![BlueCross BlueShield of Texas]

SMART CENSUS IMPORT TOOL • SCIT
Reference Guide

Version 17

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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	• Version 17 is **not compatible** with Excel 2009 and older versions. • Version 17 is compatible with Excel 2013 and newer versions.
Enable Macros	• Enable Macros feature using instructions provided in Technical References.
Using SCIT	• **NOTE:** Save Smart Census Import Template (SCIT) on your local drive before using. If working from a network drive, SCIT performance may be a bit slower. • Keep **only one SCIT file open** at a time. If multiple windows are open, SCIT will not behave as expected.
Copy/Paste	• **Paste copied data as VALUES** to avoid overwriting Excel formatting via Paste Special.
Find & Replace	• **This functionality is not available in Tool**. If you need to use this functionality, update source document and paste copied data as **VALUES** into Tool to avoid overwriting Excel formatting via Paste Special.

Version 17 Release Notes

Enrollment *Small Group*	1. On the Group Information tab, the Enrollment Date question has been removed.
Enrollment *Small Group /* *Middle Market*	1. If Medicare Eligible = Y, then Medicare HIC Number, Medicare Reason and Medicare Primary or Secondary are mandatory. 2. Allow Spouses and Dependents to enter Zip, State and Marital Status.
Quoting *Small Group*	1. Replace LO (Life Only) with AO (Ancillary Only) in the Coverage Type dropdown.
Quoting *Small Group /* *Middle Market*	1. For records that have a DC in the Coverage Type, when a file is created the Employee, Spouse and Dependent records will not be moved to the output file. 2. Added Signature Date speed jump.

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

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

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.

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

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

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.

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

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 <mark style="background-color:red">red</mark> for required columns. The entire cell is highlighted in <mark style="background-color:yellow">yellow</mark> when there is a data mismatch. For **DOB** column, over-age dependents (26 & over), the cells are highlighted in <mark style="background-color:magenta">purple</mark> and 65 & over entries will be highlighted in <mark style="background-color:lime">green</mark> 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

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.

Enter Census Data

A. **Coverage Type** - replace LO with AO in the Coverage Type dropdown.

Small Group Quoting Map Census Feature

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

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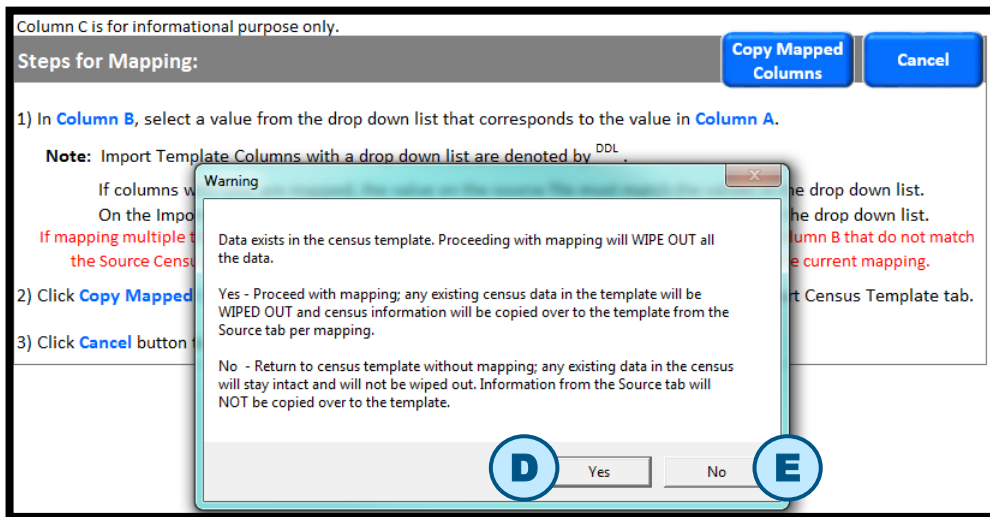
D. Click **Yes** to proceed with mapping. If data exists on the Census Template, a **Warning** message displays.

