coding of the cells. As you enter data any field highlighted in yellow is a required field, a green field is conditionally required and you can see the comments on the column header for details. Any cell that is not highlighted is optional. All other types of highlighted cells will be discussed in the Checking the Data section of the document.

Plan cost table

Plan AutoFill/Check	Coverage Level		EEOnly	Monthly Cost	
Code or Description	Code	Description	Flag	Employee	Employer
BCBS-Example	EE	Employee	Y	45.15	261.92
BCBS-Example	EE + Child	Employ and child		145.15	261.92
BCBS-Example	EE + Sp	Employee and spouse		145.15	261.92
BCBS-Example	Family	Family		295.76	261.92
KaiserTest	EE	Employee	Y	67.5	451
KaiserTest	EE + Child	Employ and child		270	500
KaiserTest	EE + Sp	Employee and spouse		270	525
KaiserTest	Family	Family		567.13	1000
KaiserTest-CA	EE	Employee	Y	135	
KaiserTest-CA	EE + Child	Employ and child			
KaiserTest-CA	EE + Sp	Employee and spouse			
KaiserTest-CA	Family	Family			
Test Plan	EE		Y	236	
UHCEx	EE	Employee	Y	277.23	
UHCEx	EE + Child	Employ and child			
UHCEx	EE + Sp	Employee and spouse			
UHCEx	Family	Family			
Eample of.Description-over_20 characters		This is over 20 charcters			
Example under 20		Under 20 characters			

Dashboard | Plans | PlanCost | Employee | Coverage | Dependents

The Plan cost table is to align each plan, on the plan table, with its applicable coverage levels and their cost. To match a plan with the coverage level, you can enter either the "Plan Code" or the "Plan Description"; it will be associated with the correct plan. If you choose you may click the drop down and select the correct "Plan Code".

As with the plan table, you also have the option of only entering the Coverage Level Code or description. The Autofill/check button will automatically fill in the other field. We do recommend using the same code/Description for all your plan levels. (Example, If you use "EE" for Employee Only then use that notation for all Employee only plans, do not switch it to 1, EE Only, or Employee only on other plans. This will make it easier if you are manually filling in the tabs and not using a cut/paste method.)

Important: any “Employee only” plans must have the EEOnly field is set to “Y”. This will help determine affordabilty of the offers in the Health Compliance Platform. You may leave the EEOnly field blank/null or enter “N” on the other coverage levels.

Plan AutoFill/Check	Coverage Level		EEOnly	Monthly Cost	
Code or Description	Code	Description	Flag	Employee	Employer
BCBS-Example		Employee	Y	45.15	261.92
BCBS-Example	EE + Child	Employe and child		145.15	261.92
BCBS-Example	EE + Sp	Employee and spouse		145.15	261.92
BCBS-Example	Family	Family		295.76	261.92
KaiserTest	EE	Employee	Y	67.50	451.00
KaiserTest	EE + Child	Employe and child		270.00	500.00
KaiserTest	EE + Sp	Employee and spouse		270.00	525.00
KaiserTest	Family	Family		567.13	1000.00
KaiserTest-CA	EE	Employee	Y	135.00	0.00
KaiserTest-CA	EE + Child	Employe and child		0.00	0.00
KaiserTest-CA	EE + Sp	Employee and spouse		0.00	0.00
KaiserTest-CA	Family	Family		0.00	0.00
Test Plan	EE	EE	Y	236.00	0.00
UHCEx	EE	Employee	Y	277.23	0.00
UHCEx	EE + Child	Employe and child		0.00	0.00
UHCEx	EE + Sp	Employee and spouse		0.00	0.00
UHCEx	Family	Family		0.00	0.00
Eample of.Description-over_20 characters	Tioc 20	This is over 20 charcters		0.00	0.00
Example under 20	Under 20 characters	Under 20 characters		0.00	0.00

Dashboard | Plans | PlanCost | Employee | Coverage | Dependents

Please keep in mind the cost of each plan. You must enter the Employee cost of each Employee only plan; other cost fields may be left null, but we recommend filling them in correctly (see image below). Any cost field left blank will be filled in with 0.00. This can/will give a false affordability reading, if any Employee only plan’s employee cost is set to 0.00 and it is not correct.

