



BlueCross BlueShield
of Texas



SMART CENSUS IMPORT TOOL • SCIT

Fully Insured (FI) Reference Guide

Version 19

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

Before You Start

Compatibility	• Version 19 is compatible with Excel 2013 and newer versions.
Enable Macros	• Enable Macros feature using instructions provided in Technical References.
Using SCIT	• NOTE: <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> • Keep only one SCIT file open at a time. If multiple windows are open, SCIT will not behave as expected.
Copy/Paste	• Paste copied data as VALUES to avoid overwriting Excel formatting via Paste Special.
Find & Replace	• This functionality is not available in Tool. If you need to use this functionality, update source document and paste copied data as VALUES into Tool to avoid overwriting Excel formatting via Paste Special.

Version 18 Release Notes

Enrollment

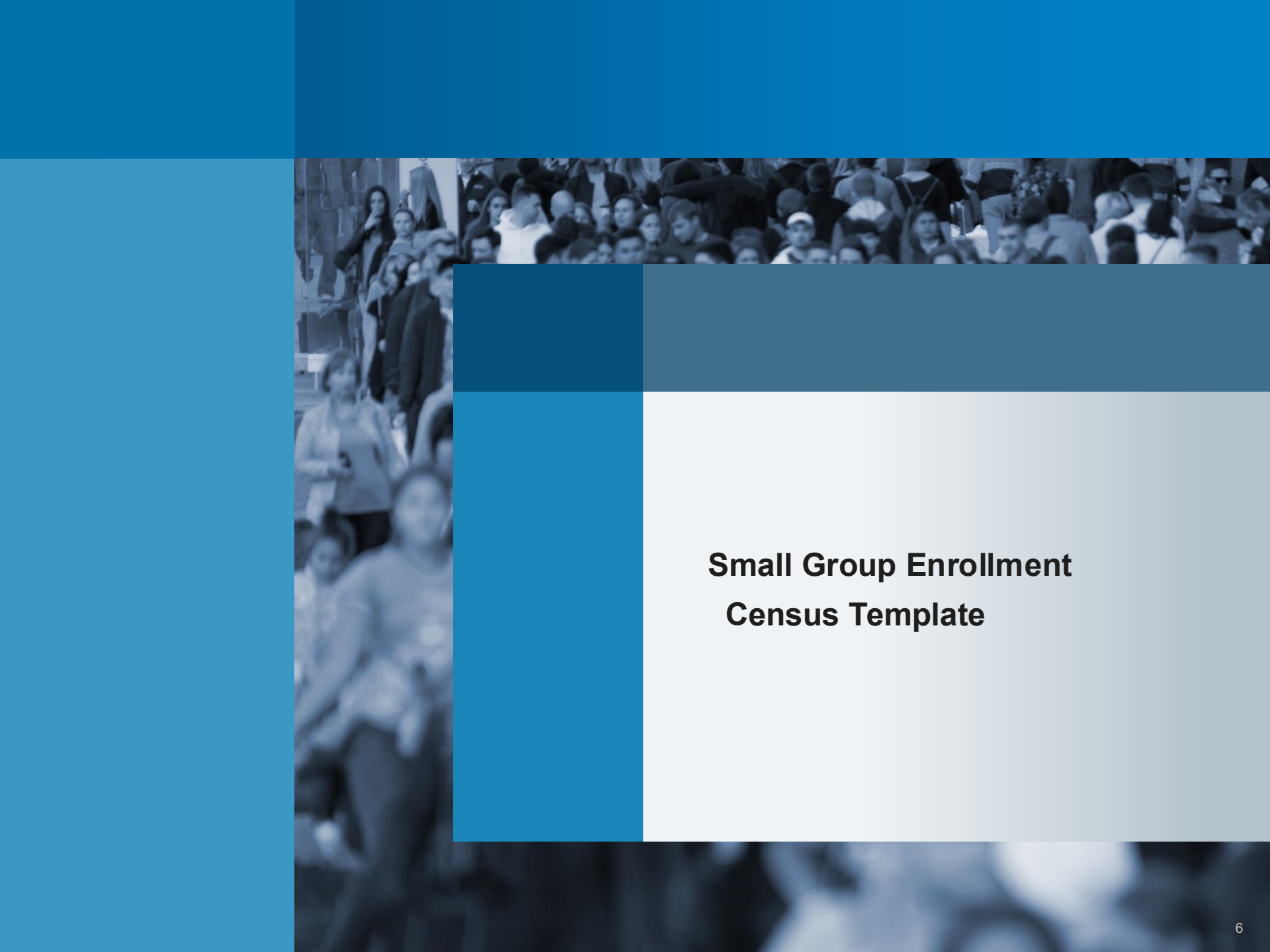
*Small Group /
Middle Market*

- Hospital indemnity and critical illness fields added
- Life options removed from MM
- Standalone enrollment file

Steps for Entering a Group Census

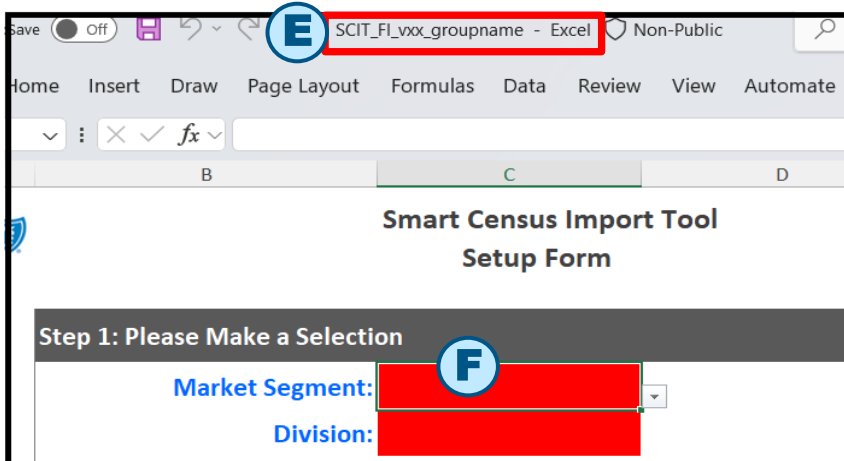
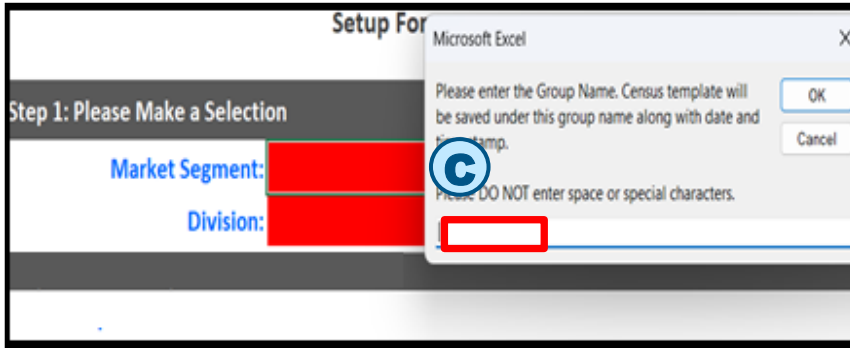
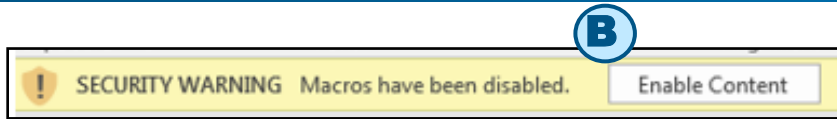
1. Open **Smart Census Import Tool (SCIT)** and save under the group's name.
2. Complete **Census Tool Setup Form**.
3. Enter data in the **Census Template** tab.
4. If the Census is provided on a separate spreadsheet, click **Map** button on the **Setup Form** OR click the **Green button** to enter 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. SCIT Setup Form will display.