> **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.
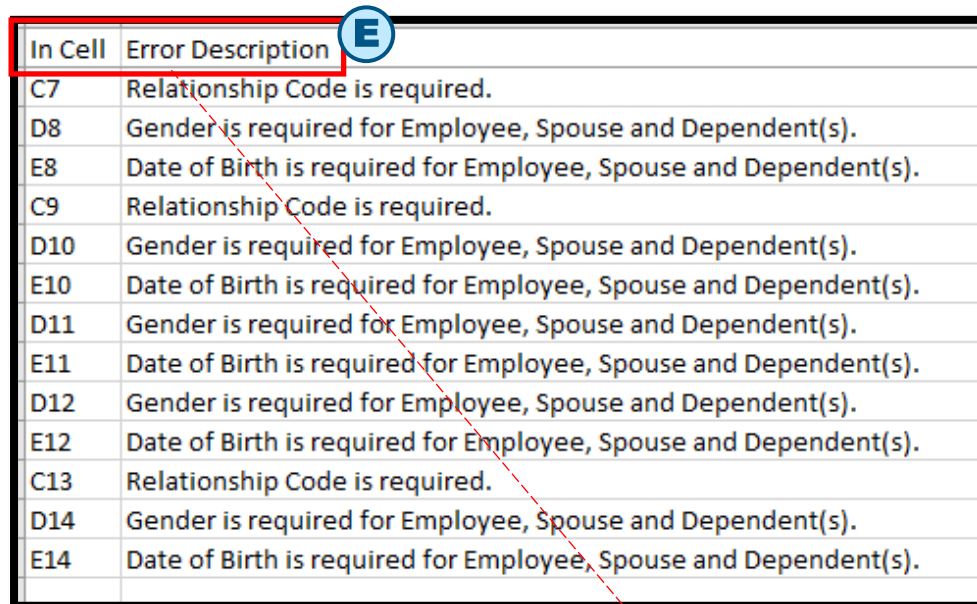
Small Group Quoting: File > Save Validation
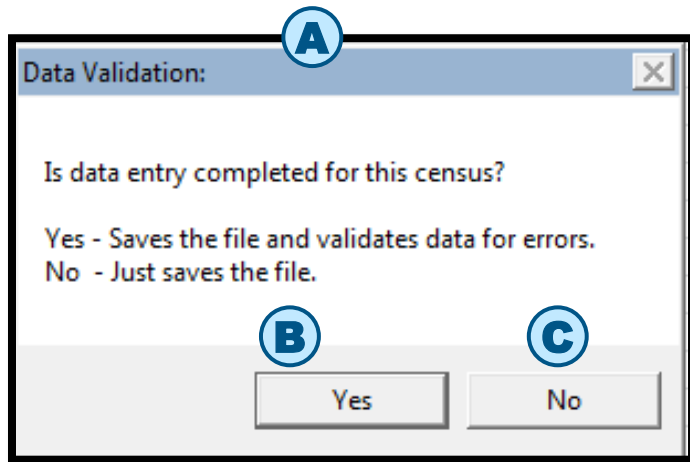
A. Click **File > Save**.
A **Data Validation** box displays.

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.
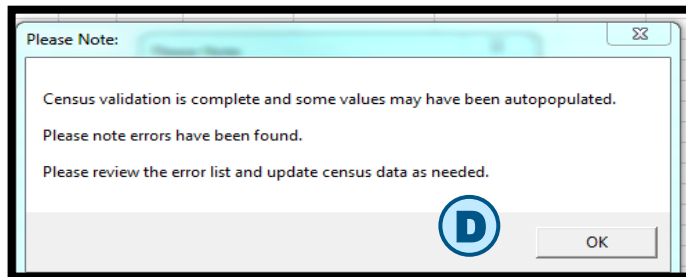
Small Group Quoting: Error List

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).

Group Information | Quoting Census Template | Error List | Quoting Help File

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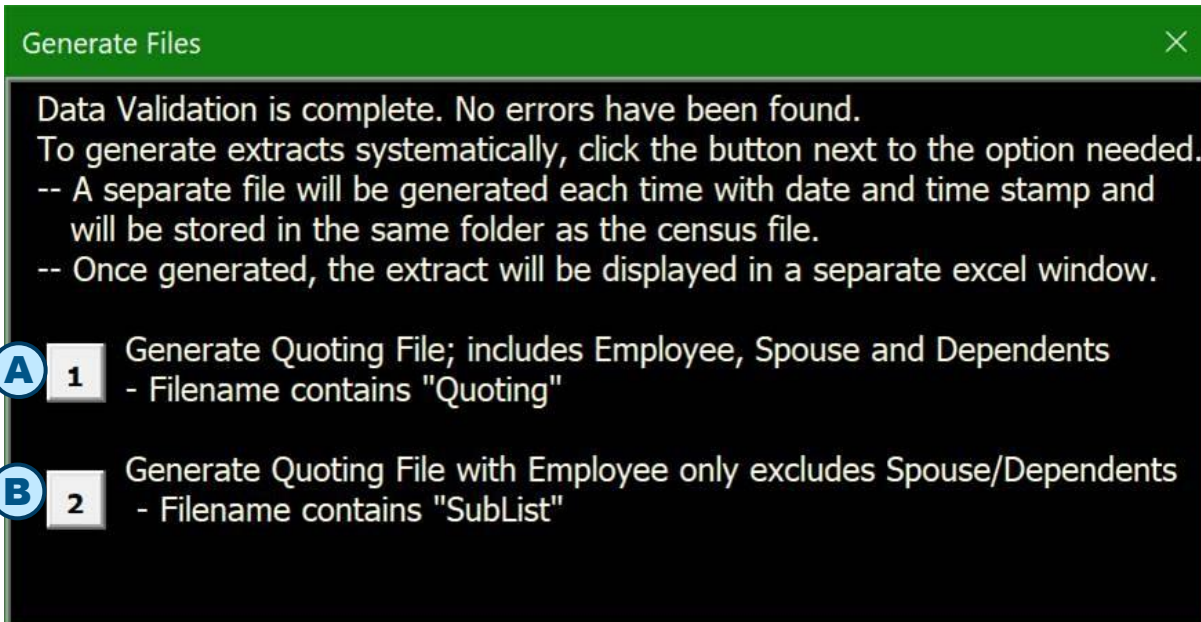
On successful data validation, **Generate Files** message box displays. A separate file is generated with date and time stamp.

