

Formatting Benefits Data

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On the data template, you will see Plan Name and Coverage Name for Benefits programs. These are the best practices in displaying or formatting the data.

Plan Name is the **Provider or Carrier's Name** of the said benefit which is usually a **text value**.

An example is for Medical Insurance, if the plan name is more than 30 characters including spaces, you can shorten or abbreviate the text. If for example, the plan name shows as Cigna HMO Select Network, you can cut it short to display as Cigna HMO or abbreviate for example Wellmark PPO Blue Cross Blue Shield 2500 to display as Wellmark PPO BCBS 2500.

On the data template, copy-paste the Plan Name and remove duplicate then next to it add the short name or the name you want to reflect on the statement as shown on the image below. You can now use **vlookup** to replace the original plan name with the short plan name.

A	B
1	2
Medical Plan	Short Plan Name
Cigna HMO Select Network	Cigna HMO
Wellmark PPO Blue Cross Blue Shield 2500	Wellmark BCBS 2500
Wellmark PPO Blue Cross Blue Shield 2000	Wellmark BCBS 2000
Cigna OAP	Cigna OAP

Coverage Name is the **Coverage** of the said benefit which is usually a **text** or a **dollar value** depending on the benefit.

Coverage for Health benefits is normally a text such as Employee Only, Employee and Spouse, Employee and Child(ren) or Family, you can

shorten the word "Employee" to display as Emp or abbreviate it as EE, for example, Emp Only or EE Only. You can also change the word "and" to a plus (+) sign or ampersand (&), for example, EE + Spouse or EE + Family.

A	B	C
1	2	3
Dental Coverage	Short Coverage Name	Short Coverage Name
Employee Only	EE Only	Emp Only
Employee and Spouse	EE + Spouse	Emp & Spouse
Employee and Child(ren)	EE + Child(ren)	Emp & Child(ren)
Family	Family	Family

Coverage for Life Insurance is normally a dollar amount and as best practice, the dollar value is displayed as a whole number if the decimal value shows as zero (0), for example, \$100,000.00 reflects on the statement as \$100,000 and if the decimal places have values, for example, \$123,456.78 it will be displayed the same, \$123,456.78 or you can round it up and show as a whole number \$123,457.

A	B	C
1	2	
Life Insurance Coverage	Short Coverage Name	Formula
100000	\$100,000	=DOLLAR(cell,0)
123456.78	\$123,456.78	=DOLLAR(cell,2)
123456.78	\$123,457	=DOLLAR(ROUNDUP(cell,0),0)