



BlueCross BlueShield  
of Texas



# SMART CENSUS IMPORT TOOL • SCIT

## Reference Guide

### *Version 16*

# Table of Contents

- **Version 16 Release Notes**
- **Steps for Entering a Group's Census**
  - [Small Group Quoting](#)
  - [Middle Market Quoting](#)
  - [Small Group Enrollment](#)
  - [Middle Market Enrollment](#)
- **How to Report Issues**
- **Technical References**
  - Enabling Macros
  - Auto Fill Feature
  - Freeze Panes, Filter and Sort Features
  - Reference Tables: Small Group Enrollment Census Template

**NOTE:** The Smart Census Import Tool (SCIT) process and tool is identical for all five divisions. This reference guide uses representative screenshots from Illinois.

# Before You Start

Compatibility	<ul style="list-style-type: none"><li>• Version 16 is <b>not compatible</b> with Excel 2009 and older versions.</li><li>• Version 16 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> Save Smart Census Import Template (SCIT) on your local drive before using. If working from a network drive, SCIT performance may be a bit slower.</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 16 Release Notes

## Enrollment *Small Group*

### Group Information TAB

1. Added new field "Is the Effective Date before 5/1". (Y/N)
  - a) If "Y", STD, LTD and Life Class rows are hidden.
  - b) If "N", Life Classes, STD and LTD fields are displayed as follows:
    - Display Class 1 and Class 2 Description fields and select Y/N if Salary Based for each Class under Life.
    - If STD or LTD is "Y", display Class 1 and Class 2 Description fields.

### Import Census Template TAB

1. Added 13 new columns: 1) Life Ins Coverage; 2) Employee Basic Life; 3) Dependent Basic Life; 4) Spouse Dependent Basic Life; 5) Child Dependent Basic Life; 6) Supplemental Life; 7) Employee Supplemental Life; 8) Spouse Supplemental Life; 9) Child Supplemental Life; 10) Short Term Disability; 11) Short Term Disability; 12) Long Term Disability; and 13) Long Term Disability.
2. Ancillary products can be selected individually (Standalone Vision, Critical Illness and Accident Insurance).
3. If a member **IS NOT** waiving coverage for all products, and user does not have a product selected, an error message will display.
4. Added additional dropdown values to Race 1-5: 1) Other Race; and All 5 Races & Other (*Race 1 only*).
5. Added Ancillary jump.
6. Added new Texas zip codes to database to generate State.

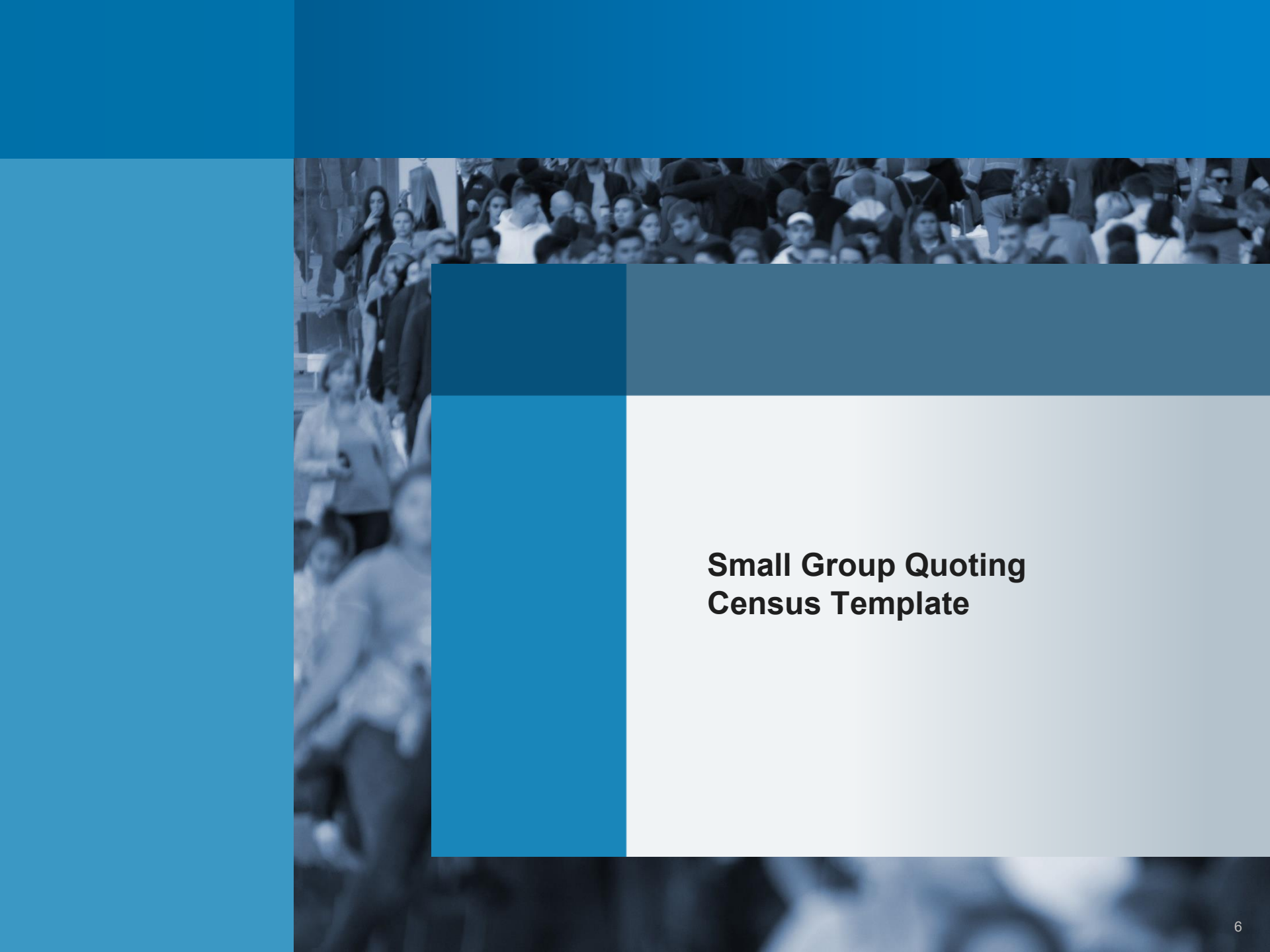
## Known Data Importing Issue

- Zip Codes with leading zeros **will not** import into the Group Sales application and will have to be manually entered. This impacts Quoting only. We anticipate this to be fixed in a future 2023 release.

# 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 **Auto Fill** 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.

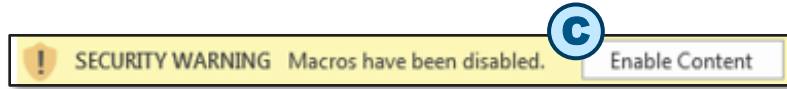




## **Small Group Quoting Census Template**



# Open SCIT and Save Under Group Name



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

B. Once **Division** is selected, state will be displayed to the left of logo

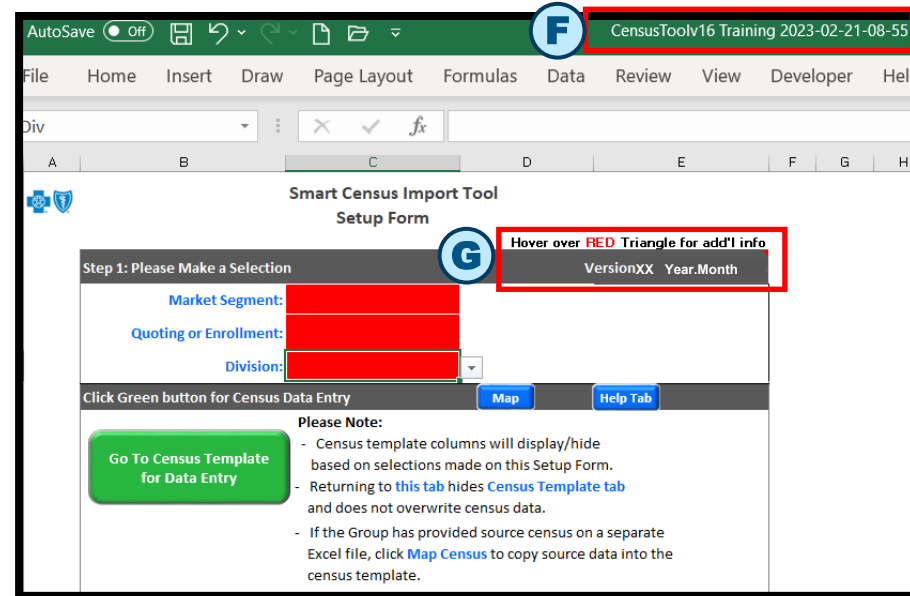
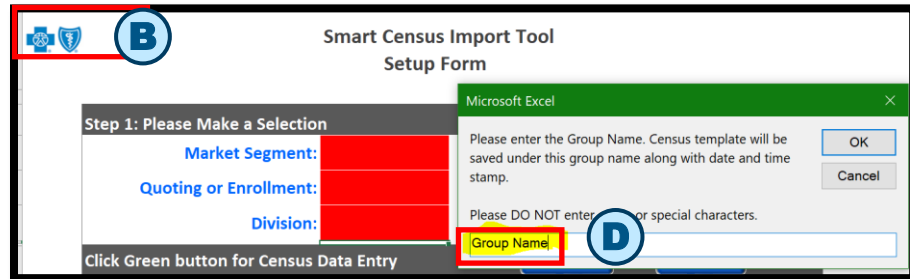
C. On File > Open, click **Enable Content**. Skip this step if macros are enabled through **File > Options** menu. Please see “Enable Macros” in Technical References for instructions.

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

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

F. 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.

G. **Version** is displayed with date. To view the latest updates to current version, click the small **red** triangle to the right of Version date.



# Complete Setup Form: Make a Selection

The screenshot shows the 'Smart Census Import Tool Setup Form' interface. At the top left is the BlueCross BlueShield of Illinois logo, annotated with a red box and a blue circle 'D'. The title 'Smart Census Import Tool Setup Form' is centered at the top. In the top right corner, there is a red triangle icon annotated with a blue circle 'E' and a red circle. Below the title bar, a grey header bar contains the text 'Step 1: Please Make a Selection' and 'Version XX' (annotated with a blue circle 'F'). The main content area has three fields: 'Market Segment: SMALL GROUP' (annotated with a blue circle 'A'), 'Quoting or Enrollment: QUOTING' (annotated with a blue circle 'B'), and 'Division: IL' (annotated with a blue circle 'C'). A tooltip text 'Hover over RED Triangle for add'l info' is visible near the red triangle icon.

**A.** Select a Market Segment: **SMALL GROUP**

**B.** Select **QUOTING**.

**C.** Select a **Division** from the drop-down list.

*Once these fields are populated, the Template is displayed and ready for data entry.*

**D.** Logo will change based on **Division** selection.

**E.** Click **red** triangle displays latest changes.

**F.** SCIT **Version** number with **Date** appended to the right.

*Once these fields are populated, the Template is displayed and ready for data entry.*



# Complete Setup Form: Other Fields

Step 1: Please Make a Selection

Market Segment: SMALL GROUP

Quoting or Enrollment: QUOTING

Division: IL

Click Green button for Census Data Entry

**Map** **Help Tab**

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

**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.

D. Click the **Map** button if you have received Census from the group on **a separate spreadsheet** (Source). This feature will enable you to copy and map the Source columns to the Census Template columns. After columns are mapped, data will be copied over to the Census Template systematically per the mapping.

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

F. Click the **Green button** to navigate to the **Quoting Census Template** for manual data entry.

**G**

Last Name	First Name	Relationship Code	Gender (M or F)	DOB (mm/dd/yyyy)	<b>AUTO FILL</b> Coverage Type	<b>AUTO FILL</b> State Code
		Employee				

**DO NOT INCLUDE** part-time employees, employees waiving coverage or in waiting period on Census.

G. Click the **Auto Fill** button to systematically populate information for select columns.

# Complete Setup Form

**Step 1: Please Make a Selection**

Market Segment: **SMALL GROUP** **A**

Quoting or Enrollment: **QUOTING** **B**

Division: **IL** **C**

Click Green button for Census Data Entry

**Map** **F**

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

**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.

**Display All Census Columns**

**ATTENTION:**

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

**A.** Select a Market Segment: **SMALL GROUP**

**B.** Select **QUOTING**

**C.** Select a **Division** from the dropdown list.

*Once these fields are populated, the Template is displayed and ready for data entry.*

**D.** Click **Map** button if you have 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 Census Template systematically per the mapping.

**E.** Click the **Green button** to navigate to the **Small Group Quoting Census** Template for manual data entry.

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

# Help Information

First Name	Relationship Code
Employee	

A. Clicking **Help** icon ⓘ will move the cursor to that exact Column in the **Quoting Help File** tab.

**Example:** Clicking Help icon in the **First Name** header will move the cursor to the **First Name** row of the **Quoting Help File** tab.

Field Name	Formatting Specifications	Maximum Length	Notes
Last Name	Alphabetic, numeric, and special characters	20	Applicable to all divisions. Applicable for 1-50 Fully Insured, 10-100 Blue Balanced Funded Quote. Optional for Employee, Spouse & Dependent.
First Name	Alphabetic, numeric, and special characters	20	Applicable to all divisions. Applicable for 1-50 Fully Insured, 10-100 Blue Balanced Funded Quote. Optional for Employee, Spouse & Dependent.

Step 1: Please Make a Selection

Market Segment:

Quoting or Enrollment: QUOTING

Division: IL

Click Green button for Census Data Entry

Map Help Tab

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

# Small Group Quoting Enter Data

<div>A</div> <div>Last Name</div> <div>i</div>	<div>First Name</div> <div>i</div>	<div>Relationship Code</div> <div>B i</div>	<div>Gender (M or F)</div> <div>i</div>	<div>DOB (mm/dd/yyyy)</div> <div>i</div>	<div>AUTO FILL</div> <div>Coverage Type</div> <div>i</div>	<div>AUTO FILL</div> <div>State from zip</div> <div>State Code</div> <div>i</div>
<div>C</div>		Employee	<div>D</div>		<div>E</div>	

- A. Column headers are Read Only. Columns cannot be deleted or moved.
- B. Row #2 **Relationship Code** value defaults to **Employee**. Please do not change this value.
- C. Beginning with Row #3, rows can be inserted or deleted as needed.
- D. 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 will be highlighted in **green** for information purposes.
- E. 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.

