Centers for Medicare & Medicaid Services
Center for Consumer Information and Insurance Oversight
7500 Security Blvd
Baltimore, MD 21244-1850

Plan Management (PM)
Copy & Paste in Templates

Version: 2.0
Last Modified: April 30, 2014

Contract Number: Accenture

Table of Contents

Table of Figures

1. Copying and Pasting in Plan Management Templates

Copy/pasting is permitted in all the Plan Management templates required as part of the Qualified Health Plan (QHP) submission. To ensure 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 your cell level validations to be over-written, 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 is expecting 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 at all possible, use the Paste/Paste Special, and select 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 zeros unless a field is specifically formatted. So for example, if you have a TIN number 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 zeros 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 would block you from pasting an entire row in (Rating Tables is an example).

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

1.3. Column Level Copy/Paste Recommendations

- Only copy user entered data, and do not include the header columns or any grey filled cells. Columns may **not** be deleted, but you can adjust the width of a column to better view data.

1.4. 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 in it.

1.5. Cell Level Copy/Paste Recommendations

- If a cell is locked (on most templates, locked cells are grey,) you cannot paste into it.

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

2. Administrative Data Template

The Administrative Data template resembles a paper form, and therefore a large portion of this template has locked cells. You can paste into individual cells requiring input, preferably using the Paste Values option (see Figure 1), which can be accessed from the right click menu or from the Excel ribbon.

Figure 1: Paste Special Menus
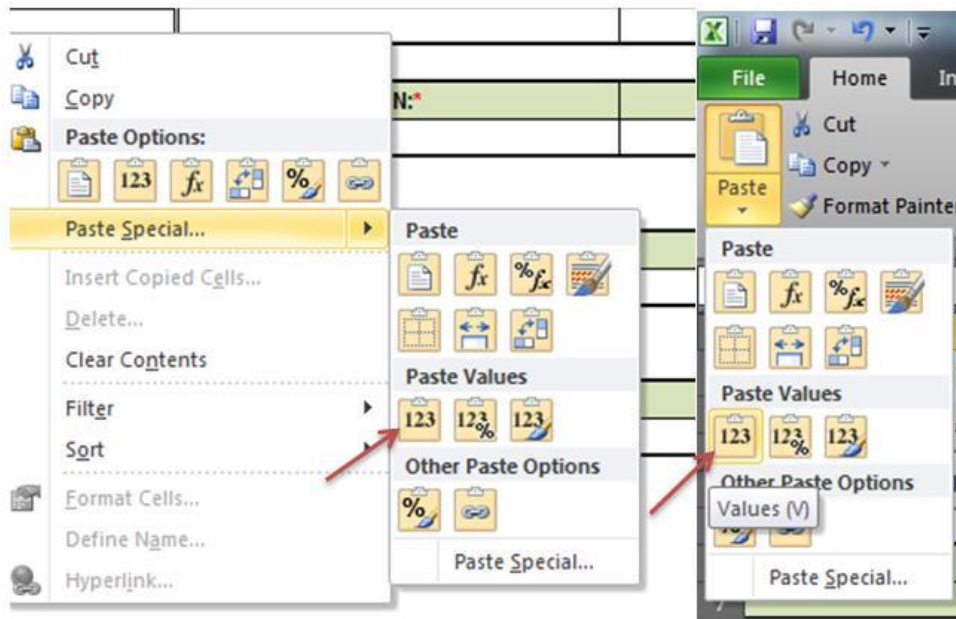
If you have an older version of the template that you want to copy from, you can select any adjacent cells with user entered data and copy into the latest version. If you are copying from an older version of the template, the Paste Values menu as shown in Figure 1 does not appear. Figure 2 depicts the menu which appears using an older version – click the third option, "Match Destination Formatting" under the Paste Options Menu.

