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.
- Note there are labeled tabs in the bottom left-hand side of the worksheet. The six 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:

- ALL Green highlighted column headers indicate columns that must be completed 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.
- Blue 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.

Helpful Hints:

- When initially accessing the template, click File, SaveAs, and save the file to your desktop or drive using the .xlsm extension it defaults to.
- Hide the product columns your client is not interested in by using the “Customize Spreadsheet” button.
- Complete the State, Effective Date, and Business Name fields first.
- It may be easier to complete all the green fields, then the blue ones.
- Please do not insert blank rows in between the employees.

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