# Small Group Quoting Enter Data

<u>Last Name</u> 	<u>First Name</u> 	<u>Relationship Code</u> 	<u>Gender</u> (M or F) 	<u>DOB</u> (mm/dd/yyyy) 	 <u>Coverage Type</u> 	 <u>State Code</u> 
		Employee				

Values can be copied and pasted 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 them.

**F. Help** icons are available below the header name of each column.

**G. Auto Fill** buttons are available in the header for select columns.

**H. State from Zip** button derives state based on zip code entered.

# Small Group Quoting Map Census Feature

Step 1: Please Make a Selection

Market Segment: **SMALL GROUP**

Quoting or Enrollment: **QUOTING**

Division: **IL**

Click Green button for Census Data Entry

**Map** **Help Tab**

Last Name (Case Sensitive)	First Name (Case Sensitive)	Relationship Code (follow Help file instruct(Ins))	Gender (M or F)	DOB (mm/dd/yyyy)	Coverage Type (follow Help file instructions)	State Code	Retiree (IL Only)	Annual Salary	Life Cla
Doe1	John	Employee	M						
Doe2	Janice	Spouse	F						
Doe3	Steve	Employee	M						
Doe4	Fred	Employee	M						
Doe5	Rebecca	Spouse	F						
Doe6	Susan	Dependent	F						
Doe7	Marcha	Dependent	F						

Instructions

1) Copy and paste the entire census from Group's spreadsheet in Source Census From The Group tab.  
 --Before copying from Source file, the Source file should be open along with Smart Census Tool file.  
 --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.

☐ Yes ☐ Cancel

**Source Census From The Group** **Group Information** **Quoting Help File**

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

B. **Source Census From The Group** worksheet (tab) displays along with a helpful **Instructions** panel.

C. Copy and paste Census information from **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 **Quoting Census Mapping** tab after pasting the Source.

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

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

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



# Small Group Quoting Mapping Census

Small Group Quoting Import Census Template Columns

Map Group's Source Census Columns (Select from drop down list)	Source Census Column Letter (For Information Only)
Last Name (Case Sensitive)	
First Name (Case Sensitive)	
Relationship Code <sup>DDL</sup>	
Gender (M or F) <sup>DDL</sup>	
DOB (mm/dd/yyyy)	
Coverage Type <sup>DDL</sup>	
State Code <sup>DDL</sup>	
Retiree (IL Only) <sup>DDL</sup>	
Annual Salary	

### Mapping Source Columns to Census Template Columns

Column A has column headers from the Census Template. 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:

Copy Mapped Columns

Cancel

- 1) In **Column B**, select a value from the drop down list that corresponds to the value in **Column A**.  
**Note:** Census 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 Census 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. Column B values which do not match the Source Census Header will be highlighted in Yellow. Please update Column B values as needed for the current mapping.
- 2) Click **Copy Mapped Columns** button to copy the mapped source columns systematically to Census Template tab.
- 3) Click **Cancel** button to skip the mapping and go to Census Template tab to enter census.

## A. Census Mapping tab displays.

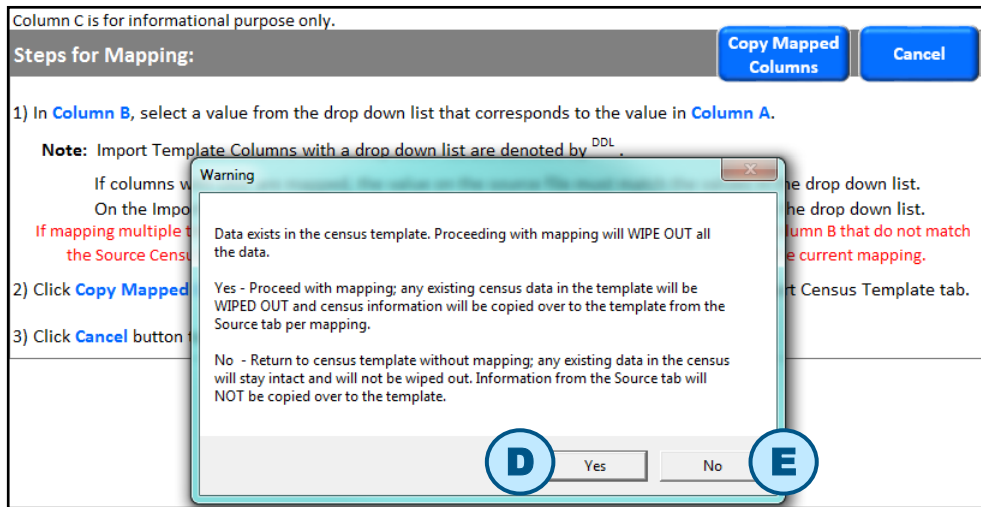
- **Column A** displays column headers from the Small Group Quoting Template.
- **Column B** has a drop-down list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the right.

## B. In **Column B**, select a value from the drop-down 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 **Census Template** tab.

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

# Small Group Quoting Mapping Census



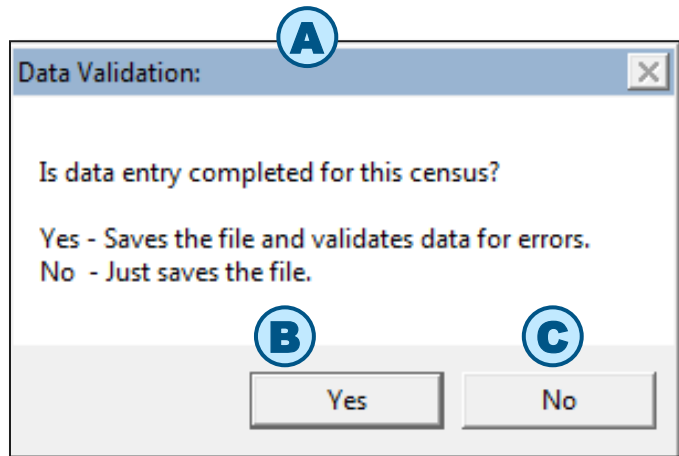
**D.** Click **Yes** to proceed with mapping. If data exists on the Census Template, a **Warning** message displays.

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

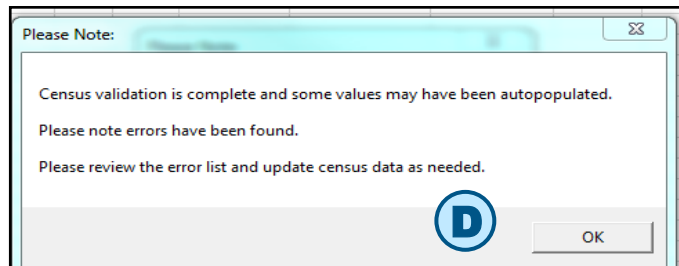
- Mapped data is systematically copied over to the Census Template.
- Complete Census entry as needed.

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

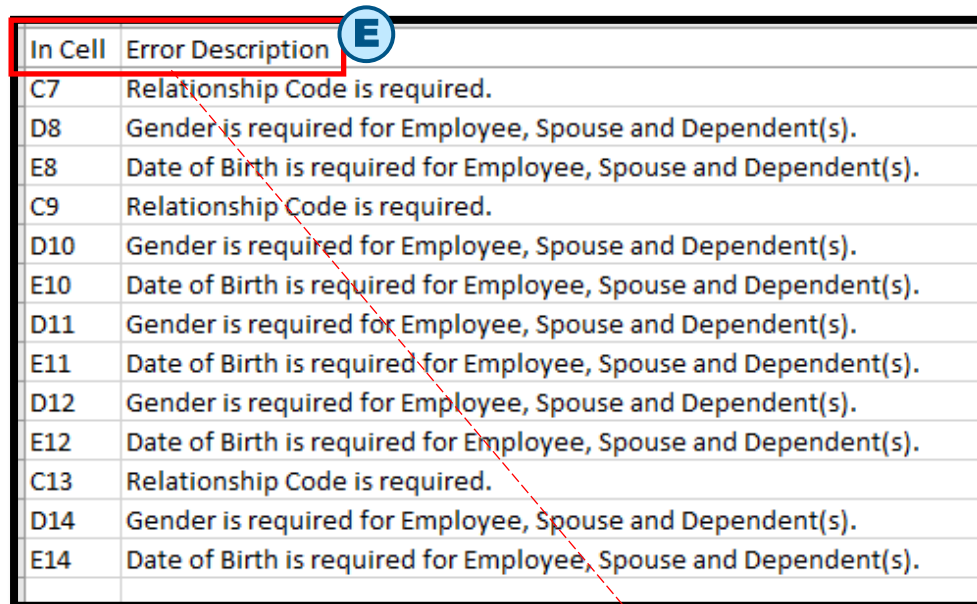
# Small Group Quoting: File > Save Validation



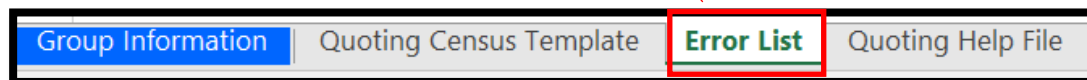
- A. Click **File > Save**.  
A **Data Validation** box displays.
- B. Click **Yes** to proceed with validation, auto-populate values and generate an error list if there are any errors.
  - File is saved.
  - Data will be validated.
  - An error list is generated if there are errors.
- C. Click **No** to save the file and bypass validation.
- D. Message box displays if errors are found. Click **OK** to navigate to **Error List** tab to review the errors.
  - On **File > Save** validation, errors will be displayed in the **Error List** tab.



# Small Group Quoting: Error List



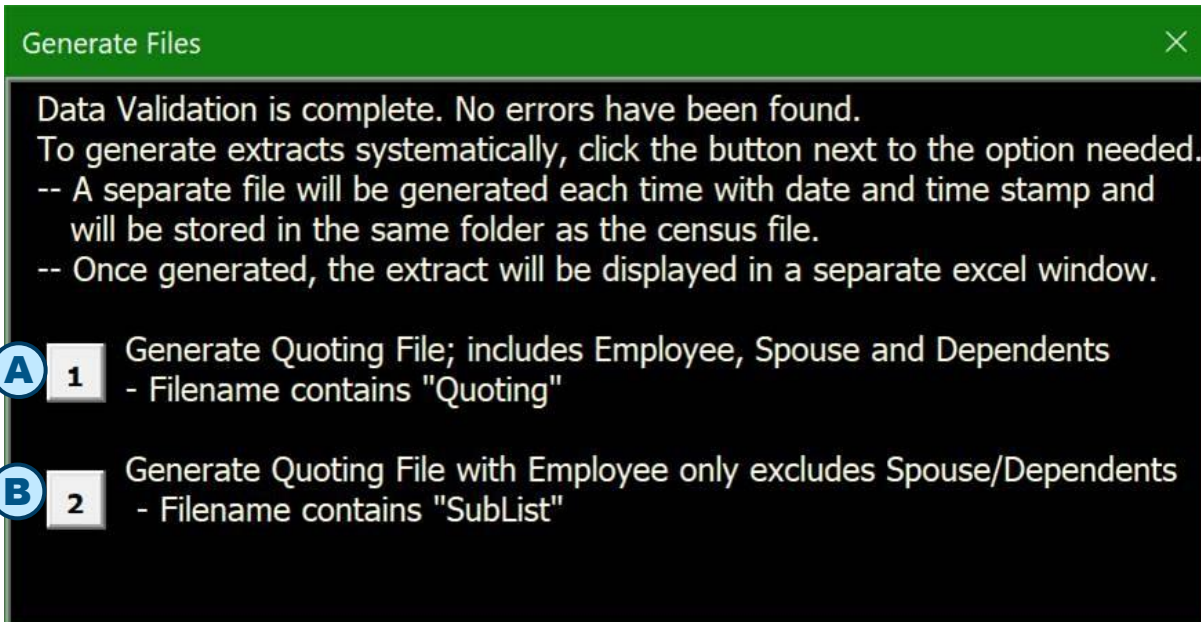
In Cell	Error Description
C7	Relationship Code is required.
D8	Gender is required for Employee, Spouse and Dependent(s).
E8	Date of Birth is required for Employee, Spouse and Dependent(s).
C9	Relationship Code is required.
D10	Gender is required for Employee, Spouse and Dependent(s).
E10	Date of Birth 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).



## E. 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.
- To update the values, click the **Small Group Quoting Census** tab. Change the values as needed.
- You can toggle between the **Error List** and **Census Template** tabs.
- Once you have corrected any errors, validate data again by clicking **File > Save**. Select **Yes** in the **Is Data Entry Complete?** message box.

# Generate Small Group Quoting Files



On successful data validation, **Generate Files** message box displays. A separate file is generated with date and time stamp.

- A. Click the first option to generate quoting file with all members – Employees, Spouses and Dependents. This is the most common option.
- B. Click the second option to generate quoting file with **Employees** only.



## **Middle Market Quoting Census Template**



# Open SCIT and Save Under Group Name

The top screenshot shows the 'Smart Census Import Tool Setup Form' with a 'Microsoft Excel' pop-up box. The pop-up box contains the text: 'Please enter the Group Name. Census template will be saved under this group name along with date and time stamp. Please DO NOT enter or special characters.' and a 'Group Name' input field. The bottom screenshot shows the same setup form with a 'Version XX Year.Month' display and a red triangle icon. A tooltip for the red triangle says: 'Hover over RED Triangle for add'l info Version XX Year.Month'.

