



BlueCross BlueShield  
of Texas



# SMART CENSUS IMPORT TOOL • SCIT

## *Blue Balance Funded (BBF) Reference Guide*

### *Version 2*

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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  | <ul style="list-style-type: none"><li>• Version 2 is compatible with Excel 2013 and newer versions.</li></ul>                                                                                                                                                                                                                              |
| Enable Macros  | <ul style="list-style-type: none"><li>• Enable Macros feature using instructions provided in Technical References.</li></ul>                                                                                                                                                                                                               |
| Using SCIT     | <ul style="list-style-type: none"><li>• <b>NOTE:</b> <i>Save Smart Census Import Template (SCIT) on your local drive before using. If working from a network drive, SCIT performance may be slower.</i></li><li>• Keep <b>only one SCIT file open</b> at a time. If multiple windows are open, SCIT will not behave as expected.</li></ul> |
| Copy/Paste     | <ul style="list-style-type: none"><li>• <b>Paste copied data as VALUES</b> to avoid overwriting Excel formatting via Paste Special.</li></ul>                                                                                                                                                                                              |
| Find & Replace | <ul style="list-style-type: none"><li>• <b>This functionality is not available in Tool.</b> If you need to use this functionality, update source document and paste copied data as <b>VALUES</b> into Tool to avoid overwriting Excel formatting via Paste Special.</li></ul>                                                              |

# Version 2 Release Notes

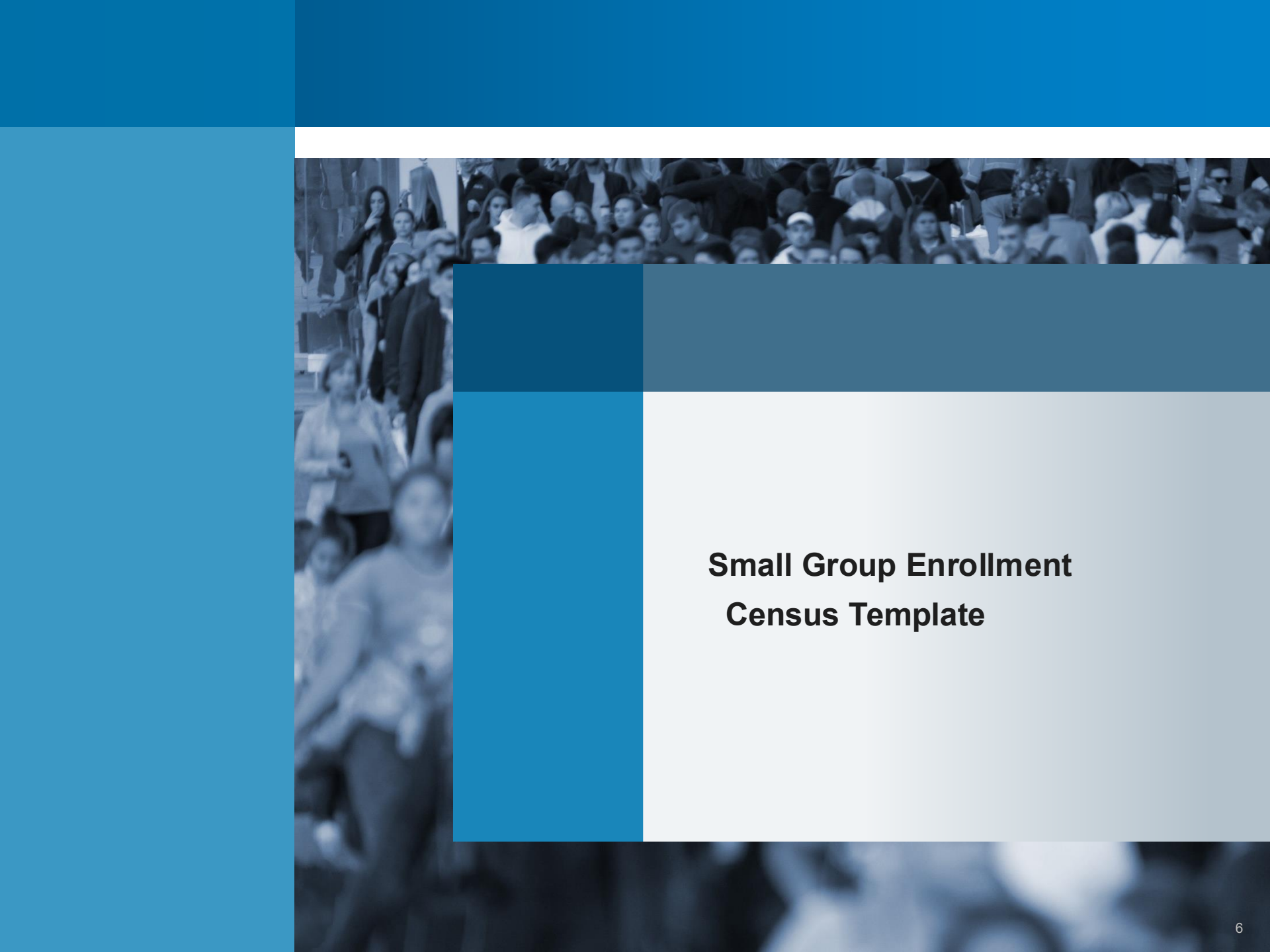
## **Enrollment** *Middle Market*

- Now applicable for all states
- Removal of coverage type options IL Cont (IL) TX Cont & TX Dependent Cont (TX) and associated fields on the template

# 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.

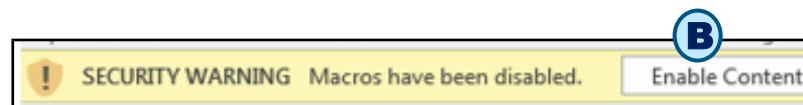




## **Small Group Enrollment Census Template**

# 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.

The "Smart Census Import Tool Setup Form for BBF Enrollment" is displayed. It has two main sections. "Step 1: Please Make a Selection" includes fields for "Market Segment:" and "Division:", both of which are redacted with black boxes. To the right, a text box says "Please enter the Group Name. Census template will be saved under this group name along with date and time stamp." Below this, "Step 2: Enter Group Benefits Information" includes a field for "Health Plan HMO Plan? N" and a "Group Name" field, which is also redacted. A blue circle with the letter "C" is next to the "Group Name" field. Buttons for "OK" and "Cancel" are on the right. A note at the top right says "Hover over RED Triangle for add".The Microsoft Excel interface is shown. The title bar at the top indicates the file is saved as "BBF Enrollment S... N...". The ribbon includes tabs for "File", "Page Layout", "Formulas", "Data", "Review", "View", and "Automate". The "Formulas" tab is active. Below the ribbon, the "Please Make a Selection" section is visible, with "Market Segment:" and "Division:" fields, both redacted. A blue circle with the letter "F" is next to the "Division:" field.

# 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).

| Step 1: Please Make a Selection          |          |
|------------------------------------------|----------|
| Market Segment: SMALL GROUP              |          |
| Division: IL                             |          |
| Step 2: Enter Group Benefits Information |          |
| Health Plan HMO Plan?                    |          |
| Plan 1:                                  | <b>A</b> |
| Plan 2:                                  |          |
| Plan 3:                                  |          |
| Has Group Selected Dental? Y             |          |
| Plan 1:                                  | <b>B</b> |
| Plan 2:                                  |          |
| Selected Integrated FSA? Y               |          |
| Plan 1:                                  | <b>C</b> |
| Plan 2:                                  |          |

# 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**.

Selected Integrated FSA? Y

Plan 1:  
Plan 2:

Click Green button for Census Data Entry

**D** Go To Census Template for Data Entry

**E** Map **F** Help Tab

**Please Note:**

- Census template columns will display/hide based on selections made on this Setup Form.
- Returning to [this tab](#) hides [Census Template](#) tab and does not overwrite census data.
- If the Group has provided source census on a separate Excel file, click [Map Census](#) to copy source data into the census template.

**G** Display All Census Columns

**ATTENTION:**

- Please click this button for displaying all census columns **AFTER** census data has been entered.

