

Rate Schedule Item Instructions

Purpose

This document is intended to help filers complete the Rate Schedule Document.

Document Organization

The Rate Schedule Item is partitioned into three primary sections; the Filing Information, Group Information, and Rating Information sections. The primary section is labeled in the left most column of the document. Each line in the document that includes a user input field is numbered (1 through 14b). Additionally, if special instructions apply to a given line, they are stated in the left most column.

User Inputs

User inputs are highlighted blue. Four types of user input structures are present in the document; *text input fields*, *date input fields*, *checkbox fields*, and *input tables*.

Text Input Fields

Text input fields accept any text entered and include the user prompt "...enter text" or "Enter a number" (e.g. [Click here to enter text.](#)). Applicable lines: 1, 3, 4, 5, 6, 7a, 7b, 8, 12a, 12b, 12c, and 13.

Date Input Fields

Date input fields accept dates of the format "mm/dd/yyyy" (e.g. 01/01/2016). Applicable lines: 2, 3, 10, 11, and 14b.

Checkbox fields

Checkbox fields are clicked to check and uncheck the box (e.g. or). Applicable line: 9, 14a, and 14b.

Input tables

Input tables are tables that include one or more of the other types of user input fields (text, date, checkbox). Input tables are placed in lines that may require more than the standard number of rows. For example, Line 5 contains an input table for group numbers which has one standard row; however, if the text field in line 5 is clicked and the tab key is pressed more rows are added to the input table. Applicable lines: 3 and 5.

Adding Rows to Input Tables

To add a row to an input table, select the bottom-right most cell in an input table, then press the tab key.

Removing Rows from Input Tables

To remove a row from an input table you must use the undo command, while holding the Ctrl key, press the Z key or click  in the upper left hand corner of the screen.

Line Items, Additional Explanation

Standard Master Contracts (Line 3)

The Rate Schedule Item may apply to multiple plans and lines of coverage. Complete one row in line 3 for each applicable standard master contract. To add rows to the input table on line 3, select the bottom-right most cell in the table and press the tab key (repeat as needed).

Group Numbers (Line 5)

Enter the applicable group numbers on line 5. To add rows to the input table on line 5, select the bottom most cell on line 5 and press the tab key (repeat as needed).

Negotiations Completed Date (Line 11)

If the date group contract negotiations completed is unknown, then enter the effective date of the rates.

Rate Schedule

The rate schedule for the filing and the Rate Schedule Item should be submitted as separate documents on the Rate/ Rule Schedule tab of SERFF.

Submitting in SERFF

After completing the Rate Schedule Item, please save the document in PDF file format and submit only the PDF version of the document on the Rate/ Rule Schedule tab of SERFF.

Developer Information

This section is intended only to provide information for Microsoft Office application developers use in automation and programming of the Rate Schedule Item.

The Rate Schedule Item document was created using Microsoft Office, Word 2013. User inputs are indicated by input controls. The following is a table to input control specific information follows:

Document Line	Content Control Type	Control Title	Control Tag	Notes
1	Rich Text	Line_1	txt_IssuerName	
2	Date Picker	Line_2	dat_SubDate	
3	Rich Text	Line_3	tbl_StdMasters	Input table within control
4	Rich Text	Line_4	txt_GrpName	
5	Rich Text	Line_5	tbl_GrpNums	Input table within control
6	Rich Text	Line_6	txt_NumEEs	
7a	Rich Text	Line_7a	txt_NumEnrEEs	
7b	Rich Text	Line_7b	txt_TotEnrEEs	
8	Rich Text	Line_8	txt_GrpSizeExpl	
9	Legacy Check Box		box_NewGrp	
10	Date Picker	Line_10	dat_EffDate	
11	Date Picker	Line_11	dat_NegDate	
12a	Rich Text	Line_12a	txt_WkDaysAfterEffDate	
12b	Rich Text	Line_12b	txt_WkDaysAfterNegDate	

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12c	Rich Text	Line_12c	txt_LateFilingExpl	
13	Rich Text	Line_13	txt_AveRateChg	
14a	Legacy Check Box		box_ConcurFiling	
14b	Legacy Check Box		box_RateManual	
14b1	Date Picker	Line_14b1	dat_RateManual	
14b2	Rich Text	Line_14b2	txt_RateManualTracker	