- From Excel menu, select **File > Open**. Go to the folder where SCIT is saved, select SCIT and click **Open**.
- Once **Division** is selected, state will be displayed to the left of logo
- On File > Open, click **Enable Content**. Skip this step if macros are enabled through **File > Options** menu. Please see “Enable Macros” in Technical References for instructions.
- In the pop-up box, type in the **Group Name** and click **OK**. Do not include spaces or any special characters.
- Select a **Folder** to save the Group’s Census and click **OK**.
- 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.
- Version** is displayed with date. To view the latest updates to current version, click the small **red** triangle to the right of Version date.

# Complete Setup Form: Make a Selection

The screenshot shows the 'Smart Census Import Tool Setup Form' interface. At the top left is the 'BlueCross BlueShield of Illinois' logo, annotated with a red box and a blue circle 'D'. The title 'Smart Census Import Tool Setup Form' is centered at the top. In the top right corner, there is a red triangle icon annotated with a blue circle 'E' and a red arrow pointing to it, with a tooltip that says 'Hover over RED Triangle for add'l info'. Below the title is a dark grey bar with the text 'Step 1: Please Make a Selection' on the left and 'Version XX' followed by a blue circle 'F' on the right. The main form area contains three fields: 'Market Segment: MID MARKET' with a blue circle 'A' next to it; 'Quoting or Enrollment: QUOTING' with a blue circle 'B' next to it and a green box around the text; and 'Division: IL' with a blue circle 'C' next to it.

A. Select a Market Segment: **MID MARKET**

B. Select **QUOTING**.

C. Select a **Division** from the drop-down list.

*Once these fields are populated, the Template is displayed and ready for data entry.*

D. Logo will change based on **Division** selection.

E. Click **red** triangle displays latest changes.

F. SCIT **Version** number with **Date** appended to right.

*Once these fields are populated, the Template is displayed and ready for data entry.*

# Complete Setup Form

Step 1: Please Make a Selection

Market Segment: MID MARKET **A**

Quoting or Enrollment: QUOTING **B**

Division: IL **C**

Click Green button for Census Data Entry

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

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

**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.

**Display All Census Columns**

**ATTENTION:**

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

**A.** Select a Market Segment:  
**MID MARKET**

**B.** Select **QUOTING**

**C.** Select a **Division** from the drop-down list.

*Once these fields are populated, the Template is displayed and ready for data entry.*

**D.** Click **Map** button if you have 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 Census Template systematically per the mapping.

**E.** Click the **Green button** to navigate to the **Mid Market Quoting Census** Template for manual data entry.

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

# Complete Setup Form: Other Fields

Step 1: Please Make a Selection

Market Segment: MID MARKET

Quoting or Enrollment: QUOTING

Division: IL

Click Green button for Census Data Entry

**Map** **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.

**Go To Census Template for Data Entry**

**D.** Click the **Map** button if you have received Census from the group on **a separate spreadsheet** (Source). This feature will enable you to copy and map the Source columns to the Census Template columns. After columns are mapped, data will be copied over to the Census Template systematically per the mapping.

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

**F.** Click the **Green button** to navigate to the **Quoting Census Template** for manual data entry.



**G**


Last Name (Case Sensitive)	First Name (Case Sensitive)	Relationship Code (follow Help file instructions)	Gender (M or F)	DOB (mm/dd/yyyy)	<b>AUTO FILL</b> Coverage Type (follow Help file instructions)	<b>AUTO FILL</b> State Code	<b>AUTO FILL</b> Retiree (IL Only)	Annual Salary	Life Class	Zip Code (BBF Only)
		Employee								

**DO NOT INCLUDE** part-time employees, employees waiving coverage or in waiting period on Census.

**G.** Click the **Auto Fill** button to systematically populate information for select columns.

# Help Information

First Name (Case Sensitive)	Relationship Code
	
<b>A</b>	Employee

A. Clicking **Help** icon  will move the cursor to that exact Column in the **Quoting Help File** tab.

**Example:** Clicking Help icon in the **First Name** header will move the cursor to the **First Name** row of the **Quoting Help File** tab.

Field Name	Formatting Specifications	Maximum Length	Notes
Last Name	Alphabetic, numeric, and special characters	20	Applicable to all divisions. Applicable for 1-50 Fully Insured, 10-100 Blue Balanced Funded Quote. Optional for Employee, Spouse & Dependent.
First Name	Alphabetic, numeric, and special characters	20	Applicable to all divisions. Applicable for 1-50 Fully Insured, 10-100 Blue Balanced Funded Quote. Optional for Employee, Spouse & Dependent.

Step 1: Please Make a Selection

Market Segment: MID MARKET

Quoting or Enrollment: QUOTING

Division: IL

Click Green button for Census Data Entry

Map

Help Tab

**B**

Group Information

GrpInfoHelpFile

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

# Middle Market Quoting Enter Data






**\*\*\*DO NOT INCLUDE part-time employees, employees waiving coverage or in waiting period on Census.**

<b>A</b> Last Name (Case Sensitive) <small>i</small>	First Name (Case Sensitive) <small>i</small>	Relationship Code <small>i</small>	DOB (mm/dd/yyyy) <small>i</small>	Gender (M or F) <small>i</small>	<b>AUTO FILL</b> Coverage Type (follow Help file instructions) <small>i</small>	<b>AUTO FILL</b> State (e.g. IL) <small>i</small>	Annual Salary <small>i</small>	<b>AUTO FILL</b> Zip Code (only 5 digits) <small>i</small>	<b>AUTO FILL</b> Medicare Primary (Y, N or U) <small>i</small>	<b>AUTO FILL</b> Retiree (Y or N) <small>i</small>	Life Class <small>i</small>
<b>C</b>		Employee		<b>D</b>		IL			N		All Active Full Time
		<b>B</b>				<b>E</b>					

- A.** Column headers are Read Only. Columns cannot be deleted or moved.
- B.** Row #2 **Relationship Code** value defaults to **Employee**.  
*Please do not change this value.*
- C.** Beginning with Row #2, rows can be inserted or deleted as needed.
- D.** 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.
- E.** 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.



# Middle Market Quoting Enter Data

Last Name (Case Sensitive) 	First Name (Case Sensitive) 	Relationship Code 	DOB (mm/dd/yyyy) 	Gender (M or F) 	 AUTO FILL Coverage Type (follow Help file instructions) 	 AUTO FILL State from zip State (e.g. IL) 
		Employee				

Values can be copied and pasted 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 them.

**F. Help** icons are available below the header name of each column.

**G. Auto Fill** buttons are available in the header for select columns.

**H. State from Zip** button derives state based on zip code entered.

# Middle Market Quoting Mapping Census

<b>A</b> Last Name (Case Sensitive) <small>i</small>	First Name (Case Sensitive) <small>i</small>	Relationship Code <small>i</small>	DOB (mm/dd/yyyy) <small>i</small>	Gender (M or F) <small>i</small>	<b>AUTO FILL</b> Coverage Type (follow Help file instructions) <small>i</small>	<b>AUTO FILL</b> State (e.g. IL) <small>i</small>	Annual Salary <small>i</small>	<b>AUTO FILL</b> Zip Code (only 5 digits) <small>i</small>	<b>AUTO FILL</b> Medicare Primary (Y, N or U) <small>i</small>	<b>AUTO FILL</b> Retiree (Y or N) <small>i</small>	Life C <small>i</small>
Smith	Jack	Employee	01/01/1990	M	EF						
Smith	Jane	Spouse	01/02/1991	F							
Smith	Joe	Dependent	01/01/1999	M							
Williams	Jack	Employee	01/01/1990	M	EF						
Williams	Jane	Spouse	01/02/1991	F							
williams	Joe	Dependent	01/01/1999	M							

Instructions

- 1) Copy and paste the entire census from Group's spreadsheet in Source Census From The Group tab.  
 --Before copying from Source file, the Source file should be open along with Smart Census Tool file.  
 --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.

☐ Yes ☐ Cancel

## A. Copy Census information from the group Census spreadsheet to **Source Census From The Group**.

- 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.

**NOTE:** The **Source Census From The Group** could be in different column sequence.

## B. After information has been pasted, click **Yes** to proceed to **Quoting Census Mapping** tab.

## C. Click **Cancel** to skip this step and go to Census Template tab.

## D. If using mapping feature more than once:

- Delete the existing Census on the **Source Census From The Group** worksheet (tab).
- Repeat steps 1 and 2 in the instructions pop-up box, above.

# Middle Market Quoting Mapping Census

A
B

Mid Market Quoting Import Census Template Columns	Map Group's Source Census Columns (Select from drop down list)	Source Census Column Letter (For Information Only)
Last Name (Case Sensitive)	Lastname	A
First Name (Case Sensitive)	first name	B
Relationship Code <sup>DDL</sup>	Relation	M
DOB (mm/dd/yyyy)	DOB	D
Gender (M or F) <sup>DDL</sup>	Gender	C
Coverage Type <sup>DDL</sup>		
Zip Code (only 5 digits)	zip	J
Medicare Primary (Y, N, U) <sup>DDL</sup> (IL and TX Divisions Only)		

### Mapping Source Columns to Import Census Template Columns

Column A has column headers from the Import Census Template.  
 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. Column B values 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.

C

Copy Mapped  
Columns

Cancel

## A. Census Mapping tab displays.

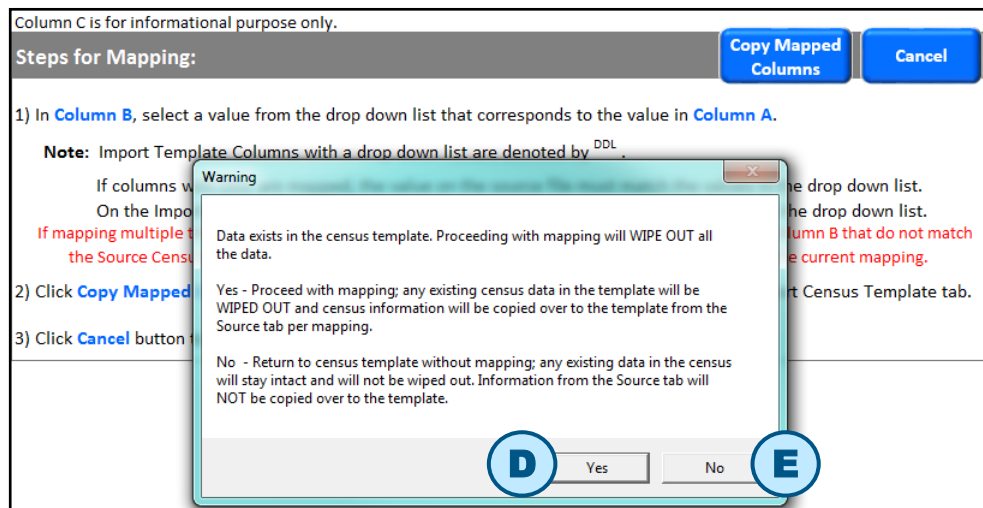
- **Column A** displays column headers from the Mid Market Quoting Enrollment Template.
- **Column B** has a drop-down list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the right.

## B. In **Column B**, select a value from the drop-down 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 **Census Template** tab.

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

# Middle Market Quoting Mapping Census



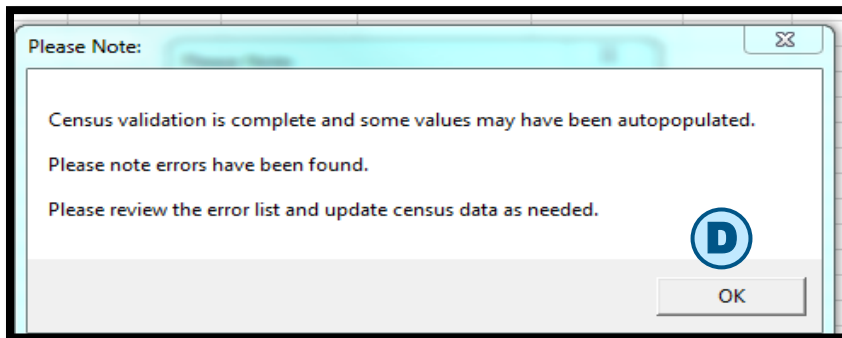
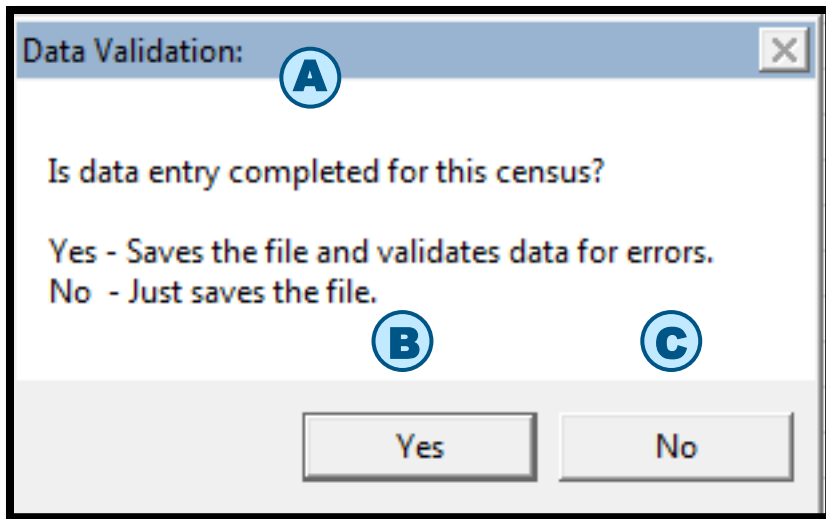
**D.** Click **Yes** to proceed with mapping. If data exists on the Census Template, a **Warning** message displays.

**NOTE:** Any existing Census data in the 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 Census Template.
- Complete Census entry as needed.