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

Complete Setup Form

A

Step 1: Please Make a Selection

Market Segment: SMALL GROUP

Division: IL

Step 2: Enter Group Benefits Information

Has Group Selected Health? Y **A**

HMO Plan? N **B**

Plan 1:

Plan 2:

Plan 3:

Plan 4:

Plan 5:

Plan 6:

Has Group Selected Dental? Y **C**

Plan 1:

Plan 2:

Has Group Selected Life? Y **D**

Class Description

Is Salary Based **E**

Class 1 All Active Full Time N

Class 2 N

Complete the required fields highlighted in red.

A. Has Group Selected Health? Select Y or N, if Y, add Plan(s).

B. HMO Plan? Select Y or N - default N.
NOTE: If HMO is Y, PCP number is required for EPO plans.

C. 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.

D. Has Group Selected Life? If Y, add Class(es).

E. Is Salary Based? - Default N.

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 Setup Form (con't)

STD Selected?	Y	E
	Class Description	
	Class 1	All Active Full Time
	Class 2	
LTD Selected?	Y	F
	Class Description	
	Class 1	All Active Full Time
	Class 2	
Selected Integrated FSA?	Y	G
	Plan 1:	
	Plan 2:	

E. **STD Selected?** If Y, add Class(es).

F. **LTD Selected?** If Y, add Class(es).

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

Complete Setup Form

- F.** Click the **Green button** to navigate to the **Import Census Template** for manual data entry.
- G.** 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.
- H.** 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.
- I.** 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

Map **Help Tab**

F 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.

I 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. 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.

C. **Source Census From The Group** worksheet (tab) displays along with an **Instructions** box.

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	Bob	Dependent	M	#####					
Van	Lucy	Employee	M	#####	EO	IL	N	645854	

Instructions

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

A ACA Small Group Enrollment Import Census Template Columns

B Map Group's Source Census Columns (Select from drop down list)

Source Census Column Letter (For Information Only)

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 **DDL**.
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.

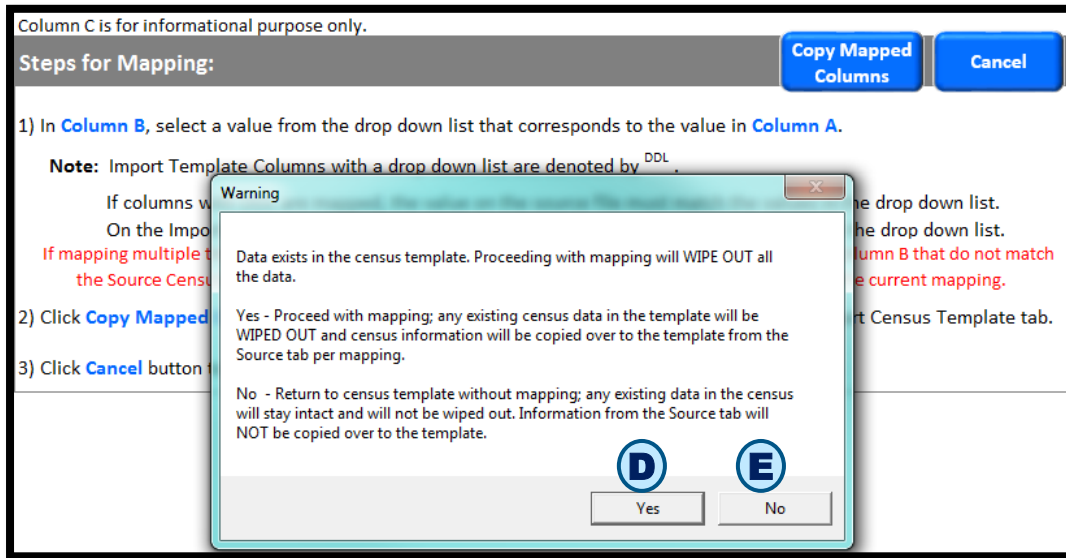
- **Column A** displays column headers from the **ACA Small Group / Mid Market Enrollment Import Census Template** Columns.
- **Column B** has a dropdown list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the right.

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	
C ⓘ	ⓘ	A ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	
Employee										
	D ⓘ									

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

- A.** Column **headers** are **Read Only**. Columns cannot be deleted or moved.
- B.** Columns display/hide, and some dropdown list values, are determined by **Setup Form** values. See “Table 1” in Technical References for details.
- C.** Row #3 **Relationship Code** value is defaulted to **Employee**.
Do not change this value.
- D.** **Starting from Row #3**, rows can be Inserted or Deleted as needed.

Enter Census Data

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

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. 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 'I' with an arrow pointing to the 'i' icon in the Address 1 header; a blue circle 'F' with an arrow pointing to the 'State from zip' button; a blue circle 'E' with an arrow pointing to the Zip Code header; and a blue circle 'G' with an arrow pointing to a yellow-highlighted cell in the City column. A red-highlighted cell is also visible in the City column below the yellow one.

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

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

 - If copying data from an external source, please make sure that the source column format matches the format of the corresponding **Import Census Template** column.
 - If copy/pasting data from an external source causes cells to lock in SCIT, click **File > Save** to unlock the cells.

Enter Census Data for FSA and HRA

FSA		
A FSA Plan 	FSA Employee Election Amount 	FSA Employer Contribution Amount 
	C	D

- A.** Column **headers** are **Read Only**. Columns cannot be deleted or moved.
- B.** Columns display/hide, and some drop-down list values, are determined by **Setup Form** values.
- C.** FSA **Employee Election Amount** is required if FSA Plan selected.
- D.** FSA **Employer Contribution Amount** is optional.

- The entire cell is highlighted in **red** for required columns. The entire cell is highlighted in **yellow** when there is a data mismatch.
- When you type in a value and click **Enter**:
 - If the value is invalid, an error message displays with **Retry**, **Cancel** and **Help** buttons.
 - **Retry** returns you to the typed-in value for editing and **Cancel** wipes out the typed-in value and returns you to the cell.
- 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.
- **Help** icons are available below the header name of each column. Clicking **Help** icon will move the cursor to that exact Column in the **Enrollment Help File** tab. Field requirements are listed in this section.

Enter Census Data for Language, Race and Ethnicity

Language			Ethnicity	Race				
A	B	C	D	E				
Native Language	Spoken	Written	Ethnicity	Race 1	Race 2	Race 3	Race 4	Race 5

A. Native Language is a mandatory field. The user can select a language from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UND (undetermined) upon validation.

B. Spoken Language is a mandatory field. The user can select a language from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UND (undetermined) upon validation.

C. Written Language is a mandatory field. The user can select a language from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UND (undetermined) upon validation.

D. Ethnicity is a mandatory field. The user can select an Ethnicity from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UNK (unknown) upon validation.

E. Race is a mandatory field. The user can select a Race from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UNK (unknown) upon validation.