Group Information **GrpInfoHelpFile**

# 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.

Click Green button for Census Data Entry

**A** **Map Census** **Help Tab**

**Go To Census Template for Data Entry**

**Please Note:**

- Census template columns will display/hide based on selections made on this Setup Form.
- Returning to **this tab** hides **Census Template tab** and does not overwrite census data.

| Last Name | First Name | Relationship | Gender | Date of Birth | Type of Enrollment | State | Retiree | Annual Salary | Life |
|-----------|------------|--------------|--------|---------------|--------------------|-------|---------|---------------|------|
| Smith     | John       | Employee     | F      | #####         | EF                 | IL    | N       | 960000        |      |
| Smith     | Emily      | Spouse       | M      | #####         |                    |       |         |               |      |
| Smith     | Rose       | Dependent    | F      | #####         |                    |       |         |               |      |
| Smith     |            | Dependent    | M      | #####         |                    |       |         |               |      |
| Van       | Lucy       | Employee     | M      | #####         | EO                 | IL    | N       | 645854        |      |

**C**

**Instructions**

**B**

1) Copy and paste the entire census from Group's spreadsheet in **Source Census From The Group** tab.  
--Make sure there is only 1 header row.  
--Header row and data should not have merged cells.  
--Make sure there are no blank rows/columns in between the data.

2) Click Yes to proceed to Census Mapping tab.  
-- Or Click Cancel to skip this step and go to Census Template tab.

If using mapping feature more than 1 time:  
a) Erase existing census on the **Source Census From The Group** tab.  
b) Repeat Steps 1 and 2 listed above.

**D** ☐ Yes ☐ Cancel **E**

**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

**Mapping Source Columns to Import Census Template Columns**

| 1  | Small Group Enrollment Import Census Template Columns | Map Group's Source Census Columns (Select from drop down list) | Source Census Column Letter (For Information Only) |
|----|-------------------------------------------------------|----------------------------------------------------------------|----------------------------------------------------|
| 2  | Group Information Columns                             |                                                                |                                                    |
| 3  | Relationship Code <sup>DDL</sup>                      | Relationship                                                   | D                                                  |
| 4  | Waive All Coverage <sup>DDL</sup>                     | waive Coverage                                                 | E                                                  |
| 5  | Waive Reason Code <sup>DDL</sup>                      | Waive Reson                                                    | F                                                  |
| 6  | First Name                                            | First Name                                                     | C                                                  |
| 7  | Mid Init                                              | Middle Initial                                                 | B                                                  |
| 8  | Last Name                                             | Last Name                                                      | A                                                  |
| 9  | Name Suffix                                           |                                                                |                                                    |
| 10 | Date Of Birth                                         | Date Of Birth                                                  | H                                                  |
| 11 | Gender <sup>DDL</sup>                                 | Gender                                                         | G                                                  |
| 12 | SSN                                                   | SSN                                                            | I                                                  |
| 13 | Address 1                                             | Home Address                                                   | J                                                  |

Column A has column headers from the Import Census Template.  
Helpful Hint: Click "+/-" to the left of row numbers to expand/collapse rows as needed.  
Column B has a drop down list with values which are column headers from the source file.  
Column C is for informational purpose only.

**Steps for Mapping:**

- 1) In **Column B**, select a value from the drop down list that corresponds to the value in **Column A**.  
**Note:** Import Template Columns with a drop down list are denoted by <sup>DDL</sup>.  
If columns with DDL are mapped, the value on the source file must match the values in the drop down list.  
On the Import Template, **File Save** data validation will erase values which do not match the drop down list.  
If mapping multiple times, Column B values will be stored from previous time. Cells with values in Column B that do not match the Source Census Header will be highlighted in Yellow. Please update selection as needed for the current mapping.
- 2) Click **Copy Mapped Columns** button to copy the mapped source columns systematically to Import Census Template tab.
- 3) Click **Cancel** button to skip the mapping and go to Import Census Template tab to enter census.

## A. Census Mapping tab displays.

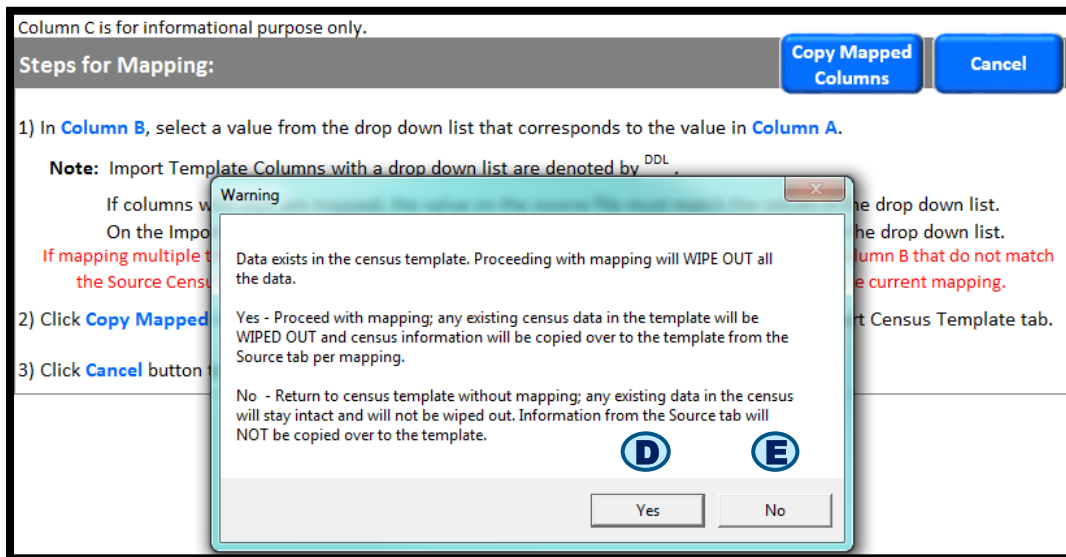
- **Column A** displays column headers from the **ACA Small Group / Mid Market Enrollment Import Census Template** Columns.
- **Column B** has a dropdown list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the right.

## 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

| General Information |                    |                   |            |          |           |             |               |        |     |  |
|---------------------|--------------------|-------------------|------------|----------|-----------|-------------|---------------|--------|-----|--|
| Relationship Code   | Waive All Coverage | Waive Reason Code | First Name | Mid Init | Last Name | Name Suffix | Date Of Birth | Gender | SSN |  |
| <b>C</b> ⓘ          | ⓘ                  | <b>A</b> ⓘ        | ⓘ          | ⓘ        | ⓘ         | ⓘ           | ⓘ             | ⓘ      | ⓘ   |  |
| Employee            |                    |                   |            |          |           |             |               |        |     |  |
|                     | <b>D</b>           |                   |            |          |           |             |               |        |     |  |
|                     |                    |                   |            |          |           |             |               |        |     |  |

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 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.

The screenshot shows a data entry table with the following columns: Address 1, Address 2, City, State, and Zip Code. Each column header has a small 'i' icon (Help) and a larger 'I' icon (Info). The State column has an 'AUTO FILL' button and a 'State from zip' button. The Zip Code column has a 'G' icon. Annotations include: a blue circle 'F' above the State column header; a blue circle 'E' above the Zip Code column header; a blue circle 'I' above the Address 1 column header with an orange arrow pointing to the 'i' icon; a blue circle 'G' above the City column header with an orange arrow pointing to the 'i' icon; a red highlight on the City column header; and a yellow highlight on the City column data cell.

- 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

General Info  **Emp Status** Health Cov Signature Date Language

- 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                                                            | Zip Code                                                                            | Home/Cell Phone                                                                     | Business Phone                                                                      | Email Address                                                                       | Marital Status                                                                      |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|  |  |  |  |  |  |  |  |  |  |  |  |
| Employee                                                                          | N                                                                                 |                                                                                   | John                                                                              |                                                                                   | Doe                                                                               | IL                                                                                  | 60515                                                                               |                                                                                     |                                                                                     |                                                                                     | Married                                                                             |
| 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                                                                   | 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.
  - A value of **Y** in the **Medicare Eligible** cell will cause **Medicare** columns to display. See 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.*