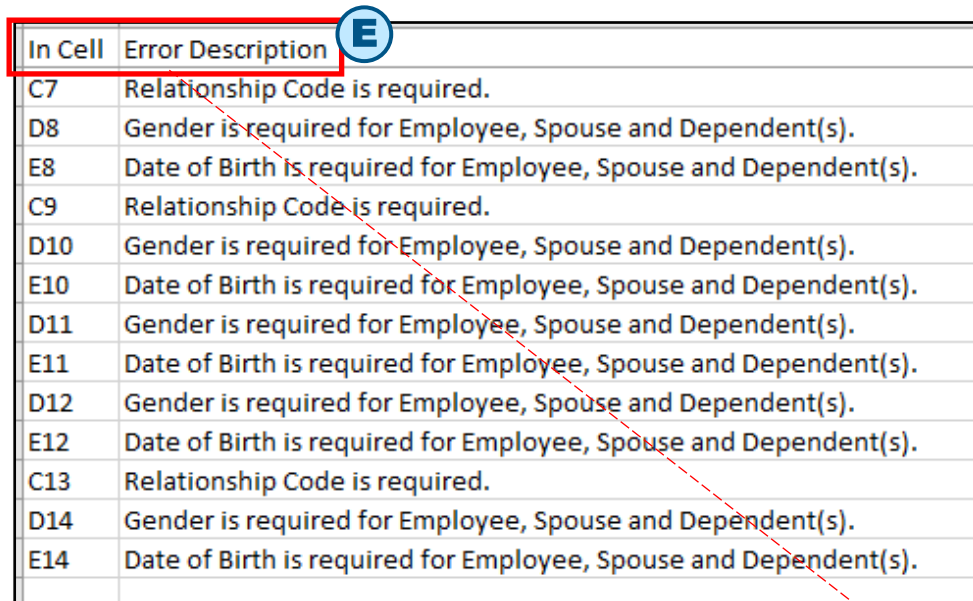
**E.** Click **No** to return to the Census Template without mapping. Existing data will not be overwritten and will remain unchanged.

# Middle Market Quoting: File > Save Validation



- A. Click **File > Save** to display a **Data Validation** box displays.
- B. Click **Yes** to proceed with validation, auto-populate values and generate an error list if there are any errors.
  - File is saved.
  - Data will be validated.
  - An error list is generated if there are errors.
- C. Click **No** to save the file and bypass validation.
- D. Message box displays if errors are found. Click **OK** to navigate to **Error List** tab to review the errors.
  - On **File > Save** validation, errors will be displayed in the **Error List** tab.

# Middle Market Quoting: 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).

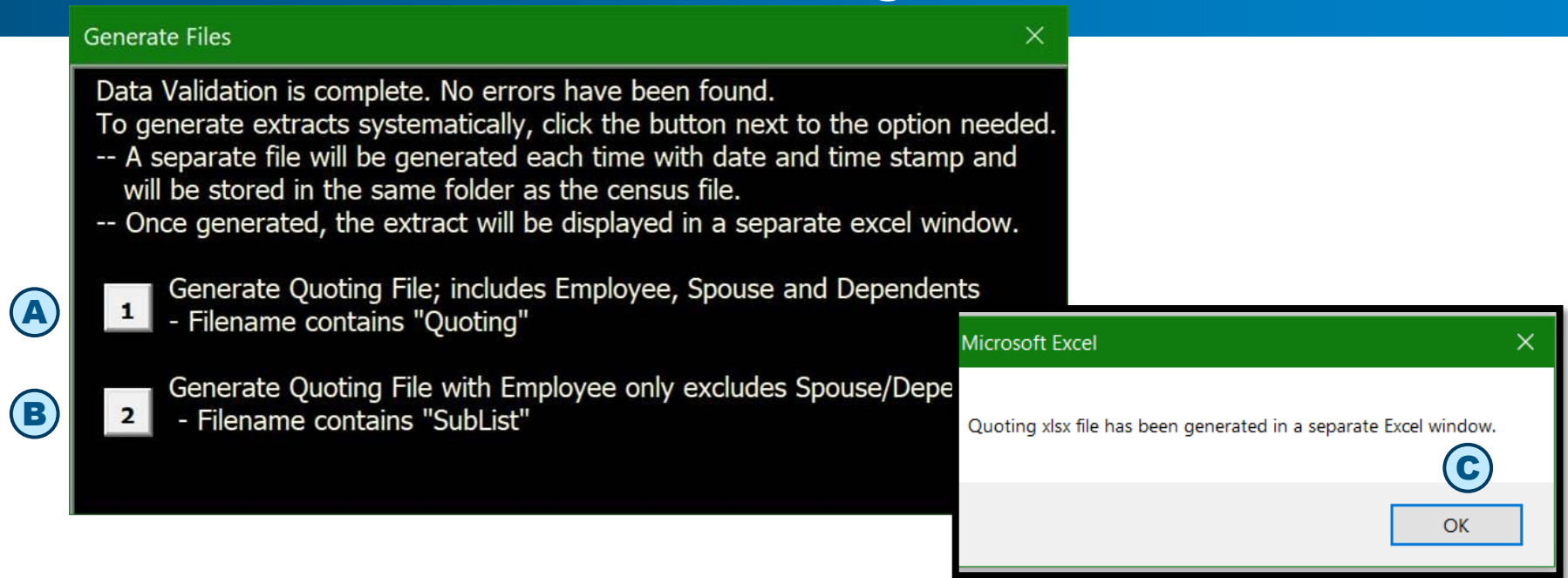
**E. Error List** tab will display:

- **In Cell** column – specifies the cell location of the error.
- **Error Description** column – specifies the column and the nature of the error.
- To update the values, click the **Mid Market Quoting Census** tab. Change the values as needed.
- You can toggle between the **Error List** and **Census Template** tabs.

Once you have corrected any errors, validate data again by clicking **File > Save**. Select **Yes** in the **Is Data Entry Complete?** message box.



# Generate Middle Market Quoting Files



The image shows two overlapping windows. The 'Generate Files' window (top left) has a green title bar and a black background with white text. It contains instructions on data validation and two numbered options for generating quoting files. The 'Microsoft Excel' window (bottom right) has a green title bar and a white background, displaying a confirmation message and an 'OK' button. A blue circle with a 'C' is positioned between the two windows.

**Generate Files**

Data Validation is complete. No errors have been found.  
To generate extracts systematically, click the button next to the option needed.

- A separate file will be generated each time with date and time stamp and will be stored in the same folder as the census file.
- Once generated, the extract will be displayed in a separate excel window.

**A**

**1** Generate Quoting File; includes Employee, Spouse and Dependents  
- Filename contains "Quoting"

**B**

**2** Generate Quoting File with Employee only excludes Spouse/Dependent  
- Filename contains "SubList"

**Microsoft Excel**

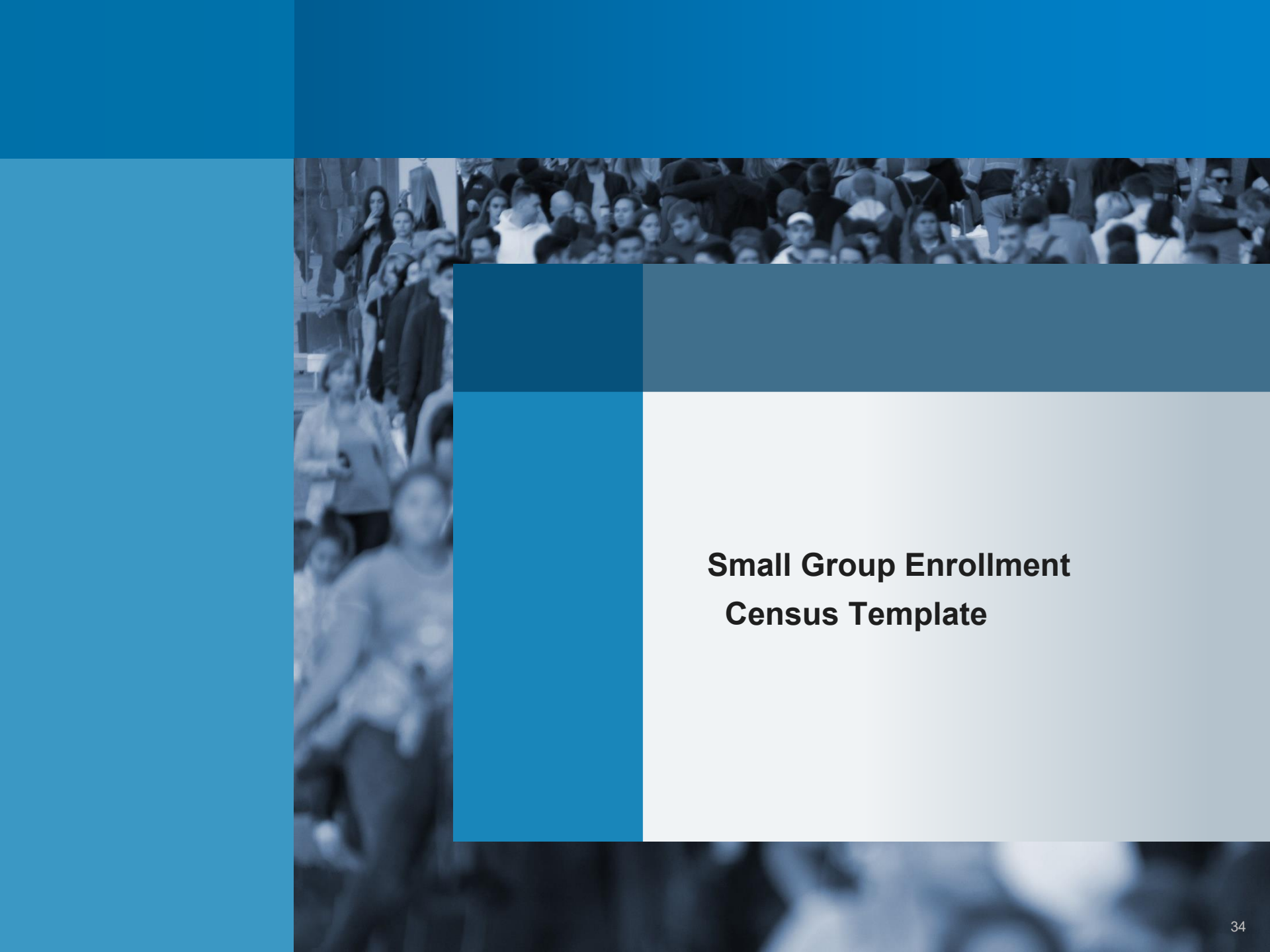
Quoting.xlsx file has been generated in a separate Excel window.

**C**

OK

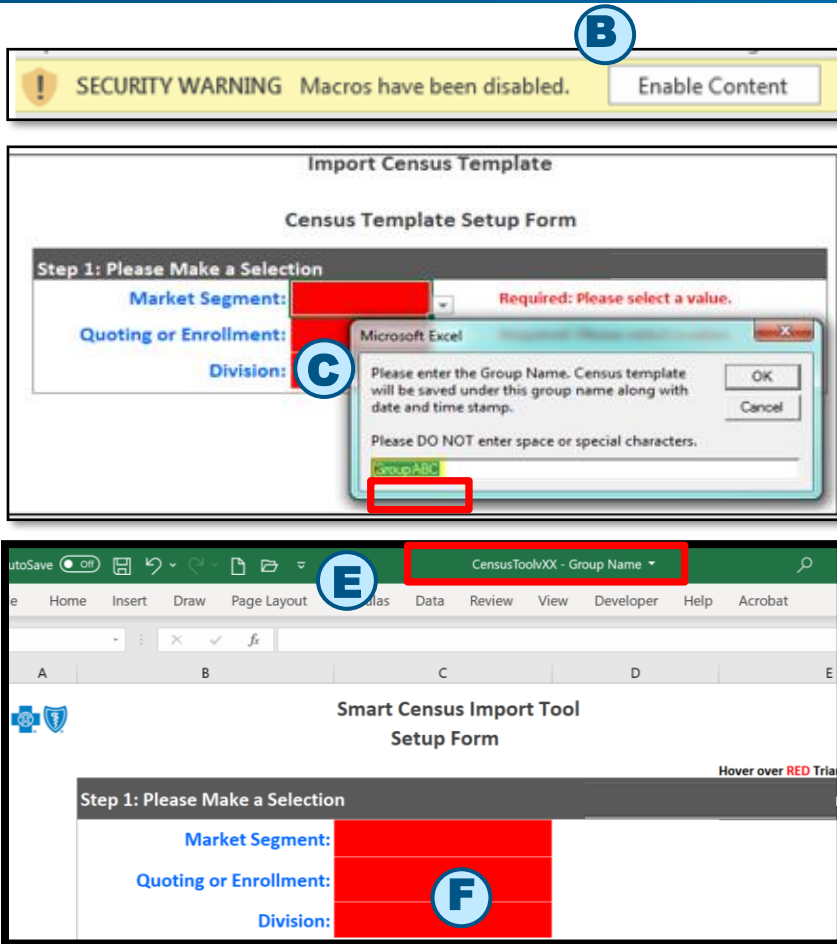
On successful data validation, **Generate Files** message box displays. Select output option:

- A.** Click the first option to generate quoting file with all members – Employees, Spouses and Dependents. This is the most common option.
- B.** Click the second option to generate quoting file with **Employees** only.
- C.** A separate file will be generated with date and time stamp and a confirmation will display. Click OK.



## **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 **Enrollment**
- Select a **Division** from drop-down list.

# Complete Setup Form

Step 1: Please Make a Selection		Version 16 Release: 2023.03
<b>Market Segment:</b> SMALL GROUP		
<b>Quoting or Enrollment:</b> ENROLLMENT		<b>Is the Effective Date before 5/1/2023?</b>
<b>Division:</b> IL		<b>A</b>
<b>Step B: Enter Group Benefits Information</b>		
<b>Has Group Selected Health?</b> Y		

**A.** Select **Y** or **N** for “Is the Group’s Effective Date before 5/1/2023?”

**B.** **Group Benefits Information** displays different values based on if Effective Date is before or after 5/1/2023.

# Complete Setup Form – Effective Date **prior** to 5/1/23

Market Segment: SMALL GROUP

Quoting or Enrollment: ENROLLMENT

Division: IL

**A** Is the Effective Date before 5/1/2023?  
Y

Step 2: Enter Group Benefits Information

Has Group Selected Health? Y **B**

HMO Plan? N

Plan 1: [Redacted]

Plan 2:

Plan 3:

Plan 4:

Plan 5:

Plan 6:

Has Group Selected Dental? Y **C**

Plan 1: [Redacted]

Plan 2:

Has Group Selected Life? Y **D**

Selected Integrated FSA? Y

Plan 1: **E**

Plan 2:

**A. Is the Effective Date before 5/1/2023?** If Y, complete **Enter Group Benefits Information (Step 2)** - complete the required fields highlighted in **red**.