Populations

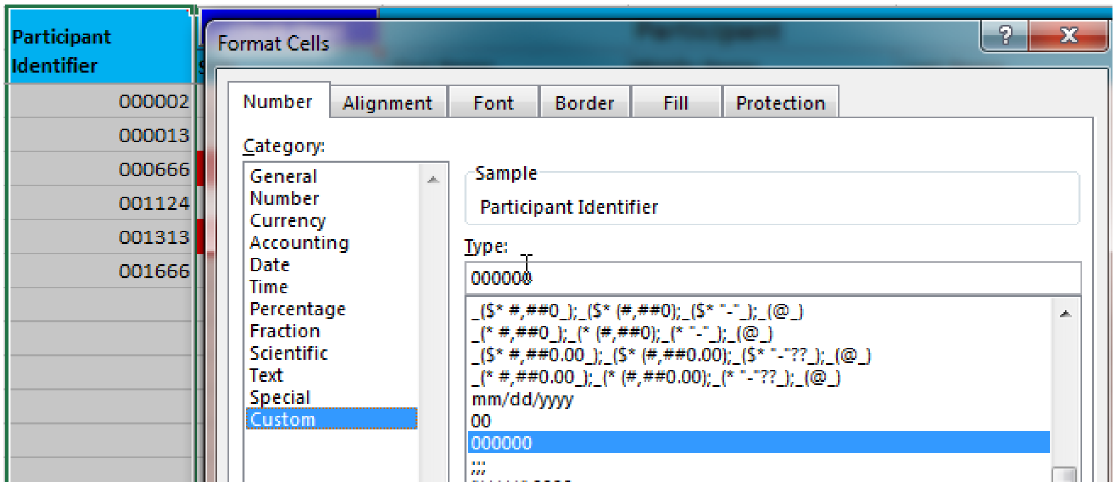
Employee populations allow you to offer different plans based on location, job title, salary band, and more. The thing to remember when using populations is that they are “inclusive” not “exclusive”. What that means is if the population is left null (empty) on the plan table, that plan will be offered to everyone. Likewise, if the population is left null on an Employee record then that employee will only get plans that do not have a population associated with it. For any Employee assigned a population, they will be offered every plan associated with that population and any plan not assigned a population (left null).

If using populations for Salary bands, you must be aware, this is not done automatically based on their salary. You will need to assign the populations to each employee and plan.

Employee Data

Employee Tab

The Participant Identifier default is set to 6 digits with leading 0’s. You may change this to fit your requirement.



You may enter the Employee SSN, Social Security Number, with or without the “-“s. any SSN without the dashes will remove any leading 0’s. Any SSN with leading 0’s will be highlighted with yellow text. This is done to show potential errors, making sure the SSN is supposed to have leading 0s. When generating the ADP file the leading 0’s will be put back in.

The file will run multiple checks on the SSN and will highlight it if anything could potentially be wrong. See the legend on the Dashboard.

If you are using populations you can select the drop down to pick the correct population for the employee.

The Participant ID will show with Red Background and Bold lettering if a COVG record is not found for that Employee. Meaning, if you have not yet entered data on the coverage tab and run “Check Sheet” all the Participant Identifiers will be highlighted. You also will not be able to generate the ADP file until all the coverages are entered.

Coverage Tab

The Participant Identifier default is set to 6 digits with leading 0's. You may change this to fit your requirement.

The selected Plan and the coverage level fields can be selected through the drop down option. If you choose not to use the drop down, you may enter the code or the description; the file will enter the information correctly when creating the file.

Instead of using populations for a plan cost change, or if you have a one off, you can use the Monthly Override to adjust the plan cost for that employee.

Monthly Cost Override	
Employee	Employer

If you do not enter the Event date when you click "AutoFill/Check" it will automatically fill in the "Coverage Start Date"; unless this is a termination of coverage, then it will use the "Coverage End Date".

If you have set the "Waived Flag" to "Y" and did not fill in the "Waive Reason Code" or the "Waive Reason Description" it will automatically fill in "06" for the code and "Unknown" as the reason.

If the "Event Reason" is left null, Data Change will be filled in.

You may enter an "Event Reason" of "Term" or "Termination" if the the employee is terminating coverage for any reason other than a waive. This will allow you to use the abbreviated record and will not require all fields to be entered. The required fields will highlight with a yellow background if left empty.

