

Guide for completing the Electronic Enrollment Spreadsheet

The spreadsheet should be uploaded to populate the enrollment in Plan Advisor (on the producer portal) and attached under the document section.

Only employees enrolling in one or more lines of coverage should be listed on the enrollment spreadsheet.

Employees that are waiving all lines of coverage do not need to be listed on the enrollment spreadsheet.

Required Fields

- **Column A – Employee Number** – each enrolling employee should be listed as a separate number and their dependent showing the identical number. For example, employee A in the grid below is employee #1 with the dependent also listed as #1.
- **Column B – Member Number** – each member enrolling, including dependents, should have a separate number assigned – showing a running member count.
- **Column C – First Name**
- **Column D – Last Name**
- **Column E – Member Type** – required for dependents ONLY

A	B	C	D	E
*Employee Number, See Instructions Tab for details	*Member Number, See Instructions Tab for details	*First Name	*Last Name	*Member Type Spouse, Domestic Partner or Child (Required for Dependents only)
1	1	Employee A	Couple	
1	2	Spouse A	Couple	Spouse
2	3	Employee B	Single	
3	4	Employee C	Family	
3	5	Spouse C	Family	Spouse
3	6	Child C	Family	Child
3	7	Child C	Family	Child

- **Column F – Sex (M or F)**
- **Column G – Date of Birth (MM/DD/YYYY)**
- **Column H – Status (Active or COBRA)** – if active leave blank
- **Columns J-O (wavier columns)** – only needed if an enrolling employee is waiving one or more lines of coverage (for example, enrolling in dental, but waiving medical).
- **Column P – Address 1**
- **Column R – City**
- **Column S – State**
- **Column T – Zip Code**
- **Column U – County**
- **Column V – Phone** – 10 digits, no hyphens*
- **Column W – Martial Status**
- **Column X – COBRA start date**, if applicable
- **Column Y – Date of Fulltime Hire or Re-Hire**
- **Column Z – SSN/Taxpayer ID** – required for both employees and their dependents