**B. Has Group Selected Health?** If Y, add plans.

**C. Has Group Selected Dental?** If Y, add plans.

## 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?**

**E. FSA Plan 1 & 2** – *drop down options are FSA and LPFSA.*

**Setup Form** values are used to:

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

# Complete Setup Form – Effective Date **after** 5/1/23

Market Segment: SMALL GROUP

Quoting or Enrollment: ENROLLMENT

Division: IL

Is the Effective Date before 5/1/2023? **N**

Step 2: Enter Group Benefits Information

Has Group Selected Health? **Y**

HMO Plan? **N**

Plan 1: [Redacted]

Plan 2:

Plan 3:

Plan 4:

Plan 5:

Plan 6:

Has Group Selected Dental? **Y**

Plan 1: [Redacted]

Plan 2:

Has Group Selected Life? **Y**

	Class Description	Is Salary Based
Class 1	All Active Full Time	N
Class 2		N

**A. Is the Effective Date before 5/1/2023?** If N, complete **Enter Group Benefits Information (Step 2)** - complete the required fields highlighted in **red**.

**B. Has Group Selected Health?** If Y, add plans.

**C. Has Group Selected Dental?** If Y, add plans.

## 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, enter the following:

**E. Class 1 and Class 2 Descriptions** - default for **Class 1** is **All Active Full Time** (this value can be overwritten).

**F. Is Salary Based?** - Default N.

**Setup Form** values are used to:

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

# Complete Setup Form – Effective Date <sup>A</sup>after 5/1/23 (con't)

Is the Effective Date before 5/1/2023?
N

**A**

STD Selected?	<b>B</b> Y	Class Description
	Class 1	All Active Full Time
	Class 2	
LTD Selected?	<b>C</b> Y	Class Description
	Class 1	All Active Full Time
	Class 2	
Selected Integrated FSA?	Y	<b>D</b>
	Plan 1:	
	Plan 2:	

- A. Is the Effective Date before 5/1/2023?** If N, complete **Enter Group Benefits Information (Step 2)** - complete the required fields highlighted in red.
- B. STD Selected?** If Y, enter the following:
- **Class 1** and **Class 2 Descriptions** - default for **Class 1** is **All Active Full Time** (this value can be overwritten).
- C. LTD Selected?** If Y, enter the following:
- **Class 1** and **Class 2 Descriptions** - default for **Class 1** is **All Active Full Time** (this value can be overwritten).
- D. FSA Plan 1 & 2** — drop down options are FSA and LPFSA.

**Setup Form** values are used to:

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



# Complete Setup Form

The screenshot shows a web-based setup form titled "Complete Setup Form". At the top, it asks "Selected Integrated FSA?" with a "Y" response. Below this are fields for "Plan 1:" and "Plan 2:". A dark grey bar contains the instruction "Click Green button for Census Data Entry" and two buttons: "Map" and "Help Tab". A green button labeled "Go To Census Template for Data Entry" is annotated with a circled 'G'. A "Please Note:" section contains 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." At the bottom, a blue button "Display All Census Columns" is annotated with a circled 'I'. An "ATTENTION:" note below it says "Please click this button for displaying all census columns AFTER census data has been entered." A red arrow points from the "Help Tab" button to a tab labeled "GrpInfoHelpFile" in a separate window at the bottom, which also has a "Group Information" tab.

Selected Integrated FSA? Y

Plan 1:

Plan 2:

Click Green button for Census Data Entry

Map Help Tab

**Go To Census Template for Data Entry** (G)

**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.

**Display All Census Columns** (I)

**ATTENTION:**

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

Group Information GrpInfoHelpFile

- F. 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.

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

# Mapping Enrollment Census

Click Green button for Census 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.

[Go To Census Template for Data Entry](#)

[Map Census](#) [Help Tab](#)

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.

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		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.

**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

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 Col		
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

### 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.

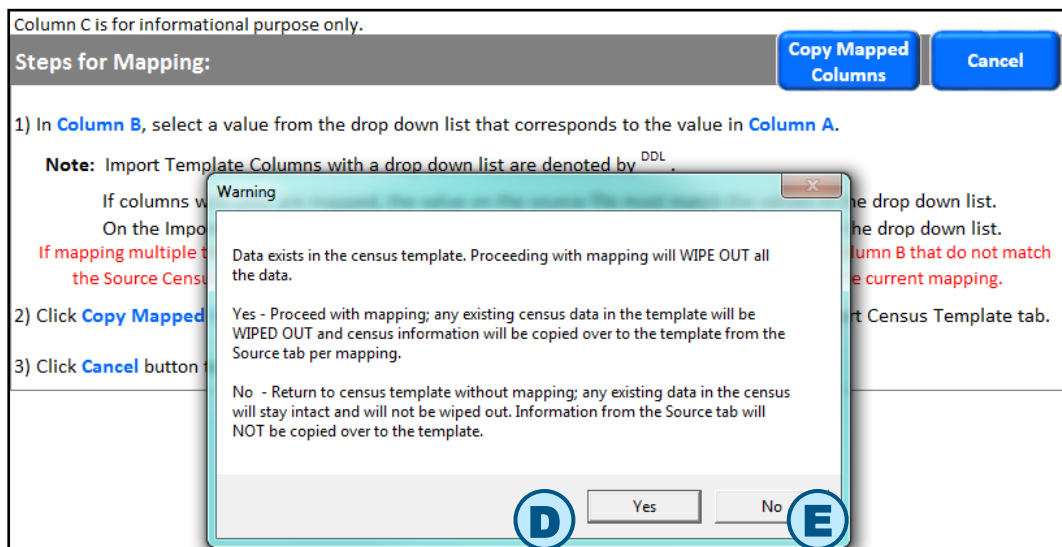
- **Column A** displays column headers from the **ACA Small Group / Mid Market Enrollment Import Census Template** Columns.
- **Column B** has a drop-down list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the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

## B. In **Column B**, select a value from the drop-down 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 drop-down 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**.  
*Please do not change this value.*
- D.** **Starting from Row #3**, rows can be Inserted or Deleted as needed.
- E.** If a **Name Suffix** is provided in **Last Name**, on **File > Save** and **Yes** to data validation **Name Suffix** will be systematically removed from **Last Name** and added to the **Name Suffix** column. Applicable Suffix values: Jr, Sr, I, II, III, IV, V.

# Enter Census Data

G				
Address 1	Address 2	City	State	Zip Code
	J →		AUTO FILL State from zip	F
			H	

- F. **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.
- G. 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.
- H. 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.
- I. 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.
- J. **Help** icons **i** and **Auto Fill** buttons **AUTO FILL** are available in the column headers.




# 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		
<b>A</b> <b>FSA Plan</b> 	<b>FSA Employee Election Amount</b> 	<b>FSA Employer Contribution Amount</b> 
	<b>C</b>	<b>D</b>

- 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				
<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>				
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)

CD	CE	CF	CG	CH	CI
Standalone Vision		Critical Illness		Accident Insurance	
Standalone Vision Coverage (Y/N)	<b>AUTO FILL</b> Standalone Vision Coverage Type	Critical Ill Coverage (Y/N)	<b>AUTO FILL</b> Critical Ill Coverage Type	Accident Ins Coverage (Y/N)	<b>AUTO FILL</b> Accident Ins Coverage Type
	<b>A</b> 		<b>B</b> 		<b>C</b> 






- 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 two 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).

# Enter Census Data (New Life Fields)

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

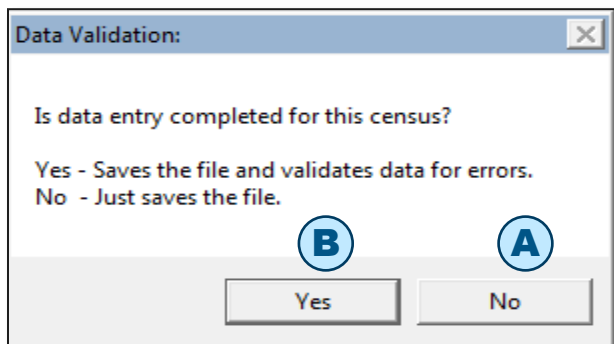
- A. Life Ins Coverage (Y/N):** Does this Employee have Life. If “Y”, then **B** thru **I** can be filled, otherwise no data allowed in **B** thru **I**.
- B. Employee Basic Life:** This will have drop down values from the Group Information Tab. If the class selected is **Salary Based**, then Salary 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
<b>A</b> Short Term Disability (Y/N) 	<b>B</b> Short Term Disability 	<b>C</b> Long Term Disability (Y/N) 	<b>D</b> Long Term Disability 	<b>E</b> 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

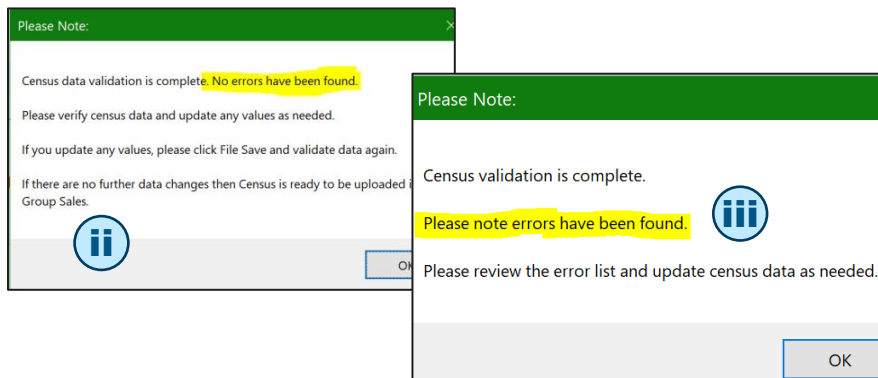
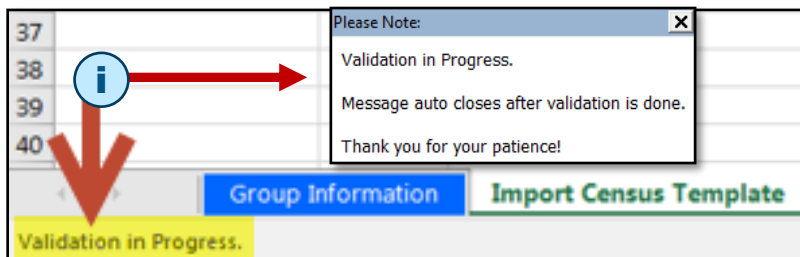


Once data entry is complete, click **File > Save** to validate the Census data. A **pop-up box** will display: **Is data entry completed for this Census?** with **Yes** and **No** buttons.

- 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 **Auto Fill** feature is available, a default value will be entered systematically. Final validation rules will run.



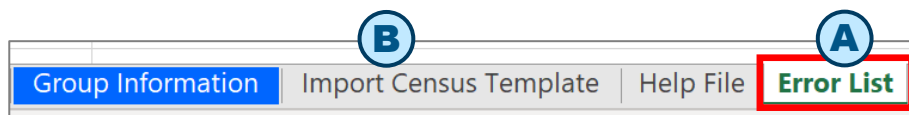
- i.** **Validation In Progress** indicators will display:

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

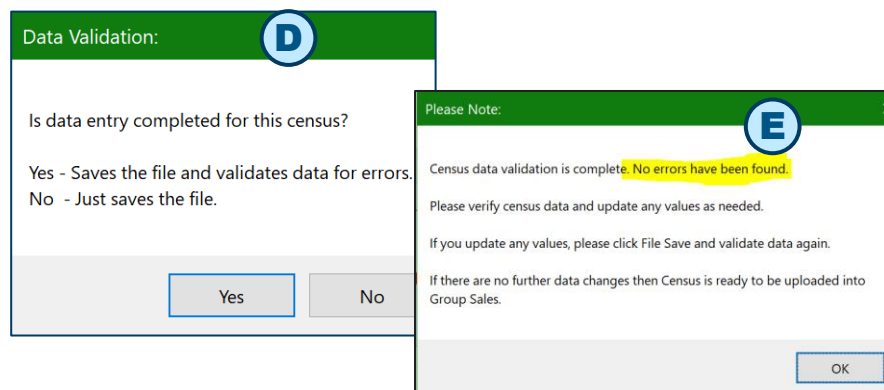
- ii.** **If no errors are found**, confirmation box displays and completed Census can be processed per current business process.

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

# Data Validation Error List



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.

# 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 red arrow points from the 'Import Census' button (labeled B) to the 'Import Census' dialog box. 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 blue circle 'F' is next to step 4. Below the steps, there's a 'Select File to upload:' field with a file path 'C:\Users\U344541\De' and a 'Browse...' button (labeled C). A blue circle 'G' is next to the 'Browse...' button. Below the file path, there's a message: 'A census already exists. Do you wish to overwrite or append to the existing census?' with two radio buttons: 'Overwrite - This option will replace previously entered census information.' (selected) and 'Append - This option will add to existing census information.' A blue circle 'H' is next to the 'Load File' button.

