

Uploading Contacts

From Carrier Report Opt 1 (Anthem – Senior)

Step 1: Obtain report from carrier. See example of client data report below. [from Anthem, depicting senior health policies.]

Important Disclaimers:

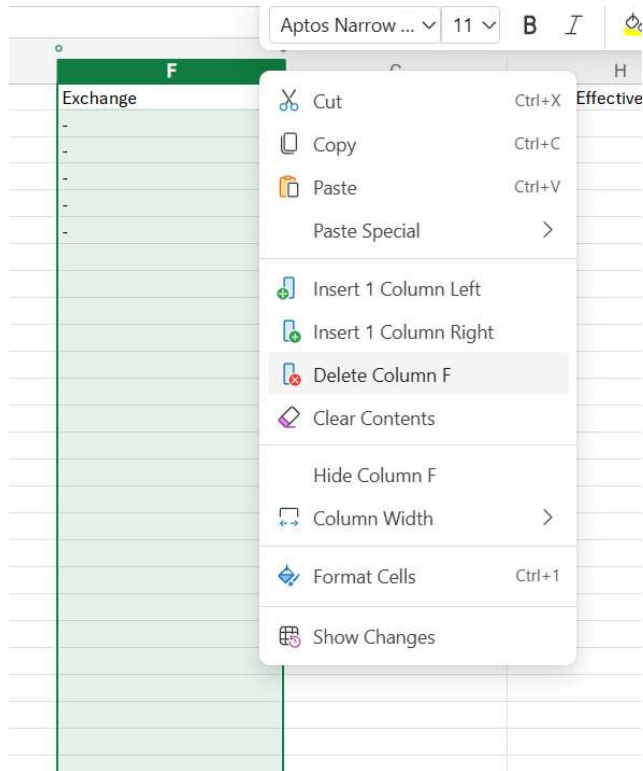
- Unless you specifically request certain information be included in your client report, your spreadsheet may be missing important information. For example, Anthem did not include Medicare ID numbers.
- Best practice to have client emails on your spreadsheet when uploading data into Compass.
- Unique Identifiers = unique information that aids Compass in identifying contacts/clients. Such as, MBI, SSN, email, phone number, etc.

[illegible]

Step 2: Remove Blank Columns [Optional]

Right click on the column header and select 'Delete Column.'

See *Excel Pro Tips* section for more information.



Step 3: Map Out Your Upload [Essential]

To ensure a successful upload, create a plan of how you'll match up the excel columns with the correct fields in Compass.
(Fields are where the values will live in Compass. Similar to a cell in excel. Recap - Field: Compass Cell: Excel.)

Part A: Review excel document. Turn your attention to the column headers on the excel document. This is the information you're uploading into Compass.

A1	Client Name											
	A	B	C	D	E	F	G	H	I	J	K	L
1	Client Name	Client ID	Market	Status	State	Effective Date	Original Effective Date	Cancellation Date	Product	Plan Name	New Busir	Bill Status
2	Watts, Brian	9R80PC9DK62	Senior	Active	IN	1/1/2025	5/1/2022	12/31/2025	Medical	Anthem MediBlue Plus	N	Paid
3	Douglas, Oconnor	6JU6YV5JH57	Senior	Active	IN	1/2/2025	1/1/2023	12/31/2025	Medical	Anthem MediBlue Plus	N	Paid
4	Gonzales, Jennifer	2U95EF5KC12	Senior	Active	IN	1/3/2025	8/1/2023	12/31/2025	Medical	Anthem MediBlue Plus	N	Paid
5	Fletcher, Mark	7YY7DN6TK15	Senior	Active	IN	1/4/2025	1/1/2024	12/31/2025	Pharmacy	Blue MedicareRx Plus (I	N	Paid
6	Turner, Travis	9VM8XP7PX16	Senior	Inactive	IN	1/1/2024	1/1/2023	12/31/2024	Medical	Anthem MediBlue Plus	N	Paid
7												

Part B: Review Compass Fields. See ‘Chart 1’ below or download the PDF version ‘Contact Upload Field Guide.’

Part C: Compare the information you're uploading to the available Compass fields.

Unless you specifically requested certain information be included in your carrier report, you may be missing important information.

Do you have emails attached to client records?

