

Reference Guide

Version 10



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***NOTE: The SCIT process and tool is identical for all divisions.
This Reference Guide provides screenshots specific to Illinois.***

Before You Start

Compatibility	- Version 9 is not compatible with Excel 2009 and older versions. - Version 9 is compatible with Excel 2013 and newer versions.
Enable Macros	Enable Macros feature using instructions provided in the Appendix.
Using SCIT	Important: Save Smart Census Import Template (SCIT) on your local/network drive before using. - If working from a network drive, please note SCIT performance may be a bit slower. - Keep only one SCIT file open at a time. If multiple SCIT files are open, you may encounter issues and data may get corrupted.
Copy/Paste	Paste copied data as values to avoid overwriting Excel formatting via Paste Special. - If multiple windows are open, SCIT will not behave as expected. - You can have multiple files open within one window; to view all windows at one time select View/Arrange All from the Excel menu.
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.

Release Notes - Version 10

Illinois Middle Market (51-150) Enhancements

Quoting Fields

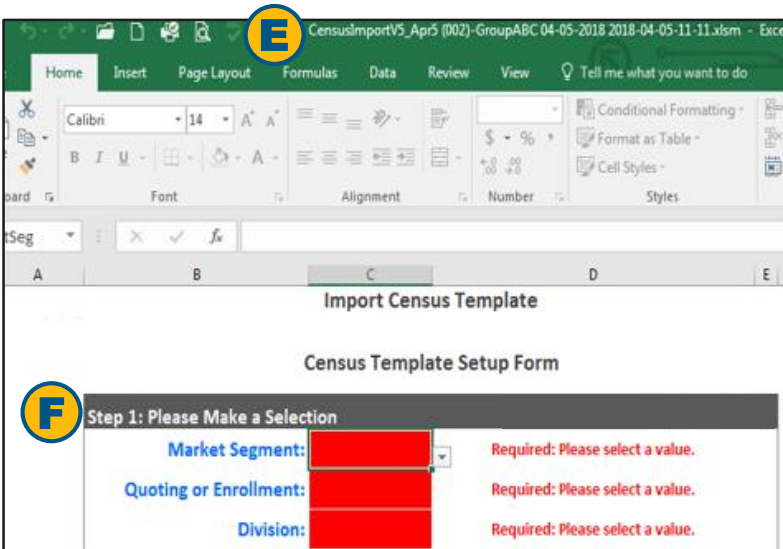
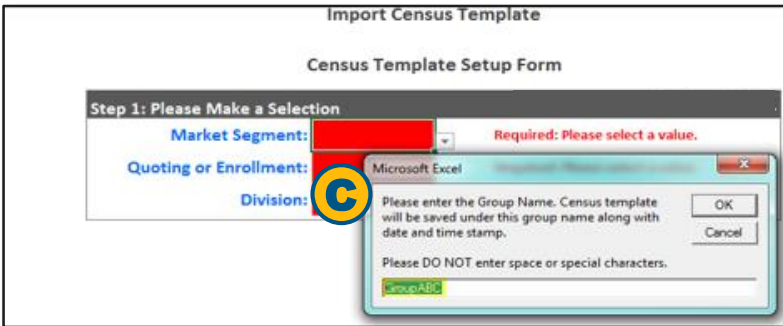
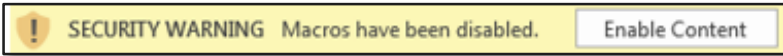
1. Corrected issue of Market Segment not sticking when closing SCIT file. Now when the user re-opens SCIT file, it no longer reverts to Small Group but displays the Market Segment they selected.
2. SCIT no longer displays an error message when user tries to re-open a generated quoting file.
3. Generated quoting files display Version 10 within file name along with date and timestamp.
4. Group Information Tab updated to display "Version 10 Release: 2021.3".
5. The Quoting Census Mapping worksheet displays Column A so user no longer needs to scroll left to view.
6. "Copy Mapped Columns" and "Cancel" buttons are now visible on the Quoting Census Mapping worksheet so users no longer needs to scroll right to view.
7. Information dialog box displays corrected extension of file type generated: "Quoting.xlsx has been generated in a separate Excel window."
8. SCIT no longer clears data for Gender if space is copied/pasted or mapped into tool for "M " or "F ". Space is removed and Gender retained.
9. SCIT automatically converts First Name and Last Name to Proper Case during validation.
10. User can manually enter "Coverage Type" in addition to using the dropdown menu.
11. Added code to turn off "AutoSave". The AutoSave events caused contention with SCIT file due to macros. The issue was isolated to naming conventions used when generating output files.

Steps for Entering a Group Census

1. Open **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 Census](#) button on the [Setup Form](#) or Click [Green](#) button to enter data. Click [Auto Fill](#) button to systematically default a value for select columns as needed.
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 Group Sales tool or 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. On **File Open**, click **Enable Content** button. Skip this step if macros are enabled through **File Options** menu. Please refer to Enable Macros in Appendix for instructions.
- C. In the pop-up box, type in the **Group Name** and click **OK**.
 - Do not include spaces or any special characters.
- D. Select a **Folder** to save the group's Census and click **OK**.
- E. The file is saved under the group's name along with the date and time stamp.
 - Original **SCIT** file stays intact and is not overwritten.
- F. **Setup Form Step 1** will display. Once the fields for Step 1 have been completed, the remaining form displays.

Complete Setup Form

Import Census Template Setup Form

Step 1: Please Make a Selection

A Market Segment: **SMALL GROUP** (2-50)

B Quoting or Enrollment: **QUOTING**

Division: **C**

Click Green button for Census Data Entry

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

D **Map Census** **F** **Help Tab**

Please Note:

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

- Select a Market Segment: **SMALL GROUP**
- Select **QUOTING**.
- Select a **Division** from drop-down list.
- Click **Map Census** 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.
- Click the **Green Button** to navigate to the quoting Census Template for manual data entry.
- Click the **Help File** tab for information on detailed specifications on the Template columns.
- Click the **Auto Fill** button to systematically populate information for select columns.

G

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

Help Information

First Name (Case Sensitive)	Relationship Code (follow Help file instructions)
Employee	

- A. Clicking [Help Icon](#) will move the cursor to that exact Column in the [Help Tab](#).

Example: Clicking [Help icon](#) in the First Name header will move the cursor to the First Name row of the [Help Tab](#).

Field Name	Formatting Specifications	Maximum Permissible 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 Version: 2018.1

Market Segment: **SMALL GROUP** (2-50)

Quoting or Enrollment: **QUOTING**

Division: **IL**

Click Green button for Census Data Entry

Map Census [Help Tab](#)

Please Note:

- A. Clicking [Help Tab](#) will navigate to the [Help File](#) worksheet. [Help File](#) worksheet has detailed specifications for all the Template columns.

Line Class	Alphabetic, numeric, and special characters	N/A
Zip Code (BBF Only)	Numeric characters only	5
Group Information		Quoting Help File

Small Group Quoting Enter Data

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

- 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 coverage dependents, 26 and over, will be highlighted in purple and 65 and over age group 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.
- F. 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.
- G. Help icons are available below the header name of each column. Please refer to the Help Information slide for details.
- H. Auto Fill icons are available in the header for select columns.

Small Group Quoting Map Census Feature

Step 1: Please Make a Selection

Market Segment: **SMALL GROUP (2-50)**

Quoting or Enrollment: **QUOTING**

Division: **IL**

Click Green button for Census Data Entry

Map Census **Help Tab**

Please Note:

Last Name (Case Sensitive)	First Name (Case Sensitive)	Relationship Code (follow Help file instructions)	Gender (M or F)	DOB (mm/dd/yy)	Copy (follow Help file instructions)	AUTO FILL State Code	AUTO FILL Retiree-IL Only	Annual Salary	Life Class	Zip Code (R/F Only)
Smith	John	Employee	M	*****	EF	IL	N			60526
Smith		Spouse	F	*****						
Smith	Johnny	Dependent								
Smith	Joanne	Dependent								
Smith	Jen	Employee								
Williams	Sam	Spouse								
Williams	Sarah	Dependent								
Williams	Shawn	Dependent								
Williams	Sage	Dependent								
Anderson	Justus	Employee								
Anderson	Justina	Spouse								

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**

- Click **Map Census** if you have Census on a separate spreadsheet from the group.
- Source Census From the Group** worksheet (tab) displays along with **Instruction's** box.
- 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.

