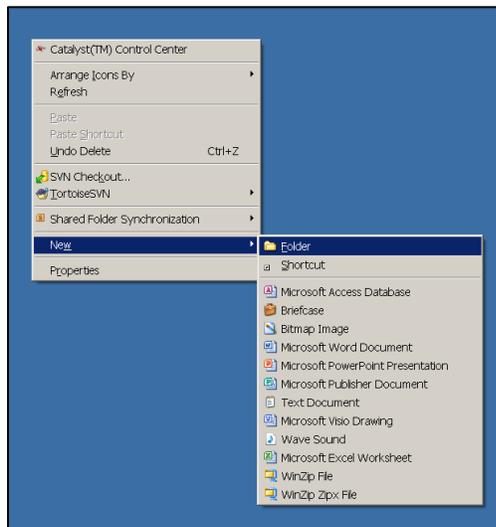


# Preparing to Use State Review Tools

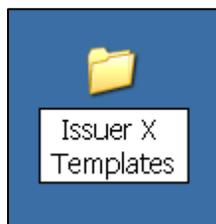
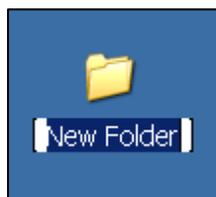
## Creating a New Folder

*Creating a new folder will provide an easy way to organize all of the template information from a specific issuer.*

1. Go to the location (either a folder or the desktop) where you want to create a new folder.
2. Right-click a blank area on the desktop or in the folder window, point to “New”, and then click “Folder.”



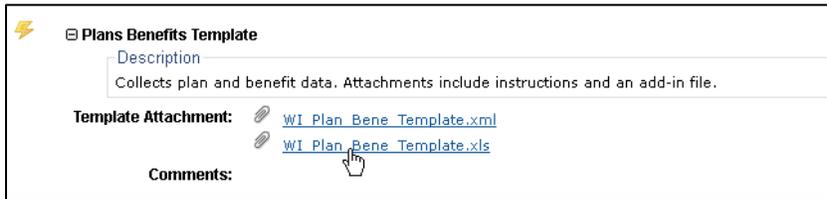
3. Type a name for the new folder and then press [Enter].



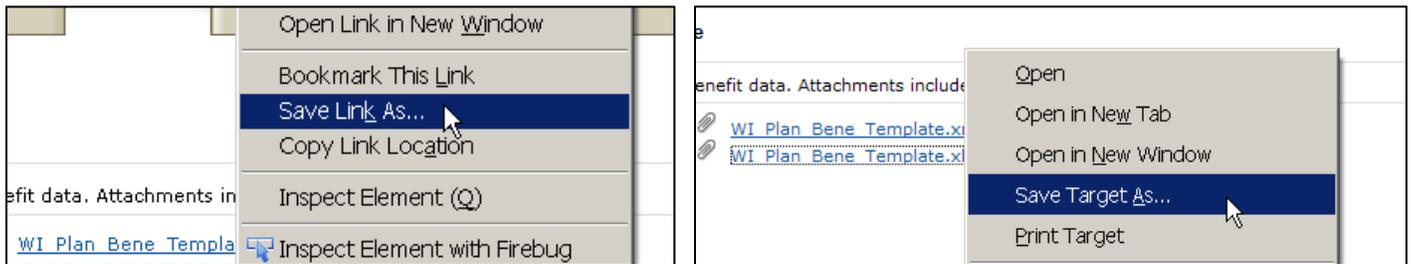
## Saving a File from SERFF

The .xls version of the template will need to be downloaded from SERFF and saved into a folder where the State Review Tools will also be saved in the next step.

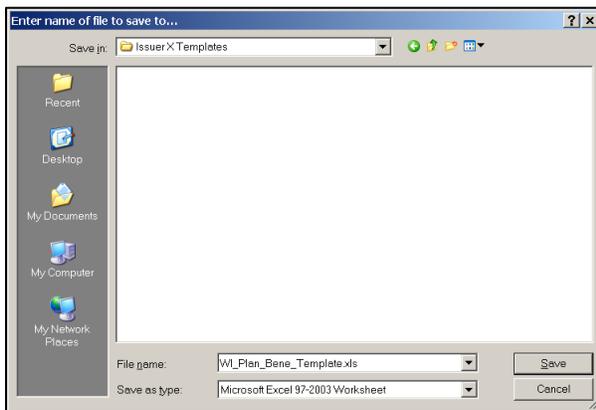
1. In SERFF, locate the file to be saved. For the purposes of downloading templates to be imported into the Review Tools, choose the .xls version of the template file, not the .xml version.