IF YOU DON'T HAVE ENOUGH INFORMATION, IT'S BEST YOU OBTAIN THAT PRIOR TO UPLOADING CONTACTS.

Step 5 (Essential): Format Excel Spreadsheet

Part A: Excel Formatting – Commas

Values (pieces of data) must be separated by commas (,) ONLY.

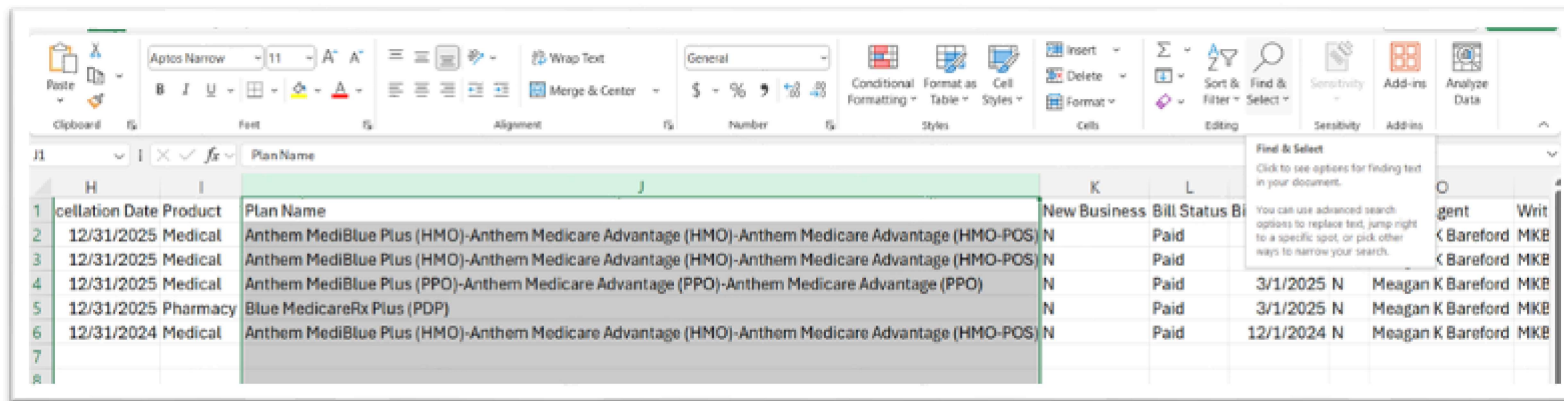
WHY? Compass requires your excel document to be uploaded in the .CSV format. CSV stands for Comma Separated Values. Meaning your values (pieces of data) must be formatted using commas (,) ONLY.

Let's look at an example!

Notice: The Plan Names (values) are separated by dashes (-) instead of commas (,). Continue reading to learn how to replace those dashes with commas all at once.

	✓	Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	
		J	
		Plan Name	N
		Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	N
		Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	N
		Anthem MediBlue Plus (PPO)-Anthem Medicare Advantage (PPO)-Anthem Medicare Advantage (PPO)	N
y		Blue MedicareRx Plus (PDP)	N
		Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	N