- Make sure there is only 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.

- Click **Yes** to proceed to Census Mapping tab after pasting the Source Census.
- 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 tab.
- Repeat Steps C and D above.

Small Group Quoting Mapping Census, Continued

A 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) ▼ B
First Name (Case Sensitive)	Last Name (Case Sensitive) A
Relationship Code ^{DDL}	Relationship Code(follow Help) C
Gender (M or F) ^{DDL}	Gender (M or F) B D
DOB (mm/dd/yyyy)	DOB (mm/dd/yyyy) E
Coverage Type ^{DDL}	Coverage Type(follow Help) F
State Code ^{DDL}	State Code G
Retiree (IL Only) ^{DDL}	Retiree (IL Only) H
Annual Salary	Annual Salary I

Mapping Source Columns to Census Template Columns

Column A has column headers from the Census Template tab.
 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: Census Template Columns with a drop down list are denoted by ^{DDL}.

If columns with DDL are mapped, the value on the source file must match the values in the drop down list.
 On the 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.

G Copy Mapped Columns

D Cancel

A. Census Mapping tab displays.

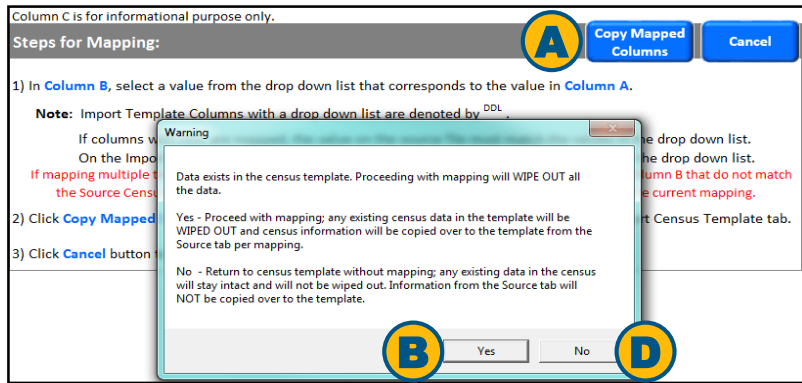
- **Column A** displays column headers from the Small Group Quoting Template.
- **Column B** has a drop-down list with values, which are column headers from the source file.
- **Column C** is for information only.
- **Instructions** display to the right.

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.

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

Small Group Quoting Copy Mapped



A. When the **Copy Mapped Columns** button is clicked and data exists on the Census Template, a **Warning** message displays.

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

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

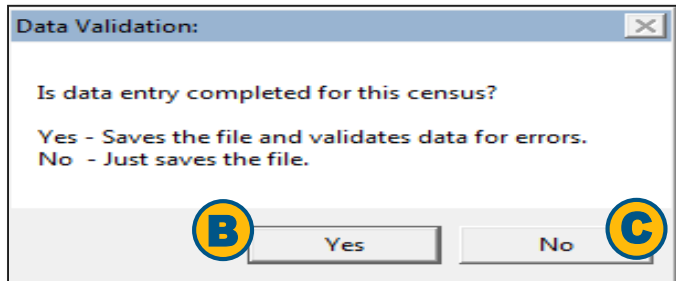
- Data from the **Source** tab gets copied over to the Census Template tab per mapped columns.

C. Census Template displays with mapped Census data. Complete rest of the Census data entry.

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

Last Name (Case Sensitive)	First Name (Case Sensitive)	Relationship Code (follow Help file instructions)	Gender (M or F)	DOB (mm/dd/yyyy)	Coverage Type (follow Help file instructions)	State Code	Retiree (IL Only)	Annual Salary	Life Class	Zip Code (BBF Only)
C	Smith	Employee	M	03/01/1979	EF	IL	N			60526
	Smith	Spouse	F	06/04/1981						
Johnny	Smith	Dependent	M	04/08/1999						
Joanne	Smith	Dependent	F	01/05/2002						
Jen	Smith	Employee	M	06/04/1980	EF	IL	N			60523
Sam	Williams	Spouse	F	04/05/1983						
Sarah	Williams	Dependent	M	08/04/1997						
Shawn	Williams	Dependent	F	09/04/1999						
Sage	Williams	Dependent	M	06/05/2001						
Justus	Anderson	Employee	F	03/01/1979	ES	IL	N			02365
Justina	Anderson	Spouse	F	06/04/1981						

Small Group Quoting File Save Validation/Error List



A. Click **File Save**. **Data Validation** box displays.

B. Click **Yes** to proceed with validation, generate an error list if there are 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.

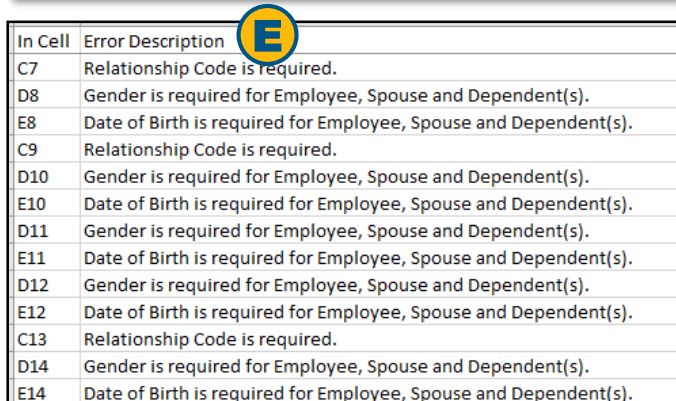
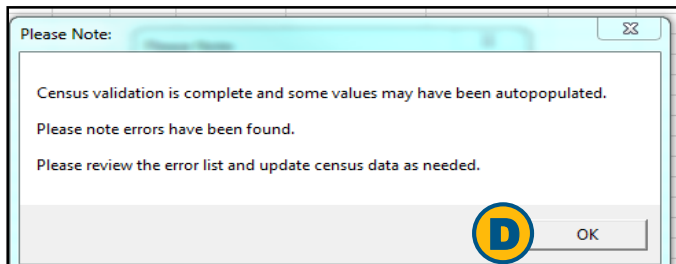
E. The Error List tab will display:

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

F. To update the values, click the Quoting Census Template tab.

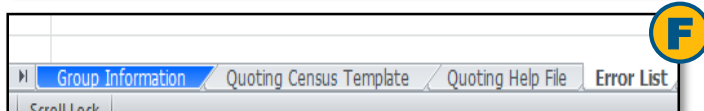
You can toggle between the **Error List** and **Census Template** tabs.

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

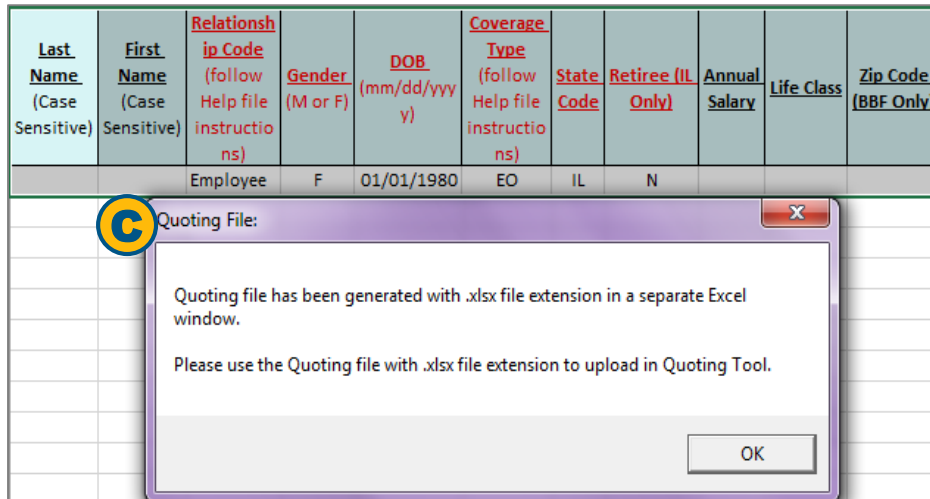
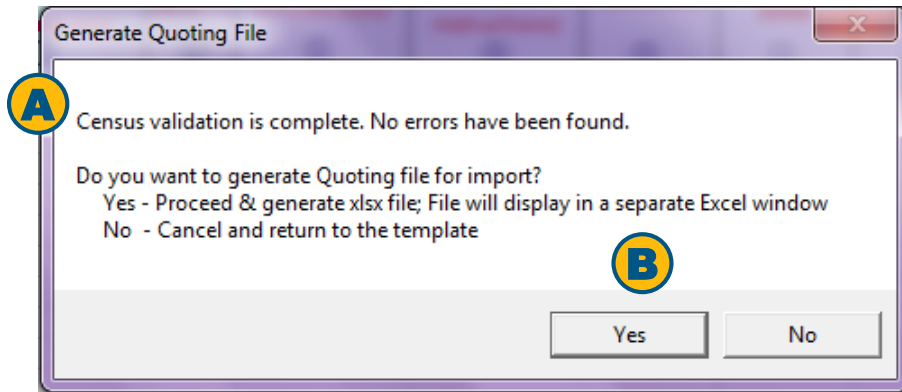


A screenshot of the 'Error List' tab in the application. It displays a table with two columns: 'In Cell' and 'Error Description'. The table contains 12 rows of error messages. A yellow circle with the letter 'E' is placed over the top right corner of the table.

