BlueCross BlueShield of Texas

SMART CENSUS IMPORT TOOL • SCIT

Blue Balance Funded (BBF) Reference Guide

Version 1

Blue Cross and Blue Shield of Illinois, a Division of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

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NOTE: *The Smart Census Import Tool (SCIT) is identical for all five divisions. This reference guide uses representative screenshots from Small Group Illinois and Mid Market Montana and will call out differences for each state, if applicable*.

Before You Start

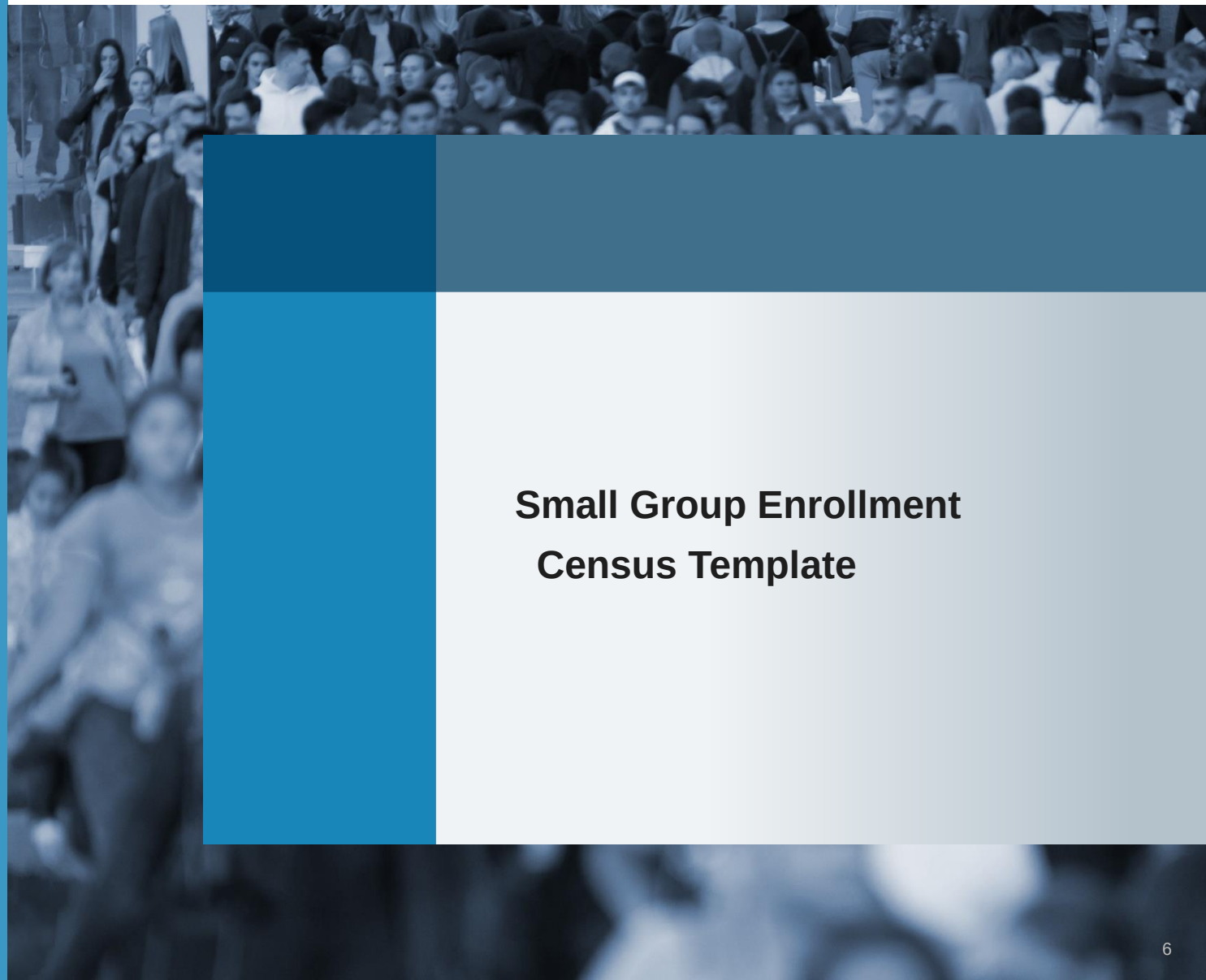
Compatibility	• Version 1 is compatible with Excel 2013 and newer versions.
Enable Macros	• Enable Macros feature using instructions provided in Technical References.
Using SCIT	• **NOTE:** *Save Smart Census Import Template (SCIT) on your local drive before using. If working from a network drive, SCIT performance may be slower.* • Keep **only one SCIT file open** at a time. If multiple windows are open, SCIT will not behave as expected.
Copy/Paste	• **Paste copied data as VALUES** to avoid overwriting Excel formatting via Paste Special.
Find & Replace	• **This functionality is not available in Tool**. If you need to use this functionality, update source document and paste copied data as **VALUES** into Tool to avoid overwriting Excel formatting via Paste Special.

Version 1 Release Notes

Enrollment *Small Group / Middle Market*	• Ancillary products removed. • When validating data, spouse and dependent addresses are not removed.
Enrollment *Small Group*	• Applicable for all states.
Enrollment *Middle Market*	• **Applicable for Montana and New Mexico only**..
Enhancement	• Removed **Save As** functionality. User no longer has to save file with a Group name and assign a location.

Steps for Entering a Group Census

1. Open **Smart Census Import Tool (SCIT)** and save under the group's name.
2. Complete **Census Tool Setup Form**.
3. Enter data in the **Census Template** tab.
4. If the Census is provided on a separate spreadsheet, click **Map** button on the **Setup Form** OR click the **Green button** to enter data. Click **AutoFill** button to systematically default a value for select columns, as applicable.
5. Click **File > Save** to validate data.
6. An **Error List** will be generated.
7. Upon successful validation, SCIT is ready to be **uploaded** in the Group Sales tool or an extract can be generated for automation.
8. Enter Census for the next group.



Small Group Enrollment Census Template

Open SCIT and Save Under Group Name

A. From Excel menu, select **File > Open** and navigate to the folder where SCIT is saved, select SCIT and click **Open**.

B. On **File > Open**, click **Enable Content** button. Skip this step if macros are enabled through **File > Options** menu. Please see “Enable Macros” in Technical References for instructions.

C. In the pop-up box, type in the **Group Name** and click **OK**. Do not include spaces or any special characters.

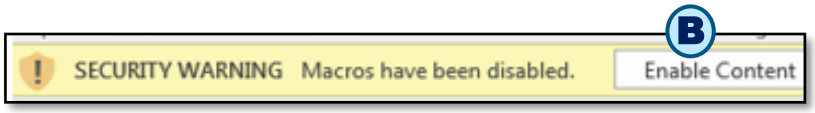
D. Select a **Folder** to save the Group’s Census, and click **OK**.

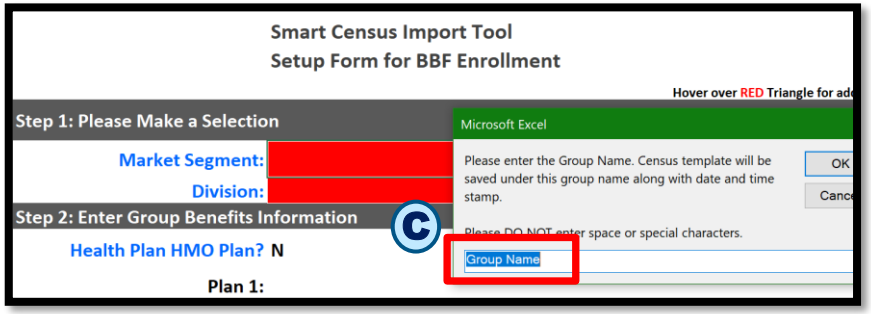
E. The file is saved under the group’s name along with the date and time stamp.