Figure 2: Match Destination Formatting
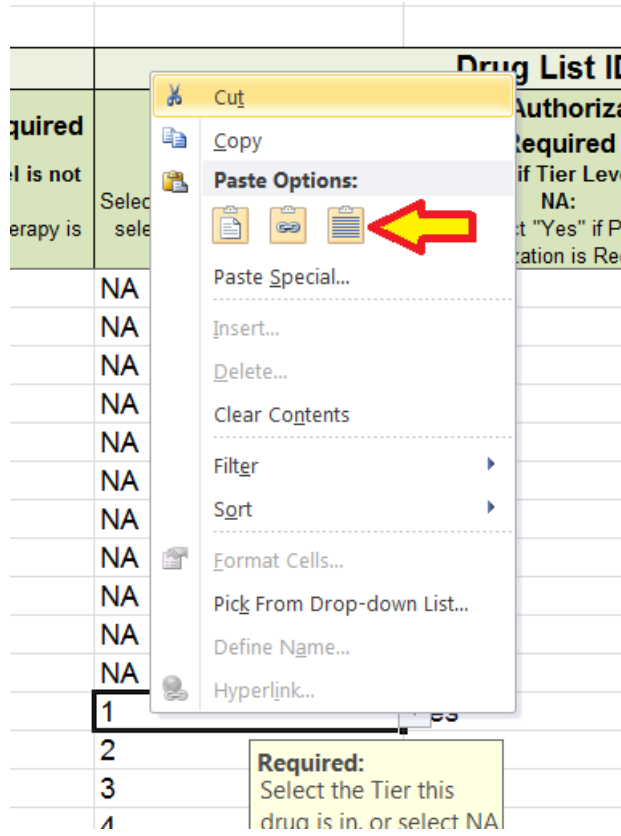
As long as you do not include a locked cell, it will paste correctly. The column headers and title fields that have a green fill, as shown in Figure 3, are always locked.

Figure 3: Column Headers and Title Fields

3. Essential Community Providers (ECP), NCQA, URAC, Network ID Templates

These four templates are simple tables and have no locked cells where users would enter data. You may copy/paste into any of these cells, but be sure to paste the correct type of data. Check the Data Traceability Matrix for specific data formats. 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" 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.

Network and Essential Community Providers both use the Network ID field. The recommended approach is to create your Network IDs (based on your state) with the Create Network IDs button in the Network ID template prior to filling out data in the ECP Template, shown in Figure 3, to ensure the enumeration of the Network IDs on both templates match.

One solution for copy/pasting in the ECP Template, if multiple providers are in the same networks, may be to use the pop-up one time, to select the Network IDs and then copy/paste to all other providers that use those networks. As with the Administrative Data template, if you have older versions of the templates already filled in, you may paste the data into the latest version. Make sure to select information starting from underneath the headers; otherwise you will be trying to paste into locked cells and will receive an Excel error (see screenshot below – highlighted cells are where you should copy from).

Figure 4: ECP Template

4. Prescription Drug Template

The Prescription Drug Template has two types of worksheets, the Formulary Sheet and the Drug List Sheet. The Formulary Sheet of this template has many grey/locked cells. Each formulary is designed to always take up 7 rows. Unused tiers in the formulary are grey/locked based on the "Number of Tiers" column. It is best to first select a Formulary ID from the drop-down list (after creating Formulary IDs), then enter the URL and select the drug list and number of tiers from the drop-down. This will grey and lock cells that are not required for input. Anything that is **not** grey can be pasted into.

Figure 5: Prescription Drug Template

For the Drug Lists, you may paste a list of RxCUIs into column A. You may also paste the Prior Auth/Step Therapy Required columns. There can be no duplicate RxCUIs; if there are, the error message will tell you the cell location of the duplicate. Also be aware, that validation will check that the tier you have selected for a drug actually exists in the formularies that use it. So if your first formulary uses Drug List 1 and has 5 tiers, you cannot mark any RxCUIs in that drug list as being in tier 6 or 7. You can select them as NA if those drugs are used in a different Drug List.

On the Drug List worksheet, if the Tier Levels (other than NA) are pasted from an old template, it produces an error upon validation. This can be fixed 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 instead of pasting.

5. Service Area Template

The Service Area template, shown in Figure 5, will grey and lock cells based on options selected in the columns. There are hidden columns that will only display if you have a service area that covers a partial county. If a cell is grey, you will not be able to paste into it. Also 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** 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 grey and locked so nothing can be pasted in, because zip codes are not needed for service areas covering entire counties.

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 will not automatically gray out nor do the Service Area Zip Code(s). 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.

Figure 6: Service Area Template

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 ▾		
		Required if State is No:		

6. Rating Tables Template

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

6.1. Issuers in Individual Rated States

Rate information may be copy/pasted into Rating Tables. Note that the Rating 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 grey and lock a large portion of the cells below the first three columns. There are a few different scenarios to keep in mind. 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 7).

Figure 7: Rating Tables Template with Age Bands and No Preference Tobacco Option

	Plan ID*	Rating Area ID*	Tobacco*	Age*	Individual Rate*
12	**Required:** Enter the 14-character Plan ID	**Required:** Select the Rating Area ID	**Require:** 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
13					
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	Required: Enter Individua Non-Tobacco c No Preference in Dollar Amou
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	

Rate Table

In this instance, the only cells that can be pasted into are the Individual Rate column cells. While the Age column is not greyed or locked, the age bands are auto-populated and should not be edited.

If you select Tobacco Use/Non-Tobacco Use, the Individual Tobacco Rate column will unhide. Figure 8 shows the Rating Tables template with separate rates for non-tobacco and tobacco users.