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).



Small Group Quoting Successful Validation



- A. Upon successful validation, **Generate Quoting File** message displays.
- B. Click **Yes** to generate the file.
- C. A new file with Census data is generated with date and time stamp in a separate excel window. Use this file to import Census in the Small Group & Middle Market Quoting tool.
 - A confirmation message displays after the file is generated.
 - The generated file is stored in the same folder as **SCIT**.
 - If generating a quoting file multiple times, a new file is created each time with the new date and time stamp. Previous files are not overwritten.

Small Group Enrollment Census Template

Open SCIT and Save Under Group Name

The image shows a sequence of steps for opening and saving a SCIT file. At the top, a yellow 'SECURITY WARNING' bar states 'Macros have been disabled.' with an 'Enable Content' button. Below this is the 'Import Census Template' dialog box, which contains a 'Census Template Setup Form'. The form has three fields: 'Market Segment', 'Quoting or Enrollment', and 'Division', each with a red 'Required: Please select a value.' message. A 'Microsoft Excel' pop-up box is shown over the 'Division' field, asking for a 'Group Name' and warning not to use spaces or special characters. The pop-up shows 'GroupABC' in the input field. Below the pop-up, the Excel spreadsheet is visible, showing the 'Census Template Setup Form' embedded in the worksheet. The form is labeled 'Step 1: Please Make a Selection' and 'version: 2018.1'. It has three red input fields for 'Market Segment', 'Quoting or Enrollment', and 'Division', each with a red 'Required: Please select a value.' message. The spreadsheet's ribbon shows 'Home', 'Insert', 'Page Layout', 'Formulas', 'Data', 'Review', and 'View'.

- A. From Excel menu, select **File Open**. Go 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 refer to Enable Macros in Appendix 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.
 - A. Original **SCIT** file stays intact and is not overwritten.
- F. Setup Form Step 1 will display.
 - Select a **Market Segment**: **SMALL GROUP**
 - Select **Enrollment**
 - Select a **Division** from drop-down list.

Complete Setup Form

A Step 2: Enter Group Benefits Information

B Has Group Selected Health? Y

B HMO Plan? N

Plan 1: Required: Please enter 7 digit plan code.

Plan 2: Optional: Enter 7 digit plan code as needed.

Plan 3: Optional: Enter 7 digit plan code as needed.

Plan 4: Optional: Enter 7 digit plan code as needed.

Plan 5: Optional: Enter 7 digit plan code as needed.

Plan 6: Optional: Enter 7 digit plan code as needed.

B Has Group Selected Dental? Required: Please select a value.

Plan 1:

Plan 2:

D Has Group Selected Life? Required: Please select a value.

Is Life or STD Salary Based?

Click Green button for Census 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.

F

F **ATTENTION:**

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

- A. Step 2 section displays.
- B. Complete the required fields highlighted in red.
- [Has Group Selected Health?](#) is defaulted to Y.
 - Note on Health and Dental plans:
 - **SCIT** only validates that a 7-digit 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. [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](#).
- D. Click [Map Census](#) 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 Census Template systematically per the mapping.
- E. Click the [Green Button](#) to navigate to the quoting Census Template for manual data entry.
- F. Click the [Help Tab](#) for information on detailed specifications on the Template columns.
- G. Click [Blue Button](#) to display all Census columns on the Census Template.

Small Group Enrollment Map 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](#)

Last Name	First Name	Relationship	Gender	Date of Birth	Type of Enrollment	State	Retiree	Annual Salary	Life Class	Employee Home Zip
Smith	John	Employee	F	#####	EF	IL	N	960000		60456
Smith	Emily	Spouse	M	#####						
Smith	Spouse	Dependent	F	#####						
Smith	Jack	Dependent	M	#####						
Van	Emily	Employee	M	#####	EO	IL	N	645854		60456

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.

[Yes](#) [Cancel](#)

- A. Click [Map Census](#) if you have Census on a separate spreadsheet from the group.
- B. [Source Census From the Group](#) worksheet (tab) displays along with [Instruction's](#) 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](#).

- A. Make sure there is only one header row.
- B. Header row and data should not have merged cells.
- C. 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:

- a) Delete the existing Census on the source Census from the group tab.
- b) Repeat Steps C and D listed above.

Small Group Enrollment Map Census/Copy Mapped, Continued

A ACA Small Group Enrollment Import Census Template Columns

B Map Group's Source Census Columns (Select from the List)

C Copy Mapped Columns

Mapping Source Columns to Import Census Template Columns

Column A has column headers from the Import Census Template.
 Helpful Hint: Click "a1" 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**.
- 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.

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

Group Information Columns	Relationship	Waive Coverage	Waive Reason	First Name	Middle Initial	Last Name	Name Suffix	Date Of Birth	Gender	SSN	Address 1	Address 2	City	State
Relationship Code ^{DDL}	Relationship													
Waive All Coverage ^{DDL}	waive Coverage													
Waive Reason Code ^{DDL}	Waive Reason													
First Name	First Name													
Middle Initial	Middle Initial													
Last Name	Last Name													
Name Suffix														
Date Of Birth	Date Of Birth													
Gender ^{DDL}	Gender													
SSN	SSN													
Address 1	Home Address													
Address 2														
City	City													
State ^{DDL}	State													

- A.** Census Mapping tab displays.
- **Column A** displays column headers from the Small Group 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 tab.
- Click the **Cancel** button to skip the mapping and go to **Census Template** tab to enter 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 **WIPE OUT** and the Census information will be copied over to the Template from the Source tab per mapping.

- Mapped data is systematically copied over to the 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.

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**.
- 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.

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

Warning

Data exists in the census template. Proceeding with mapping will WIPE OUT all the data.

Yes - Proceed with mapping; any existing census data in the template will be WIPE OUT and census information will be copied over to the template from the Source tab per mapping.

No - Return to census template without mapping; any existing data in the census will stay intact and will not be wiped out. Information from the Source tab will NOT be copied over to the template.

D Yes **E** No

Small Group Enrollment 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	Address 1	Address 2	City	State	Zip Code	Home/Cell Phone	Business Phone	Email Address
Employee																	

Clicking the **Green** Button on the Setup Form navigates to the 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. Please see Reference Table 1.
- 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. 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 overage dependents, 26 and over, are highlighted in **purple** and 65 and over age group are highlighted in **green** for information purposes.

- F. 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.
- G. 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.
- H. Help icons are available below the header name of each column. Please refer to the Help Information slide for details.
- I. **Auto Fill icons** are available in the header for select columns.

Small Group Enrollment Enter Census Data, Continued

I. 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.
- Please refer to Reference Table 2 in the Appendix.

J. Returning to the **Group Information** tab hides all other tabs: **Import Census Template** tab, **Error List** tab and **ACA Help** 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 **ACA Help** tab, click the **Help** tab button.

K. SSN – Leading zeros & dashes

- Be sure to type leading zeros, if applicable.
- When copying/pasting, make sure source data has leading zeros.

- 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.

L. Extended ZIP Codes

- If source 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.