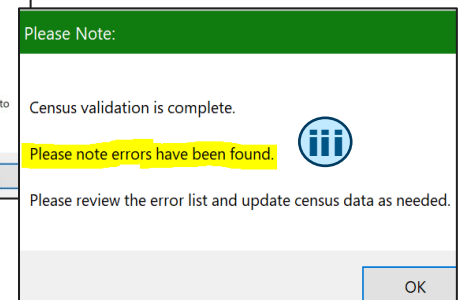
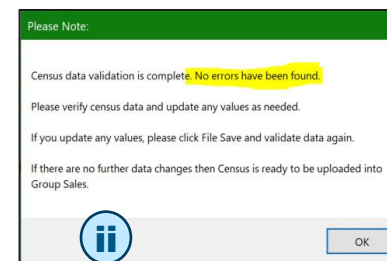
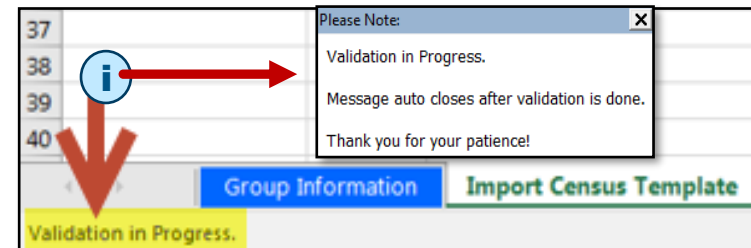
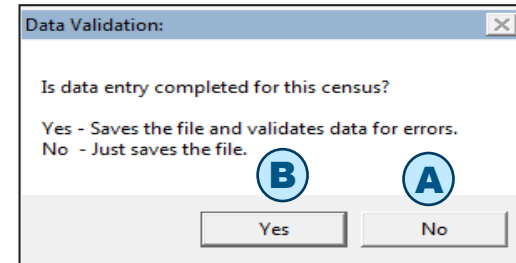
- B. Click **Yes** if Census entries are complete. Existing data is saved. If values are blank in columns where the **AutoFill** feature is available, a default value will be entered systematically. Final validation rules will run.

- 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.

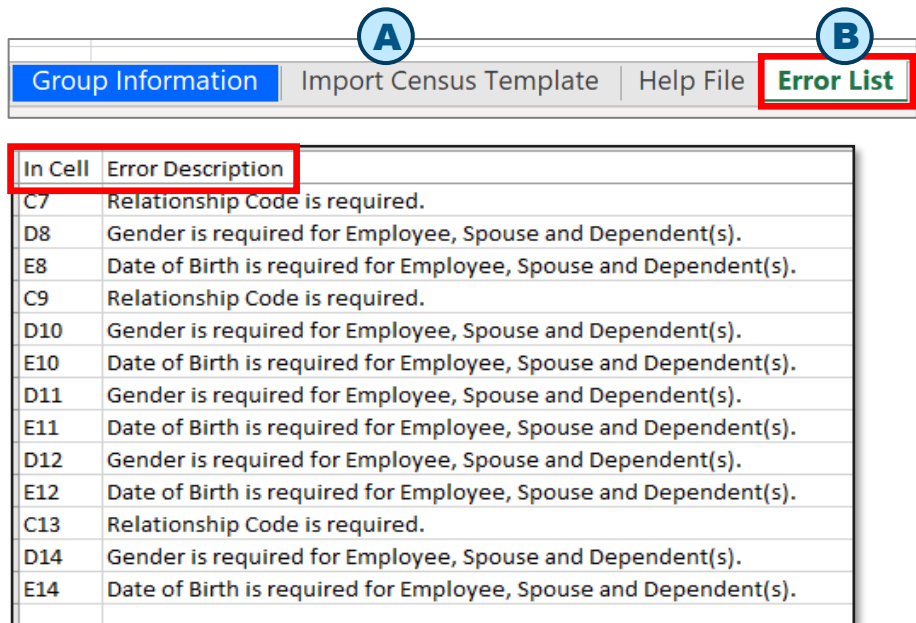
**B.** If there are data errors, the **Error List** tab will display:

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

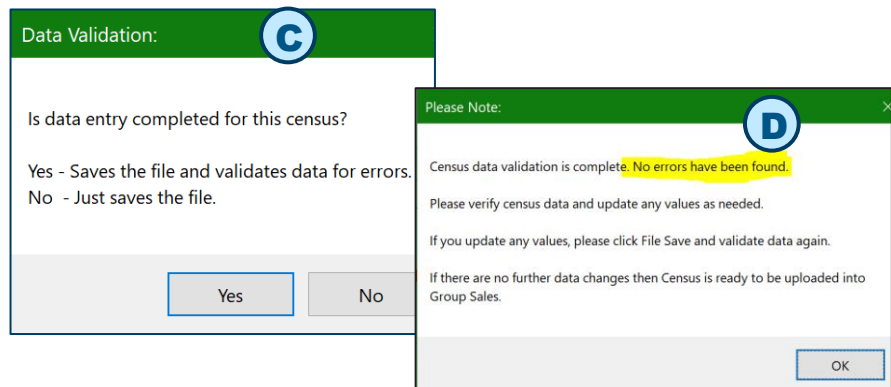
Once you have corrected any errors, validate data again by clicking **File > Save**.

**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.



| Group Information |                                                                  | Import Census Template | Help File | Error List |
|-------------------|------------------------------------------------------------------|------------------------|-----------|------------|
| In Cell           | Error Description                                                |                        |           |            |
| C7                | Relationship Code is required.                                   |                        |           |            |
| D8                | Gender is required for Employee, Spouse and Dependent(s).        |                        |           |            |
| E8                | Date of Birth is required for Employee, Spouse and Dependent(s). |                        |           |            |
| C9                | Relationship Code is required.                                   |                        |           |            |
| D10               | Gender is required for Employee, Spouse and Dependent(s).        |                        |           |            |
| E10               | Date of Birth is required for Employee, Spouse and Dependent(s). |                        |           |            |
| D11               | Gender is required for Employee, Spouse and Dependent(s).        |                        |           |            |
| E11               | Date of Birth is required for Employee, Spouse and Dependent(s). |                        |           |            |
| D12               | Gender is required for Employee, Spouse and Dependent(s).        |                        |           |            |
| E12               | Date of Birth is required for Employee, Spouse and Dependent(s). |                        |           |            |
| C13               | Relationship Code is required.                                   |                        |           |            |
| D14               | Gender is required for Employee, Spouse and Dependent(s).        |                        |           |            |
| E14               | Date of Birth is required for Employee, Spouse and Dependent(s). |                        |           |            |



**Data Validation:**

Is data entry completed for this census?

Yes - Saves the file and validates data for errors.  
No - Just saves the file.

**Please Note:**

Census data validation is complete. No errors have been found.

Please verify census data and update any values as needed.

If you update any values, please click File Save and validate data again.

If there are no further data changes then Census is ready to be uploaded into Group Sales.

# 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.

The screenshot shows the 'Member Census' page of the Small Group & Middle Market Enrollment Tool. The 'Import Census' button is highlighted with a red arrow and a blue circle labeled 'B'. Below it, the 'Import Census' dialog box is open. The 'Select File to upload:' field shows the file path 'C:\Users\U344541\Desktop' and the 'Browse...' button is highlighted with a blue circle labeled 'C'. The 'Overwrite' radio button is selected by default, and the 'Load File' button is highlighted with a blue circle labeled 'H'. A blue circle labeled 'F' points to the filename 'U344541' in the file path. A blue circle labeled 'G' points to the 'Overwrite' radio button. A blue circle labeled 'D' points to the 'Census Count' field showing '5'.

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....

**Import Census**

**Note:** Please download the updated template for TX division.

Download the [Census Import Template](#) or view an [example](#) of a formatted import file. Please refer to the [Help](#) file for additional details regarding the Import Census spreadsheet.

**Steps to save the Import Census Template:**

1. Click on the Census Import Template link and Save the file on your desktop.
2. Open saved Census Import Template, from the saved location, and select the appropriate Division from the drop down options. Click Continue.
3. Save to your desktop.
4. The Census Import Template is now ready to input the census information.

Select File to upload:  Outdated Te...ate Version.xls

A census already exists. Do you wish to overwrite or append to the existing census?

☒ Overwrite - This option will replace previously entered census information.

☐ Append - This option will add to existing census information

**Attention**

Error importing the data... Please download the current census template version from the link above.