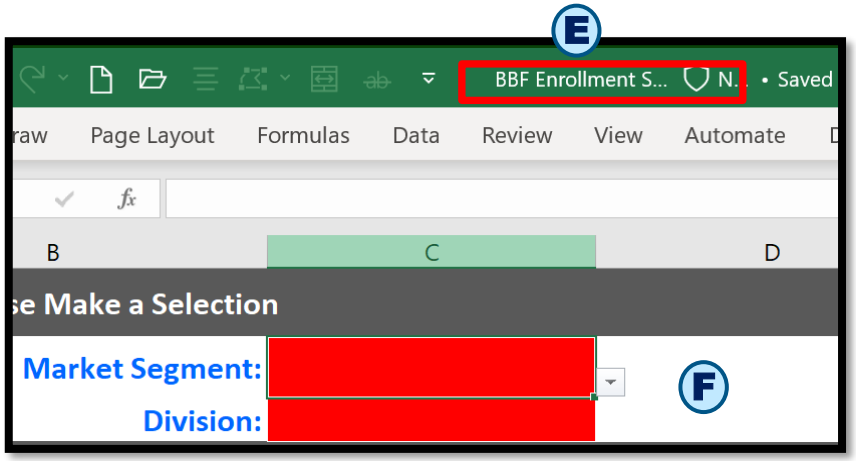
- Original SCIT file stays intact and is not overwritten.

F. **Setup Form** will display.

- Select **Market Segment**: **SMALL GROUP** OR **MID MARKET**
- Select a **Division** from dropdown list.







Complete Setup Form

Setup Form values are used to:

- Display/hide Census columns in the **Import Census Template** tab.
- Display dropdown values for some columns based on **Division**.

Complete the required fields highlighted in red.

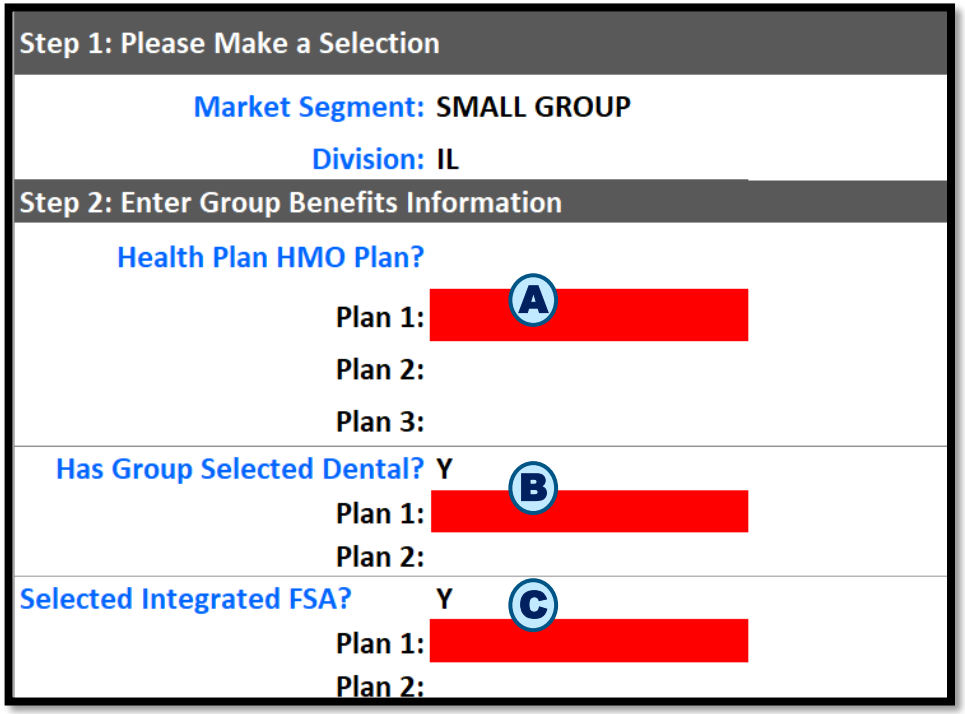
A. Health Plan HMO Plan? Select Y or N and add Plan(s).

B. Has Group Selected Dental? If Y, add Plan(s).

NOTE on Plans:

- When Plan codes are changed in **Setup Form**, the old codes will be highlighted in yellow in the **Import Census Template** tab.
- SCIT only validates the Plan codes entered. It does not check against the **Small Group & Middle Market Enrollment Tool** to validate that an eligible Plan code has been entered.
- When Plan codes are changed in the **Setup Form**, the old codes will be highlighted in yellow in the **Import Census Template** tab.

C. Selected Integrated FSA? If Y, add Plan(s).



Complete Setup *Form (con't)*

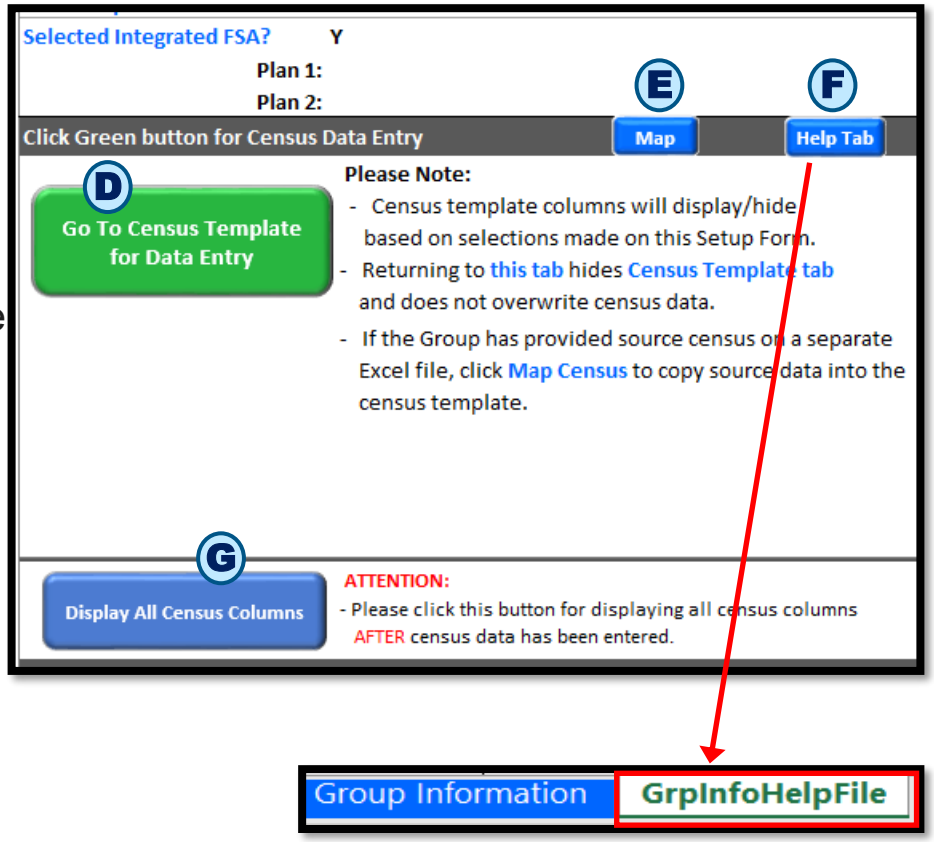
D. Click the **Green button** to navigate to the **Import Census Template** for manual data entry.

E. Click **Map** button if you received the Census from the group on a separate spreadsheet (Source).

This feature will enable you to copy and map the Source columns to the Template columns. After columns are mapped, data will be copied over to the **Import Census Template** systematically per the mapping.

F. Click the **Help Tab** button to navigate to the **GrpInfoHelpFile** tab. This tab has detailed specifications for all the entries on the **Group Information** tab.

G. Click **Blue button** to display all Census columns on the **Import Census Template**.



Mapping Enrollment Census

A. Click **Map** button if you have Census on a separate spreadsheet from the group.

B. **Source Census From The Group** tab displays along with an **Instructions** box.

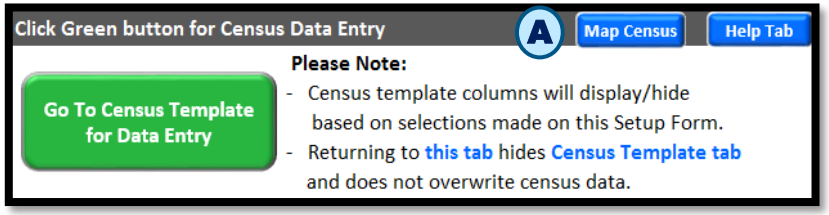
C. Copy and paste Census information from the **Source** spreadsheet to this worksheet.