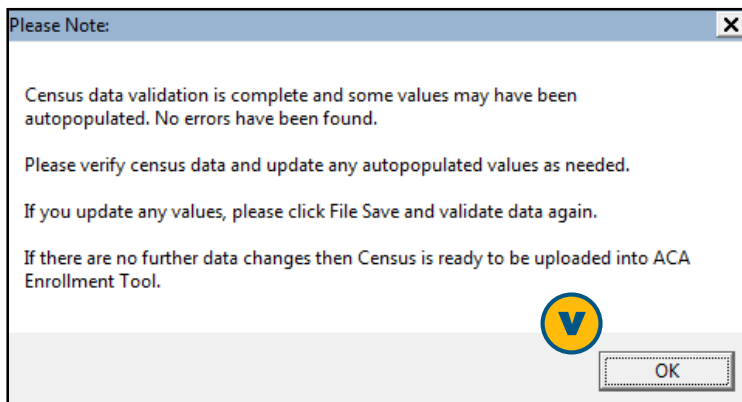
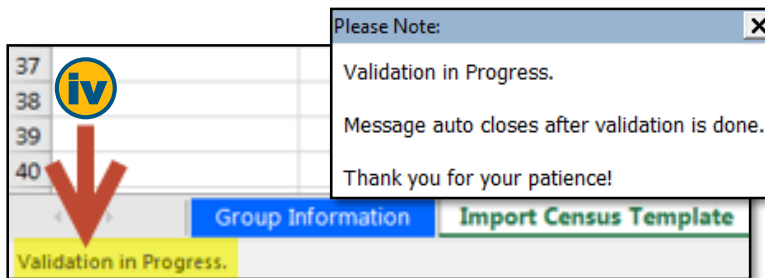
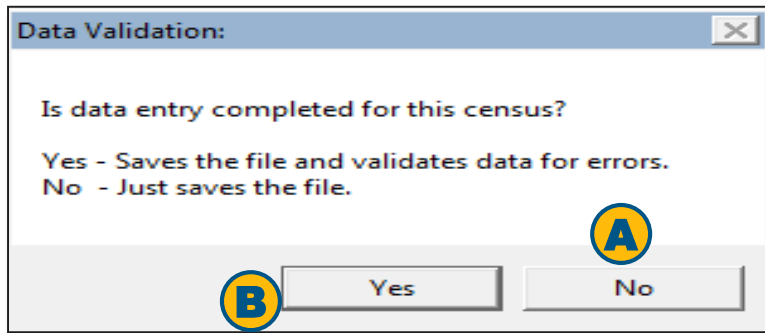
M. Date values

- 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**.

N. Text values

- If source values are longer than the expected length, they are truncated systematically when you click **File Save**.

Small Group Enrollment 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.
 - i. Existing data is saved.
 - ii. If values are blank in columns where the Auto Populate feature is available, a default value will be entered systematically.
 - iii. Final validation rules will run.
 - iv. [Validation In Progress](#) indicators will display.
 - Excel Status bar (bottom left corner).
 - Validation in Progress pop-up box.
 - v. After the validation rules finish running, if there are any errors, a message box displays indicating that errors have been found. Click [OK](#).
 - vi. [Error List](#) tab displays errors.
 - vii. If no errors are found, confirmation box displays and Census can be imported into Small Group & Middle Market Enrollment Tool.

Small Group Enrollment 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).



Upon [File Save](#) validation, errors will be displayed in the [Error List](#) tab.

A. [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 [Quoting Census Template](#) 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.

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

The image shows two screenshots of a web application. The top screenshot is the 'Member Census' page, which has tabs for 'Account Information', 'Additional Information', 'Plan Selections', 'Member Census' (active), 'Rates', 'Account Summary', and 'Release for Enrollment'. Below the tabs, there's a 'Member Census' section with a 'Previous' button and a 'Continue' button. At the bottom, there's a 'Census Count: 5' and an 'Add Member' button. To the right, there are 'Export Census' and 'Import Census' buttons. A red arrow points from the 'Import Census' button to the bottom screenshot. The bottom screenshot is the 'Import Census' page. It has a blue header 'Import Census'. Below it, there's a paragraph: '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 is a section titled 'Steps to save the Import Census Template:' with four numbered steps. Then, there's a 'Select File to upload:' field with a text box showing 'C:\Users\U344541\Des' and a 'Browse...' button. Below that, there's a question: 'A census already exists. Do you wish to overwrite or append to the existing census?' with two radio buttons: 'Overwrite' (selected) and 'Append'. At the bottom right, there's a 'Load File' button. A blue arrow points from the 'Load File' button back to the top screenshot.

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**.

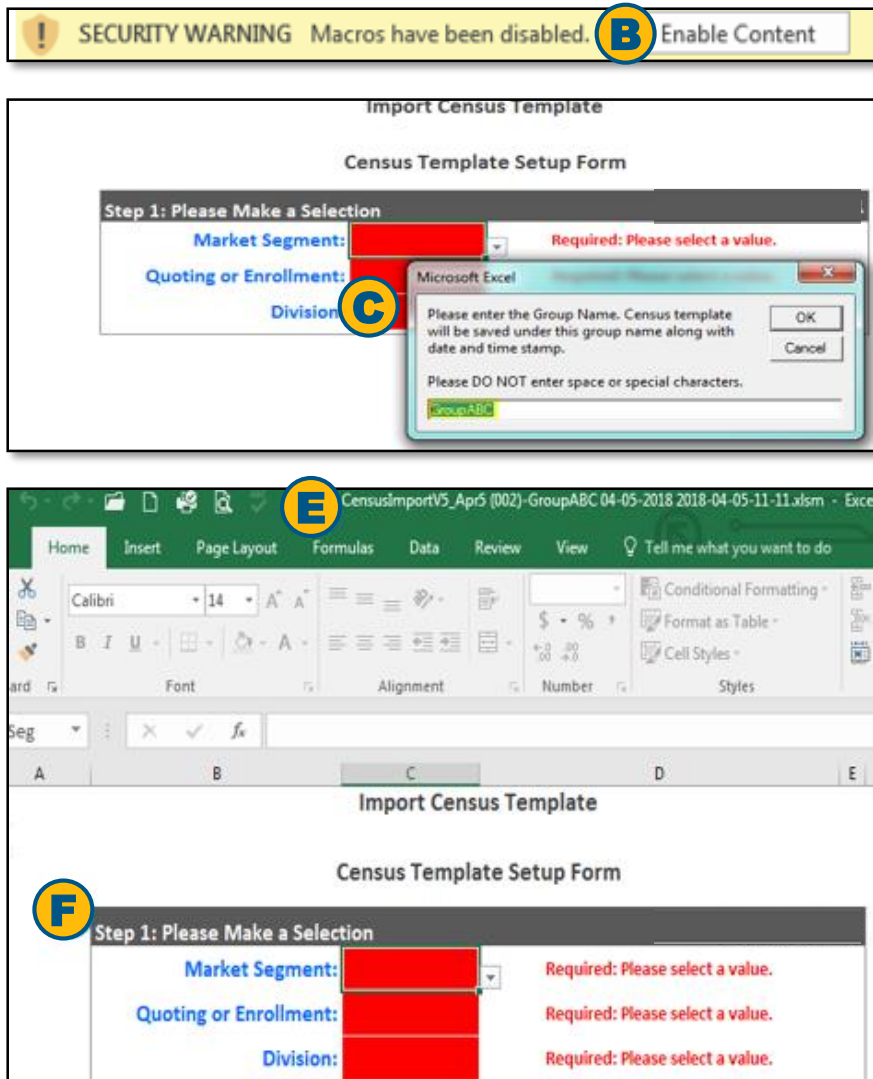
The upload steps have not changed.

- 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.

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. On **File Open**, click **Enable Content** button. Skip this step if macros are enabled through **File Options** menu. Please refer to Enable Macros in Appendix for instructions.
- C. In the pop-up box, type in the **Group Name** and click **OK**. Please do not include spaces or any special characters.
 - **Do not include spaces or any special characters.**
- D. Select a **Folder** to save the Group's Census and click **OK**.
- E. The file is saved under the group's name along with the date and time stamp. Original **SCIT** file stays intact and is not overwritten.
- F. **Setup Form Step 1** will display.