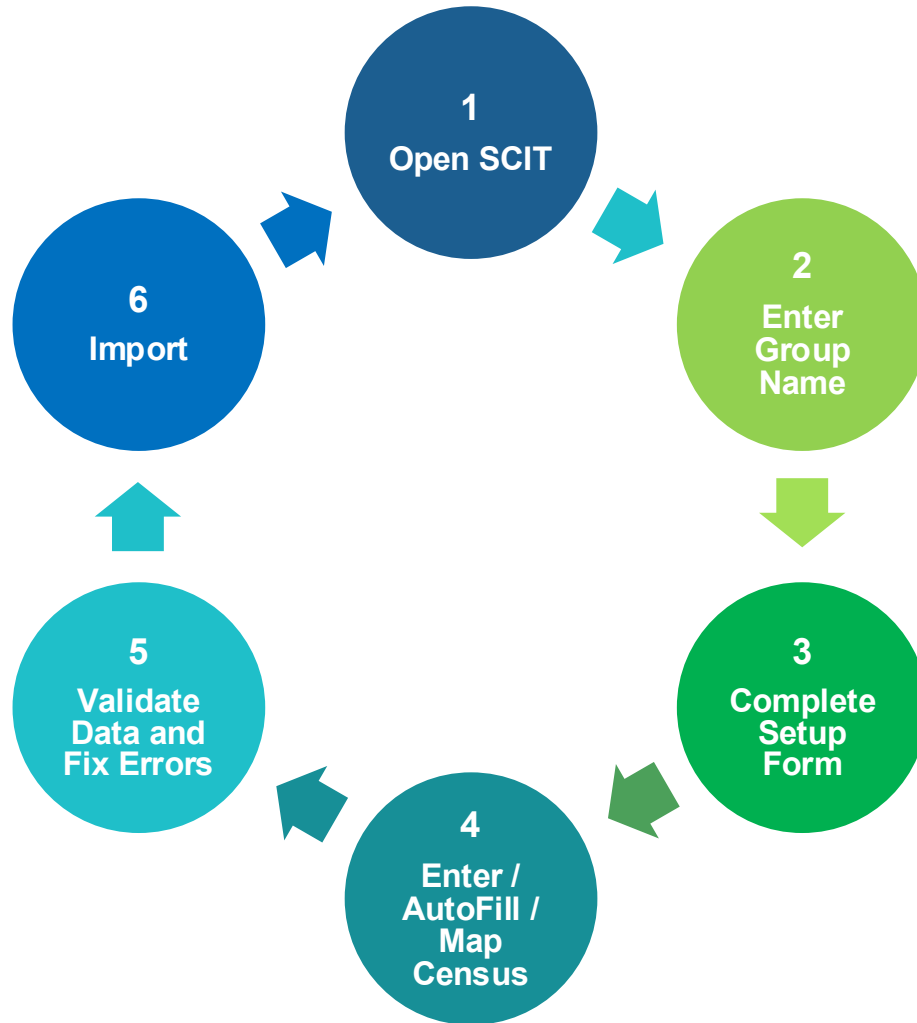
indicates Error Message

indicates Warning Message

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.



**Middle Market Enrollment  
Census Template**  
*(Excludes Texas)*

# 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 code has been 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.

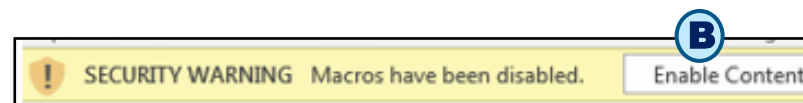
**C. Selected Integrated FSA?** If Y, add Plan(s).

**D. Selected Integrated HRA?** If Y, add Plan(s).

| Step 1: Please Make a Selection          |          |
|------------------------------------------|----------|
| <b>Market Segment:</b> MID MARKET        |          |
| <b>Division:</b> MT                      |          |
| Step 2: Enter Group Benefits Information |          |
| <b>Health Plan HMO Plan?</b>             | <b>A</b> |
| Plan 1:                                  |          |
| Plan 2:                                  |          |
| Plan 3:                                  |          |
| <b>Has Group Selected Dental?</b> Y      |          |
| Plan 1:                                  | <b>B</b> |
| Plan 2:                                  |          |
| <b>Selected Integrated FSA?</b> Y        |          |
| Plan 1:                                  | <b>C</b> |
| Plan 2:                                  |          |
| <b>Selected Integrated HRA?</b> Y        | <b>D</b> |
| Plan 1:                                  |          |
| Plan 2:                                  |          |
| Plan 3:                                  |          |

# 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.

The image shows the "Smart Census Import Tool Setup Form for BBF Enrollment". It has two main sections: "Step 1: Please Make a Selection" and "Step 2: Enter Group Benefits Information". In Step 1, there are fields for "Market Segment:" and "Division:". In Step 2, there is a "Health Plan HMO Plan?" field with a dropdown menu. Below this, there is a "Group Name" field which is highlighted with a red rectangle. A blue circle with the letter "C" is positioned above the "Group Name" field. To the right of the "Group Name" field, there is a text box with the instruction: "Please enter the Group Name. Census template will be saved under this group name along with date and time stamp." and "Please DO NOT enter space or special characters." There are "OK" and "Cancel" buttons on the right side.A screenshot of the Microsoft Excel interface. The title bar shows the file name "BBF Enrollment S..." and a status "N...". The file name is highlighted with a red rectangle. A blue circle with the letter "E" is positioned above the title bar. The Excel ribbon is visible at the top, showing tabs for "File", "Page Layout", "Formulas", "Data", "Review", "View", and "Automate". The main workspace shows a grid with columns labeled B, C, and D. Below the grid, there is a section titled "Please Make a Selection" with fields for "Market Segment:" and "Division:". A blue circle with the letter "F" is positioned above the "Market Segment:" field.

# Complete Setup Form

- G.** Click the **Green button** to navigate to the **Import Census Template** for manual data entry.
- H.** 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.
- I.** 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.
- J.** Click **Blue button** to display all Census columns on the **Import Census Template**.

The screenshot shows a web form titled "Selected Integrated FSA?". At the top, it says "Plan 1:" and "Plan 2:". Below this is a navigation bar with a "Map" button and a "Help Tab" button. A green button labeled "Go To Census Template for Data Entry" is highlighted with a green circle and the letter 'G'. A blue button labeled "Display All Census Columns" is highlighted with a blue circle and the letter 'J'. A red arrow points from the "Help Tab" button to a tab labeled "GrpInfoHelpFile" in a separate window below. The main content area contains a "Please Note:" section with three bullet points: "Census template columns will display/hide based on selections made on this Setup Form.", "Returning to this tab hides Census Template tab and does not overwrite census data.", and "If the Group has provided source census on a separate Excel file, click Map Census to copy source data into the census template." Below this is an "ATTENTION:" section with a note: "Please click this button for displaying all census columns AFTER census data has been entered."

# Mapping Enrollment Census

- A. Click **Map** button if you have Census on a separate spreadsheet from the group.
- B. **Source Census From The Group** worksheet (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.

Click Green button for Census Data Entry

**Map** **A** **Help Tab**

**Go To Census Template for Data Entry**

**Please Note:**

- Census template columns will display/hide based on selections made on this Setup Form.
- Returning to [this tab](#) hides [Census Template tab](#) and does not overwrite census data.
- If the Group has provided source census on a separate Excel file, click [Map Census](#) to copy source data into the census template.

| Last Name | First Name | Relationship | Gender | Date of Birth | Type of Enrollment | State | Retiree | Annual Salary | Life |
|-----------|------------|--------------|--------|---------------|--------------------|-------|---------|---------------|------|
| Smith     | John       | Employee     | F      | #####         | EF                 | IL    | N       | 960000        |      |
| Smith     | Emily      | Spouse       | M      | #####         |                    |       |         |               |      |
| Smith     | Rose       | Dependent    | F      | #####         |                    |       |         |               |      |
| Smith     | Jack       | Dependent    | M      | #####         |                    |       |         |               |      |
| Van       | E          | Employee     | M      | #####         | EO                 | IL    | N       | 645854        |      |

**C**

**Instructions** **B**

- 1) Copy and paste the entire census from Group's spreadsheet in **Source Census From The Group** tab.
  - Make sure there is only 1 header row.
  - Header row and data should not have merged cells.
  - Make sure there are no blank rows/columns in between the data.
- 2) Click **Yes** to proceed to **Census Mapping** tab.
  - Or Click **Cancel** to skip this step and go to **Census Template** tab.

If using mapping feature more than 1 time:

- a) Erase existing census on the **Source Census From The Group** tab.
- b) Repeat Steps 1 and 2 listed above.