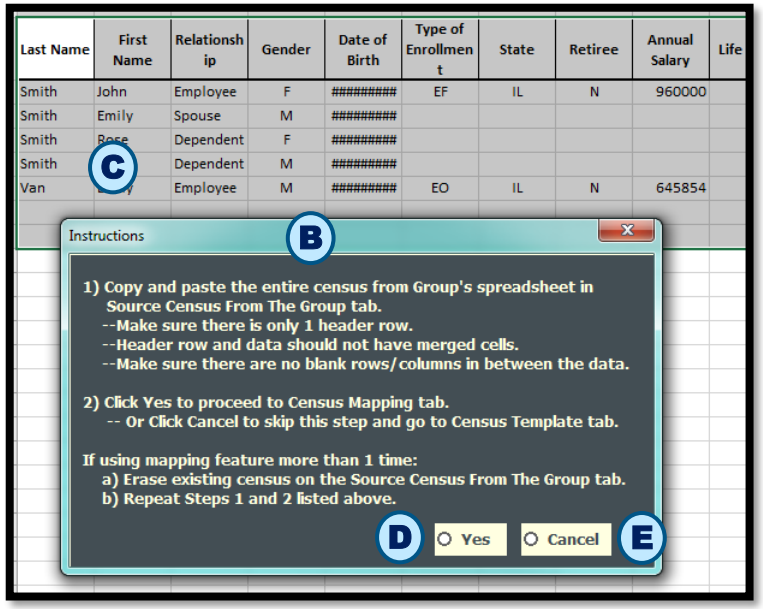
NOTE: *Paste copied data as VALUES to avoid overwriting Excel formatting via Paste Special.*

- There should only be one header row.
- Header row and data should not have merged cells.
- Make sure there are no blank rows OR columns in between the data.

D. Click **Yes** to proceed to the **Census Mapping** tab after pasting the **Source** Census.

E. Click **Cancel** to skip **Map Census** feature and go to the Census Template.

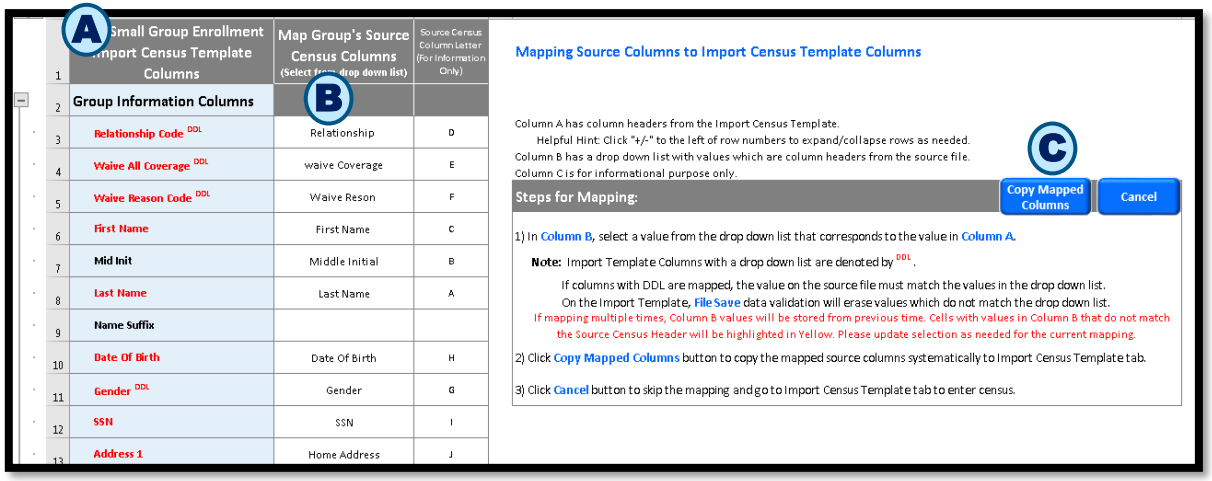




NOTE: *If using mapping feature more than once:*

- *Delete the existing Census on the **Source Census From The Group** worksheet (tab).*
- *Repeat steps C and D listed above.*

Mapping Enrollment Census



A. Census Mapping tab displays.

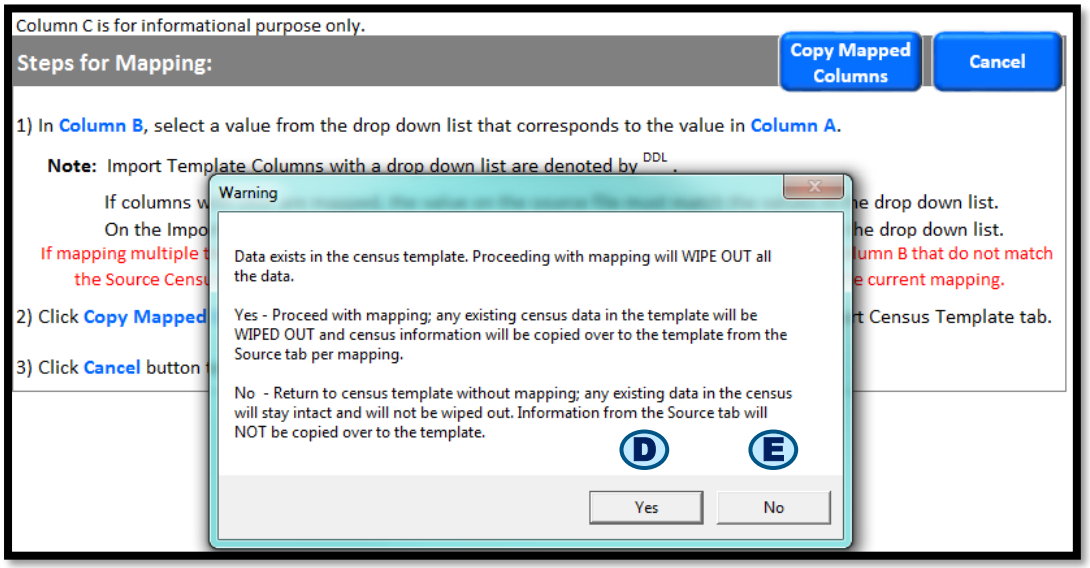
- **Column A** displays column headers from the **ACA Small Group / Mid Market Enrollment Import Census Template** Columns.
- **Column B** has a dropdown list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the right.

B. In **Column B**, select a value from the dropdown list that corresponds to the value in **Column A**.

C. Click the **Copy Mapped Columns** button to copy the mapped source columns systematically to the **Import Census Template** tab.

- Click the **Cancel** button to skip the mapping and go to **Import Census Template** tab to enter Census.

Mapping Enrollment Census



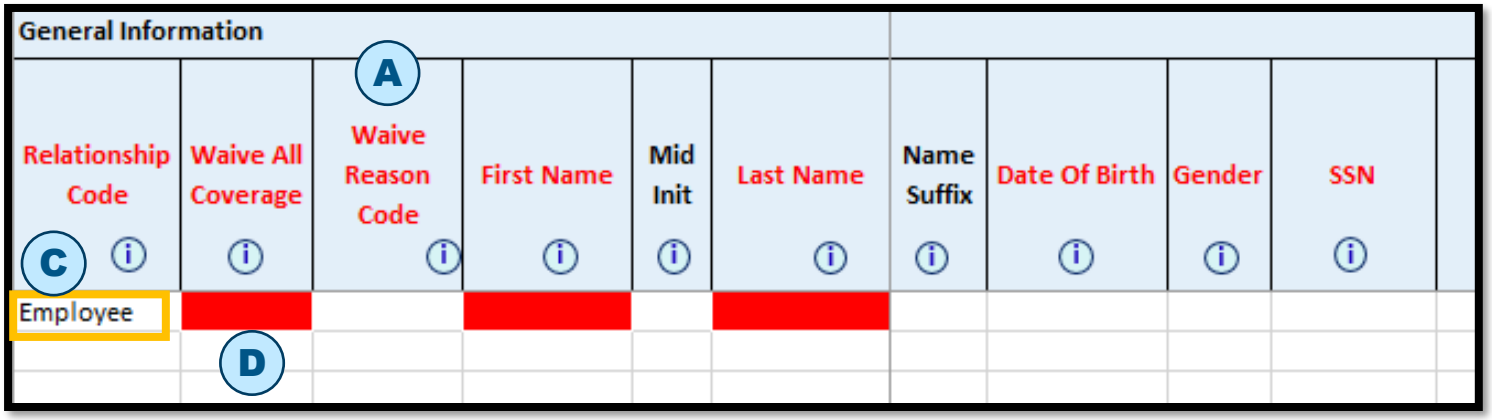
D. Click **Yes** to proceed with mapping. If data exists on the Census Template, a **Warning** message displays.