Complete Setup Form

The screenshot shows the 'Import Census Template' window with the 'Census Template Setup Form' tab active. The form is titled 'Step 1: Please Make a Selection'. It contains the following elements:

- A:** 'Market Segment: MID MARKET (51-150)'
- B:** 'Quoting or Enrollment: QUOTING' with a dropdown arrow
- C:** 'Division: IL'
- D:** 'Map Census' button
- E:** 'Go To Census Template for Data Entry' button
- F:** 'Help Tab' button

Below the buttons, there is a 'Please Note:' section with the following text:

- 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.

- A. Select a Market Segment: [MID MARKET](#)
- B. Select [QUOTING](#)
- C. Select a [Division](#) from drop-down list.
- D. Click [Map Census](#) 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 quoting Census Template for manual data entry.
- F. Click the [Help Tab](#) for information on detailed specifications on the Template columns.

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 Class
Smith	Jack	Employee	01/01/1990	M	EF	IL		60515	N	N	All Active Full Time
Smith	Jane	Spouse	01/02/1991	F				60515			
Smith	Joe	Dependent	01/01/1999	M				60515			
Williams	Jack							0515	N	N	All Active Full Time
Williams	Jane							0515			
Williams	Joe							0515			

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 t
- b) Repeat Steps 1 and 2 listed above


☐ Yes
 ☐ Cancel

A. Copy Census information from the group Census spreadsheet to [mapping Census Template](#).

- Make sure there is only 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 can be in different column sequence.

B. After information has been pasted, click [Yes](#) to proceed to 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 tab.
- Repeat steps 1 and 2 in the instructions pop-up box, above.

Middle Market Quoting Mapping Census/Copy Mapped Columns, Continued

Mid Market Quoting Import Census Template Columns

Mid Market Quoting Import Census Template Columns	Map Group's Source Census Columns (Select from drop down list)	Import Census Column Letter (For Information Only)
Last Name (Case Sensitive)	Lastname	A
First Name (Case Sensitive)	firstname	B
Relationship Code ^{DDL}	Relation	M
DOB (mm/dd/yyyy)	DOB	D
Gender (M or F) ^{DDL}	Gender	C
Coverage Type ^{DDL}		
Zip Code (only 5 digits)	zip	J
Medicare Primary (Y, N, U) ^{DDL} (L 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 ^{DDL}.
If columns with DDL are mapped, the value on the source file must match the values in the drop down list.
On the Import Template, **File Save** data validation will erase values which do not match the drop down list.
If mapping multiple times, Column B values will be stored from previous time. 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.

Column C is for informational purpose only.

Steps for Mapping:

- 1) In **Column B**, select a value from the drop down list that corresponds to the value in **Column A**.
Note: Import Template Columns with a drop down list are denoted by ^{DDL}.
If columns with DDL are mapped, the value on the source file must match the values in the drop down list.
On the Import Template, **File Save** data validation will erase values which do not match the drop down list.
If mapping multiple times, Column B values will be stored from previous time. 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.

Warning

Data exists in the census template. Proceeding with mapping will WIPE OUT all the data.

Yes - Proceed with mapping; any existing census data in the template will be WIPED OUT and census information will be copied over to the template from the Source tab per mapping.

No - Return to census template without mapping; any existing data in the census will stay intact and will not be wiped out. Information from the Source tab will NOT be copied over to the template.

Yes No

- 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.
- 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 Census Enter Data

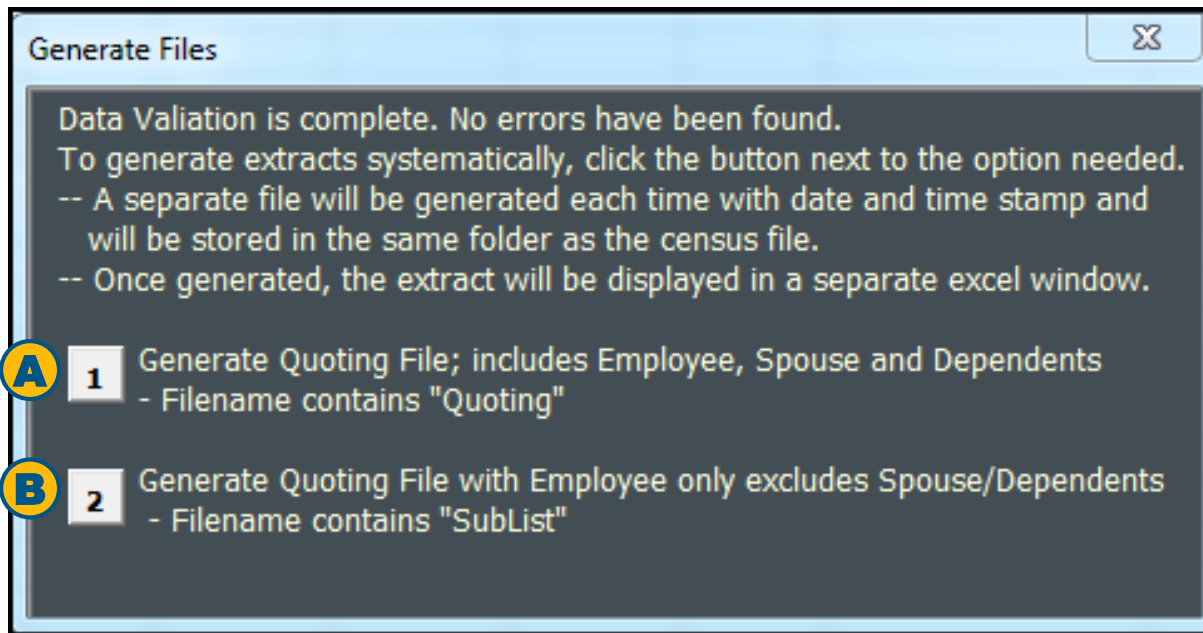
Last Name (Case Sensitive) i	First Name (Case Sensitive) i	Relationship Code i	DOB (mm/dd/yyyy) i	Gender (M or F) i	AUTO FILL Coverage Type (follow Help file instructions) i	AUTO FILL State (e.g. IL) i	Annual Salary i	AUTO FILL Zip Code (only 5 digits) i	AUTO FILL Medicare Primary (Y, N or U) i	AUTO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

- 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. DOB column coverage dependents, 26 and over, are highlighted in purple and 65 and over age group 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.
- F. 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.
- G. Help icons are available below the header name of each column. Please refer to the Help Information slide for details.
- H. Auto Fill icons are available in the header for select columns.

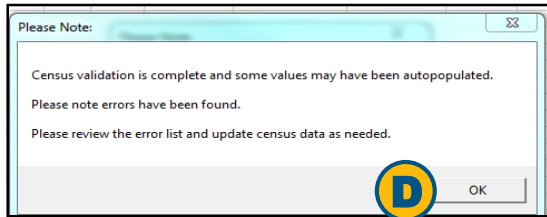
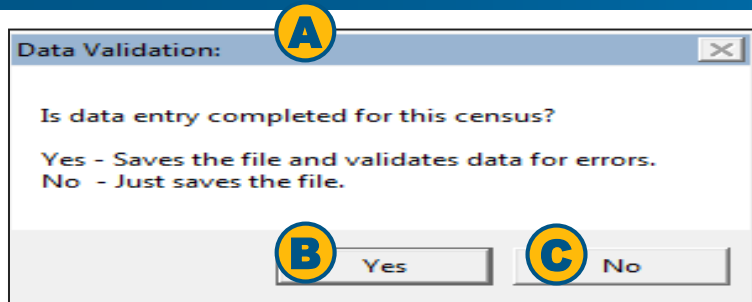
Generate Middle Market Quoting Files



On successful data validation, [Generate Files](#) message box displays. A separate file is generated with date and time stamp.

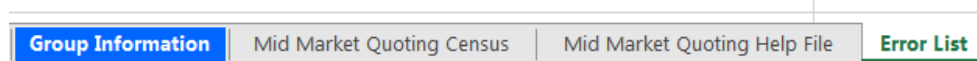
- A. Click the first option to generate quoting file with subscribers, spouse and dependents.
- B. Click the second option to generate quoting file with just subscribers list only.

Middle Market Quoting File Save 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. Click **File Save**. **Data Validation** box displays.
- B. Click **Yes** to proceed with validation, auto populate values and generate an error list if there are 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.
- 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 Quoting Census Template 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.