Dependents

If you leave the Dependent Identifier empty it will be automatically filled in with the first name + DOB, when you click the AutoFill/Check button (Eddie01/13/2001)

When adding a dependent to a selected plan (i.e. baby born or marriage), best practice is to have a new coverage record for the Employee with the new start date, as well as, a new record for each dependent covered with the new start date. If you just add the new Dependent with the new start date, the template will highlight the Dependent ID as invalid due to the Coverage Start date not matching the Employees coverage start date.

Likewise when removing a Dependent (i.e Dependent aging out or divorce), you will need to enter a new coverage record for the Employee with the new start date and new dependent records for any remaining dependents with the new start date. You do not have to enter an End of coverage date for the Dependent Aging out. The system will use 1 day prior to the new start date to end the dependents coverage.

Be aware, if you have multiple coverages for a single dependent i.e. same coverage start date) the SSN will still highlight at duplicate as a duplicate SSN.

Checking for issues

Autofill/Check Buttons

We recommend clicking the Autofill/check button on each sheet, once the data is filled in, before moving on to the next tab. Some of the items comopleted will be

- Sorts tabs
    - Employee Tab - By Participant Identifier
    - Coverage Tab - By Participant Identifier, Coverage Start Date, EventDate
    - Dependents Tab - by Participant Identifier, Coverage Start Date, Coverage End Date, Dependent Identifier
- Removes any blank rows
- Runs mulitple checks and calculations to determine possible issues