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

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

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

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

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.

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

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]

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.*

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

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

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

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 (e.g. IL)	Annual Salary	AUTO FILL Zip Code (only 5 digits)	AUTO FILL Medicare Primary (Y, N or U)	AUTO FILL Retiree (Y or N)	Life Cl
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. 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
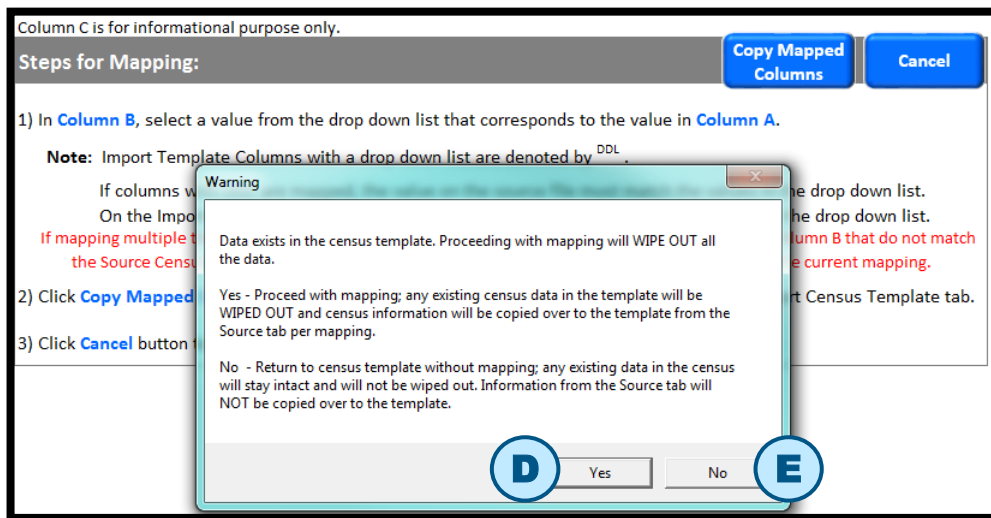
D. Click **Yes** to proceed with mapping. If data exists on the Census Template, a **Warning** message displays.

> **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
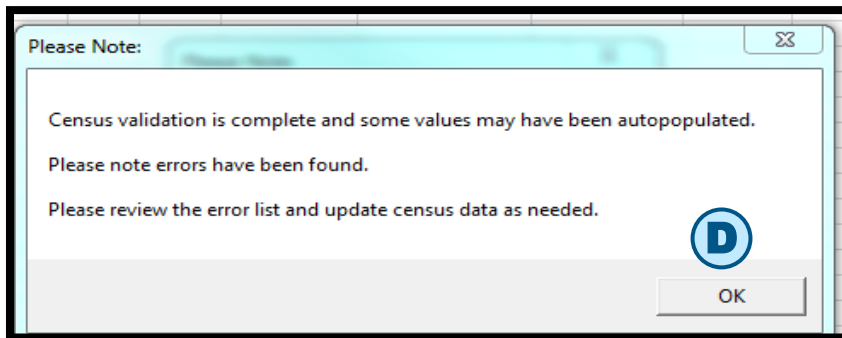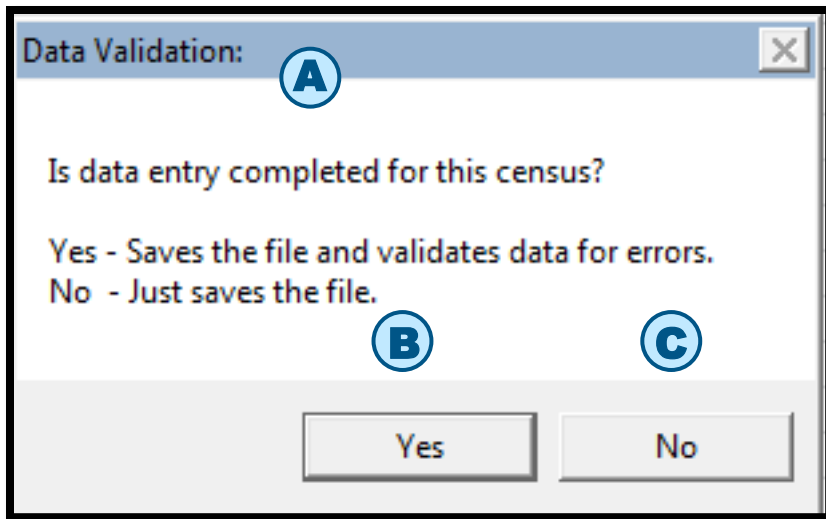
A. Click **File > Save** to display a **Data Validation** box displays.

