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Health care insurance is full of forms and red tape. Those forms are also changing all the time. For agents, making sure they are providing clients with the most up to date forms can be time consuming. Utilizing Excel and VBA makes the management of clients and making sure all forms are current a quick and easy process. Through the use of this program, agencies can save hours every week and spend more time attending to client needs. The spreadsheet will keep track of clients and their respective renewal date and allow the user to quickly download the required forms from the internet.

Brigham Young University

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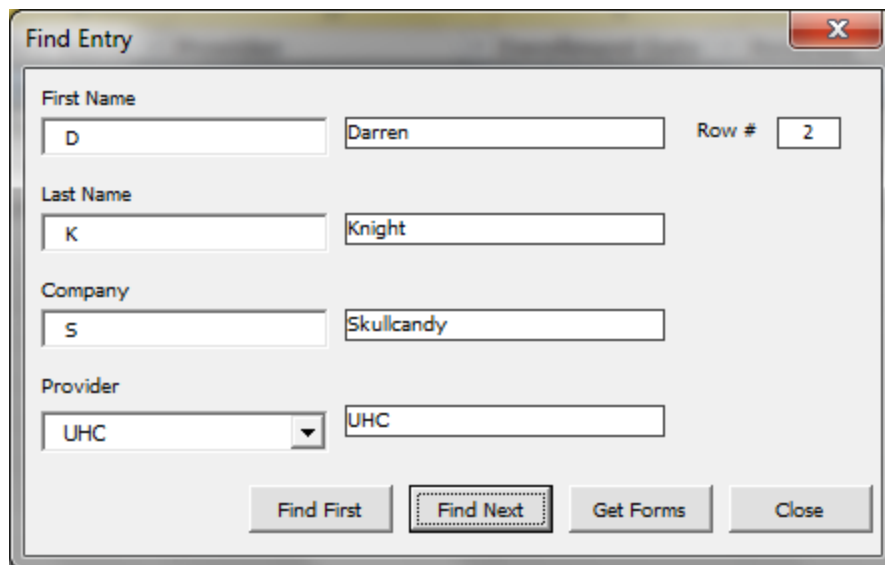
Overview

The motivation for this program came from hearing the frustrations that comes from navigating through multiple levels of secure webpages to download health care insurance forms that change regularly and without notification. This is a very repetitive process when multiple forms need to be downloaded for a single client. With that in mind code was written using VBA to download the latest forms from the health care insurance provider of the client of interest. Additionally, a spreadsheet was set up to manage clients and when they are up for renewal.

| Employer | Last Name | First Name | Provider | Enrollment Date | Renewal Date | Status |
|------------|-----------|------------|-------------------|-----------------|--------------|---------|
| Skullcandy | Knight | Darren | UHC | 5/4/2010 | 5/4/2011 | Renew |
| GBS | King | Tim | BCBS - Individual | 1/1/2010 | 1/1/2011 | Expired |
| Xactware | Knight | Keisha | BCBS - Large | 3/14/2011 | 3/13/2012 | Good |
| Apple | Doe | John | Altius One | 1/1/2010 | 1/1/2011 | Expired |

Figure 1 - Spreadsheet for managing health care insurance clients.

There are several things to note about the spreadsheet in Figure 1. First, the ribbon has been customized with 2 additional buttons. The “Find Entry” button allows the user to search for a client by Employer, Last Name, First Name, or Provider, as shown in Figure 2.

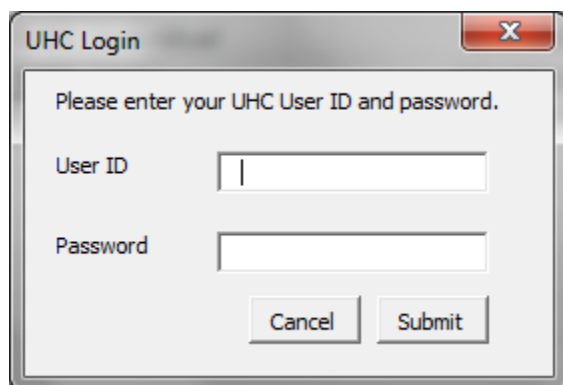


The "Find Entry" dialog box is used for searching for a client. It contains the following fields and buttons:

- First Name:** A text box containing "D" and another text box containing "Darren".
- Last Name:** A text box containing "K" and another text box containing "Knight".
- Company:** A text box containing "S" and another text box containing "Skullcandy".
- Provider:** A dropdown menu showing "UHC" and a text box containing "UHC".
- Row #:** A text box containing "2".
- Buttons:** "Find First", "Find Next" (highlighted with a dashed border), "Get Forms", and "Close".

Figure 2 - Search window for finding a client.

The "Get Forms" button will download, from the website associated with the provider of the currently selected client (or row of the active cell). Forms can also be downloaded from the "Find Entry." The pdf forms are downloaded to a folder that is unique to the provider and is located along the same path as the workbook. If a secure login is required to download the forms a window will pop up to allow the user to input their username and password, as shown in Figure 3.



The "UHC Login" dialog box is used for secure login. It contains the following fields and buttons:

- Text:** "Please enter your UHC User ID and password."
- User ID:** A text box with a vertical cursor.
- Password:** A text box.
- Buttons:** "Cancel" and "Submit".

Figure 3 - Secure login user form.

An additional feature of the spreadsheet is that the user can input the enrollment date of the client and the renewal date is automatically calculated to be 1 year later. There are also visual indicators as to what the status is of the clients' insurance. If renewal is within 30 days, the user will be given indication that the client is coming up for renewal.

Issues Faced

The most difficult and time consuming aspect of this project was search through the html source code for all of the different providers. Every provider had a slightly different format and figuring out what to have the code search for was tricky at times. One particular website changed during the course of me writing the code. There were also issues with signing in to one secure sight, because the username and password objects in the html were essentially arrays with multiple items. I didn't even know that was possible. So, with the help of a generous professor I figured out what I was looking for and got past that issue. That same webpage used frames, which increased the complexity even further, but my professor came to the rescue again.

This project incorporates some element from almost everything covered in class this semester. User forms are utilized in various fashions. The Ribbon is customized to increase usability. The primary user that this program is intended for is not very well acquainted with Excel and I wanted to make sure I could hand it over and have it be fairly self-explanatory. If there were just a button on the page it could very easily get deleted and the user would have no idea how to get it back without calling me. With the buttons docked to the ribbon there is little chance that they will ever disappear. Another decision that had to be made was whether or not to show internet explorer. If it was not shown there needed to be some indication that the download was successful that is why the window shown in Figure 4 was created.

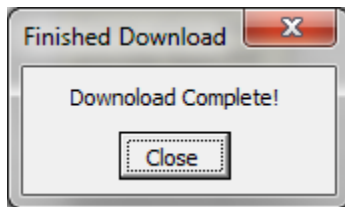


Figure 4 - Window indicating that download was successful.

In order for the files to be successfully downloaded a folder with the name of each provider needs to exist in the same directory as the workbook.