**D** **E**

☐ Yes ☐ Cancel

- 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**

| ACA Small Group Enrollment Import Census Template Columns | Map Group's Source Census Columns (Select from drop down list) | Source Census Column Letter (For Information Only) |
|-----------------------------------------------------------|----------------------------------------------------------------|----------------------------------------------------|
| <b>Group Information Columns</b>                          |                                                                |                                                    |
| Relationship Code <sup>DDL</sup>                          | Relationship                                                   | D                                                  |
| Waive All Coverage <sup>DDL</sup>                         | waive Coverage                                                 | E                                                  |
| Waive Reason Code <sup>DDL</sup>                          | Waive Reson                                                    | F                                                  |
| First Name                                                | First Name                                                     | C                                                  |
| Mid Init                                                  | Middle Initial                                                 | B                                                  |
| Last Name                                                 | Last Name                                                      | A                                                  |
| Name Suffix                                               |                                                                |                                                    |
| Date Of Birth                                             | Date Of Birth                                                  | H                                                  |
| Gender <sup>DDL</sup>                                     | Gender                                                         | G                                                  |
| SSN                                                       | SSN                                                            | I                                                  |
| Address 1                                                 | Home Address                                                   | J                                                  |

**B**

**C**

**Mapping Source Columns to Import Census Template Columns**

Column A has column headers from the Import Census Template.  
 Helpful Hint: Click "+"/- to the left of row numbers to expand/collapse rows as needed.  
 Column B has a drop down list with values which are column headers from the source file.  
 Column C is for informational purpose only.

**Steps for Mapping:**

1) In **Column B**, select a value from the drop down list that corresponds to the value in **Column A**.

**Note:** Import Template Columns with a drop down list are denoted by <sup>DDL</sup>.

If columns with DDL are mapped, the value on the source file must match the values in the drop down list.  
 On the Import Template, **File Save** data validation will erase values which do not match the drop down list.  
 If mapping multiple times, Column B values will be stored from previous time. Cells with values in Column B that do not match the Source Census Header will be highlighted in Yellow. Please update selection as needed for the current mapping.

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

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

**Copy Mapped Columns** **Cancel**

## A. Census Mapping tab displays.

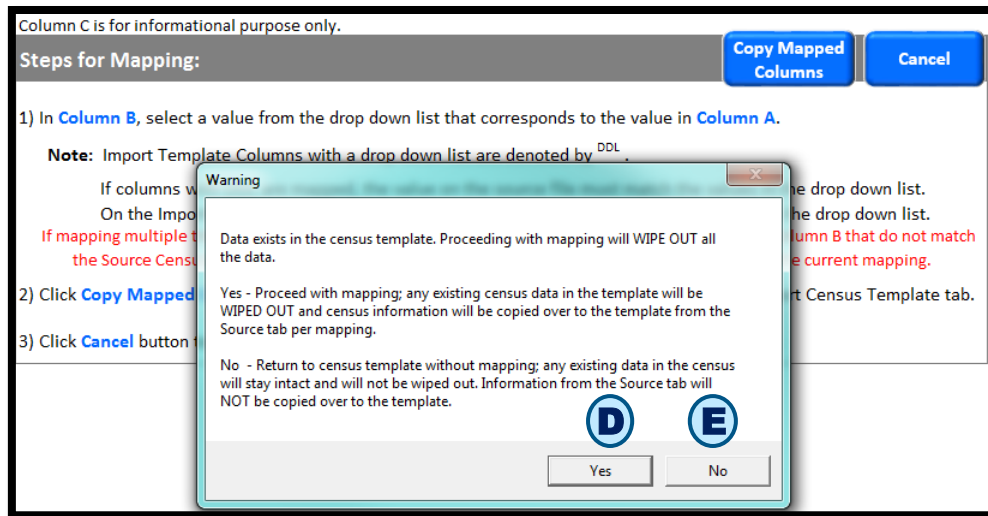
- **Column A** displays column headers from the **ACA Small Group / Mid Market Enrollment Import Census Template** Columns.
- **Column B** has a dropdown list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the right.

## 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 WIPE 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

| General Information |                    |                   |            |          |           |             |               |        |     |  |
|---------------------|--------------------|-------------------|------------|----------|-----------|-------------|---------------|--------|-----|--|
| Relationship Code   | Waive All Coverage | Waive Reason Code | First Name | Mid Init | Last Name | Name Suffix | Date Of Birth | Gender | SSN |  |
| Employee            |                    |                   |            |          |           |             |               |        |     |  |
|                     |                    |                   |            |          |           |             |               |        |     |  |
|                     |                    |                   |            |          |           |             |               |        |     |  |

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 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.

The screenshot shows a data entry table with the following columns: Address 1, Address 2, City, State, and Zip Code. Each column header has an information icon (i). The State column header also includes an 'AUTO FILL' button and a 'State from zip' button. A circled 'I' points to the City column header, and an arrow points from it to the State column header. A circled 'F' points to the 'State from zip' button. A circled 'E' points to the Zip Code column header. In the data rows below, the City column has a red highlight (G) and the Zip Code column has a yellow highlight (G). A circled 'G' is also present in the State column of the second row.

- 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

General Info  **Emp Status** Health Cov Signature Date Language

- 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                                                            | Zip Code                                                                            | Home/Cell Phone                                                                     | Business Phone                                                                      | Email Address                                                                       | Marital Status                                                                      |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|  |  |  |  |  |  |  |  |  |  |  |  |
| Employee                                                                          | N                                                                                 |                                                                                   | John                                                                              |                                                                                   | Doe                                                                               | IL                                                                                  | 60515                                                                               |                                                                                     |                                                                                     |                                                                                     | Married                                                                             |
| 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                                                                   | 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.
  - A value of **Y** in the **Medicare Eligible** cell will cause **Medicare** columns to display. See 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.*

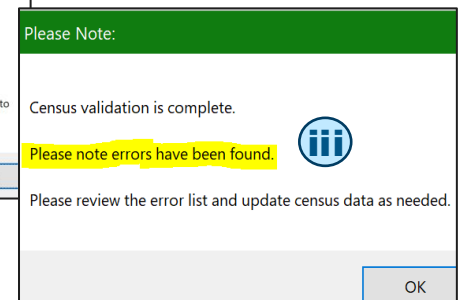
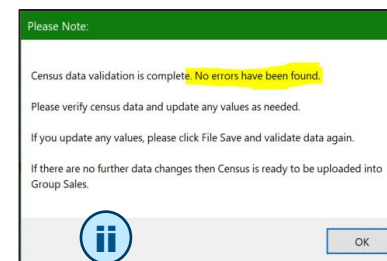
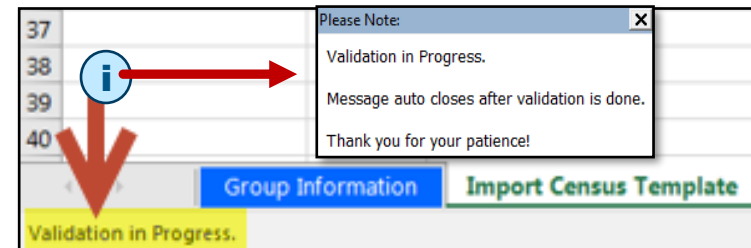
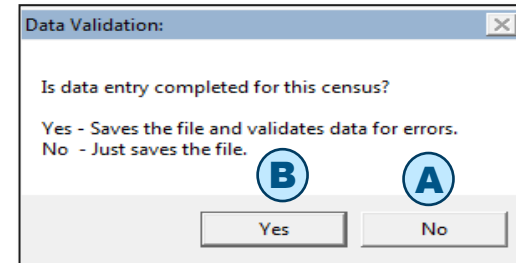
- B. Click **Yes** if Census entries are complete. Existing data is saved. If values are blank in columns where the **AutoFill** feature is available, a default value will be entered systematically. Final validation rules will run.

- 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.