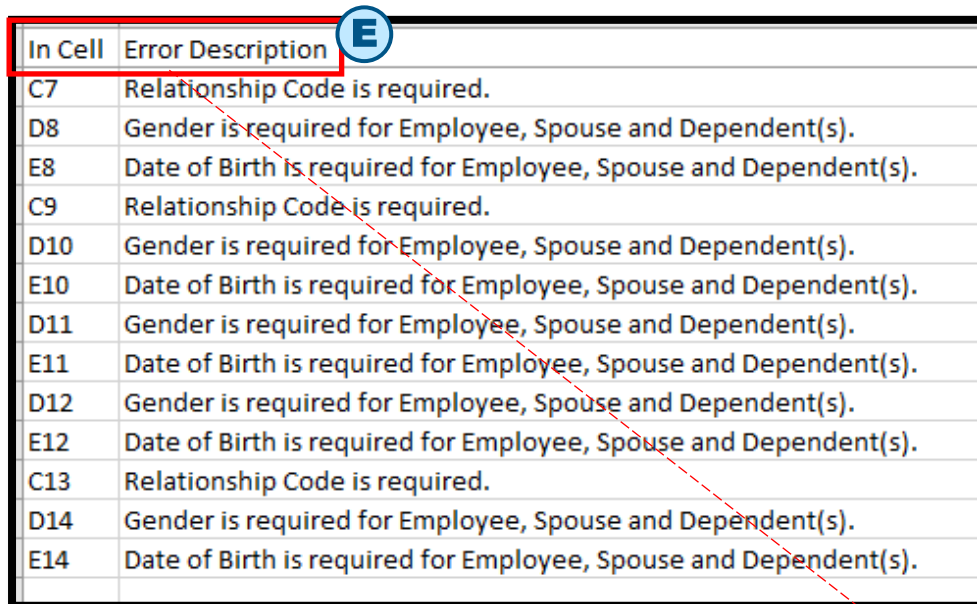**B.** Click **Yes** to proceed with validation, auto-populate values and generate an error list if there are any errors.

– 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

Group Information | Mid Market Quoting Census | Mid Market Quoting Help File | **Error List**
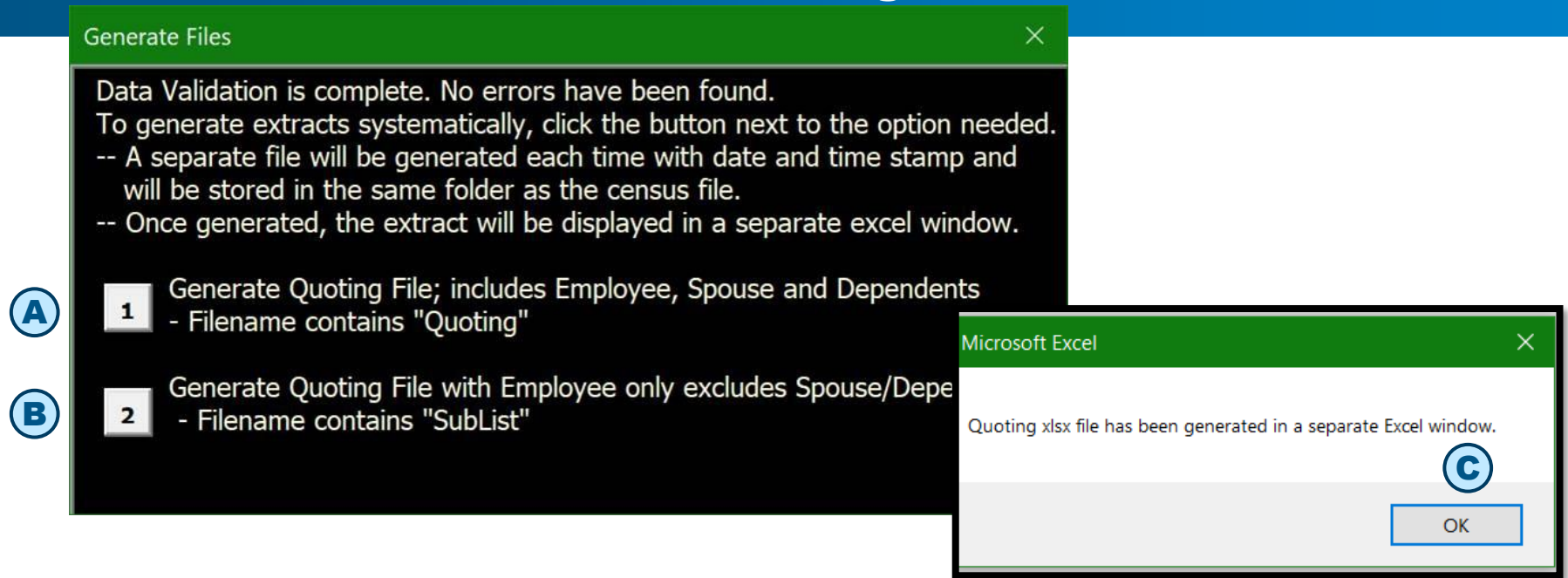
E. Error List tab will display:

- **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

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/Depe
- 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.