NOTE: *Any existing Census data in the Import Census Template will be WIPED OUT and the Census information will be copied over to the Template from the Source tab per mapping.*

- Mapped data is systematically copied over to the **Import Census Template**.
- Complete Census entry as needed.

E. Click **No** to return to the **Import Census Template** without mapping. Existing data will not be overwritten and will remain unchanged.

Enter Census Data



Clicking the **Green button** on the **Setup Form** navigates to the **Import Census Template** tab.

A. Column **headers** are **Read Only**. Columns cannot be deleted or moved.

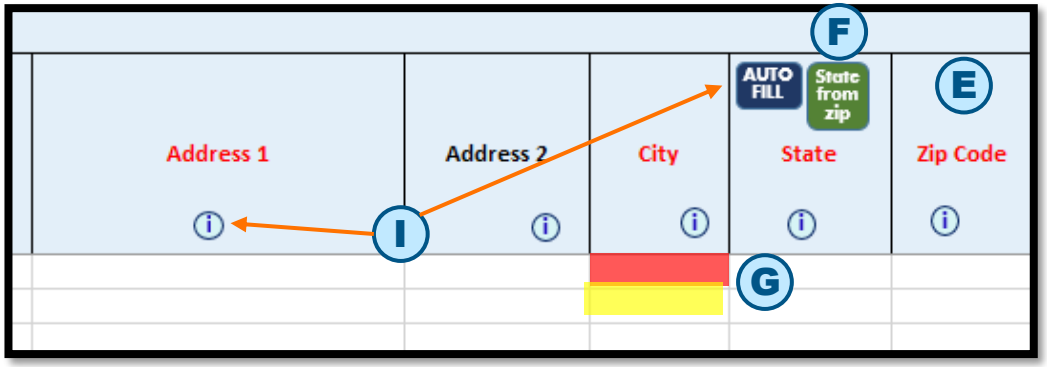
B. Columns display/hide, and some dropdown list values, are determined by **Setup Form** values. See “Table 1” in Technical References for details.

C. Row #3 **Relationship Code** value is defaulted to **Employee**.
Do not change this value.

D. **Starting from Row #3**, rows can be Inserted or Deleted as needed.

Enter Census Data

E. **Zip code** is required for all **Employees**. If source file has **extended Zip Codes**, paste in SCIT "as is". These values will be highlighted in yellow and on **File > Save** validation, only the first 5 numbers of the **Zip Code** will be saved.



F. After entering in **Zip Code**, click the **State from Zip** button in State cell to populate the **State** for all members. State will fill in if there is no State code already.

G. The entire cell is highlighted in red for required columns. The entire cell is highlighted in yellow when there is a data mismatch. For **DOB** column over-age dependents (26 & over), the cells are highlighted in purple and 65 & over entries are highlighted in green for information purposes.

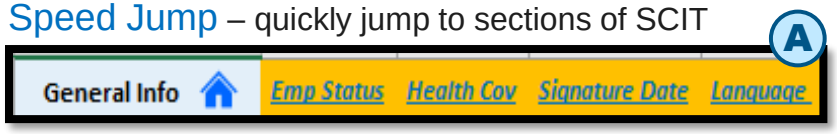
H. When you type in a value and click **Enter**:

1) If the value is invalid, an error message displays with **Retry**, **Cancel** and **Help** buttons.
2) **Retry** returns you to the typed-in value for editing and **Cancel** wipes out the typed-in value and returns you to the cell.

I. **Help** icons and **AutoFill** buttons are available in the column headers.

Enter Census Data - Speed Jumps and Medicare

A. Speed Jump – quickly jump to sections of SCIT



B. Zip, State and Marital Status - allowed for Spouse and Dependents.

Relationship Code	Waive All Coverage	Waive Reason Code	First Name	Mid Init	Last Name	AUTO FILL State from zip / State	Zip Code	Home/Cell Phone	Business Phone	Email Address	B Marital Status
											Married
Employee	N		John		Doe	IL	60515				
Spouse			Jane		Doe	IL	60515				
Disabled Dependent			Peter		Doe	IL	60515				

C. Medicare Eligible – when Medicare Eligible is selected the Medicare HIC Number, Medicare Reason and Medicare Primary or Secondary are mandatory.

Relationship Code	Waive All Coverage	Waive Reason Code	First Name	Mid Init	Last Name	Medicare Eligible	Medicare HIC Number	C Medicare Reason	Medicare Primary or Secondary	Plan A Start Date	Plan A End Date	Plan B Start Date	Plan B End Date
Employee	N		John		Doe	Y							
Spouse			Jane		Doe	Y							
Disabled Dependent			Peter		Doe	N							

Enter Census Data

- For **Employment Status** and **Medicare Eligible** columns, the cell value drives the display/hide behavior of the corresponding dependent data columns.
  - When you enter **COBRA** as the value in the **Employment Status** cell, additional **COBRA** columns will become available for completion. Similarly, entering **IL Cont** as the value will cause **IL Continuee** columns to display for completion.
  - A value of **Y** in the **Medicare Eligible** cell will cause **Medicare** columns to display. See "Table 2" in Technical References.
- Returning to the **Group Information** tab hides other tabs: **Import Census Template** tab**, Error List** tab and **Help File** tab.
  - To return to, and display the **Import Census Template** tab, click the **Green button**.
  - To return to, and display the **Error List** tab, click **Green button** and click **File > Save**.
  - To return to, and display the **Help File** tab, click the **Help File** tab.
- **SSN dashes**
  - If the source **SSN** value has dashes, paste into SCIT "as is". These values will be highlighted in yellow. On **File > Save** validation, dashes will be removed systematically.
- **Date values**
  - While typing dates include "/"
  - If the **date** format in the source file is formatted with a different date format than MM/DD/YYYY, you can still copy and paste it into SCIT "as is". The date will be reformatted systematically to MM/DD/YYYY when you click **File > Save**.
- **Text values**
  - If source values are longer than the expected length, they are truncated systematically when you click **File > Save**.
- Values can be copied and pasted as needed onto the Census columns.

  NOTE: *Paste copied data as VALUES to avoid overwriting Excel formatting via Paste Special.*
  - If copying data from an external source, please make sure that the source column format matches the format of the corresponding **Import Census Template** column.
  - If copy/pasting data from an external source causes cells to lock in SCIT, click **File > Save** to unlock the cells.

Data Validation

Once data entry is complete, click **File > Save** to validate the Census data. A **pop-up box** will display: **Is data entry completed for this Census?** with **Yes** and **No** buttons.

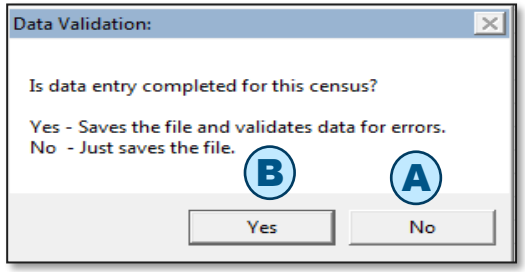
A. Click **No** if you want to save existing data and return to complete the Census entry later. **NOTE**: *Validation rules do not run.*

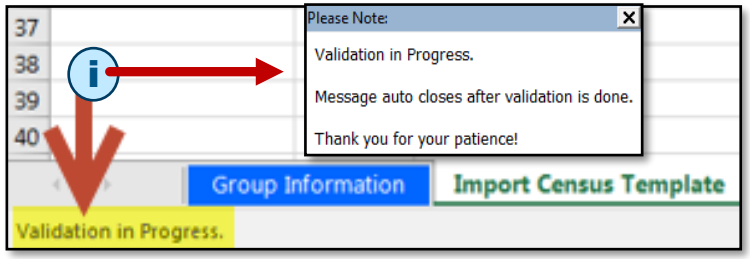
B. Click **Yes** if Census entries are complete. Existing data is saved. If values are blank in columns where the **AutoFill** feature is available, a default value will be entered systematically. Final validation rules will run.