2. Right-click on the file and choose “Save Link As...” or “Save Target As...”



3. Navigate to the folder where the file should be saved.



4. Click “Save.”

## Downloading State Review Tools

The State Review Tools are accessible in SERFF Online Help and can be downloaded as needed.

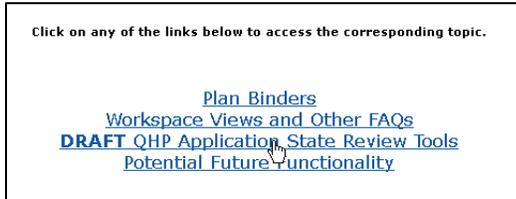
1. Navigate to Online Help in SERFF



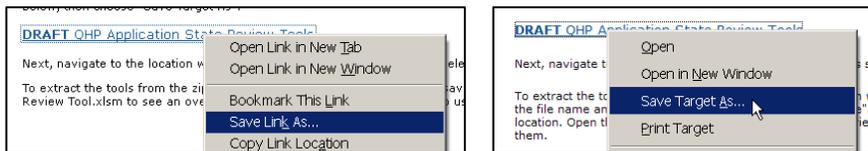
2. Choose “Plan Management”



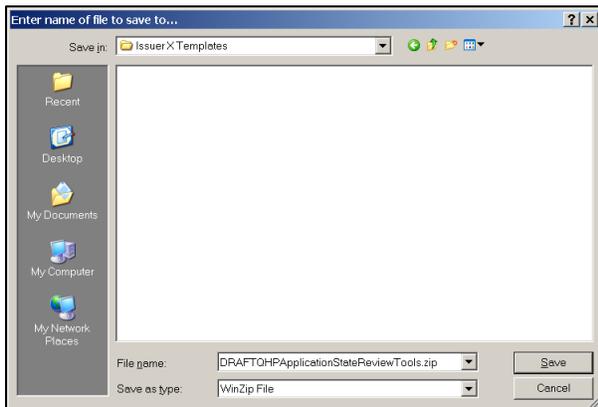
3. Click on the “DRAFT QHP Application State Review Tools”



4. Right-click on the link for DRAFT QHP Application State Review Tools and choose either “Save Link As...” or “Save Target As...”



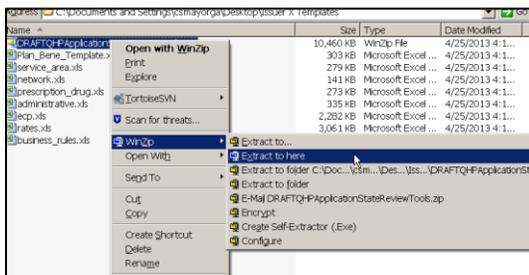
5. Locate the folder where the issuer’s templates are saved and click “Save.”



## Unzipping State Review Tools

The tools are zipped in SERFF to allow for a faster download. They will need to be unzipped to use in your review.

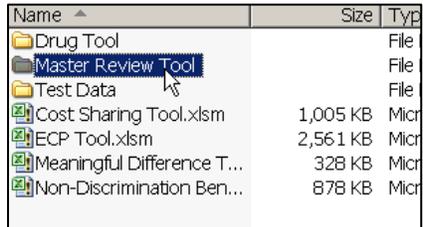
1. Navigate to the location where the .zip file is saved.
2. Right-click on the .zip file of the State Review Tools and choose “WinZip”, then “Extract to here”



3. Open the “Draft QHP Application State Review Tools” folder which should have appeared after unzipping in the prior step.



4. Open the “Master Review Tool” folder.



5. Open the “Master Review Tool” .xlsm file.



6. The Overview and Instructions tabs of this .xlsm file will provide further instructions for using the State Review Tools.