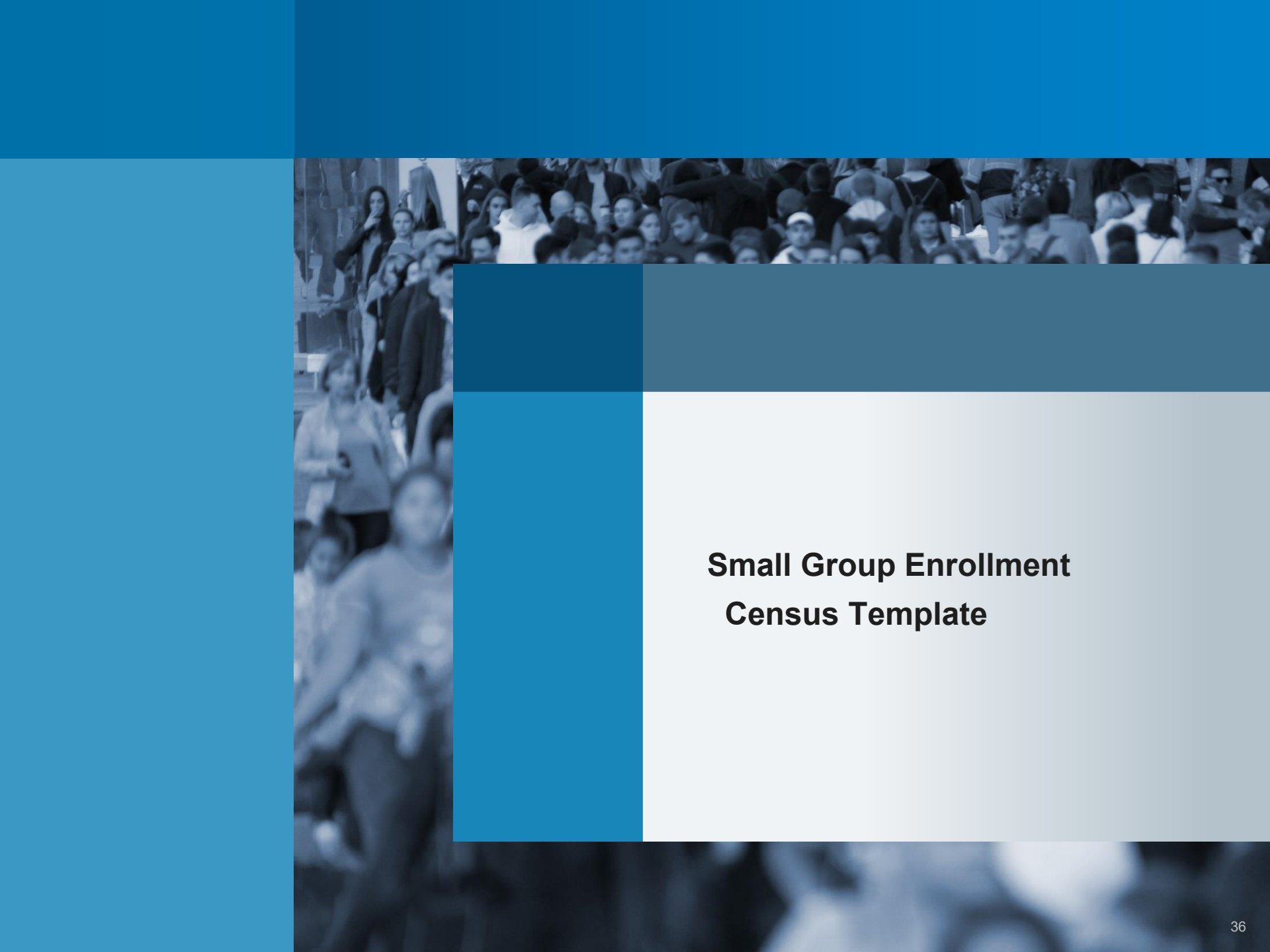**C.** A separate file will be generated with date and time stamp and a confirmation will display. Click OK.

Enter Census Data

A. **Coverage Type** For records that have a **DC** in the Coverage Type, when a file is created the Employee, Spouse and Dependent records will not be moved to the output file.

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

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?** If Y, enter the following:

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

E. **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 *(con't)*

A. 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).*

B. 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).*

C. Selected Integrated FSA? If Y, enter the following:

- **Plan 1 & 2 –** *dropdown 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

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

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

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

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

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 ⓘ and **Auto Fill** buttons are available in the column headers.

Enter Census Data - Medicare

A. **Speed Jump** New for V17 is a new speed jump for Signature Date.

Relationship Code	Waive All Coverage	Waive Reason Code	First Name	Mid Init	Last Name	State	Zip Code	Home/Cell Phone	Business Phone	Email Address	Marital Status
Employee	N		Rick		Rov	IL	60515	6309920183	6309932195		Married
Spouse			Cindy		Rov	IL	60515				Domestic Partner
Dependent Child			Jack		Rov	IL	60515				Single

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

Relationship Code	Waive All Coverage	Waive Reason Code	First Name	Mid Init	Last Name	Medicare Eligible	Medicare HIC Number	Medicare Reason	Medicare Primary or Secondary
Employee	N		Rick		Rov	Y			
Spouse			Cindy		Rov	Y			
Dependent Child			Jack		Rov	Y			

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

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 <mark>yellow</mark>. 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

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

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

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

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

- The entire cell is highlighted in red for required columns. The entire cell is highlighted in yellow when there is a data mismatch.