NOTE: *Race 1 field is mandatory. Additional Races can be added to Race 2 through Race 5 fields.*

Enter Census Data (New Ancillary Fields)

Standalone Vision A		Critical Illness B				Accident Insurance C		Hospital Indemnity D	
Standalone Vision Coverage (Y/N)	AUTO FILL Standalone Vision Coverage Type	Critical Ill Coverage (Y/N)	Employee Critical Illness	Spouse Critical Illness	Child Critical Illness	Accident Ins Coverage (Y/N)	AUTO FILL Accident Ins Coverage Type	Hospital Indemnity Coverage (Y/N)	AUTO FILL Hospital Indemnity Coverage Type
i	i	i	i			i	i		

- A. Standalone Vision:** These two columns are displayed when **Employee Status** is either **Active** or **COBRA** for all Divisions. They are also displayed for IL when **Employee Status** is **Retired** or **IL Cont.** They are also displayed for TX when **Employee Status** is **TX Cont** or **TX Dependent Cont.**
- B. Critical Illness:** These columns are displayed when the **Employee Status** is **Active** for all Divisions. If **Critical Illness Coverage** is set to **Y**, then either **Standalone Vision** or **Accident Insurance** must also be **Y**; otherwise, the two **N** cells are highlighted **red**. If data is entered and the **Employee Status** is **not Active**, the cells are highlighted **yellow**. The data will be removed once the user clicks the **Save** button (validation).
- C. Accident Insurance:** These two columns are displayed when the **Employee Status** is **Active** for all Divisions. If **Accident Insurance** is set to **Y**, then either **Standalone Vision** or **Accident Insurance** must also be **Y**; otherwise, the two **N** cells are highlighted **red**. If data is entered and the **Employee Status** is **not Active**, the cells are highlighted **yellow**. The data will be removed once the user clicks the **Save** button (validation).
- D. Hospital Indemnity** These two columns are displayed when **Employee Status** is either **Active** or **COBRA** for all Divisions. They are also displayed for IL when **Employee Status** is **Retired** or **IL Cont.** They are also displayed for TX when **Employee Status** is **TX Cont** or **TX Dependent Cont.**

Enter Census Data

Term Life								
A Life Ins Coverage (Y/N) 	B Employee Basic Life 	C Dependent Basic Life (Y/N) 	D Spouse Dependent Basic Life 	E Child Dependent Basic Life 	F Supplemental Life (Y/N) 	G Employee Supplemental Life 	H Spouse Supplemental Life 	I Child Supplemental Life 

- A. Life Ins Coverage (Y/N):** Does this Employee have Life. If “Y”, then **B** thru **I** can be filled, otherwise no data allowed in **B** thru **I**.
- B. Employee Basic Life:** This will have drop down values from the Group Information Tab. If the class selected is **Salary Based**, then Salary is mandatory
- C. Dependent Basic Life (Y/N):** Does the Spouse/Child have Dependent Life. If “Y”, then either Spouse or Child must have a value.
- D. Spouse Dependent Basic Life:** Dropdown of **No Coverage** and **\$10,000**.
- E. Child Dependent Basic Life:** Dropdown of **No Coverage** and **\$5,000**.
- F. Supplemental Life (Y/N):** Does the Employee/Spouse/Child have Supplemental Life. If “Y”, then Employee must have a value.
- G. Employee Supplemental Life:** Dropdown of **\$10,000** to **\$500,000**.
- H. Spouse Supplemental Life:** Dropdown of **No Coverage** to **\$150,000**. Spouse’s amount can not be over 50% of the Employee amount.
- I. Child Supplemental Life:** Dropdown of **No Coverage** and **\$10,000**.

Enter Census Data (STD and LTD)

STD		LTD		Salary
A Short Term Disability (Y/N) 	B Short Term Disability 	C Long Term Disability (Y/N) 	D Long Term Disability 	E Employee Salary 

- A. Short Term Disability (Y/N):** Does the user have Short Term Disability (Y/N).
- B. Short Term Disability :** If previous field is “Y” then select from the drop down one of the classes entered on the Group Information Tab.
- C. Long Term Disability (Y/N):** Does the user have Long Term Disability (Y/N).
- D. Long Term Disability :** If previous field is “Y” then select from the drop down one of the classes entered on the Group Information Tab.
- E. Employee Salary:** If Employee Basic Life selected class **Is Salary Based** and/or STD and/or LTD is selected then Salary is mandatory.

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.*

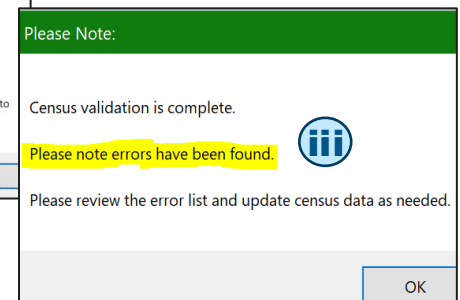
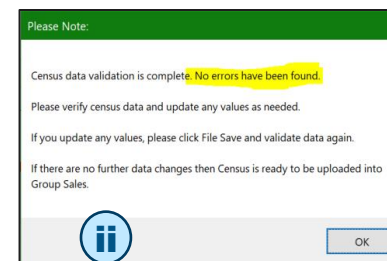
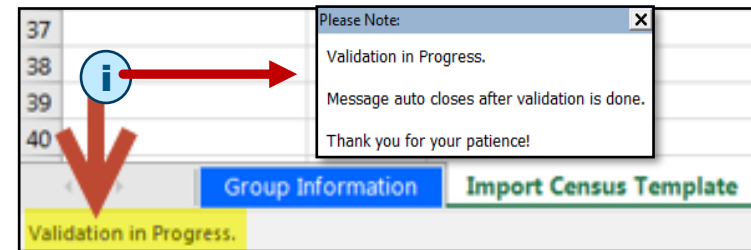
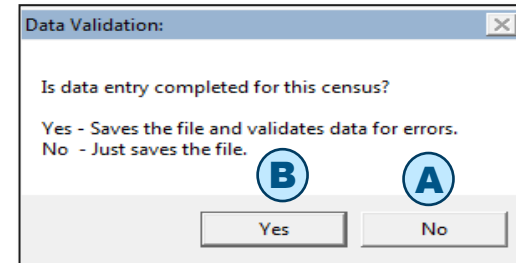
- B. Click **Yes** if Census entries are complete. Existing data is saved. If values are blank in columns where the **AutoFill** feature is available, a default value will be entered systematically. Final validation rules will run.

- i. **Validation In Progress** indicators will display:

- Excel Status bar (bottom left corner)
- Validation in Progress pop-up box

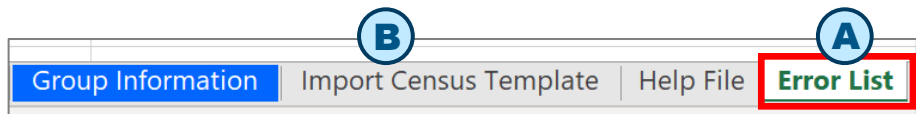
- ii. **If no errors are found**, confirmation box displays and completed Census can be processed per current business process.

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

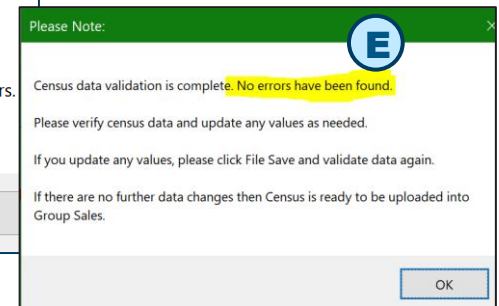
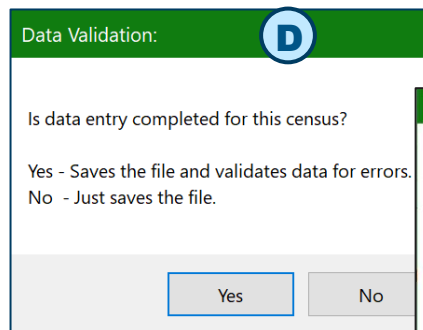


Data Validation Error List

- A.** 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.
- B.** 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.
- C.** Once you have corrected any errors, validate data again by clicking **File > Save**.
- D.** Select **Yes** in the **Is data entry completed for this census?** message box.
- E.** 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).



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

The screenshot shows the 'Member Census' page in 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: 5' is displayed, along with 'Add Member', 'Export Census', and 'Import Census' buttons. An orange arrow points from the 'Import Census' button to the 'Import Census' dialog box below.