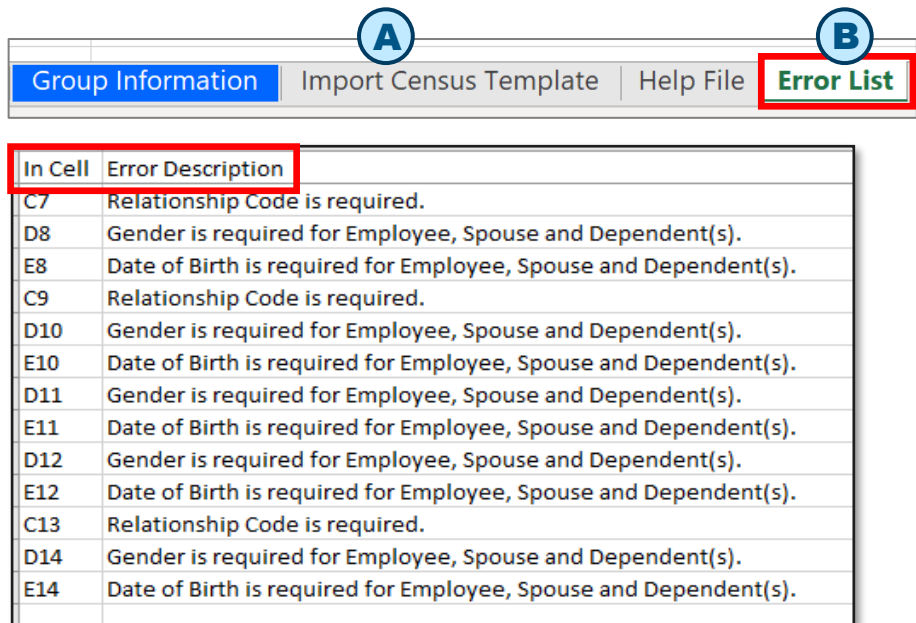
**B.** If there are data errors, the **Error List** tab will display:

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

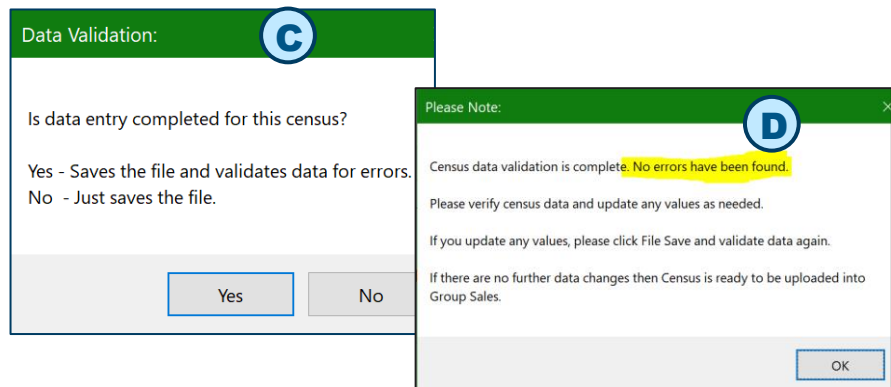
Once you have corrected any errors, validate data again by clicking **File > Save**.

**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.



| In Cell | Error Description                                                |
|---------|------------------------------------------------------------------|
| C7      | Relationship Code is required.                                   |
| D8      | Gender is required for Employee, Spouse and Dependent(s).        |
| E8      | Date of Birth is required for Employee, Spouse and Dependent(s). |
| C9      | Relationship Code is required.                                   |
| D10     | Gender is required for Employee, Spouse and Dependent(s).        |
| E10     | Date of Birth is required for Employee, Spouse and Dependent(s). |
| D11     | Gender is required for Employee, Spouse and Dependent(s).        |
| E11     | Date of Birth is required for Employee, Spouse and Dependent(s). |
| D12     | Gender is required for Employee, Spouse and Dependent(s).        |
| E12     | Date of Birth is required for Employee, Spouse and Dependent(s). |
| C13     | Relationship Code is required.                                   |
| D14     | Gender is required for Employee, Spouse and Dependent(s).        |
| E14     | Date of Birth is required for Employee, Spouse and Dependent(s). |



**Data Validation:**

Is data entry completed for this census?

Yes - Saves the file and validates data for errors.  
No - Just saves the file.

**Yes** **No**

**Please Note:**

Census data validation is complete. **No errors have been found.**

Please verify census data and update any values as needed.

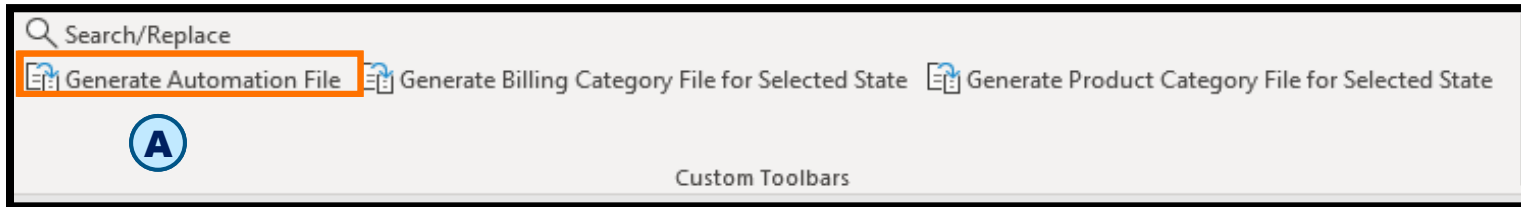
If you update any values, please click File Save and validate data again.

If there are no further data changes then Census is ready to be uploaded into Group Sales.

**OK**

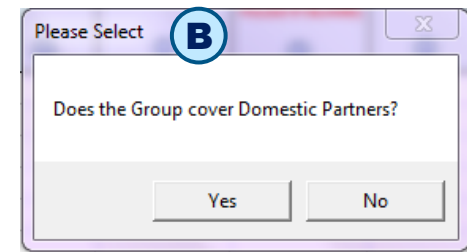
# Generate Automation File for Middle Market

\*\*\* Before generating the automation file, be sure to run data validation.



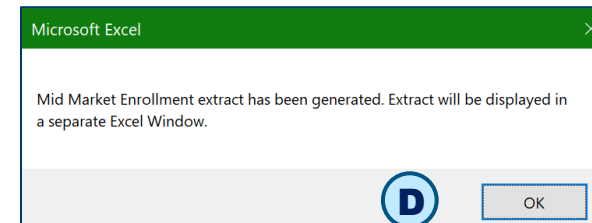
A. From Excel Menu bar, click **Add-ins** option, then click **Generate Automation file** OR use the keyboard shortcut **Ctrl + Shift + I**.

B. **Does Group cover Domestic Partners?** message box displays along with **Yes** and **No** buttons.



C. If **Yes** button is selected, in the automation extract any **DP** (Domestic Partner) **Relationship Code** values will be highlighted in **yellow** for internal informational use.

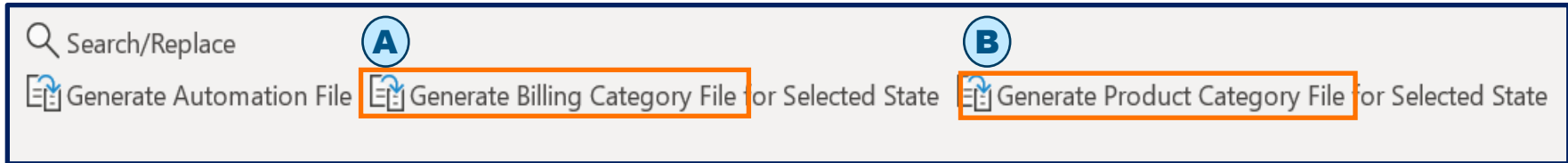
D. Confirmation box displays after the file has been generated. Click **OK** button to return to the **Import Census Template**.



E. Generated file will be open in a separate Excel window and will be stored in the same folder as the Group's SCIT file with date and time stamp.

F. If file is generated multiple times, a new file will be generated each time along with date and time stamp. The prior generated file(s) will not be overwritten.

# Generate Billing Category and Product Category File for Middle Market Enrollment



**NOTE:** *This extract can be generated as needed.*

- A.** From Excel Menu bar, click **Add-ins** option then click **Generate Billing Category File**.
- B.** From Excel Menu bar, click **Add-ins** option then click **Generate Product Category File**.
- C.** A separate file will be generated that lists enrolling Subscribers with Billing Categories.
- D.** Confirmation box displays after the file has been generated.  
Click **OK** button to return to the Census Template.
- E.** Generated file will be open in a separate Excel window and will be stored in the same folder as the Group's SCIT file with date and time stamp.
- F.** If file is generated multiple times, a new file will be generated each time along with date and time stamp. The prior generated file(s) will not be overwritten.

# 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.

The screenshot shows the 'Member Census' page of the 'Small Group & Middle Market Enrollment Tool'. The page has a navigation bar with tabs: Account Information, Additional Information, Plan Selections, Member Census (active), Rates, Account Summary, and Release for Enrollment. Below the navigation bar, there's a 'Member Census' section with a 'Previous' button and a 'Continue' button. A 'Census Count' of 5 is shown, along with an 'Add Member' button. An 'Export Census' button is also present. A red arrow points to the 'Import Census' button, which is circled in blue and labeled 'B'. Below this, the 'Import Census' dialog box is open. It contains instructions on how to save the import template. A 'Select File to upload:' field shows the path 'C:\Users\U344541\Desktop' and a 'Browse...' button, which is circled in blue and labeled 'C'. Below this, there's a question: 'A census already exists. Do you wish to overwrite or append to the existing census?'. The 'Overwrite' radio button is selected, and the 'Append' radio button is also visible. A 'Load File' button is circled in blue and labeled 'H'. A red arrow points from the 'Import Census' button in the main page to the 'Load File' button in the dialog box.