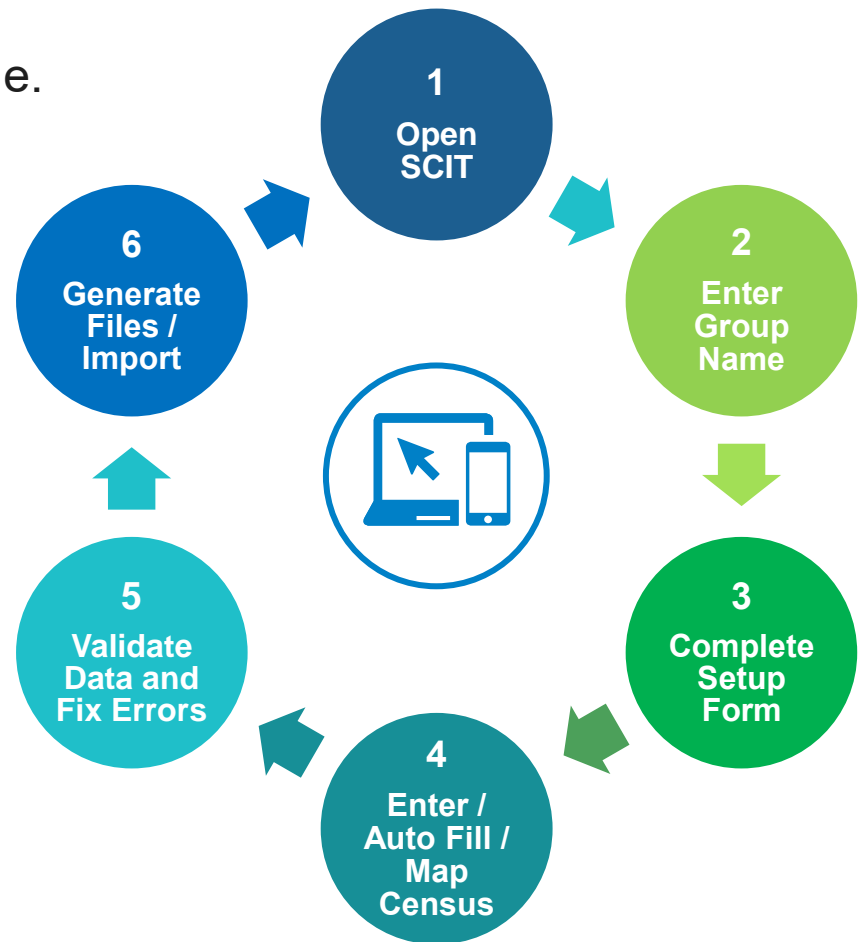
In SCIT, once Census data is validated and no errors are found, the Census is ready to be uploaded into **Small Group & Middle Market Enrollment Tool**.

## The upload steps have not changed.

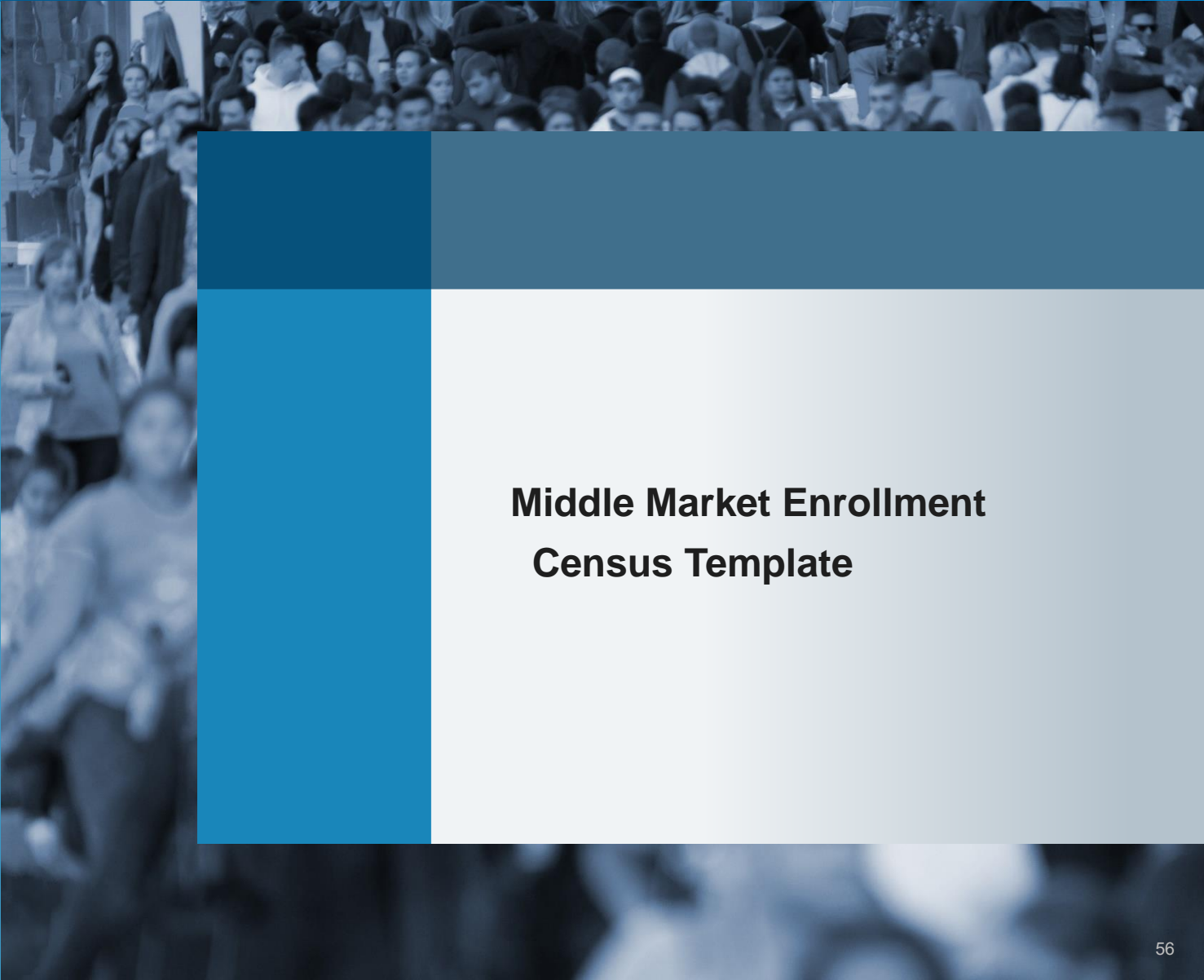
- A. In the **Small Group & Middle Market Enrollment Tool**, navigate to the Group's **Member Census** page.
- B. Click the **Import Census** button.
- C. When the **Import Census** pops up, click **Browse**.
- D. Navigate to the folder that has SCIT with the group's filename.
- E. Select the file and 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**

# Complete Setup Form

Market Segment: MID MARKET	
Quoting or Enrollment: ENROLLMENT	
Division: IL	
Step 2: Enter Group Benefits Information	
Has Group Selected Health? Y	<b>A</b>
HMO Plan? N	
Plan 1:	
Plan 2:	
Plan 3:	
Plan 4:	
Plan 5:	
Plan 6:	
Has Group Selected Dental? Y	<b>B</b>
Plan 1:	
Plan 2:	
Has Group Selected Life? Y	<b>C</b>
Selected Integrated FSA? Y	<b>D</b>
Plan 1:	
Plan 2:	
Selected Integrated HRA? Y	<b>E</b>
Plan 1:	
Plan 2:	
Plan 3:	

**Enter Group Benefits Information** section displays.

Complete the required fields highlighted in **red**.

**A. Has Group Selected Health?** If Y, add plans.

**B. Has Group Selected Dental?** If Y, add plans.

## 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. Has Group Selected Life?**

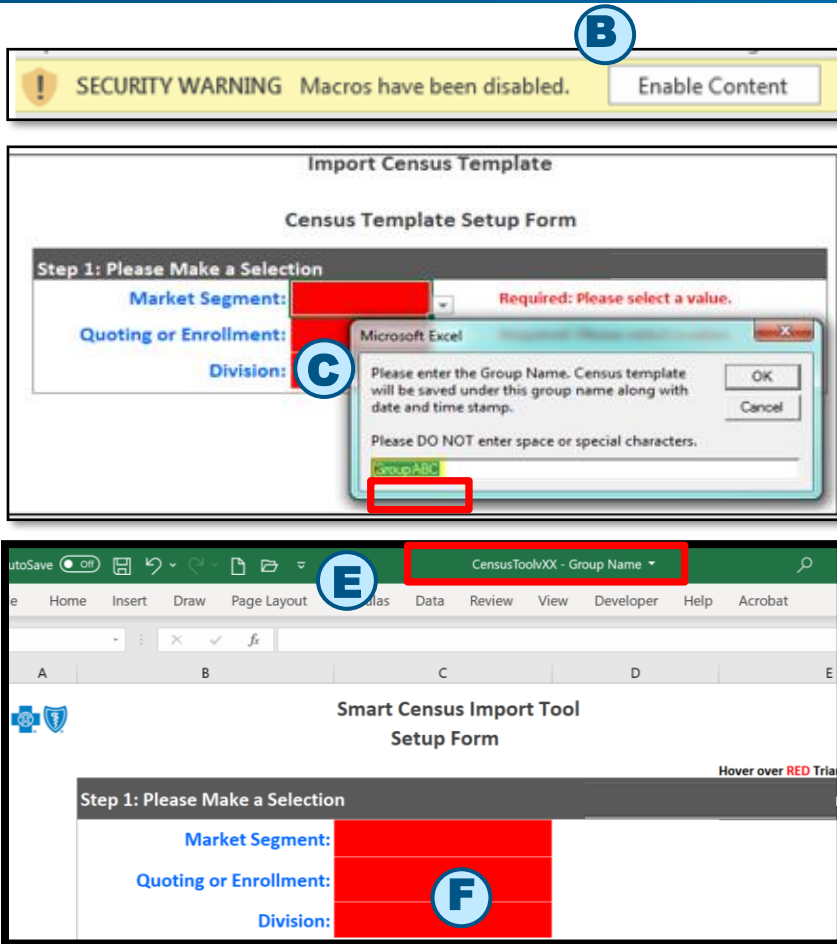
**D. FSA Plan 1 & 2** – drop down options are FSA and LPFSA.

**E. HRA Plan 1, 2, and 3** – drop down options are HRA1, HRA2 and HRA3.

**Setup Form** values are used to:

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

# 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 **Enrollment**
- Select a **Division** from drop-down list.

# Complete Setup Form

The screenshot shows a web form titled 'Complete Setup Form'. At the top, it asks 'Selected Integrated HRA?' with a 'Y' response. Below this are fields for 'Plan 1:', 'Plan 2:', and 'Plan 3:'. A dark grey bar contains a 'Click Green button for Census Data Entry' instruction, a 'Map' button (labeled with a blue circle 'F'), and a 'Help Tab' button (labeled with a blue circle 'H'). On the left, a green button labeled 'Go To Census Template Data Entry' (labeled with a blue circle 'G') is highlighted. To its right, a 'Please Note:' section contains two 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.' At the bottom left, a blue button labeled 'Display All Census Columns' (labeled with a blue circle 'I') is shown. To its right, an 'ATTENTION:' section states: '- Please click this button for displaying all census columns **AFTER** census data has been entered.' A red arrow points from the 'Help Tab' button to a tab labeled 'GrpInfoHelpFile' in a separate window below, which is highlighted with a red border. Another tab labeled 'Group Information' is visible to its left.

Selected Integrated HRA? Y

Plan 1:  
Plan 2:  
Plan 3:

Click Green button for Census Data Entry

Map Help Tab

**Go To Census Template 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.

**Display All Census Columns**

**ATTENTION:**

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

Group Information GrpInfoHelpFile

- F. 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.

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

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

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

# Mapping Enrollment Census

Click Green button for Census Data Entry

**A** **Map** **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		Dependent	M	#####					
Van		Employee	M	#####	EO	IL	N	645854	

**C**

**B**

**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**   **E**

**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.

**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

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 Col		
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

### 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:

Copy Mapped Columns

Cancel

- 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.
- Click **Copy Mapped Columns** button to copy the mapped source columns systematically to Import Census Template tab.
- Click **Cancel** button to skip the mapping and go to Import Census Template tab to enter census.

## A. Census Mapping tab displays.

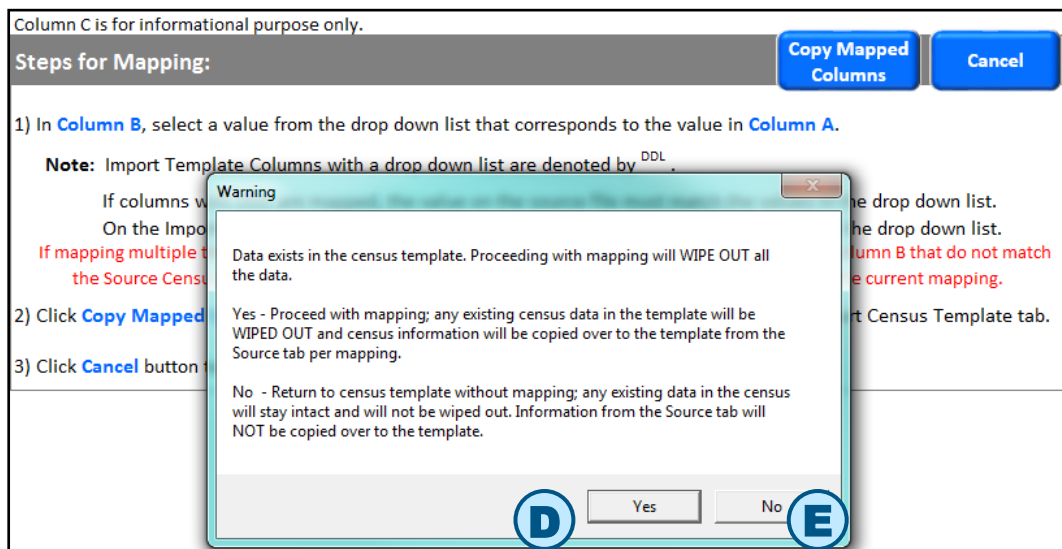
- **Column A** displays column headers from the **ACA Small Group / Mid Market Enrollment Import Census Template** Columns.
- **Column B** has a drop-down list with values which are column headers from the source file.
- **Column C** is for information purpose only.
- **Instructions** display to the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

## B. In **Column B**, select a value from the drop-down 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 drop-down 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**.  
*Please do not change this value.*
- D.** **Starting from Row #3**, rows can be Inserted or Deleted as needed.
- E.** If a **Name Suffix** is provided in **Last Name**, on **File > Save** and **Yes** to data validation **Name Suffix** will be systematically removed from **Last Name** and added to the **Name Suffix** column. Applicable Suffix values: Jr, Sr, I, II, III, IV, V.