The 'Import Census' dialog box contains the following information:

- 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 ready to input the census information.
- Select File to upload: C:\Users\U344541\Desktop [Browse...]
- 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
- [Load File]

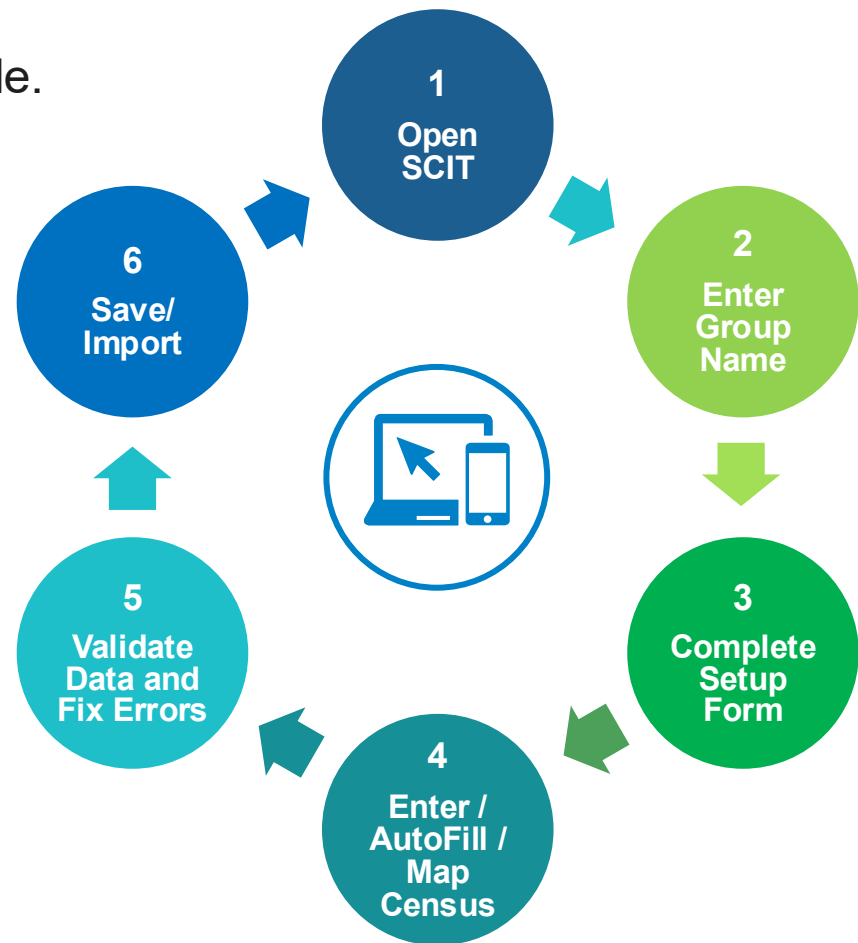
In SCIT, once Census data is validated and no errors are found, the Census is ready to be uploaded into **Small Group & Middle Market Enrollment Tool**.

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.

Enter Census for the Next Group

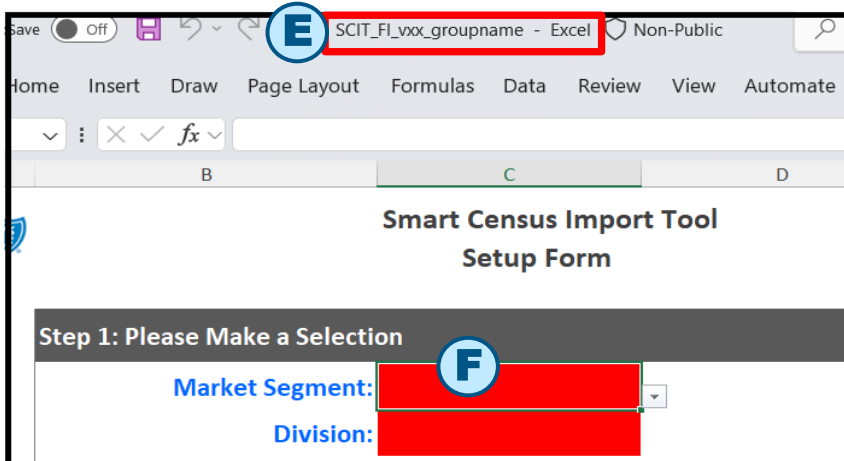
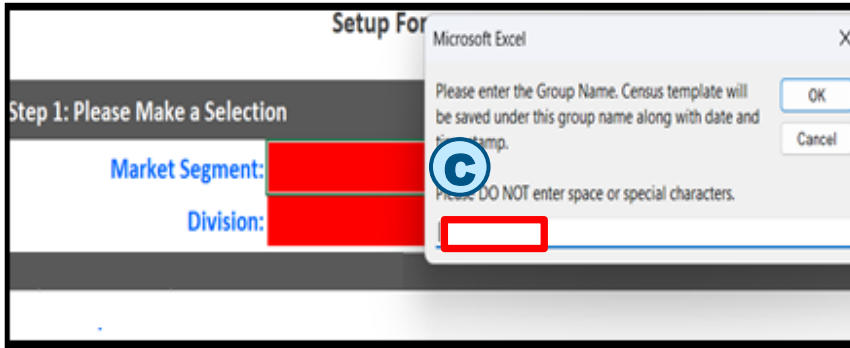
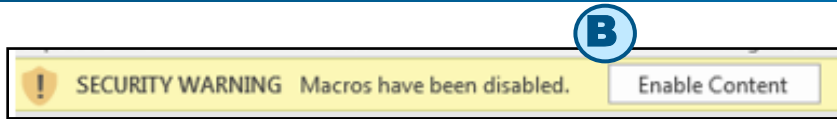
To enter Census for the next group,
File Close prior group's open SCIT file.
Repeat Steps 1 through 6.





Middle Market Enrollment Census Template

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. **SCIT Setup Form** will display.
 - Select **Segment: SMALL GROUP OR MID MARKET**
 - Select a **Division** from dropdown list.

Complete Setup Form

Step 2: Enter Group Benefits Information

Has Group Selected Health? Y **(A)**

HMO Plan? N **(B)**

Plan 1: [REDACTED]

Plan 2:

Plan 3:

Plan 4:

Plan 5:

Plan 6:

Has Group Selected Dental? N **(C)**

Plan 1:

Plan 2:

Selected Integrated FSA? Y **(D)**

Plan 1:

Plan 2:

Selected Integrated HRA? Y **(E)**

Plan 1:

Plan 2:

Plan 3:

Complete the required fields highlighted in red.

A. Has Group Selected Health? Select Y or N, if Y, add Plan(s).

B. HMO Plan? Select Y or N - default N.
NOTE: If HMO is Y, PCP number is required for EPO plans.

C. 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.

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

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

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 Setup Form

- F.** Click the **Green button** to navigate to the **Import Census Template** for manual data entry.
- G.** 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.
- H.** 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.
- I.** 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

Map **Help Tab**

F 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.

I 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** 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

Mapping Source Columns to Import Census Template Columns

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)
Group Information Columns		
Relationship Code ^{DDL}	Relationship	D
Waive All Coverage ^{DDL}	waive Coverage	E
Waive Reason Code ^{DDL}	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 ^{DDL}	Gender	G
SSN	SSN	I
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 ^{DDL}.
 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.

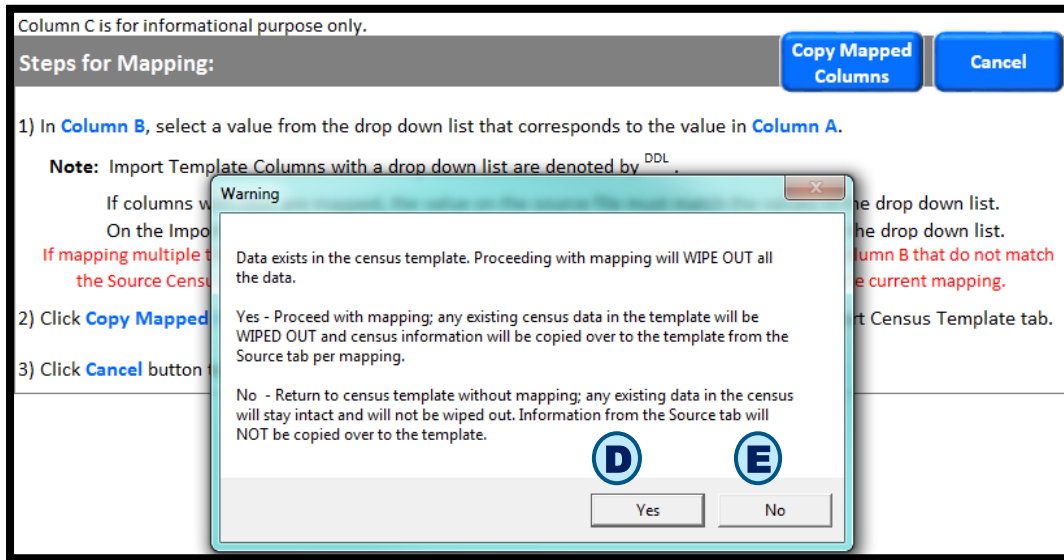
- **Column A** displays column headers from the **ACA Small Group / Mid Market Enrollment Import Census Template** Columns.
- **Column B** has a dropdown list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the right.