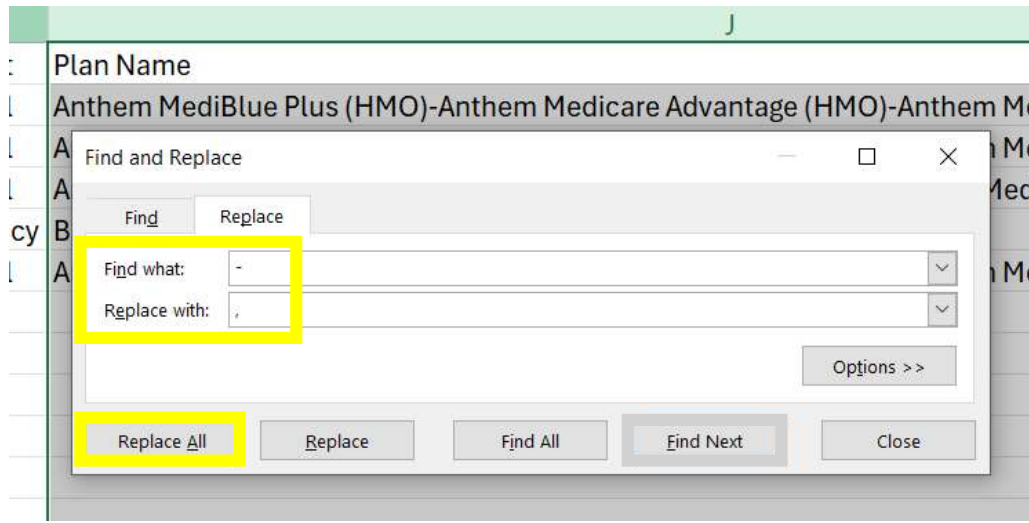
Click on the column header



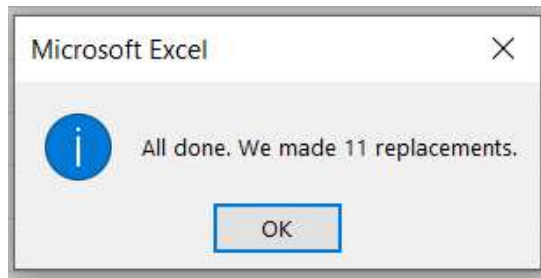
H	I	J	K	L	M	N	O
cellation Date Product	Plan Name		New Business	Bill Status			
12/31/2025 Medical	Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	N	Paid				
12/31/2025 Medical	Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	N	Paid				
12/31/2025 Medical	Anthem MediBlue Plus (PPO)-Anthem Medicare Advantage (PPO)-Anthem Medicare Advantage (PPO)	N	Paid	3/1/2025	N	Meagan K Bareford	MKB
12/31/2025 Pharmacy	Blue MedicareRx Plus (PDP)	N	Paid	3/1/2025	N	Meagan K Bareford	MKB
12/31/2024 Medical	Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	N	Paid	12/1/2024	N	Meagan K Bareford	MKB

***On Your Keyboard Press: CTRL+H**

You'll be brought to the Find & Replace menu where we will tell excel to *find* the dashes (-) and *replace* them with commas (,).



Click: Replace All



Progress Check!

Before	After
Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS) Plan Name Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS) Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS) Anthem MediBlue Plus (PPO)-Anthem Medicare Advantage (PPO)-Anthem Medicare Advantage (PPO) Blue MedicareRx Plus (PDP) Anthem MediBlue Plus (HMO)-Anthem Medicare Advantage (HMO)-Anthem Medicare Advantage (HMO-POS)	Anthem MediBlue Plus (HMO),Anthem Medicare Advantage (HMO),Anthem Medicare Advantage (HMO,POS) Plan Name Anthem MediBlue Plus (HMO),Anthem Medicare Advantage (HMO),Anthem Medicare Advantage (HMO,POS) Anthem MediBlue Plus (HMO),Anthem Medicare Advantage (HMO),Anthem Medicare Advantage (HMO,POS) Anthem MediBlue Plus (PPO),Anthem Medicare Advantage (PPO),Anthem Medicare Advantage (PPO) Blue MedicareRx Plus (PDP) Anthem MediBlue Plus (HMO),Anthem Medicare Advantage (HMO),Anthem Medicare Advantage (HMO,POS)

Great Job! Keep Going!

PAUSE!!! At this stage, you have two options of how to move forward:

- **Opt 1: [Recommend]: Rename Column Headers with Compass Field Name.** Replace column headers on the excel spreadsheet with the correct Compass field name.
- **Opt 2: Match Records in Compass.** Meaning Compass will provide a list of fields and you'll select which excel column coordinates with which fields in Compass.