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....

**Import Census**

**Note:** Please download the updated template for TX division.

Download the [Census Import Template](#) or view an [example](#) of a formatted import file. Please refer to the [Help](#) file for additional details regarding the Import Census spreadsheet.

**Steps to save the Import Census Template:**

1. Click on the Census Import Template link and Save the file on your desktop.
2. Open saved Census Import Template, from the saved location, and select the appropriate Division from the drop down options. Click Continue.
3. Save to your desktop.
4. The Census Import Template is now ready to input the census information.

Select File to upload:  Outdated Te...ate Version.xls

A census already exists. Do you wish to overwrite or append to the existing census?

☒ Overwrite - This option will replace previously entered census information.

☐ Append - This option will add to existing census information

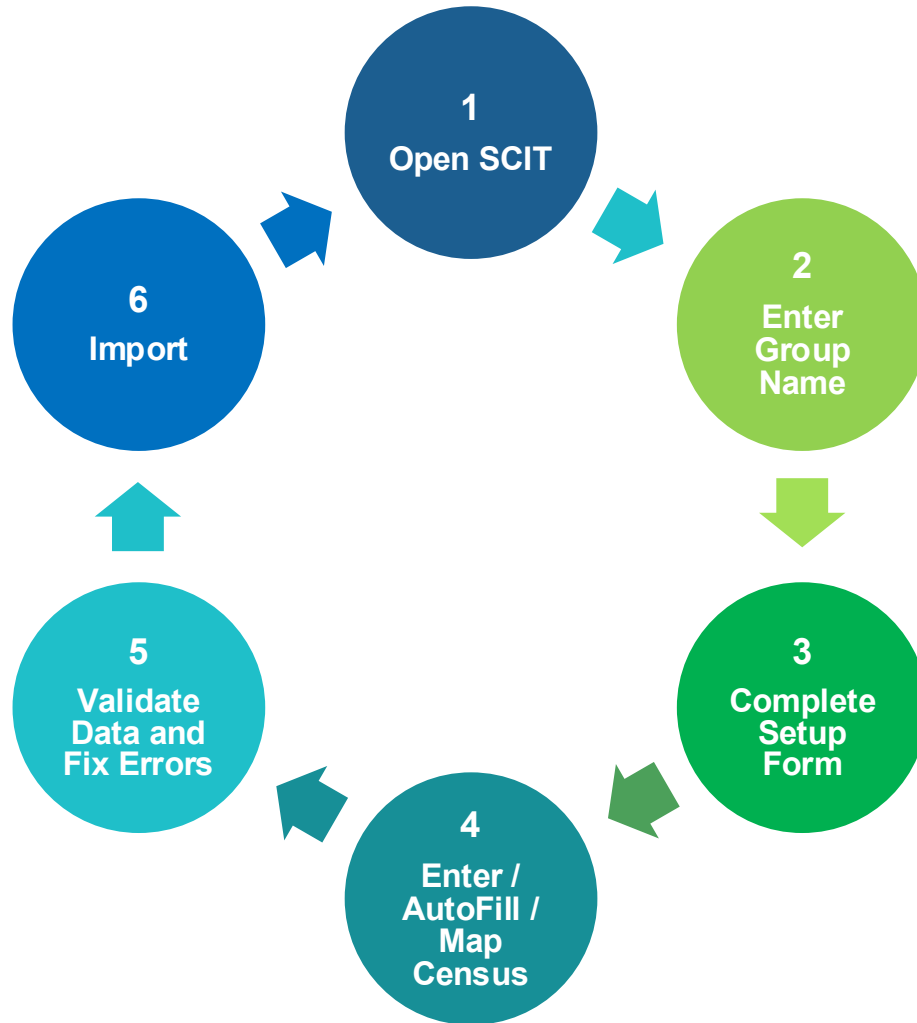
**Attention**  
Error importing the data... Please download the current census template version from the link above.

indicates Error Message  
 indicates Warning Message

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

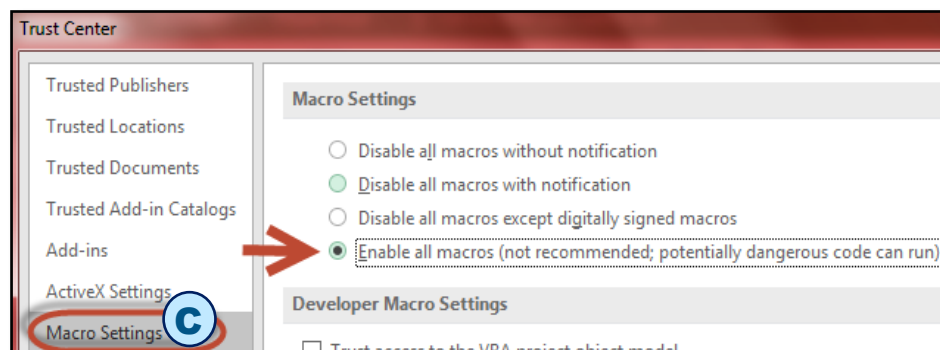
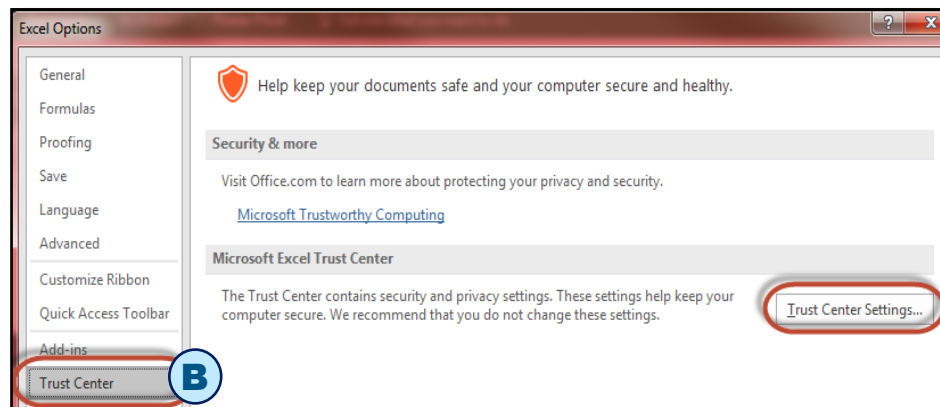
If **Enable Macros** is not enabled each time SCIT is opened, you will need to click the **Enable Content** button to use tool.

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**.

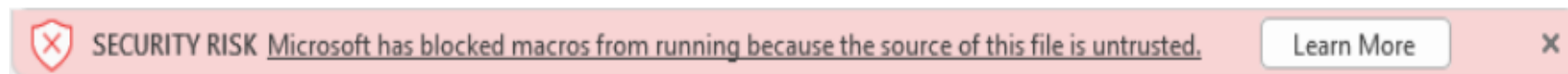
**C.** From Trust Center box, select **Macro Settings**. Then, select the checkbox for **Enable all macros**.



**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*)



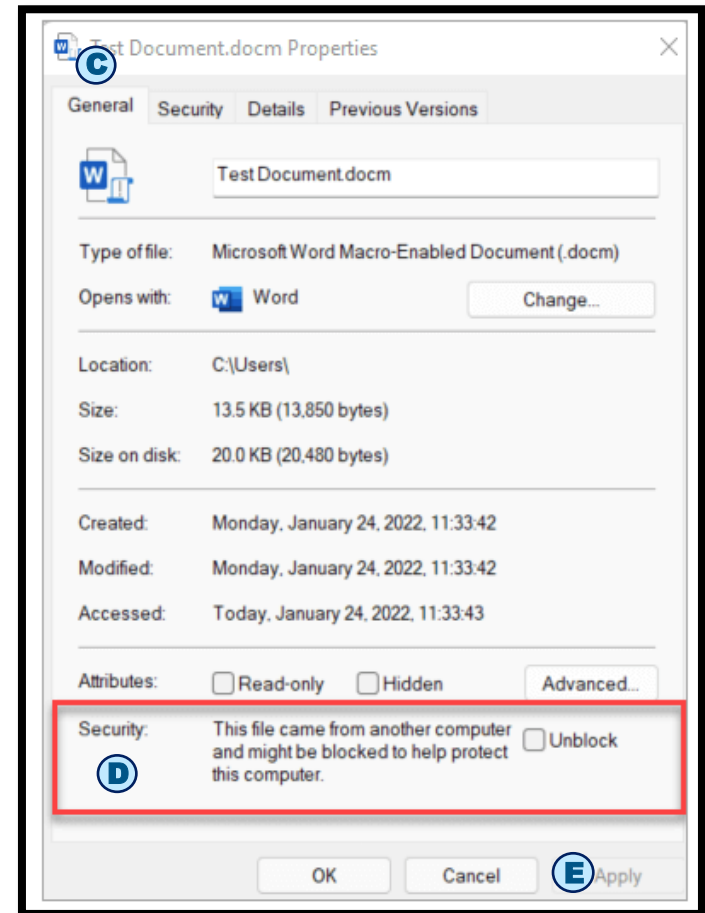
SECURITY RISK Microsoft has blocked macros from running because the source of this file is untrusted.