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	
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 “Table 1” in Technical References for details.
- C.** Row #3 **Relationship Code** value is defaulted to **Employee**.
Do not change this value.
- D.** **Starting from Row #3**, rows can be Inserted or Deleted as needed.

Enter Census Data

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

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 icon). Annotations include: a blue circle 'I' with an arrow pointing to the 'Address 1' header; a blue circle 'F' with an arrow pointing to the 'State' header; a blue circle 'E' with an arrow pointing to the 'Zip Code' header; a blue circle 'G' with an arrow pointing to a red-highlighted cell in the 'City' column; and a green circle 'F' with an arrow pointing to the 'State from zip' button in the 'State' column. The 'State' column also has an 'AUTO FILL' button. A yellow-highlighted cell is visible in the 'City' column in 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. Similarly, entering **IL Cont** as the value will cause **IL Continuee** columns to display for completion.
 - A value of **Y** in the **Medicare Eligible** cell will cause **Medicare** columns to display. See “Table 2” in Technical References.
- Returning to the **Group Information** tab hides other tabs: **Import Census Template** tab, **Error List** tab and **Help File** tab.
 - To return to, and display the **Import Census Template** tab, click the **Green button**.
 - To return to, and display the **Error List** tab, click **Green button** and click **File > Save**.
 - To return to, and display the **Help File** tab, click the **Help File** tab.
- **SSN dashes**
 - If the source **SSN** value has dashes, paste into SCIT “as is”. These values will be highlighted in **yellow**. On **File > Save** validation, dashes will be removed systematically.
- **Date values**
 - While typing dates include “/”
 - If the **date** format in the source file is formatted with a different date format than MM/DD/YYYY, you can still copy and paste it into SCIT “as is”. The date will be reformatted systematically to MM/DD/YYYY when you click **File > Save**.
- **Text values**
 - If source values are longer than the expected length, they are truncated systematically when you click **File > Save**.
- Values can be copied and pasted as needed onto the Census columns.

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

 - If copying data from an external source, please make sure that the source column format matches the format of the corresponding **Import Census Template** column.
 - If copy/pasting data from an external source causes cells to lock in SCIT, click **File > Save** to unlock the cells.

Enter Census Data for FSA and HRA

FSA			HRA
A	C	D	E
FSA Plan	FSA Employee Election Amount	FSA Employer Contribution Amount	HRA Plan
			

A. Column **headers** are **Read Only**.

Columns cannot be deleted or moved.

B. Columns display/hide, and some drop-down list values, are determined by **Setup Form** values.

C. FSA **Employee Election Amount** is required if FSA Plan selected.

D. FSA **Employer Contribution Amount** is optional.

E. **HRA Plan** column will display only for Middle Market.

- The entire cell is highlighted in **red** for required columns. The entire cell is highlighted in **yellow** when there is a data mismatch.
- When you type in a value and click **Enter**:
 - If the value is invalid, an error message displays with **Retry**, **Cancel** and **Help** buttons.
 - **Retry** returns you to the typed-in value for editing and **Cancel** wipes out the typed-in value and returns you to the cell.
- 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.
- **Help** icons are available below the header name of each column. Clicking **Help** icon will move the cursor to that exact Column in the **Enrollment Help File** tab. Field requirements are listed in this section.

Enter Census Data for Language, Race and Ethnicity

Language			Ethnicity	Race				
A	B	C	D	E				
Native Language	Spoken	Written	Ethnicity	Race 1	Race 2	Race 3	Race 4	Race 5

A. Native Language is a mandatory field. The user can select a language from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UND (undetermined) upon validation.

B. Spoken Language is a mandatory field. The user can select a language from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UND (undetermined) upon validation.

C. Written Language is a mandatory field. The user can select a language from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UND (undetermined) upon validation.

D. Ethnicity is a mandatory field. The user can select an Ethnicity from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UNK (unknown) upon validation.

E. Race is a mandatory field. The user can select a Race from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UNK (unknown) upon validation.

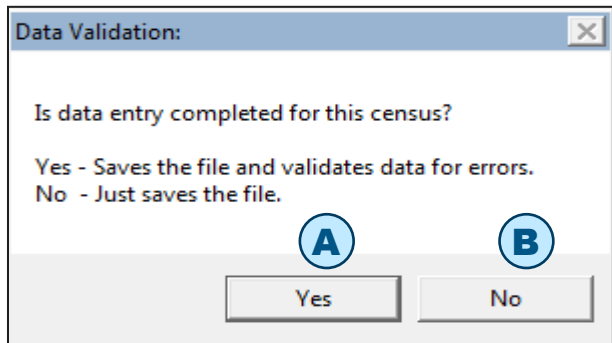
NOTE: *Race 1 field is mandatory. Additional Races can be added to Race 2 through Race 5 fields.*

Enter Census Data (New Ancillary Fields)

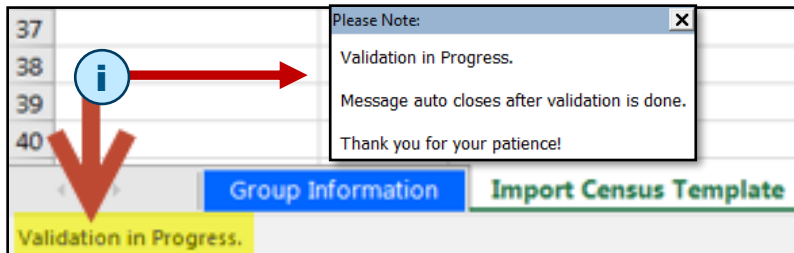
Standalone Vision A		Critical Illness B				Accident Insurance C		Hospital Indemnity D	
Standalone Vision Coverage (Y/N) i	AUTO FILL Standalone Vision Coverage Type i	Critical Ill Coverage (Y/N) i	Employee Critical Illness i	Spouse Critical Illness	Child Critical Illness	Accident Ins Coverage (Y/N) i	AUTO FILL Accident Ins Coverage Type i	Hospital Indemnity Coverage (Y/N)	AUTO FILL Hospital Indemnity Coverage Type

- A. Standalone Vision:** These two columns are displayed when **Employee Status** is either **Active** or **COBRA** for all Divisions. They are also displayed for IL when **Employee Status** is **Retired** or **IL Cont.** They are also displayed for TX when **Employee Status** is **TX Cont** or **TX Dependent Cont.**
- B. Critical Illness:** These columns are displayed when the **Employee Status** is **Active** for all Divisions. If **Critical Illness Coverage** is set to **Y**, then either **Standalone Vision** or **Accident Insurance** must also be **Y**; otherwise, the two **N** cells are highlighted **red**. If data is entered and the **Employee Status** is **not Active**, the cells are highlighted **yellow**. The data will be removed once the user clicks the **Save** button (validation).
- C. Accident Insurance:** These two columns are displayed when the **Employee Status** is **Active** for all Divisions. If **Accident Insurance** is set to **Y**, then either **Standalone Vision** or **Accident Insurance** must also be **Y**; otherwise, the two **N** cells are highlighted **red**. If data is entered and the **Employee Status** is **not Active**, the cells are highlighted **yellow**. The data will be removed once the user clicks the **Save** button (validation).
- D. Hospital Indemnity** These two columns are displayed when **Employee Status** is either **Active** or **COBRA** for all Divisions. They are also displayed for IL when **Employee Status** is **Retired** or **IL Cont.** They are also displayed for TX when **Employee Status** is **TX Cont** or **TX Dependent Cont.**

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 **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.