Figure 8: Rating Tables Template with Separate Rates for Tobacco Use

	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	**Require:** 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		
	12345NC0012222	Rating Area 1	Tobacco User/Non-			

Rate Table

In this instance, the cells you will be able to paste into are the Individual Rate and Individual Tobacco Rate.

6.2. Issuers in Family Tiering States

You may copy into selected cells within the row 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 9 shows the Rating Tables template with Family Tiering columns displayed.

Figure 9: Rating Tables Template Displaying Family Tiering Columns

In this instance, because there is a hidden column, you would 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 9).

Figure 10: Rating Table Template Showing Adjacent Cells that Cannot be Copied

7. Rating Business Rules Template

The Rating Business Rules template is, for the most part, a simple table. However, the first row is considered the "Issuer" rule and therefore the Plan and Product ID columns are grey and locked. It is required to enter every column in the first row (except for Plan/Product ID). For every row after that, 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, so if plans and products have the same answer to this column as the Issuer rule, they can be left blank. If you are copying data from an older version of the template, though, it would be permissible to copy and paste this cell.

Figure 11 shows the Rating Business Rules template.

Figure 11: Rating Business Rules Template – Relationship to Primary Pop-up

The bottom table in the Benefits Package sheet contains benefit information and EHB data. The benefits are locked cells, as well as the EHB/State Mandate columns. 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. The Limit Unit column is a pop-up with two drop-downs that allow you to select the unit of limitation. Be aware that if you paste a limit unit that is not in the pop-up, you will
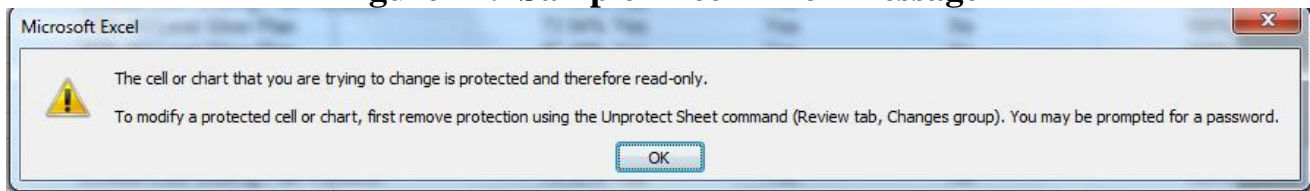
8. Plans & Benefits Template

In the Plans & Benefits template, shown in Figure 12, there are places that are fairly easy to paste into and others that are not. The top table in the Benefits Package sheet contains high-level plan information. Any of this information can be pasted in below the header rows.

Figure 12: Plan & Benefits Template Showing Plan Level Data

receive a validation error.

Figure 13: Plan & Benefits Template - Bottom EHB Table

The Cost Share Variances sheet is much more complicated to paste into. The first four columns 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 should become greyed out and locked that are not applicable. To make sure the appropriate rows grey out, manually select "No" from the dropdown instead of pasting. If you are trying to paste any information into a row that has a grey cell, you will receive the Excel error message, shown in Figure 14.

Figure 14: Sample Excel Error Message

You **can** paste values into any adjacent cells that are not grey, 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 15 shows Benefits Template Sample columns for Primary Care Visit to Treat an Injury or Illness with Copay and Coinsurance columns.

Figure 15: Benefits Template Cost Share Variance Sheet Sample Benefit Columns

Make sure if you are pasting data that you paste the correct type (whole dollar amount or percentage) 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 that you want to paste information from.

1. On the Cost Share Variance sheet that you want to paste into, delete values from columns G, H, and I in each row that you want to paste data into, as shown in Figure 16. This will clear out any locked cells on that row.

Figure 16: Subsection of Benefits Template

2. Select and copy the block of data you want to paste into the template (see Figure 17) 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 grey cells, as long as you paste values only.

Figure 17: 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 18.)

Figure 18: Benefits Template Deductible Columns After Paste Values

4. When you are finished pasting, go back to columns G, H, and I and select from the drop-downs. Cells that are not applicable based on these values will grey and lock.

5. It is permissible to have a value in a cell before it is grey/locked. For example, each of the benefits has an In Network Tier 2 column (see Figure 19.) You may fill out all cells with values. When you select Multiple In Network Tiers = NO, all In Network Tier 2 cells will grey and lock. Any values in them will still be present, but the template ignores any cells with a grey fill for both Validate and Finalize.

Figure 19: Benefits Template Tier 2 Benefit Columns

For best results, **do not** paste your answers into columns (G, H, I). If you do, it will not trigger the grey/locking of columns that do not apply. If a cell is not grey, it is **required** to 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.