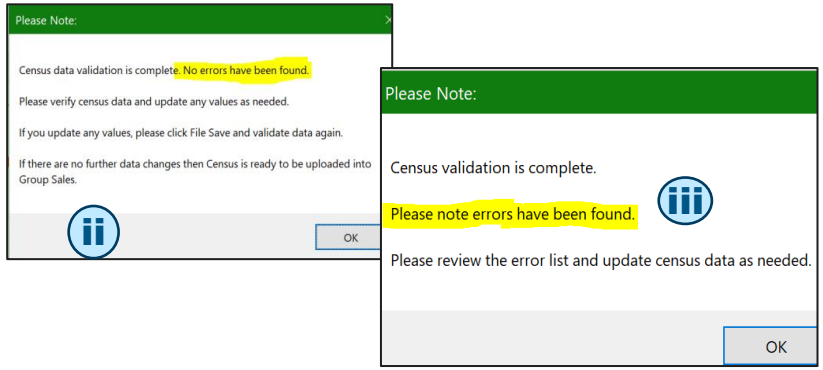
i. Validation In Progress indicators will display:
- Excel Status bar (bottom left corner)
- Validation in Progress pop-up box

ii. If no errors are found, confirmation box displays and completed Census can be processed per current business process.

iii. If there are any errors, a message box displays indicating that errors have been found. Click **OK**.







Data Validation Error List

A. To update the values, click the **Import Census Template** tab. Change the values as needed. You can toggle between the **Error List** and **Import Census Template** tabs.

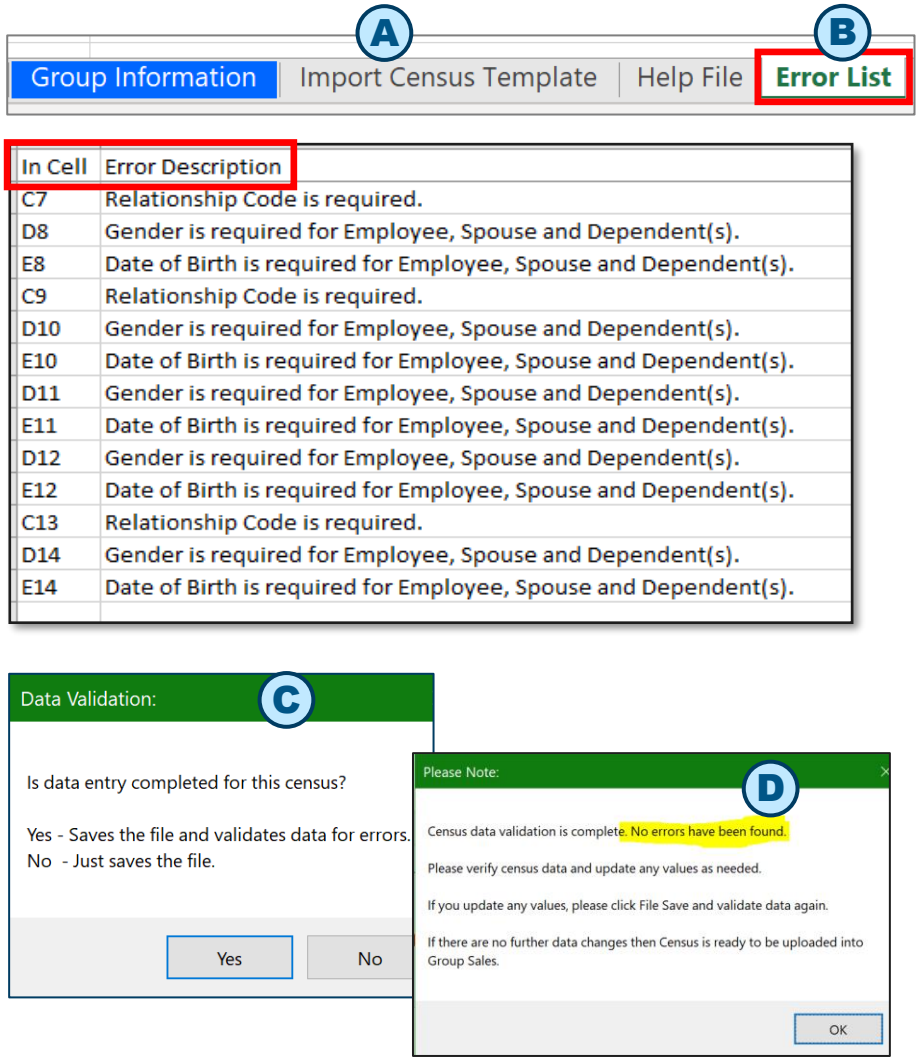
B. If there are data errors, the **Error List** tab will display:

- **In Cell** column – specifies the cell location of the error.
- **Error Description** column – specifies the column and the nature of the error.

Once you have corrected any errors, validate data again by clicking **File > Save**.

C. Select **Yes** in the **Is data entry completed for this census?** message box.

D. If no errors are found, a confirmation box displays and completed Census can be processed per current business process.



On Successful Validation, Upload SCIT into Small Group & Middle Market Enrollment Tool

The upload steps have not changed.

A. In the **Small Group & Middle Market Enrollment Tool**, navigate to the Group's **Member Census** page.

B. Click the **Import Census** button.

C. When the **Import Census** pops up, click **Browse**.

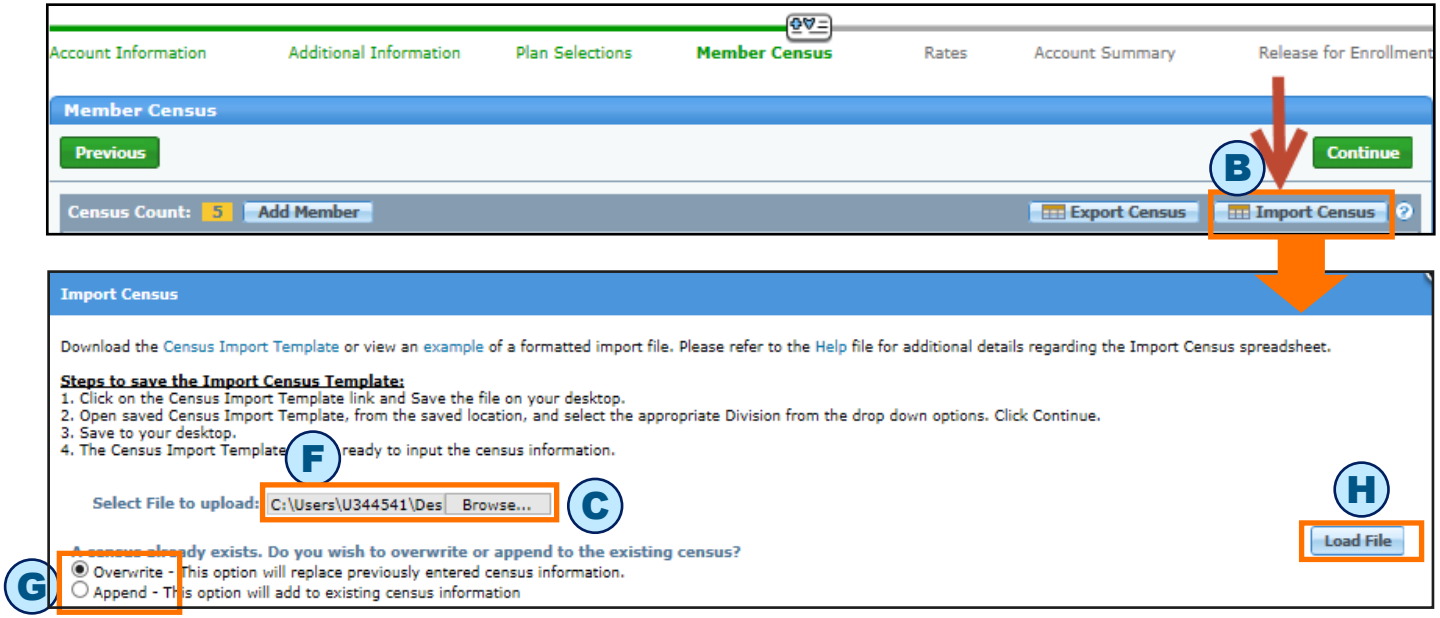
D. Navigate to the folder that has SCIT with the group's filename.