[Learn More](#)



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.

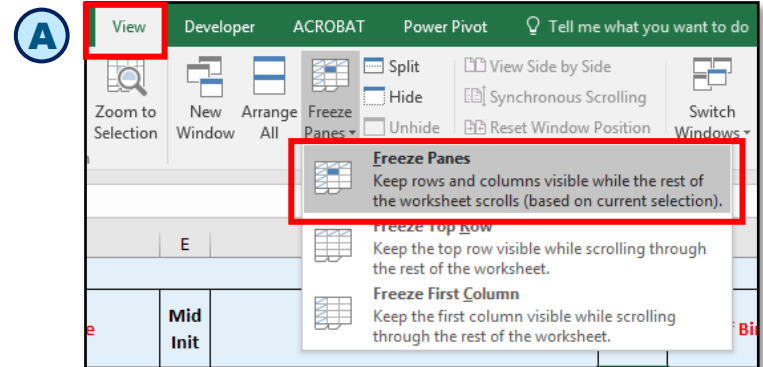
- A. Save file to local device.
- B. Right-click on the file and select **Properties** from dropdown menu.
- C. Select the **General tab**.
- D. Under the **Security** section, select the **Unblock** checkbox.
- E. Click **Apply** button.



# Freeze Panes, Filter and Sort Features

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

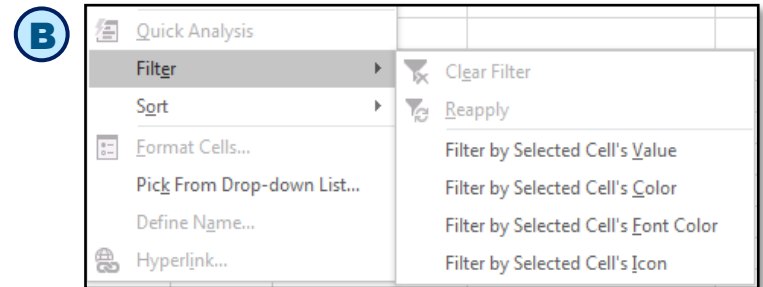
- Click the first cell in the range you want to freeze.
- From Excel menu select **View**, then click **Freeze Panes**.
- Rows and columns before the **Freeze Pane** will be visible as you scroll through the rest of the columns and/or rows.
- To remove, select **View**, **Freeze Panes** and **Unfreeze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



## B. Filter Census data as needed.

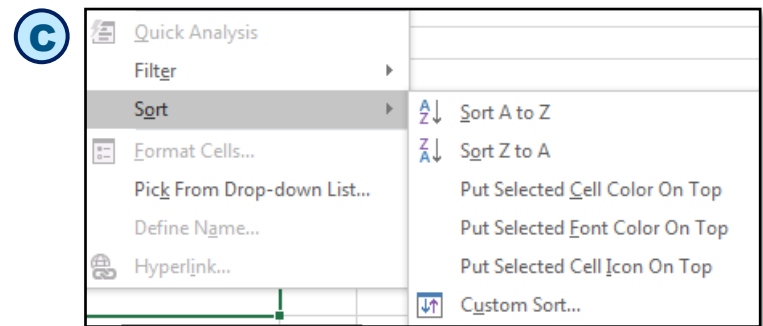
- Click in the cell, then right-click, and select **Filter**.
- Select a **Filter** option as needed.
- Apply and clear the **Filters** as needed.

**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.

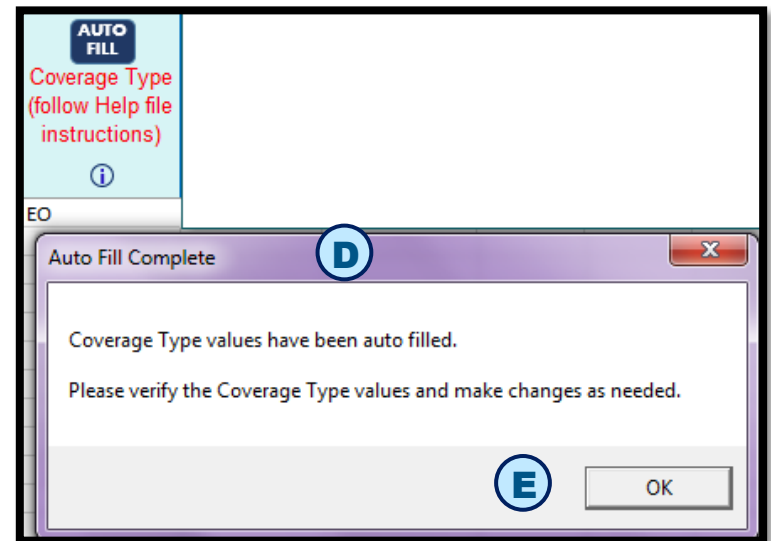
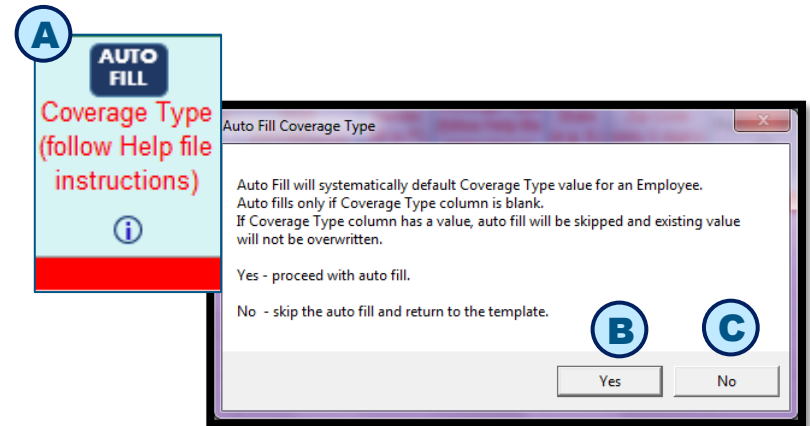
- Click in the cell, then right click, and select Sort.
- Select Sort option as needed.
- Be sure to **highlight all the data rows**, columns A through BK.
- **WARNING: If column/row range is not selected correctly and Sort is applied, data will become jumbled.**
- Sort functionality is NOT available 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<br>Has Group Selected Health? is N                 | Columns AD through AH                      | Display columns (SG/MM)<br>Hide columns (SG/MM)                       |
| HMO Plan? is Y                                                                     | Columns AK and AN<br>Columns AI, AK and AN | Display columns (SG – NM & TX / MM – OK)<br>Display columns (SG – IL) |
| HMO Plan? Is N                                                                     | Columns AI through AN                      | Hide columns (SG/MM)                                                  |
| Has Group Selected Dental? is Y<br>Has Group Selected Dental? is N                 | Columns AQ through AU                      | Display columns (SG)<br>Hide columns (SG)                             |
| Has Group Selected Integrated FSA? is Y<br>Has Group Selected Integrated FSA? is N | Columns BG through BI                      | Display columns (SG/MM)<br>Hide columns (SG/MM)                       |
| Has Group Selected Integrated HRA? is Y<br>Has Group Selected Integrated HRA? is N | Columns BJ                                 | Display columns (MM)<br>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 ( <i>IL only</i> ) | Column A Relationship Code | "Civil Union" is displayed ( <i>SG/MM</i> ) |

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 ( <i>SG/MM</i> )      |
| Cursor is on Medicare Eligible column cell and value is Y       | Medicare columns AV:AX are displayed ( <i>SG/MM</i> ) |

# 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](mailto:SGMM_TechSupport@hcsc.com)
- Please include “New Census Template” in the subject line and attach a screen shot, if possible