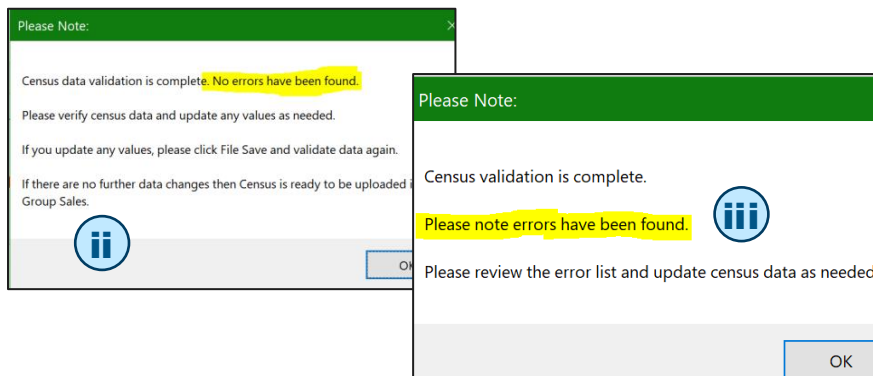
B. Click **No** if you want to save existing data and return to complete the Census entry later.
NOTE: *Validation rules do not run.*

i. Validation In Progress indicators will display:

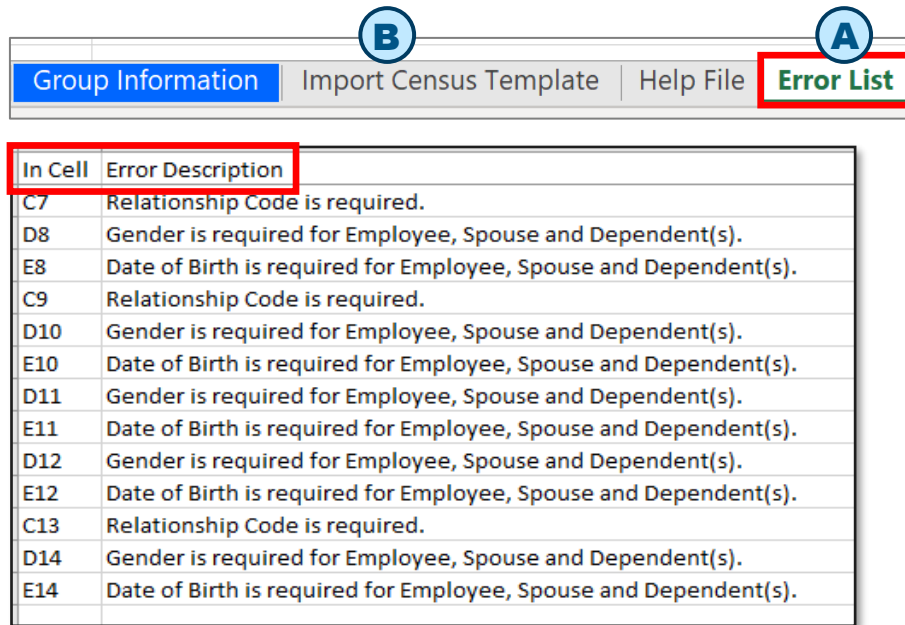
- Excel Status bar (bottom left corner)
- Validation in Progress pop-up box

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



The screenshot shows the 'Error List' tab selected in the 'Import Census Template' window. A table lists data validation errors with columns 'In Cell' and 'Error Description'. The 'In Cell' column contains cell references (C7, D8, E8, C9, D10, E10, D11, E11, D12, E12, C13, D14, E14) and the 'Error Description' column contains messages like 'Relationship Code is required.' and 'Gender is required for Employee, Spouse and Dependent(s).'. A red box highlights the 'In Cell' and 'Error Description' headers. A blue circle 'B' is above the 'Import Census Template' tab, and a blue circle 'A' is above the 'Error List' tab.

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).

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

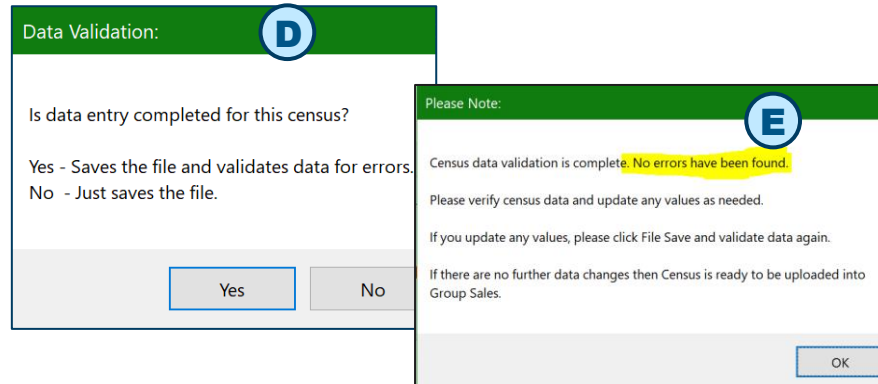
- **In Cell** column – specifies the cell location of the error.
- **Error Description** column – specifies the column and the nature of the error.

B. 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.

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

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

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



The screenshot shows two dialog boxes. The 'Data Validation' box (labeled D) asks 'Is data entry completed for this census?' with 'Yes' and 'No' buttons. The 'Please Note' box (labeled E) displays a message: 'Census data validation is complete. No errors have been found.' It also includes instructions to verify data and click 'File Save' if updates are made, and a confirmation that the census is ready for upload if no further changes are made. An 'OK' button is at the bottom.

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

The screenshot shows the 'Member Census' page in 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: 5' is displayed, along with an 'Add Member' button. At the bottom right, there are 'Export Census' and 'Import Census' buttons. A red arrow points from the 'Import Census' button to the 'Import Census' dialog box below. The dialog box has a title bar 'Import Census' and a message: '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.' Below this, there are 'Steps to save the Import Census Template:' listed. A 'Select File to upload:' field shows a file path 'C:\Users\U344541\Desktop' and a 'Browse...' button. At the bottom, there are two radio buttons: 'Overwrite' (selected) and 'Append'. A 'Load File' button is at the bottom right. Various letters in circles (A-H) are placed over the interface elements to correspond with the steps in the list.