E. Select the file and click **Open**.

F. Filename displays in the **Select File to upload** box.

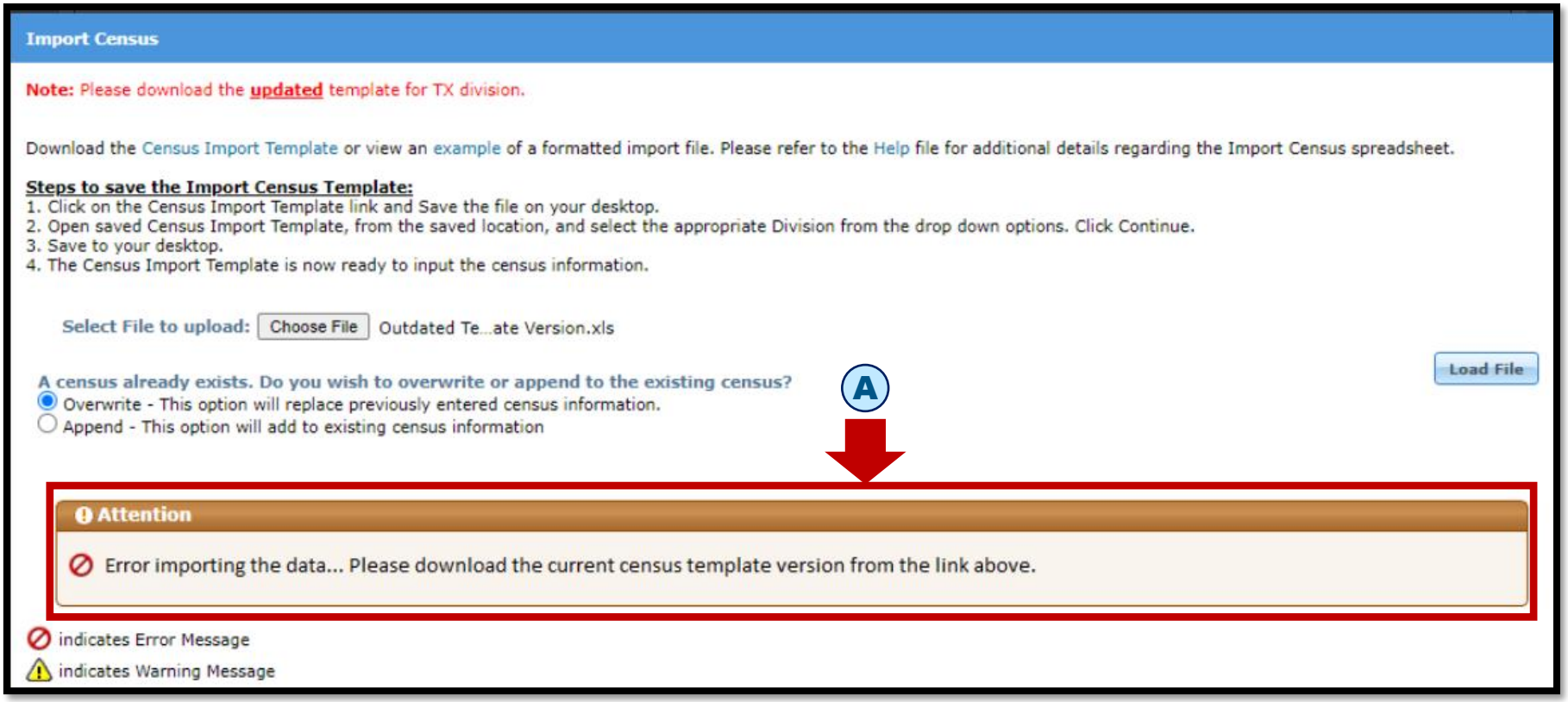
G. **Overwrite** existing Census information is selected by default. If needed, select **Append** radio button to add to existing Census information.

H. Click the **Load File** button.



In SCIT, once Census data is validated and no errors are found, the Census is ready to be uploaded into **Small Group & Middle Market Enrollment Tool.**

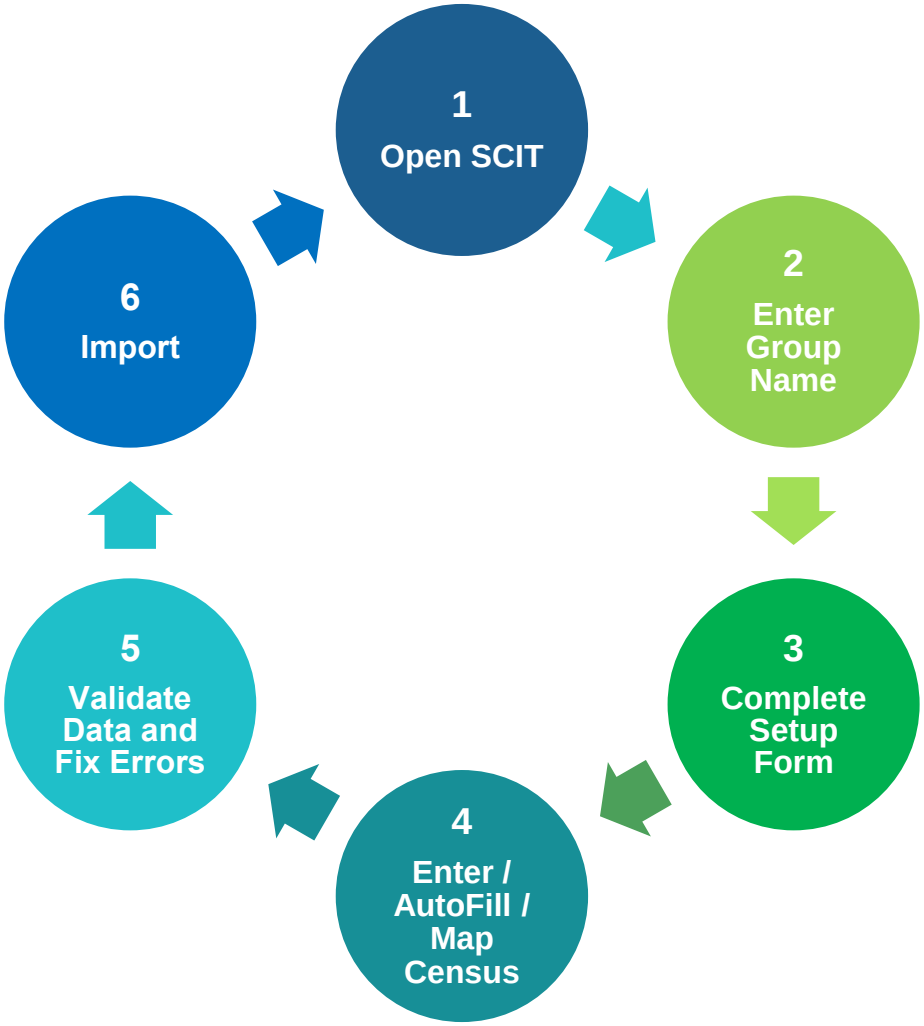
Latest Version Required….



The imported template is the minimum version (**one version minus the current version).** If user imports a template outside minimum version, the following error message will display:

A. *The imported census template version is out of date and is only valid until <MM/DD/YYYY>. Please download the current census template version from the link above.*

Enter Census for the Next Group



To enter Census for the next Group, **File Close** prior group's open SCIT file.

Repeat Steps 1 through 6.