# Enter Census Data

The diagram shows a table with the following columns: Address 1, Address 2, City, State, and Zip Code. The State column has an 'AUTO FILL' button and a 'State from zip' button. The Zip Code column has an 'F' icon. Below the headers, there are three rows of data entry cells. The first row has a 'J' icon with a red arrow pointing to the Address 2 cell. The second row has an 'H' icon and a red highlighted cell in the Zip Code column. The third row has a yellow highlighted cell in the Zip Code column. A 'G' icon is located above the State column header.

- F.** **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.
- G.** After entering in **Zip Code**, click the **State from Zip** button in State cell to populate the **State** for all members.
- H.** 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.
- I.** When you type in a value and click **Enter**:
  - A.** If the value is invalid, an error message displays with **Retry**, **Cancel** and **Help** buttons.
  - B.** **Retry** returns you to the typed-in value for editing and **Cancel** wipes out the typed-in value and returns you to the cell.
- J.** **Help** icons and **Auto Fill** buttons are available in the column headers.





# 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
<b>A</b>	<b>C</b>	<b>D</b>	<b>E</b>
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				
<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>				
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.

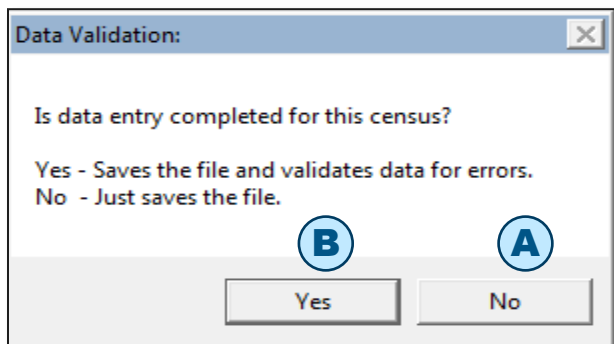
**C. Written Language** is a mandatory field. The user can select a language from the drop down, map data over or paste copied data as VALUES. If field remains blank, it will default to UND (undetermined) upon validation.

**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.

# Data Validation

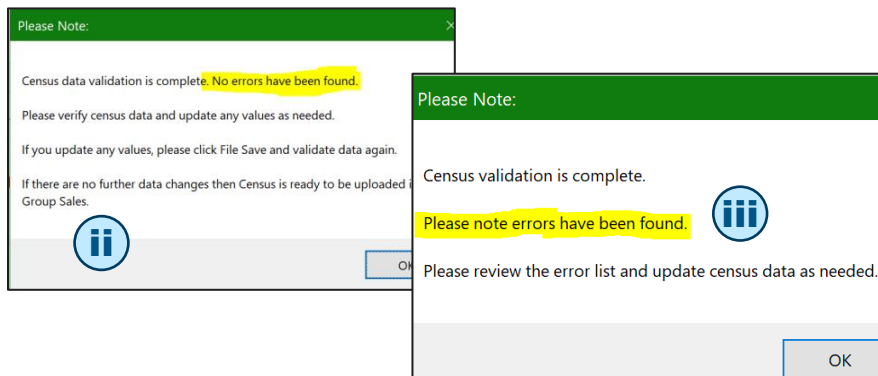
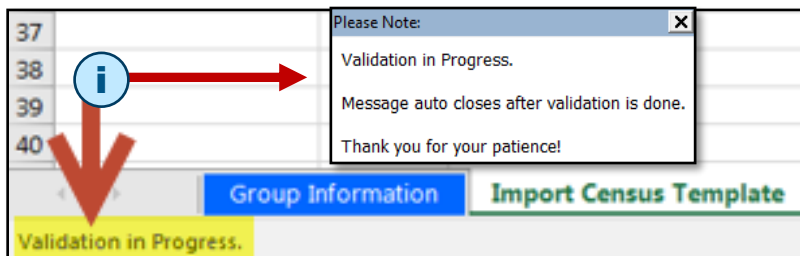


Once data entry is complete, click **File > Save** to validate the Census data. A **pop-up box** will display: **Is data entry completed for this Census?** with **Yes** and **No** buttons.

- 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 **Auto Fill** feature is available, a default value will be entered systematically. Final validation rules will run.



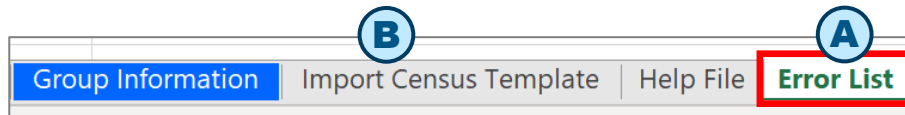
- i.** **Validation In Progress** indicators will display:

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

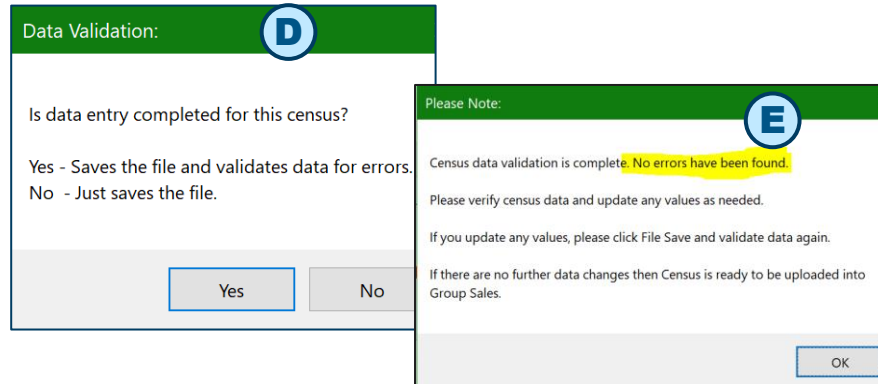
- ii.** **If no errors are found**, confirmation box displays and completed Census can be processed per current business process.

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

# Data Validation Error List



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.

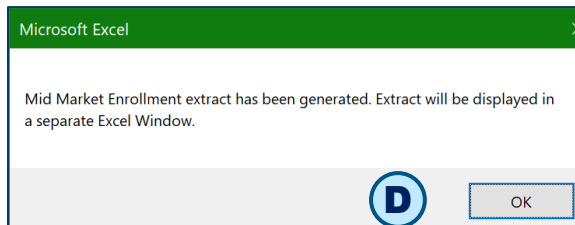
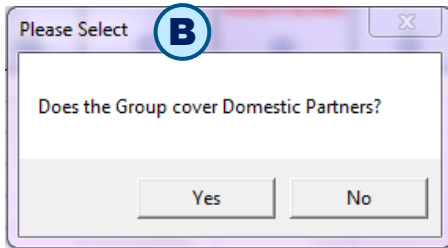
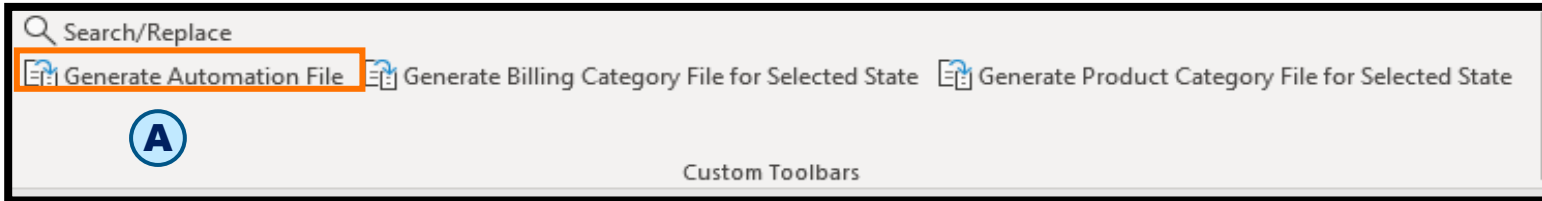
C. Once you have corrected any errors, validate data again by clicking **File > Save**.

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.

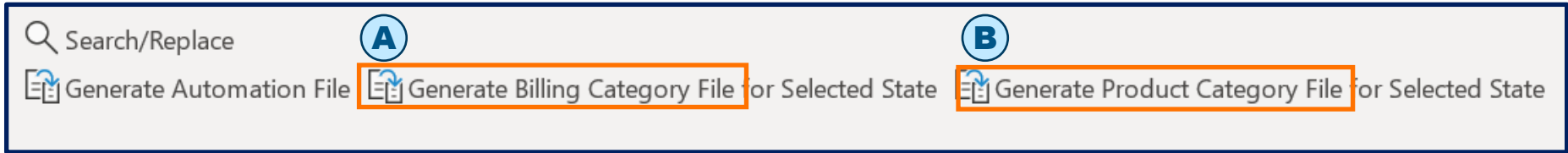
# Generate Automation File for Middle Market

**Important: 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 screenshot shows the 'Member Census' page in the Small Group & Middle Market Enrollment Tool. The page has tabs for Account Information, Additional Information, Plan Selections, Member Census (active), Rates, Account Summary, and Release for Enrollment. The Member Census section shows a 'Census Count' of 5 and an 'Add Member' button. An 'Import Census' button is highlighted with a red arrow and a blue circle labeled 'B'. Below this, the 'Import Census' dialog is open. It contains instructions on how to save the import template and a 'Select File to upload' section with a 'Browse...' button highlighted with a blue circle labeled 'C'. Below the file selection, there are radio buttons for 'Overwrite' (selected) and 'Append', with a blue circle labeled 'G' next to the 'Overwrite' option. A 'Load File' button is highlighted with a blue circle labeled 'H'.

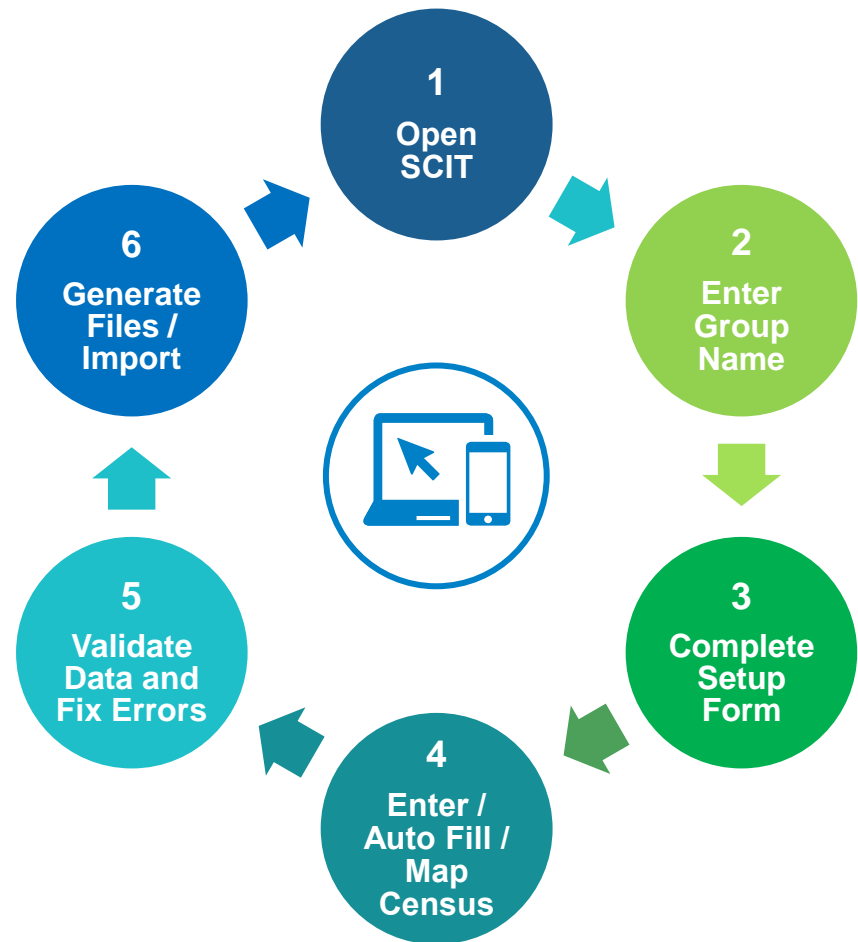
In SCIT, once Census data is validated and no errors are found, the Census is ready to be uploaded into **Small Group & Middle Market Enrollment Tool**.

## 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

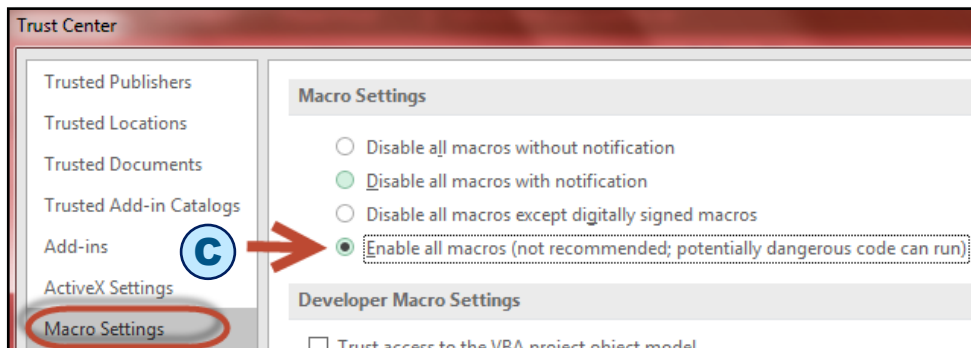
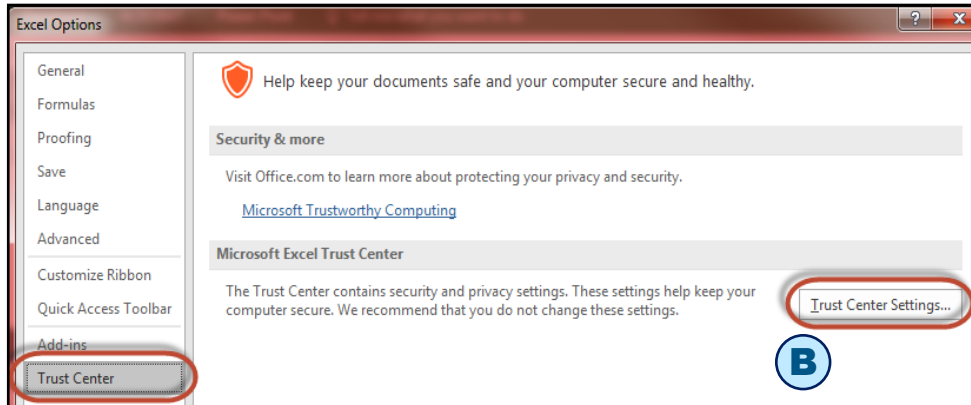
To enter Census for the next group,  
**File Close** prior group's open SCIT  
file. Repeat Steps 1 through 6.