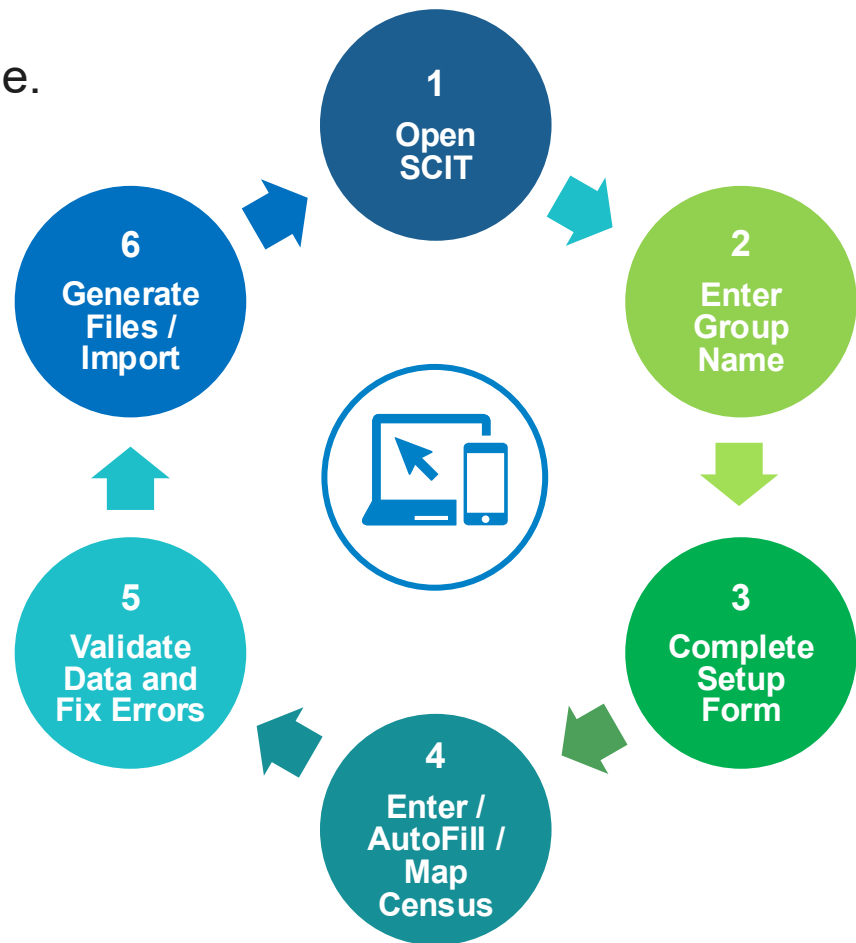
In SCIT, once Census data is validated and no errors are found, the Census is ready to be uploaded into **Small Group & Middle Market Enrollment Tool**.

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.

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.





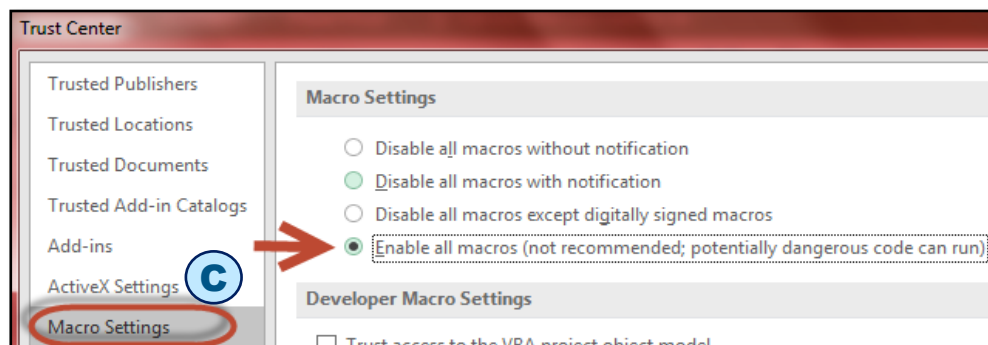
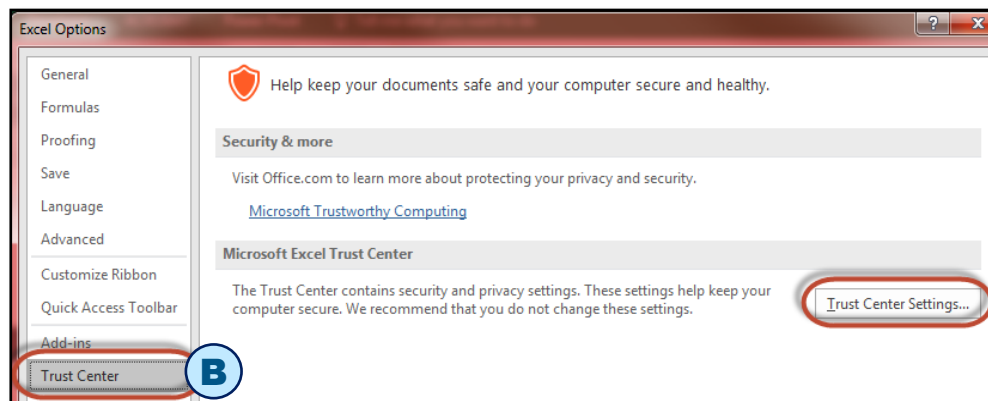
Technical References

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.

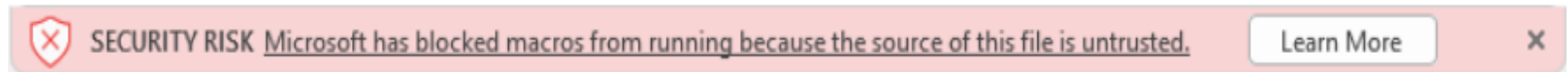
- A. From Excel menu, select **File > Options**.
- B. From Excel's **Options** box, select **Trust Center** and then click on **Trust Center Settings**.
- C. From Trust Center box, select **Macro Settings**. Then, select the checkbox for **Enable all macros**.



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*)



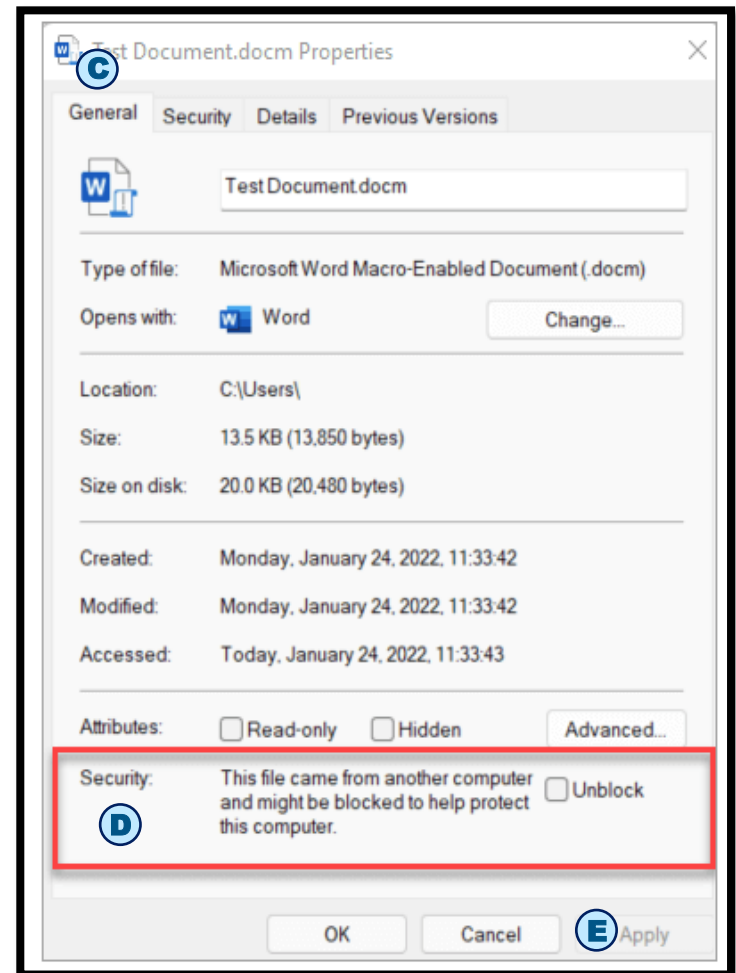
SECURITY RISK Microsoft has blocked macros from running because the source of this file is untrusted.

[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**.