Middle Market Quoting Import File

NOTE:

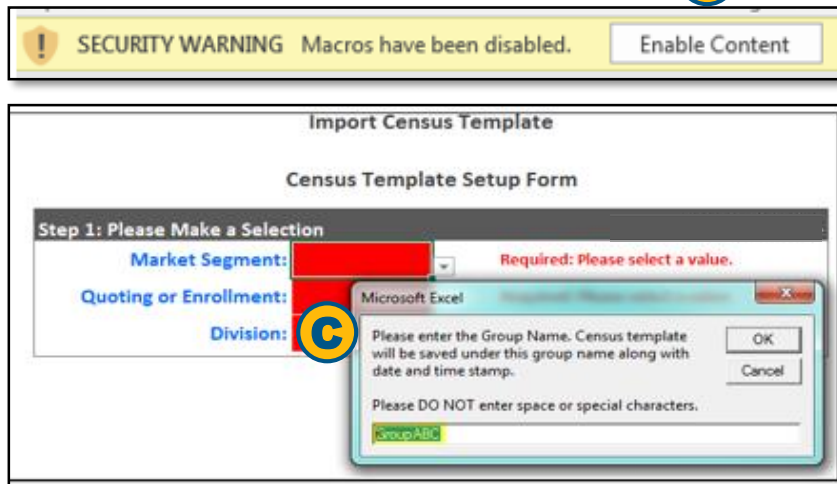
Zip codes with leading zeros **will not** import into the Group Sales application correctly.
Users will need to manually enter the leading zeros.

This will be corrected in the next Release.

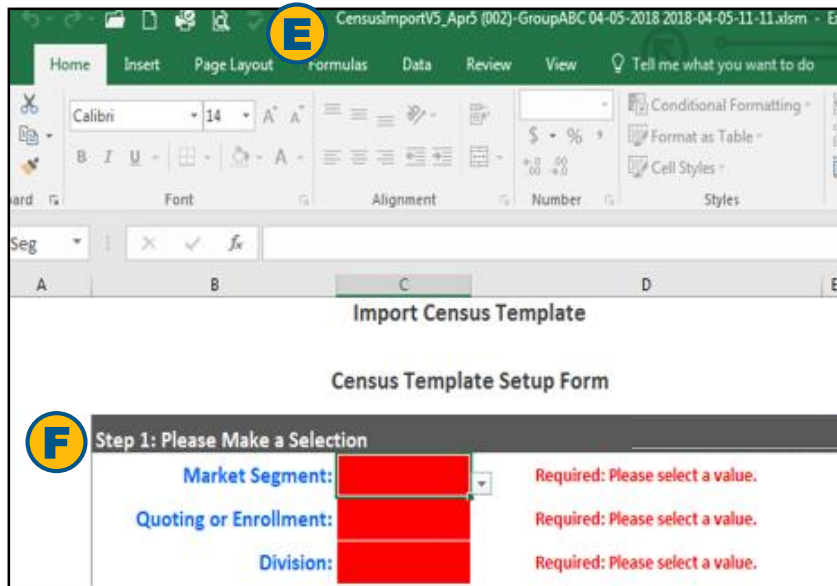
Middle Market Enrollment Census Template

Open SCIT and Save Under Group Name

B



- A. From Excel menu, select **File Open**. Go 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 refer to Enable Macros in Appendix 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.
 - A. Original **SCIT** file stays intact and is not overwritten.
- F. Setup Form Step 1 will display.
 - Select a **Market Segment**: **MID MARKET**
 - Select **Enrollment**
 - Select a **Division** from drop-down list.



Complete Setup Form

The screenshot shows a web form titled "Step 2: Enter Group Benefits Information". It contains several sections with red highlights and callouts:

- Callout A:** Points to the "Step 2: Enter Group Benefits Information" header.
- Callout B:** Points to the "HMO Plan?" label, which is next to a red input field.
- Callout C:** Points to the "Has Group Selected Health? Y" label, which is next to a red input field.
- Callout D:** Points to the "Map Census" button.
- Callout E:** Points to the "Go To Census Template for Data Entry" button.
- Callout F:** Points to the "Help Tab" button.
- Callout G:** Points to the "Display All Census Columns" button.

The form includes the following text and instructions:

- Has Group Selected Health? Y** (Red highlight)
- HMO Plan?** (Red highlight) *Required: Please select a value.*
- Plan 1:** (Red highlight) *Required: Please enter a plan code.*
- Plan 2:** Optional: Enter a plan code as needed.
- Plan 3:** Optional: Enter a plan code as needed.
- Plan 4:** Optional: Enter a plan code as needed.
- Plan 5:** Optional: Enter a plan code as needed.
- Plan 6:** Optional: Enter a plan code as needed.
- Has Group Selected Dental?** (Red highlight) *Required: Please select a value.*
- Plan 1:**
- Plan 2:**
- Has Group Selected Life? Y**
- 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.
- ATTENTION:**
 - Please click this button for displaying all census columns **AFTER** census data has been entered.

- A. Step 2 section displays.
- B. Complete the required fields highlighted in red.
 - **Has Group Selected Health?** is defaulted to **Y**.
 - Note on Health and Dental plans:
 - When Plan codes are changed in **Setup Form**, the old codes will be highlighted in yellow in the **Census Template** tab.
- C. **Setup Form** values are used to:
 - display/hide Census columns in the **Census Template** tab.
 - display drop down values for some columns are based on **Division**.
- D. Click **Map Census** 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 Census Template systematically per the mapping.
- E. Click the **Green Button** to navigate to the quoting Census Template for manual data entry.
- F. Click the **Help Tab** for information on detailed specifications on the Template columns.
- G. Click **Blue Button** to display all Census columns on the Census Template.

Middle Market Enrollment Map 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

Last Name	First Name	Relationship	Gender	Date of Birth	Type of Enrollment	State	Retiree	Annual Salary	Life Class	Employee Home Zip
Smith	John	Employee	F	#####	EF	IL	N	960000		60456
Smith	Emily	Spouse	M	#####						
Smith		Dependent	F	#####						
Smith		Dependent	M	#####						
Van	Emily	Employee	M	#####	EO	IL	N	645854		60456

Instructions

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

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

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

D ☐ Yes ☐ Cancel **E**

- Click [Map Census](#) if you have Census on a separate spreadsheet from the group.
 - [Source Census From the Group](#) worksheet (tab) displays along with [Instruction's](#) box.
 - 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.**
- Make sure there is only 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.
- Click [Yes](#) to proceed to the [Census Mapping](#) tab after pasting the [Source](#) Census.
 - 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 tab.
- Repeat steps C and D listed above.

Middle Market Enrollment Map Census/Copy Mapped, Continued

ACA Small Group / Mid Market Enrollment Import Census Template Columns	Map Group / Mid Market Enrollment Import Census Columns (select from drop down list)	Source Census Column Letter (For Information Only)
Group Information Columns		
Relationship Code ^{DDL}	Relationship code	A
Waive All Coverage ^{DDL}	Waive all coverage	B
Waive Reason Code ^{DDL}	waives reason code	C
First Name	Frist name	D
Mid Init	Mid Init	E
Last Name	Last Name	F
Name Suffix	Name Suffix	G
Date Of Birth	Date of birth	H
Gender ^{DDL}	gender	I

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: Census Template Columns with a drop down list are denoted by ^{DDL}.
 If columns with DDL are mapped, the value on the source file must match the values in the drop down list.
 On the Import Template, **File Save** data validation will erase values which do not match the drop down list.
 If mapping multiple times, Column B values will be stored from previous time. 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 Import Census Template tab.
- 3) Click **Cancel** button to skip the mapping and go to Import Census Template tab to enter census.

Column C is for informational purpose only.

Steps for Mapping:

- 1) In **Column B**, select a value from the drop down list that corresponds to the value in **Column A**.
Note: Import Template Columns with a drop down list are denoted by ^{DDL}.
 If columns with DDL are mapped, the value on the source file must match the values in the drop down list.
 On the Import Template, **File Save** data validation will erase values which do not match the drop down list.
 If mapping multiple times, Column B values will be stored from previous time. 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 Import Census Template tab.
- 3) Click **Cancel** button to skip the mapping and go to Import Census Template tab to enter census.

Warning

Data exists in the census template. Proceeding with mapping will WIPE OUT all the data.