- When you type in a value and click **Enter**:
  - If the value is invalid, an error message displays with **Retry**, **Cancel** and **Help** buttons.
  - **Retry** returns you to the typed-in value for editing and **Cancel** wipes out the typed-in value and returns you to the cell.

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

- **Help** icons are available below the header name of each column. Clicking Help icon will move the cursor to that exact Column in the Enrollment Help File tab. Field requirements are listed in this section.

Enter Census Data for Language, Race and Ethnicity

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

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

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

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

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

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

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

Enter Census Data (New Ancillary Fields)

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

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

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

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 **(A)**
HMO Plan?	N
Plan 1:	�altogether red ▆
Plan 2:	
Plan 3:	
Plan 4:	
Plan 5:	
Plan 6:	
Has Group Selected Dental?	Y **(B)**
Plan 1:	▆ red ▆
Plan 2:	
Has Group Selected Life?	Y **(C)**
Selected Integrated FSA?	Y
Plan 1:	**(D)**
Plan 2:	
Selected Integrated HRA?	Y
Plan 1:	**(E)**
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

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

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

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

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

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 <mark>yellow</mark> 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 <mark>red</mark> for required columns. The entire cell is highlighted in <mark>yellow</mark> when there is a data mismatch. For **DOB** column over-age dependents (26 & over), the cells are highlighted in <mark>purple</mark> and 65 & over entries are highlighted in <mark>green</mark> 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 ⓘ and **Auto Fill** buttons 🔲 are available in the column headers.

Enter Census Data - Medicare

A. Speed Jump New for V17 is a new speed jump for Signature Date.

Relationship Code	Waive All Coverage	Waive Reason Code	First Name	Mid Init	Last Name	State	Zip Code	Home/Cell Phone	Business Phone	Email Address	Marital Status
Employee	N		Rick		Rov	IL	60515	6309920183	6309932195		Married
Spouse			Cindy		Rov	IL	60515				Domestic Partner
Dependent Child			Jack		Rov	IL	60515				Single

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

Relationship Code	Waive All Coverage	Waive Reason Code	First Name	Mid Init	Last Name	Medicare Eligible	Medicare HIC Number	Medicare Reason	Medicare Primary or Secondary
Employee	N		Rick		Rov	Y			
Spouse			Cindy		Rov	Y			
Dependent Child			Jack		Rov	Y			

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

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 <mark>yellow</mark>. 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

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

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

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

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

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

- The entire cell is highlighted in red for required columns. The entire cell is highlighted in yellow when there is a data mismatch.

- When you type in a value and click **Enter**:
  - If the value is invalid, an error message displays with **Retry**, **Cancel** and **Help** buttons.
  - **Retry** returns you to the typed-in value for editing and **Cancel** wipes out the typed-in value and returns you to the cell.

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

- **Help** icons are available below the header name of each column. Clicking Help icon will move the cursor to that exact Column in the Enrollment Help File tab. Field requirements are listed in this section.

Enter Census Data for Language, Race and Ethnicity

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

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

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

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

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

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

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

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

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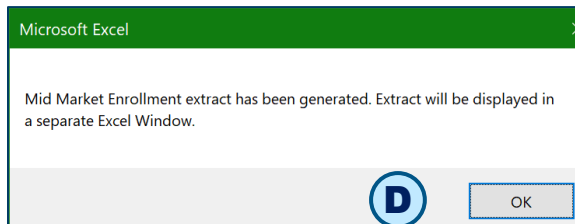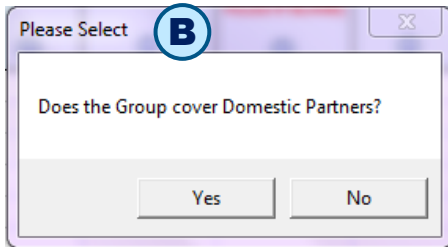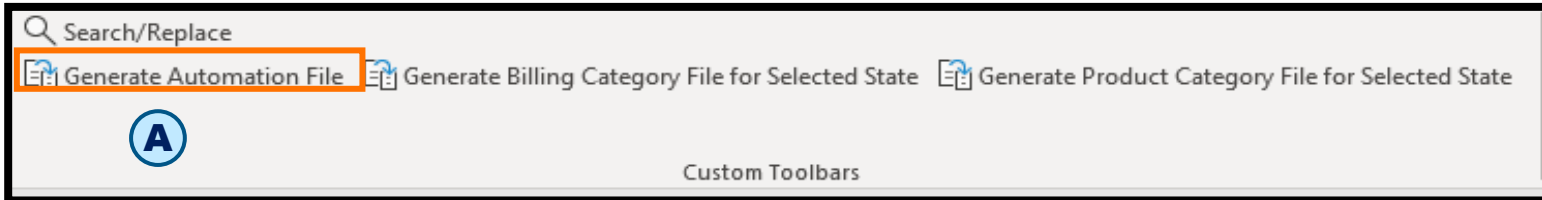
A. From Excel Menu bar, click **Add-ins** option, then click **Generate Automation file OR** use the keyboard shortcut **Ctrl + Shift + I.**