Technical References

Enable Macros

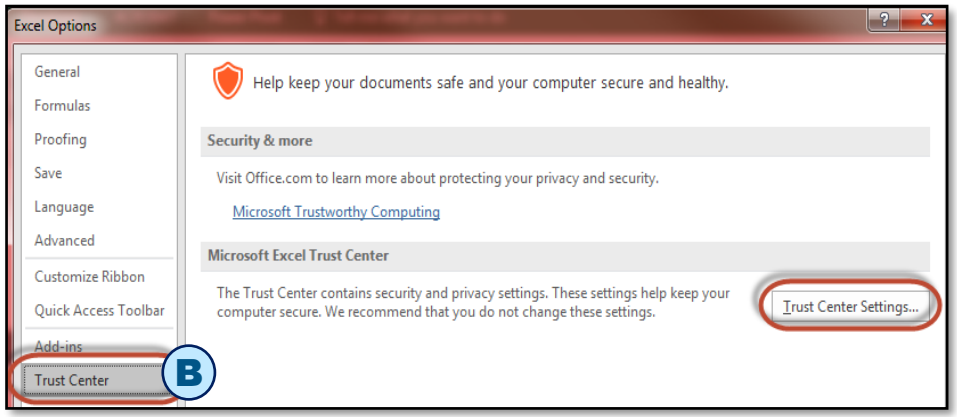
If **Enable Macros** is not enabled each time SCIT is opened, you will need to click the **Enable Content** button to use tool.

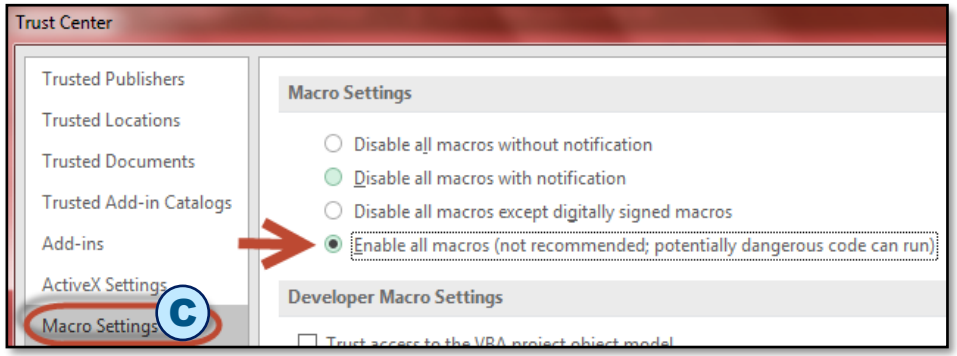
Once Macros have been enabled the first time, you will not need to click the **Enable Content** button each time SCIT is opened.

A. From Excel menu, select **File > Options**.

B. From Excel's **Options** box, select **Trust Center** and then click on **Trust Center Settings**.

C. From Trust Center box, select **Macro Settings**. Then, select the checkbox for **Enable all macros**.

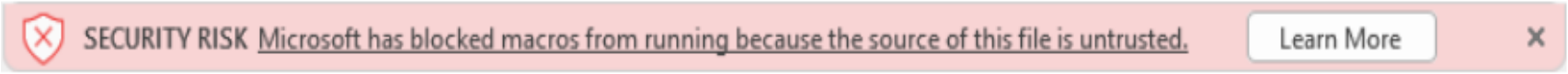




WARNING: Once this option is turned on, open files with macros ONLY from a trusted source.

Macros – Security Risk

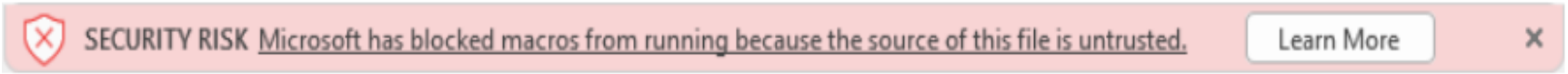
Throughout last 2023, Microsoft pushed out an updates to disable macros for security purposes. These updates disabled any macros contained in files downloaded from the internet or attached to emails. As a result, some users (depending on their Office version), need to remove the mark of the web due to the Security Risk below. If you see this message, follow the instructions on the next slide “Remove Mark of the Web”..



These instructions are to be followed after a new version of SCIT is downloaded. **Each time a new SCIT version is downloaded, the process will need to be repeated.**

NOTE: *BCBS has no control over this security update from Microsoft. Additional information on update can be found via link:* ***Macros from the internet will be blocked by default in Office*.**

Macros – Remove Mark of the Web (*Instructions*)



For an individual file, such as a file downloaded from an internet location or an email attachment the user has saved to their local device, the simplest way to lock macros is to remove Mark of the Web.

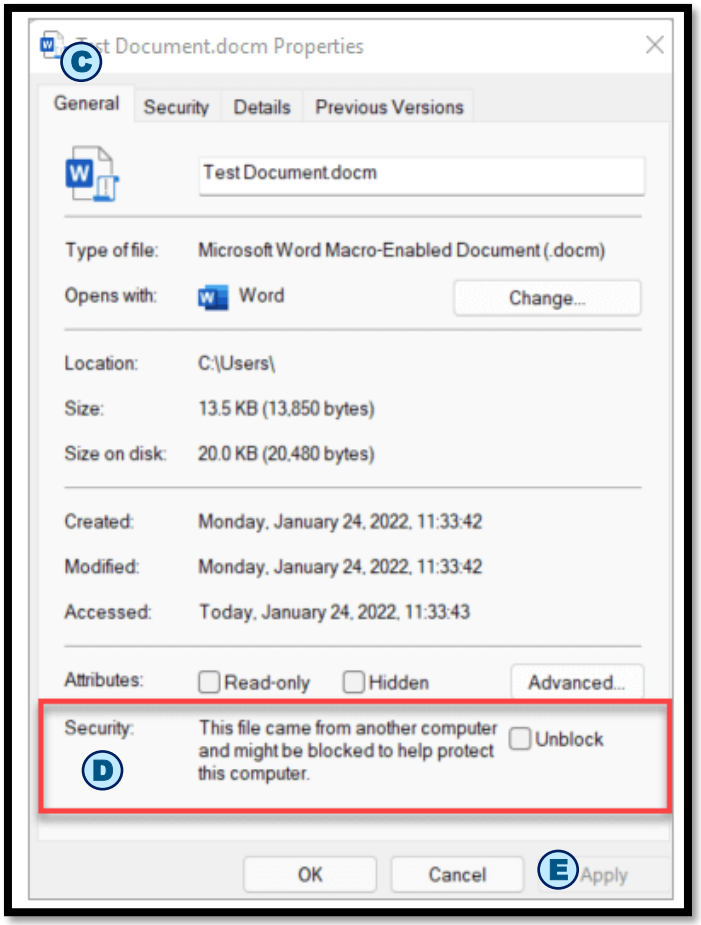
A. Save file to local device.

B. Right-click on the file and select **Properties** from dropdown menu.

C. Select the **General tab**.

D. Under the **Security** section, select the **Unblock** checkbox.

E. Click **Apply** button.



Freeze Panes, Filter and Sort Features

A. Freeze Panes as needed to make data entry easier.

- Click the first cell in the range you want to freeze.
- From Excel menu select **View**, then click **Freeze Panes**.
- Rows and columns before the **Freeze Pane** will be visible as you scroll through the rest of the columns and/or rows.
- To remove, select **View**, **Freeze Panes** and **Unfreeze Panes**.

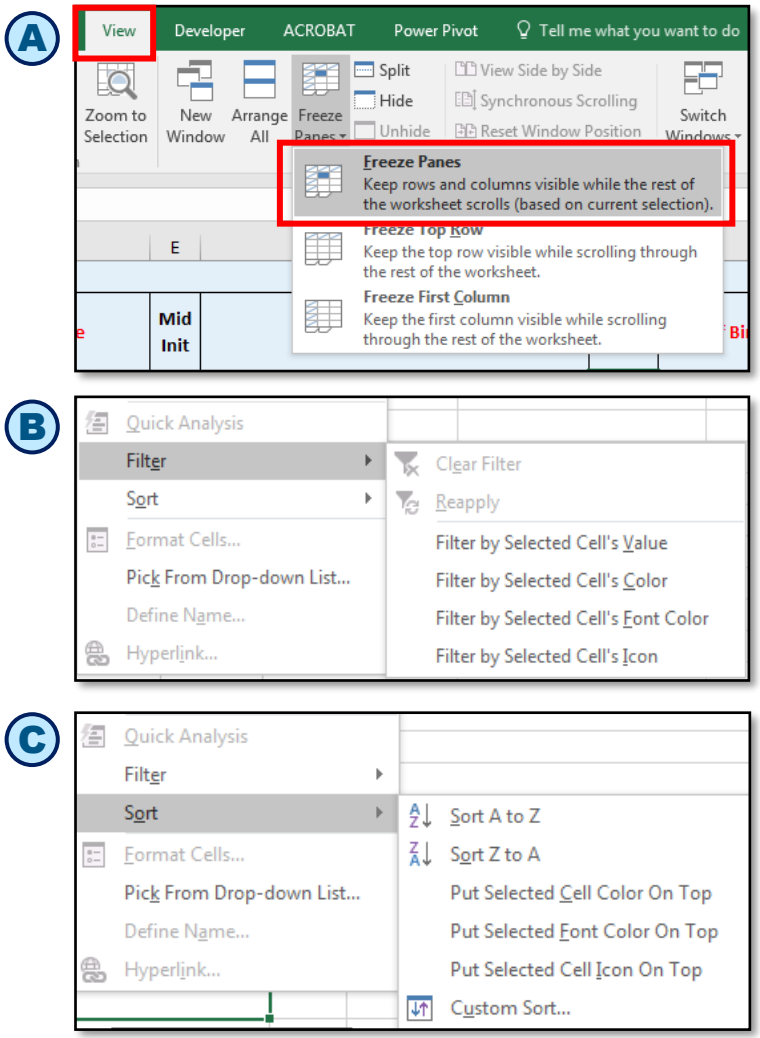
B. Filter Census data as needed.