Yes - Proceed with mapping; any existing census data in the template will be WIPE OUT and census information will be copied over to the template from the Source tab per mapping.

No - Return to census template without mapping; any existing data in the census will stay intact and will not be wiped out. Information from the Source tab will NOT be copied over to the template.

D Yes **E** No

- 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.
- In **Column B** select a value from the drop-down list that corresponds to the value in **Column A**.
- 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.
- 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 **WIPE OUT** and the Census information will be copied over to the Template from the Source tab per mapping.

 - Mapped data is systematically copied over to the Census Template.
 - Complete Census entry as needed.
- Click **No** to return to the Census Template without mapping. Existing data will not be overwritten and will remain unchanged.

Middle Market Enrollment Enter Census Data

[illegible]

Clicking the Green Button on the Setup Form navigates to the 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. Please see Reference Table 1.
- C. Row #2 **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. **ZIP code** is required for all employees, spouse and dependents.
- F. 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 coverage dependents, 26 and over, are highlighted in **purple** and 65 and over age group are highlighted in **green** for information purposes.

G. 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.

H. 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 Census Template column.
- If copy/pasting data from an external source causes cells to lock in **SCIT**, click [File Save](#) to unlock the cells.

- I. Help icons are available below the header name of each column. Please refer to the Help Information slide for details.

J. **Auto Fill** icons are available in the header for select columns.

Middle Market Enrollment Enter Census Data, Continued

I. For [Medicare Eligible](#) column, the cell value drives the display/hide behavior of the corresponding dependent data columns.

- A value of [Y](#) in the [Medicare Eligible](#) cell will cause [Medicare](#) columns to display.
- Please refer to Reference Table 2 in the Appendix.

J. Returning to the [Group Information](#) tab hides all other tabs: [Census Template](#) tab, [Error List](#) tab and [Help](#) tab

- To return to, and display the [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](#) tab, click the [Help](#) tab button.

K. SSN – Leading zeros & dashes

- Be sure to type leading zeros, if applicable.
- When copying/pasting, make sure source data has leading zeros.
- 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.

L. Extended [ZIP Codes](#)

- If source 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.

M. 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](#).

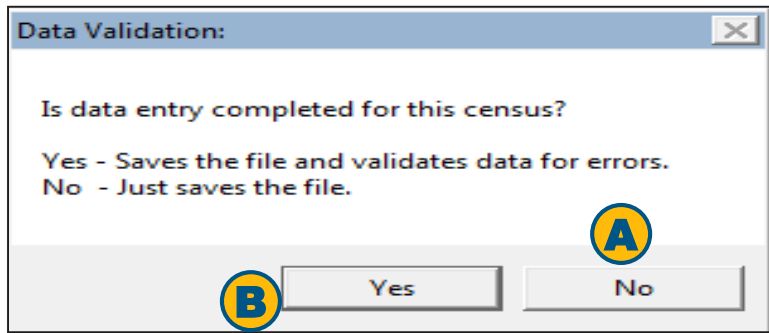
N. Text values

- If source values are longer than the expected length, they are truncated systematically when you click File Save.

O. Name Suffix

- If [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

Middle Market Enrollment Data Validation

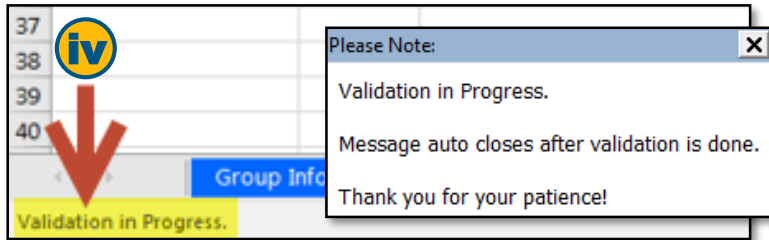


Once data entry is complete, click **File Save** to validate the Census data. A **pop-up box** will display: *Is data entry completed for this Census?* with **Yes** and **No** buttons.

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.

- i. Existing data is saved.
- ii. If values are blank in columns where the Auto Populate feature is available, a default value will be entered systematically.
- iii. Final validation rules will run.
- iv. **Validation In Progress** indicators will display.
 - Excel Status bar (bottom left corner).
 - Validation in Progress pop-up box.
- v. After the validation rules finish running, if there are any errors, a message box displays indicating that errors have been found. Click **OK**.
- vi. **Error List** tab displays errors.
- vii. If no errors are found, confirmation box displays and completed Census can be processed per current business process.

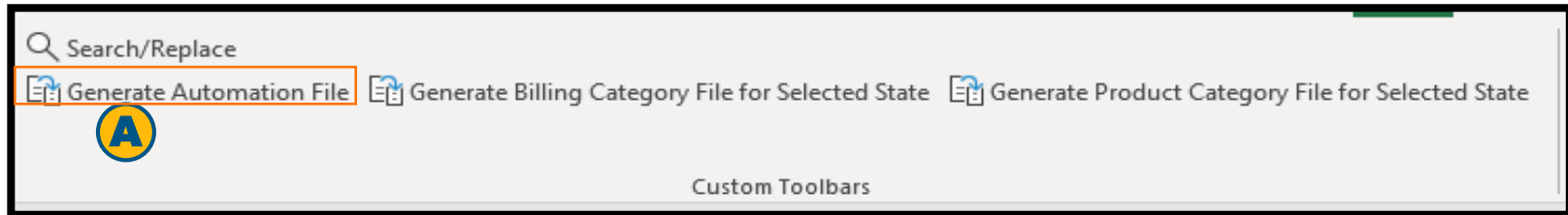


vi

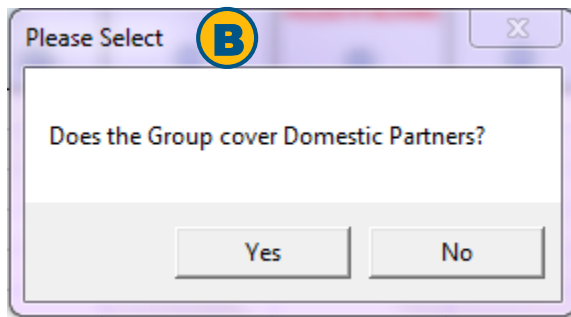
In Cell	Error Description
A2	Last Name is required for all Relationship Codes.
C2	First Name is required for all Relationship Codes.
J2	Valid Employment Status is required for Subscriber.
K2	Waive Reason Code is required if Subscriber is waiving Health coverage.

Successful Validation

Generate Automation File For Mid-Market Enrollment



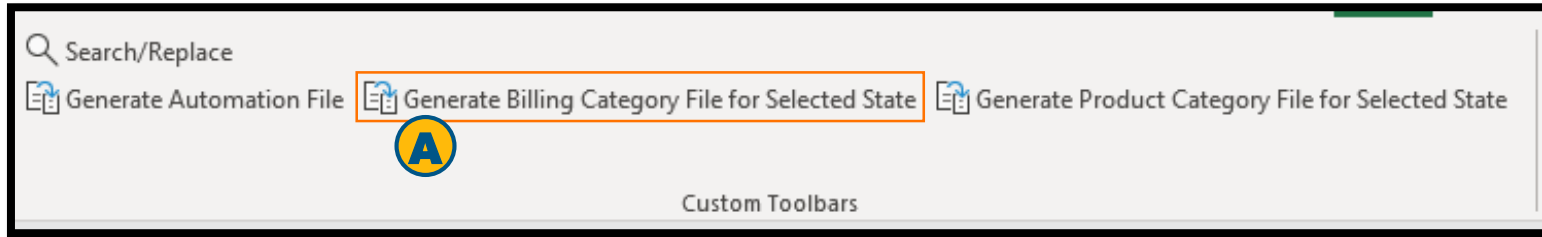
Important: Before generating the automation file, be sure to run data validation.



- A. From Excel Menu bar, click **Add-ins** option then click **Generate IL Automation File** **OR** use the keyboard key combination **Ctrl + Shift + I**.
- B. **Does Group cover Domestic Partners?** message box displays along with **Yes** or **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. (New in Version 8)
- 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.