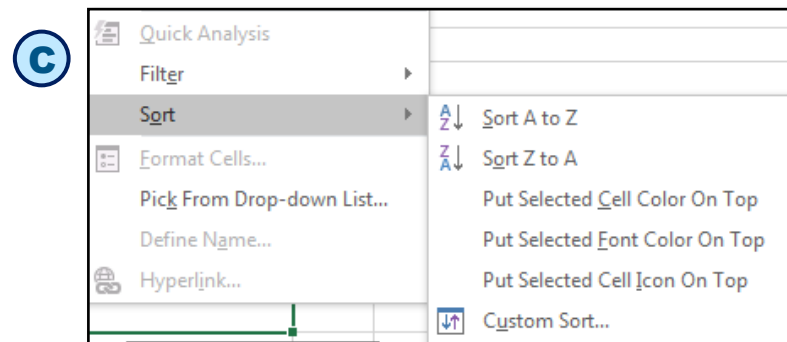
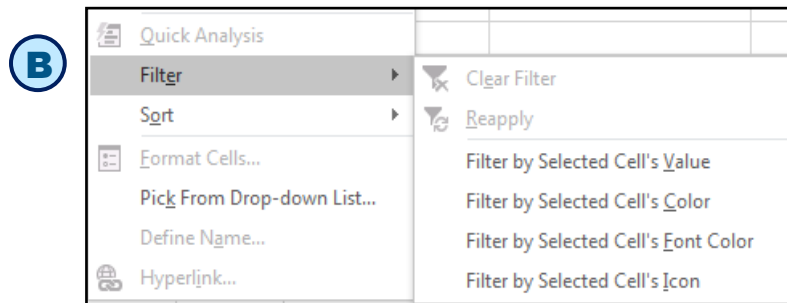
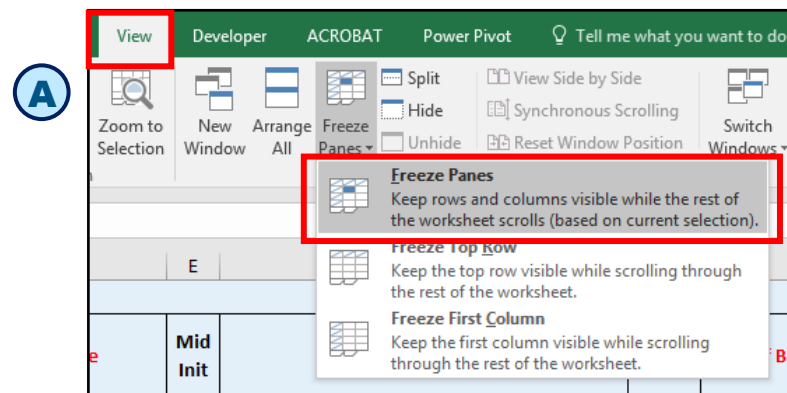
B. Filter Census data as needed.

- 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.

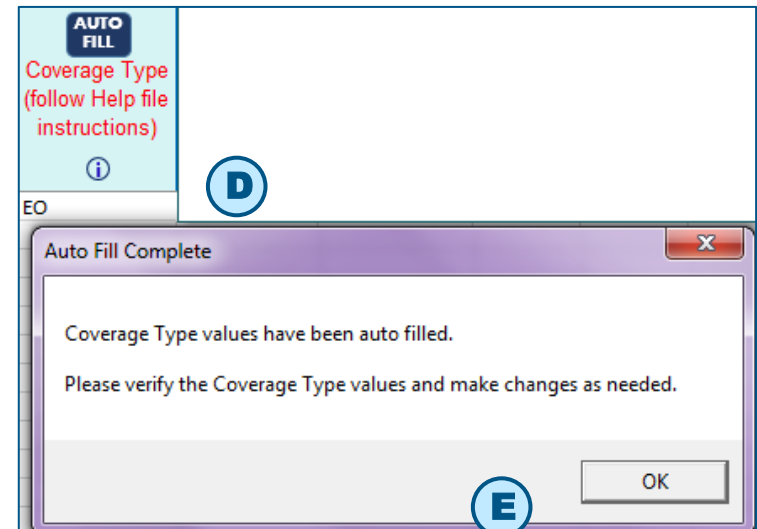
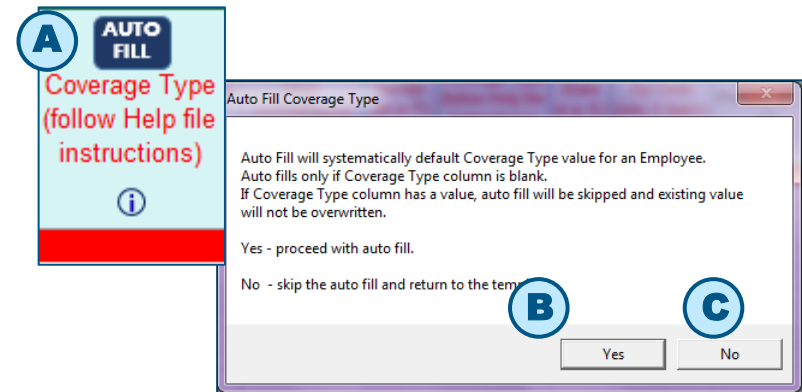


AutoFill Feature



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

Column with AutoFill	Description	Available In
Accident Ins Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG Enrollment
Billing Category and Product Category	AutoFills typed in value for Enrolling Subscribers	MM Enrollment
Critical Illness Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG Enrollment
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 Enrollment
Employment Status	AutoFills value of A or Active for Employee	SG/MM Enrollment
Health Coverage (Y/N)	AutoFills value of Y for Employee choosing coverage	SG/MM Enrollment
Health Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	Available in all Templates
Selected Health Plan	AutoFills value of Plan 1 from Setup Form for Employee	SG/MM Enrollment

AutoFill Select Columns Reference Table *(con't)*

Column with AutoFill	Description	Available In
Coverage Type		SG/MM
State Code or State	AutoFills value from the Division value entered on the Setup Form	Available in all Templates
State from Zip	Fills in State when Zip Code is present	Available in all Templates
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
Dental Coverage (Y/N)	AutoFills value of Y for Employee choosing coverage	SG/MM
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 value of today's date for Employee	SG/MM
Standalone Vision Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee	SG/MM
Accident Ins Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee	SG/MM
Hospital Indemnity Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee	SG/MM

Reference Tables:

Small Group and Middle Market Enrollment

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

Setup Form field on Group Information tab	Column(s)	Displayed or Hidden
Has Group Selected Health? is Y Has Group Selected Health? is N	Columns AD through AH	Display columns (SG/MM) Hides columns (SG/MM)
HMO Plan? is Y HMO Plan? is N	Columns AI through AN	Display columns (SG – IL , NM & TX only / MM) Hides columns (SG/MM)
Has Group Selected Dental? is Y Has Group Selected Dental? is N	Columns AQ through AU	Display columns (SG/MM) Hide columns (SG/MM)
Has Group Selected Life? Is Y Has Group Selected Life? Is N	Columns AV through BA	Display columns (SG) Hide columns (SG)
Has Group Selected Integrated FSA? is Y Has Group Selected Integrated FSA? is N	Columns BN through BP	Display columns (SG/MM) Hide columns (SG/MM)
Has Group Selected Integrated HRA? is Y Has Group Selected Integrated HRA? is N	Columns BQ	Display columns (SG/MM) Hide columns (SG/MM)
Has Group Selected Life? is Y Has Group Selected Life? is N	Columns AV through BA Columns CJ through CR	Display columns (SG) Hide columns (SG)
STD Selected? is Y STD Selected? is N	Columns CS through CT	Display columns (SG) Hide columns (SG)
LTD Selected? is Y LTD Selected? is N	Columns CU through CV	Display columns (SG) Hid columns (SG)

Reference Tables:

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

Based on dropdown values selected on Import Census Template, Column are displayed or hidden

Group Information tab column selection	Column(s)	Displayed or Hidden
Employee Status is "COBRA"	Columns X:Z and CD:CE.	Displays COBRA Reason code, COBRA Start Date, COBRA Project End Date and Standalone Vision columns. (SG)
Employee Status is "Active"	Columns CD:CI	Displays Standalone Vision columns (SG)
Employee Status is "Retired" (<i>IL only</i>)	Columns CD:CE	Displays Standalone Vision, Critical Illness and Accident Insurance columns (SG)

State-specific column dropdown variances

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

Reference Tables:

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

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

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

How to Report Issues



For technical issues with Group Sales Tools
Contact our ITG Service Center at
888-706-0583



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

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