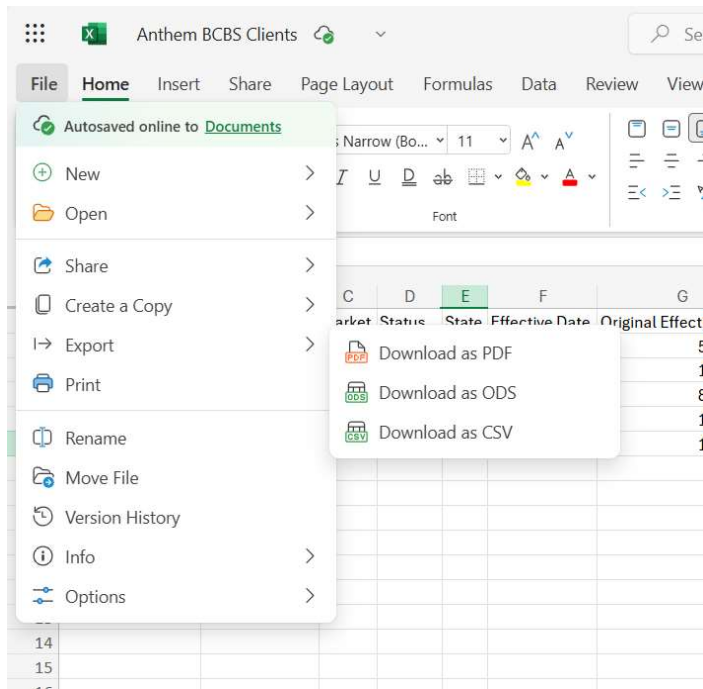
Part A: Excel Formatting – Values

Using the 'Find & Replace' function,

Step 6: Convert/Export/Save As excel.CSV & Upload!

Download Excel file in the .CSV format.

Opt1 If you're working from Outlook:



Uh Oh! Error Message!

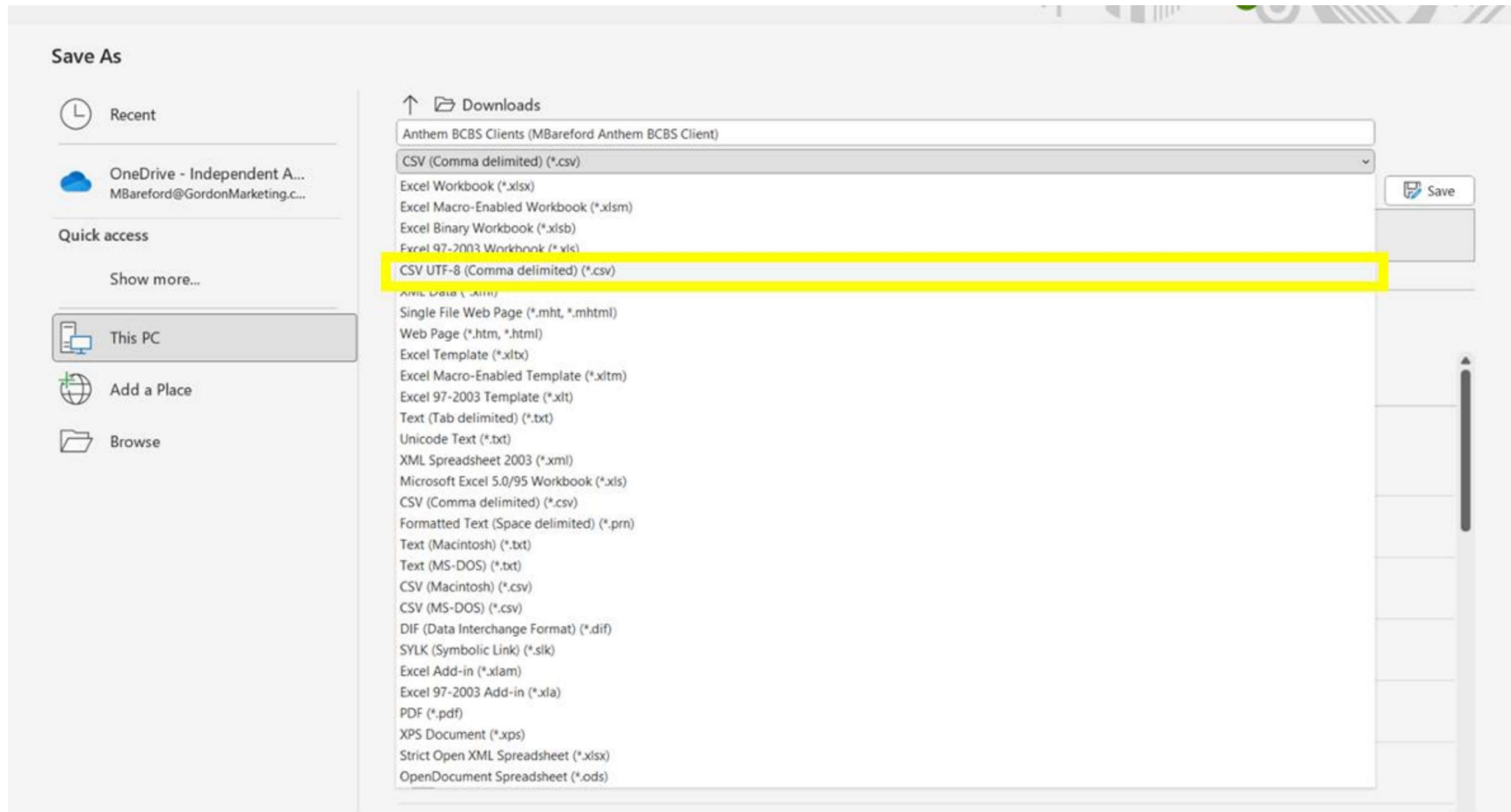
POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. Don't show again Save As...