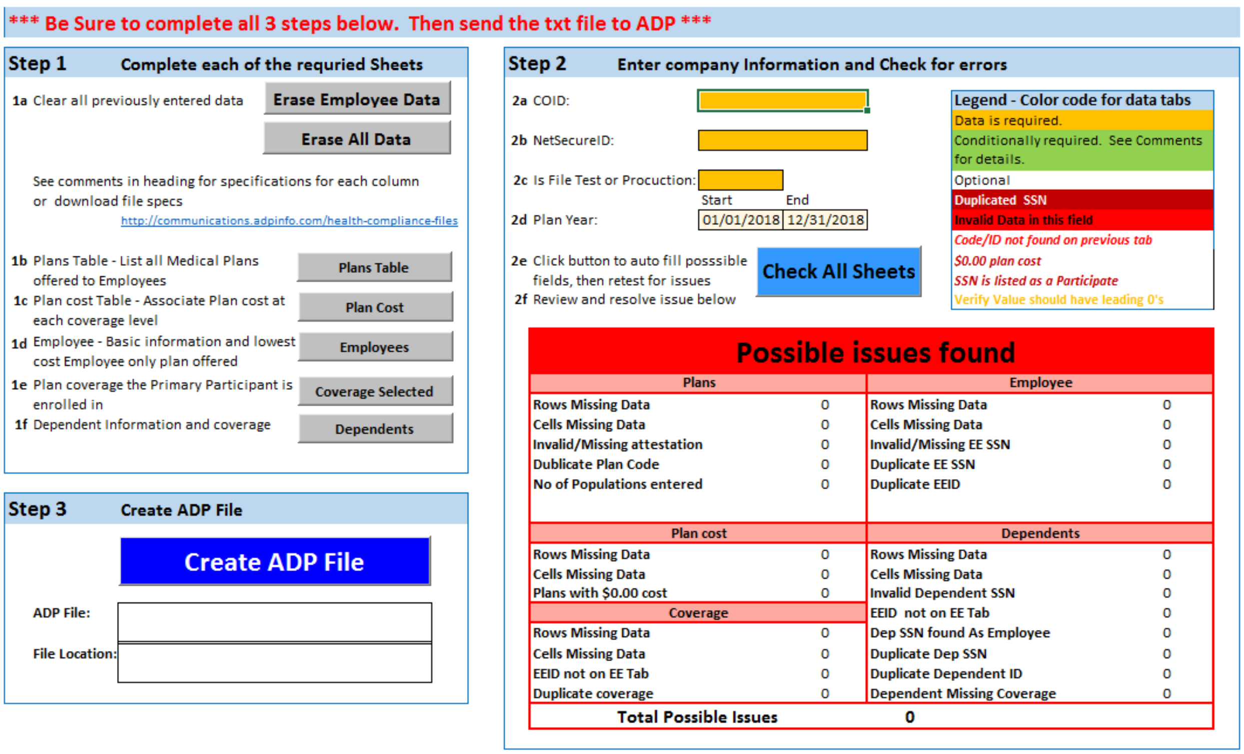
Check All Sheets

Will run the checks on all 5 tabs

Dashboard - Review the Errors

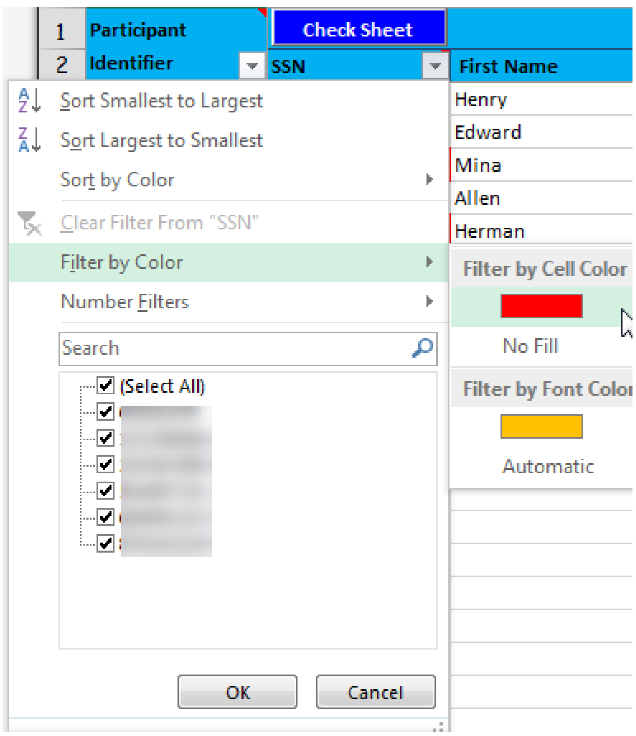
If you haven't already entered your company information: COID, NetsecureID and your plan year. You will also need to verify if this is a test or production file.

You may review possible issues with the file from the dashboard to get an overview of the issues.



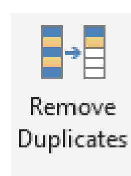
Filter by Color

To help find issues you can use the filter by color option to enable you to see where the issue may be. Click on the Down arrow on the column you want to filter on, select "Filter by color" and then the color you wish to filter by

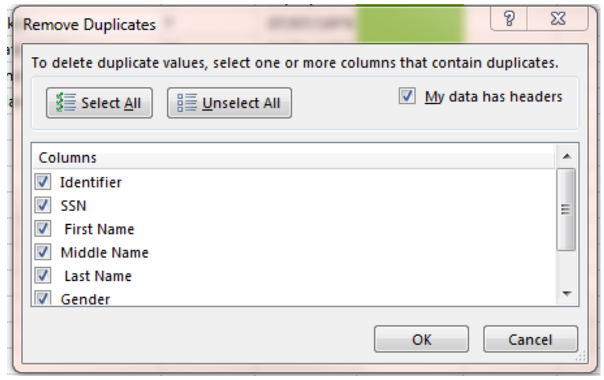


Remove Duplicates

If you have duplicate entries on any of your tabs you can easily remove them by using the Remove duplicate option in Excel. It is located on the Data tab



It will then ask you which columns you want to use to check for duplicates. Make sure you select enough fields to determine actual duplicates and do not remove additional coverages.



Create the File

Dashboard

***Note:** If you have any Employees listed on the Employee Tab, that do not have a Selected coverage or Waive on the coverage tab, you will not be able to create the file. You will get a message asking you to add the missing coverage records.

When you click the Create ADP file button on the dashboard it will rerun all the checks to make sure any fields that can be auto-filled are filled in and the tabs are sorted. Once the checks are completed it will ask you to Save the Excel workbook with a "Save As" dialog. The default name for the file will be Wrkng_data_Netsecure_YYYYMMDD.xlsm. This is to allow you to save the data without saving over the actual template and keep a record of your files.

After you save the Excel Workbook it will create and save the file in the ADP Pipe Delimited format. It will save this file in the same location as your Excel Workbook. Once it has been created you will have a link to the folder and the file.

You can now send the File to ADP via sFTP or other secure method. Please do not send the file via regular email.