## Technical References

# Enable Macros



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

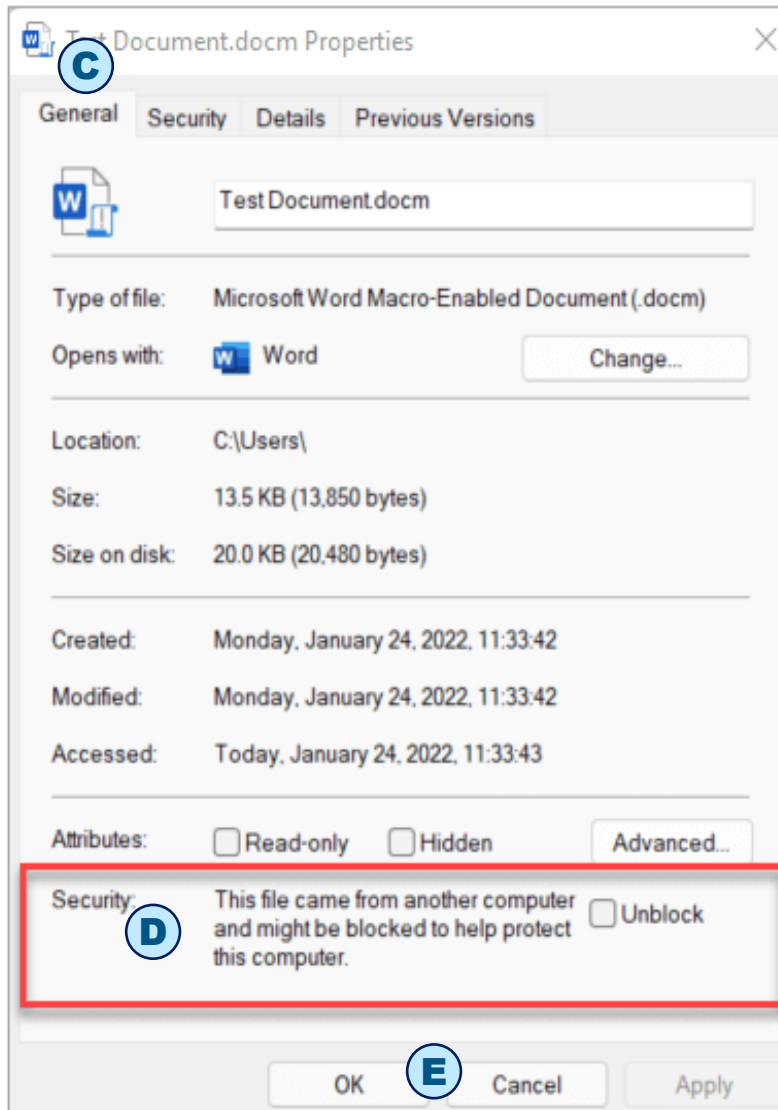
- If **Enable Macros** is not enabled each time SCIT is opened, you will need to click the **Enable Content** button to use tool.
- Once Macros have been enabled the first time, you will not need to click the **Enable Content** button each time SCIT is opened.

**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**.

# Enable Macros - Remove Mark of the Web from a file

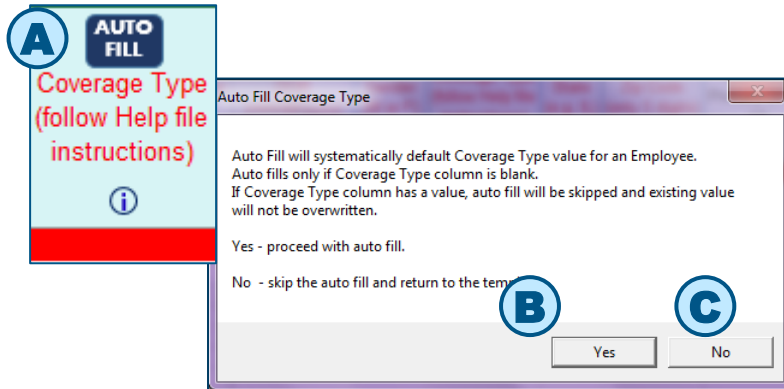


Earlier this year, Microsoft added an additional security layer and automatically disabled macros files in files downloaded from internet locations.

If a file is downloaded a file from an internet location or an email attachment and saved to a local device, the simplest way to unblock macros is to remove Mark of the Web as follows.

- 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 **Security**, remove the checkmark from **Unblock**.
- E. Click **Apply** button then **OK** button.

# Auto Fill Feature



**Auto Fill** feature is available for select columns where an **AUTO FILL** button is displayed in the header.

**A.** Click **Auto Fill**. Message box displays with information regarding the auto fill for the column along with **Yes** and **No** buttons.

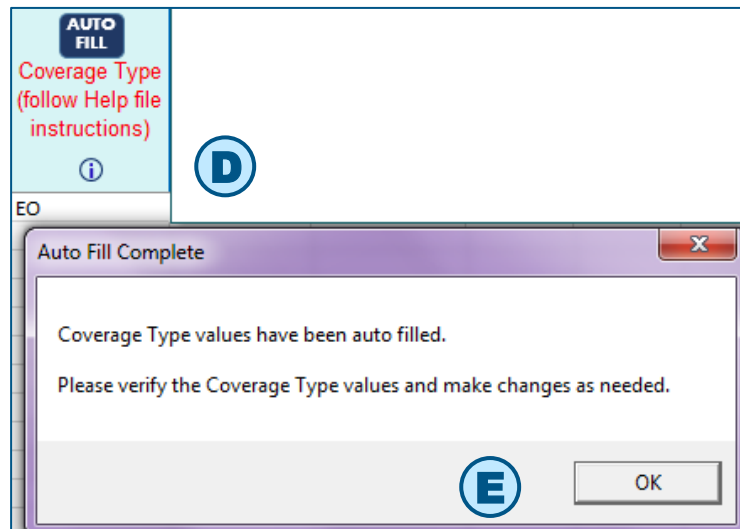
**B.** Click **Yes** to proceed with auto fill.

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

**C.** Click **No** to skip Auto Fill and return to the Template.

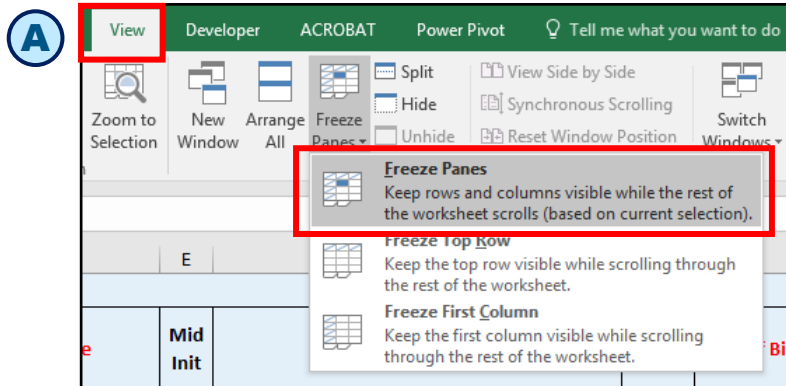
**D.** Message box displays after Auto Fill is complete.

**E.** Please verify the auto-filled values and change these values as needed.



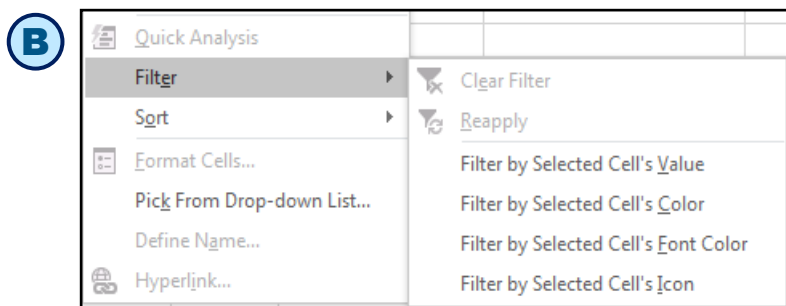
**NOTE:** Coverage Type Auto Fill is used for illustration.

# Freeze Panes, Filter and Sort Features



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

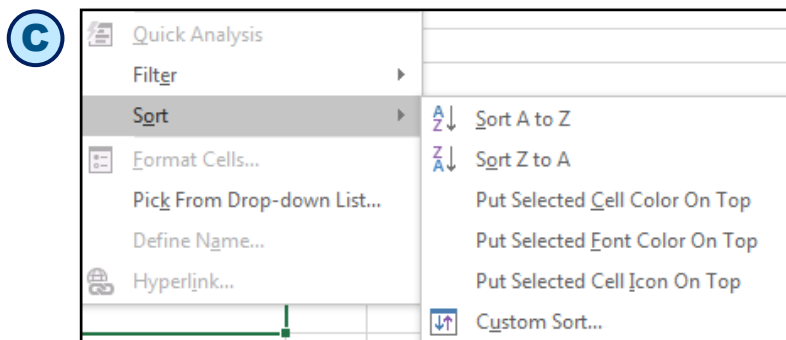
- Click the first cell in the range you want to freeze.
- From Excel menu select **View**, then click **Freeze Panes**.
- Rows and columns before the **Freeze Pane** will be visible as you scroll through the rest of the columns and/or rows.
- To remove, select **View**, **Freeze Panes** and **Unfreeze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

# 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	Columns AD through AH	Display Columns (SG/MM)
HMO Plan? is Y	Columns AI through AP	Display Columns (SG – IL , NM & TX only / MM)
HMO Plan? Is N	Columns AI through AP	Hide Columns (SG/MM)
Has Group Selected Health? is N	Columns AD through AP	Hide Columns (SG/MM)
Has Group Selected Dental? is Y	Columns AQ through AU	Display Columns (SG/MM)
Has Group Selected Dental? is Y	Columns AQ through AU	Display Columns (SG/MM)
Has Group Selected Dental? is N		Hide Columns (SG/MM)
Has Group Selected Life? Is Y (IL and TX only)	Columns AV through BA	Display Columns (MM)
Has Group Selected Life? Is N (IL and TX only)		Hide Columns (MM)
Has Group Selected Integrated FSA? is Y	Columns BN through BP	Display Columns (SG/MM)
Has Group Selected Integrated FSA? is N		Hide Columns (SG/MM)
Has Group Selected Integrated HRA? is Y	Columns BQ	Display Columns (SG/MM)
Has Group Selected Integrated HRA? is N		Hide Columns (SG/MM)
Is the Effective Date before 5/1/2023? is N		(SG)
Has Group Selected Life? is Y	Columns AV through BA Columns CJ through CR	Hide Columns (SG) Display Columns (SG)
Has Group Selected Life? is N	Columns AV through BA Columns CJ through CR	Display Columns (SG) Hide Columns (SG)
STD Selected? is Y	Columns CS through CT	Display columns (SG)
STD Selected? is N		Hide Columns (SG)
LTD Selected? is Y	Columns CU through CV	Display columns (SG)
LTD Selected? is N		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.
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)

# Auto Fill Select Columns Reference Table

Column with Auto Fill	Description	Available In
Accident Ins Coverage Type	Auto Fills 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	Auto Fills typed in value for Enrolling Subscribers	MM Enrollment
Critical Illness Coverage Type	Auto Fills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG Enrollment
Dental Coverage (Y/N)	Auto Fills value of Y for Employee choosing coverage	
Dental Coverage Type	Auto Fills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG/MM Enrollment
Dental Plan	Auto Fills value of Plan 1 from Setup Form for Employee	SG/MM Enrollment
Employee SSN	Auto Fills value for Spouse and Dependent row(s) with Employee's SSN	MM Enrollment
Employment Status	Auto Fills value of A or Active for Employee	SG/MM Enrollment
Health Coverage (Y/N)	Auto Fills value of Y for Employee choosing coverage	SG/MM Enrollment
Health Coverage Type	Auto Fills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	Available in all Templates
Health Plan	Auto Fills value of Plan 1 from Setup Form for Employee	SG/MM Enrollment
Medicare Primary	Auto Fills value of N for Employees	MM Quoting

# Auto Fill Select Columns Reference Table *(con't)*

Column with Auto Fill	Description	Available In
Retiree (IL Only)	IL Division Only: Auto Fills value of N for Employees	SG Quoting
Selected Dental Plan	Auto Fills value of Plan 1 from Setup Form for Employee	SG/MM Enrollment
Signature Date	Auto Fills value of today's date for Employee	SG Enrollment
Standalone Vision Coverage Type	Auto Fills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG Enrollment
State Code	Auto Fills value from the Division value entered on the Setup Form	SG/MM Quoting
State from ZIP	Fills in State when ZIP Code is present	Available in all Templates
ZIP Code	Auto Fills ZIP Code for Spouse and Dependent row(s) with Employee's ZIP Code	MM Quoting

# 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