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	
1	Client Name	Client ID	Market	Status	State	Effective Date	Original Effective Date	Cancellation Date	Product	Plan Name	New Business	Bill Status	Bill Due Date	ACA	Writing Agent	Writing TIN	Paid Agent	Paid TIN	Parent Age	Parent TIN				
2	Watts, Brian	9R80PC9D	Senior	Active	IN	1/1/2025	5/1/2022	#####	Medical	Anthem Medicare		Paid	3/1/2025	N	Meagan K f MKBLHJSM	Meagan K f MKBLHJSM	Benefit Plan	XMPLTNFBPA						
3	Douglas, C	6JU6YV5J	Senior	Active	IN	1/2/2025	1/1/2023	#####	Medical	Anthem Medicare		Paid	3/1/2025	N	Meagan K f MKBLHJSM	Meagan K f MKBLHJSM	Benefit Plan	XMPLTNFBPA						
4	Gonzales, 2	U95EF5K	Senior	Active	IN	1/3/2025	8/1/2023	#####	Medical	Anthem Medicare		Paid	3/1/2025	N	Meagan K f MKBLHJSM	Meagan K f MKBLHJSM	Benefit Plan	XMPLTNFBPA						
5	Fletcher, B	7YY7DN6T	Senior	Active	IN	1/4/2025	1/1/2024	#####	Pharmacy	Blue Medicare		Paid	3/1/2025	N	Meagan K f MKBLHJSM	Meagan K f MKBLHJSM	Benefit Plan	XMPLTNFBPA						
6	Turner, Tra	9VM8XP7F	Senior	Inactive	IN	1/1/2024	1/1/2023	#####	Medical	Anthem Medicare		Paid	#####	N	Meagan K f MKBLHJSM	Meagan K f MKBLHJSM	Benefit Plan	XMPLTNFBPA						
7																								
8																								
9																								

Click: File → Save As

Navigate to the File Type field which should be entitled 'CSV (Comma delimited) (*.csv)'

To change the file type ***Select: 'CSV UTF-8 (Comma delimited) (*.csv)' *Save to Desktop***



Step 7: Upload to Compass.

1. Navigate to your Contacts page in Compass.
2. Select the down arrow next to

Kizen

Home Contacts Broadcasts Automations Dashboard Custom Objects Policies Carriers Platform

Resources Recent

View

All Contacts

1 Contact

PERFORM ACTION NEW CONTACT

QUICK FILTERS County* State Enrollments: Carrier Drugs Contains: Policies: Product Detail Policies: Carrier Policies: Stage Tags

New Contact Upload Contacts

☐	Full Name	Lead Source	Lead Date	Lead Agent	Email	Client
☐	Brian Watts	—	—	—	christina59@gmail.com	—

< Page 1 of 1 >

50 Per Page

a.

Opt 2 Match Records in Compass.

Upload Contacts

City (city)	Don't Upload	Select CSV Field First
County* (county)	Don't Upload	Select CSV Field First
State* (state)	Don't Upload	Select CSV Field First
Zipcode* (zipcode)	Status	Select CSV Field First
Fips* (fips)	State	Select CSV Field First
Primary Agent (primary_agent)	Effective Date	Select CSV Field First
Personal Notes (personal_notes)	Original Effective Date	Select CSV Field First
Client Status (client_status)	Cancellation Date	Select CSV Field First
Monthly Newsletter Opt-In (monthly_newsletter_op...	Product	Select CSV Field First
	Plan Name	Select CSV Field First
	New Business	Select CSV Field First
	Bill Status	Select CSV Field First
	Bill Due Date	Select CSV Field First

CANCEL UPLOAD