- Click in the cell, then right-click, and select **Filter**.
- Select a **Filter** option as needed.
- Apply and clear the **Filters** as needed.

NOTE: *Even when the **Filters** are cleared the filter arrows will display. They will reset systematically and will not be displayed after you select **File > Save**.*

C. Sort Census data as needed.

- Click in the cell, then right click, and select Sort.
- Select Sort option as needed.
- Be sure to **highlight all the data rows**, columns A through BK.
- **WARNING: If column/row range is not selected correctly and Sort is applied, data will become jumbled.**
- Sort functionality is NOT available on the Error List tab.



AutoFill Feature

AutoFill feature is available for select columns where **AutoFill** button is displayed in the header.

A. Click **AutoFill**. Message box displays with information regarding the **AutoFill** for the column along with **Yes** and **No** buttons.

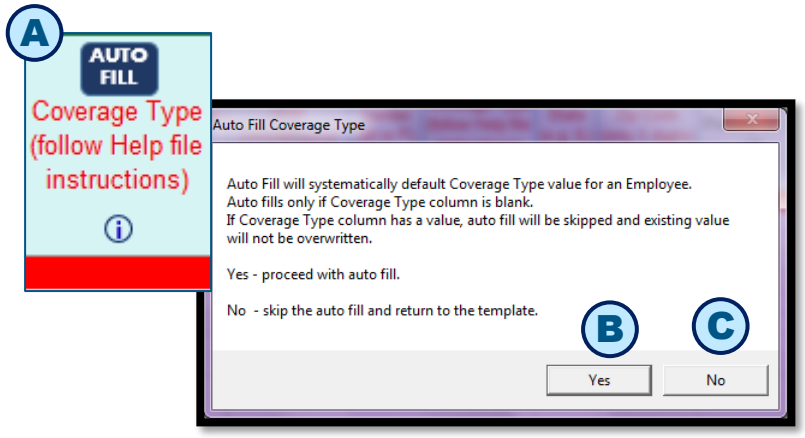
B. Click **Yes** to proceed with AutoFill.

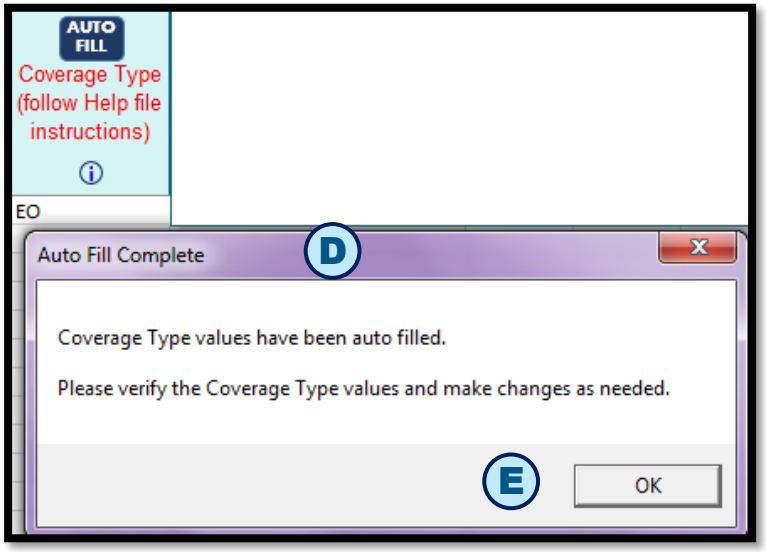
- If the values in the **AutoFill** column are blank, then a default value will be systematically populated.
- If there is an existing value in the **AutoFill** column then AutoFill will be skipped, and existing value will not be overwritten.

C. Click **No** to skip AutoFill and return to the Template.

D. Message box displays after AutoFill is complete.

E. Click **OK** to close confirmation message "*Please verify the auto-filled values and change these values as needed*."





NOTE: *Coverage Type AutoFill is used for illustration.*

AutoFill Select Columns Reference Table

Columns with AutoFill	Description	Available In
State	Fills in State when Zip Code is present	SG/MM
Employment Status	AutoFills value of A or Active for Employee	SG/MM
Health Coverage (Y/N)	AutoFills value of Y for Employee choosing coverage	SG/MM
Health Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG/MM
Selected Health Plan	AutoFills value of Plan 1 from Setup Form for Employee	SG/MM
Signature Date	AutoFills value of today's date for Employee	SG/MM
Dental Coverage (Y/N)	AutoFills value of Y for Employee choosing coverage	
Dental Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG/MM
Selected Dental Plan	AutoFills value of Plan 1 from Setup Form for Employee	SG/MM
Signature Date	AutoFills today's date for Employee	SG/MM
Billing Category and Product Category	AutoFills typed in value for Enrolling Employees	MM

Reference Tables:
Small Group and Middle Market Enrollment

Based on Setup Form fields, columns on the Import Census Template are displayed or hidden

Setup Form field on Group Information tab	Column(s)	Displayed or Hidden
Has Group Selected Health? is Y Has Group Selected Health? is N	Columns AD through AH	Display columns *(SG/MM)* Hide columns *(SG/MM)*
HMO Plan? is Y	Columns AK and AN Columns AI, AK and AN	Display columns *(SG – NM & TX / MM – OK)* Display columns *(SG – IL)*
HMO Plan? Is N	Columns AI through AN	Hide columns *(SG/MM)*
Has Group Selected Dental? is Y Has Group Selected Dental? is N	Columns AQ through AU	Display columns *(SG)* Hide columns *(SG)*
Has Group Selected Integrated FSA? is Y Has Group Selected Integrated FSA? is N	Columns BG through BI	Display columns *(SG/MM)* Hide columns *(SG/MM)*
Has Group Selected Integrated HRA? is Y Has Group Selected Integrated HRA? is N	Columns BJ	Display columns *(MM)* Hide columns *(MM)*

Reference Tables:
Small Group and Middle Market Enrollment *(con't)*

State-specific column dropdown variances

Setup Form State	Column(s)	Display
Division *(IL only)*	Column A Relationship Code	"Civil Union" is displayed *(SG/MM)*
Division *(IL only)*	Column T Employment Status	"IL Cont" value is displayed *(SG/MM)*
Division *(TX only)*	Column T Employment Status	"TX Cont" and "TX Dependent Cont" values are displayed (*SG/MM)*

Based on column dropdown selections on the Import Census Template, columns are displayed or hidden.

When cursor is in Column's Cell and the value is	Census Template Columns
Cursor is on Employment Status column cell and value is "COBRA"	COBRA columns X:Z are displayed *(SG/MM)*
Cursor is on Employment Status column cell and value is "IL Cont" *(IL only)*	IL Cont columns are AA:AC displayed *(SG/MM)*
Cursor is on Medicare Eligible column cell and value is Y	Medicare columns AV:AX are displayed *(SG/MM)*

How to Report Issues

For technical issues with Group Sales Tools

Contact our ITG Service Center at

888-706-0583

For questions about information in the user manual or the new SCIT

- **Email SGMM_TechSupport@hcsc.com**
- **Please include “New Census Template” in the subject line and attach a screen shot, if possible**