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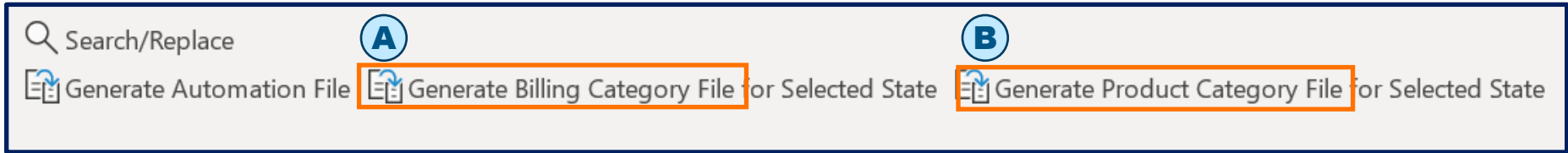
NOTE*:* This extract can be generated as needed.

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

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.

Cycle diagram:
- 1 Open SCIT
- 2 Enter Group Name
- 3 Complete Setup Form
- 4 Enter / Auto Fill / Map Census
- 5 Validate Data and Fix Errors
- 6 Generate Files / Import

Technical References

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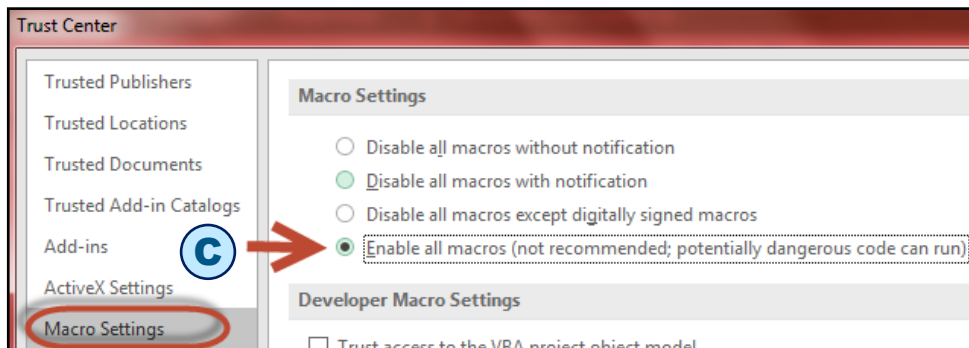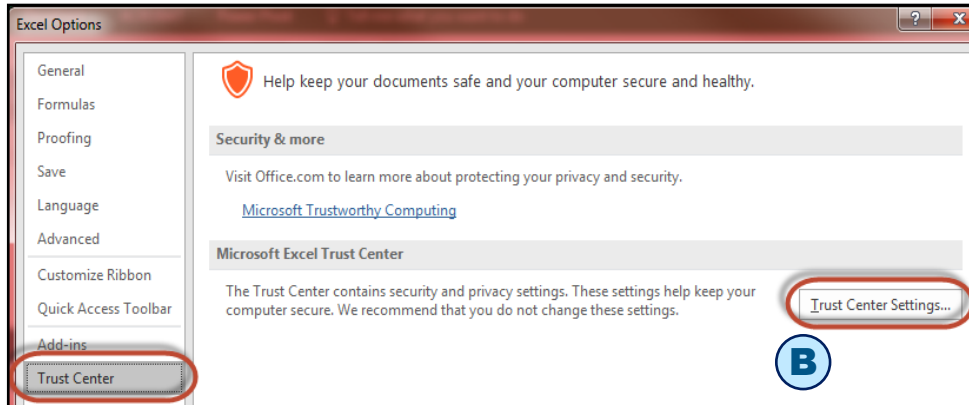
WARNING: Once this option is turned on, open files with macros ONLY from a trusted source.

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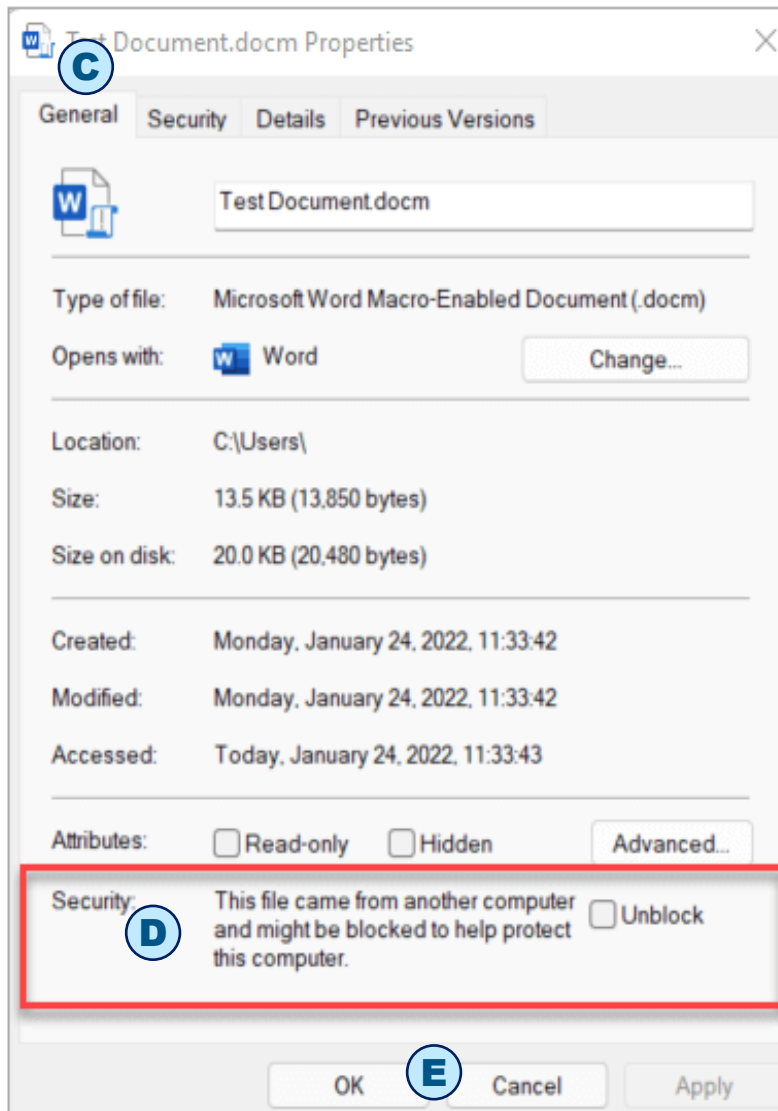
Earlier this year, Microsoft added an additional security layer and automatically disabled macros files in files downloaded from internet locations.

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

NOTE: Coverage Type Auto Fill is used for illustration.

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.

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**.
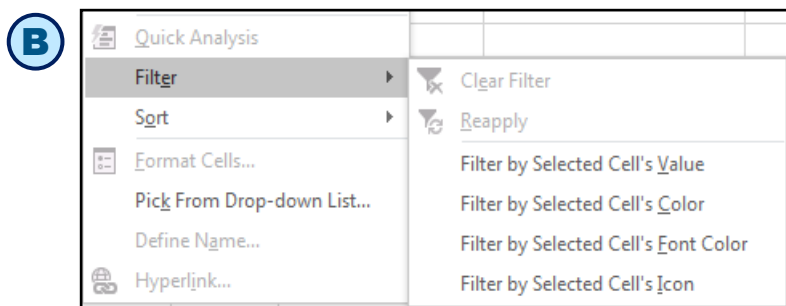
B. **Filter** Census data as needed.

– 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**.
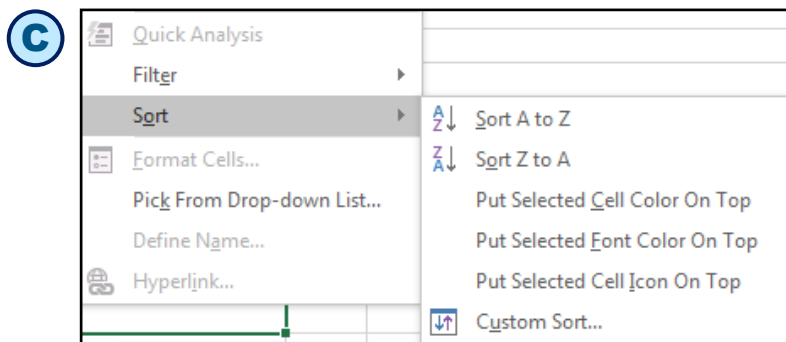
C. **Sort** Census data as needed.

– 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 Has Group Selected Dental? is N	Columns AQ through AU	Display Columns *(SG/MM)* Hide Columns *(SG/MM)*
Has Group Selected Life? Is Y *(IL and TX only)* Has Group Selected Life? Is N *(IL and TX only)*	Columns AV through BA	Display Columns *(MM)* Hide Columns *(MM)*
Has Group Selected Integrated FSA? is Y Has Group Selected Integrated FSA? is N	Columns BN through BP	Display Columns *(SG/MM)* Hide Columns *(SG/MM)*
Has Group Selected Integrated HRA? is Y Has Group Selected Integrated HRA? is N	Columns BQ	Display Columns *(SG/MM)* Hide Columns *(SG/MM)*
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 STD Selected? is N	Columns CS through CT	Display columns *(SG)* Hide Columns *(SG)*
LTD Selected? is Y LTD Selected? is N	Columns CU through CV	Display columns *(SG)* Hid Columns *(SG)*

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

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

Group Information tab column selection	Column(s)	Displayed or Hidden
Employee Status is "COBRA"	Columns X:Z and CD:CE.	Displays COBRA Reason code, COBRA Start Date, COBRA Project End Date and Standalone Vision columns.
Employee Status is "Active"	Columns CD:CI	Displays Standalone Vision columns *(SG)*
Employee Status is "Retired" *(IL only)*	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 *(IL only)*	Column A Relationship Code	"Civil Union" is displayed *(SG/MM)*
Division *(IL only)*	Column T Employment Status	"IL Cont" value is displayed *(SG/MM)*
Division *(TX only)*	Column T Employment Status	"TX Cont" and "TX Dependent Cont" values are displayed *(SG/MM)*

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

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

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

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**

- **Please include "New Census Template" in the subject line and attach a screen shot, if possible**