Generate Billing Category and Product Category File For Middle Market Enrollment

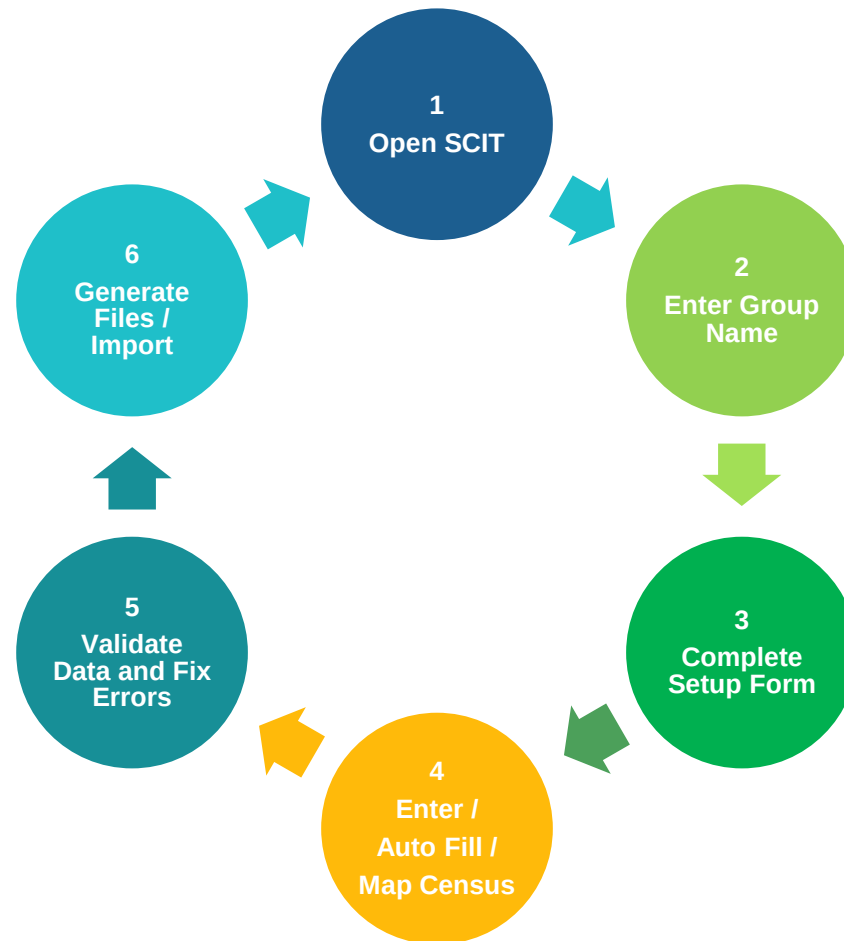


Note: This extract can be generated as needed.

- A. From Excel Menu bar, click [Add-ins](#) option then click [Generate Billing Category File](#).
 - A separate file will be generated that lists enrolling Subscribers with Billing Categories.
- B. Confirmation box displays after the file has been generated. Click [OK](#) button to return to the Census Template.
- C. 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.
- D. 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.

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.





For technical issues with the Group Sales Tools:

- Contact our ITG Service Center at **888-706-0583**

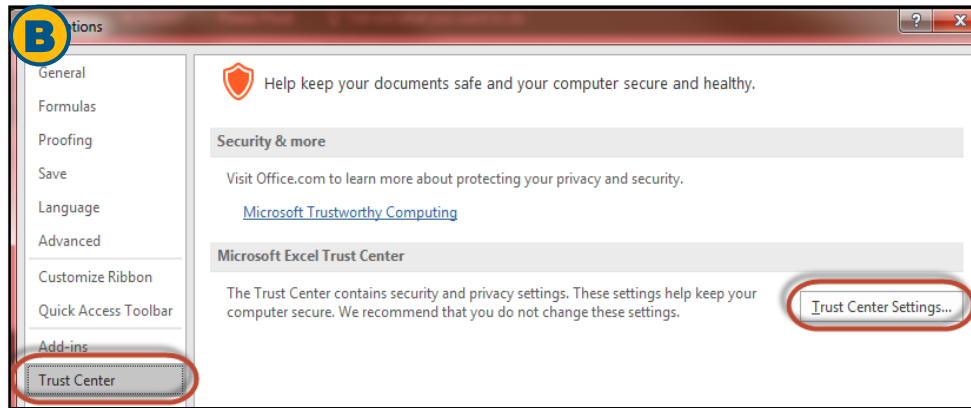


For questions about information in the user manual or the new SCIT:

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

Appendix

Enable Macros

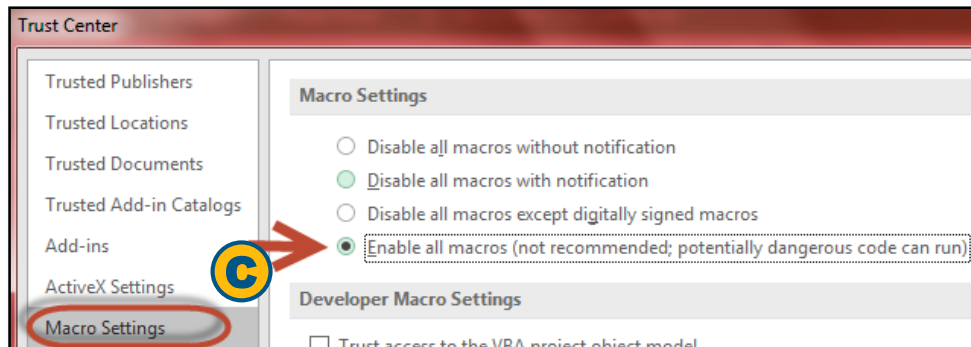


- If **Enable Macros** is not enabled each time **SCIT** is opened, you will need to click the **Enable Content** button.
- Once Macros has been enabled the first time, you will not need to click the **Enable Content** button each time **SCIT** is opened.

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

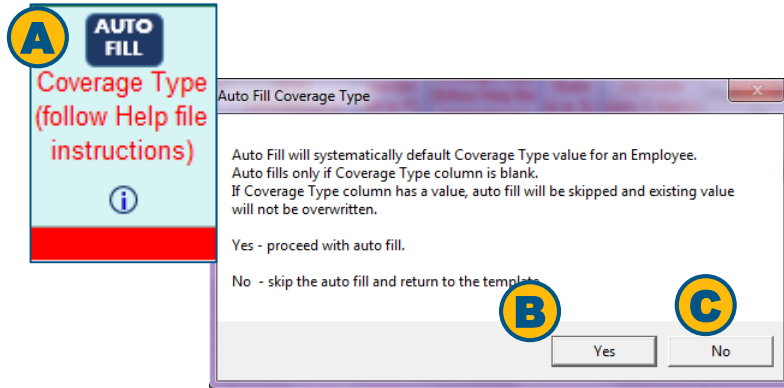
B. From Excel's **Options** box, select **Trust Center** and then click on **Trust Center Settings**.

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



Please note the warning message on the snapshot. Once this option is turned on, open files with macros only from a trusted source.

Auto Fill Feature



Auto Fill feature is available for select columns and an  button will be displayed in the column 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.

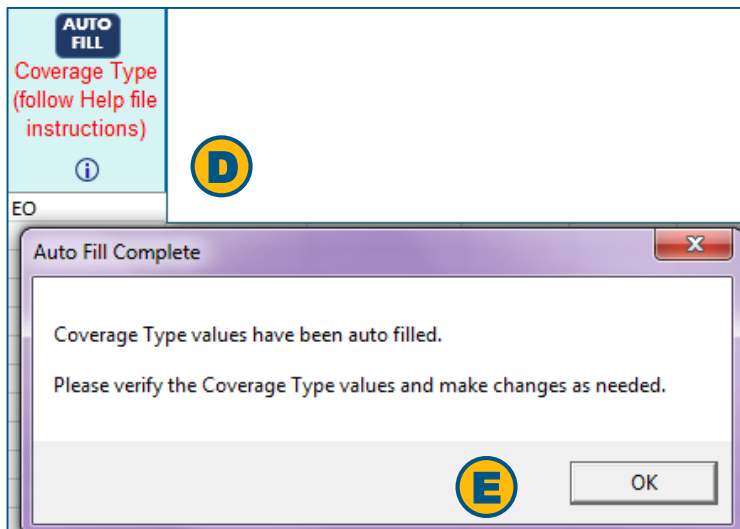
- If the values in the Auto Fill column are blank then a default value will be systematically populated.
- If there is an existing value in the Auto Fill column then auto fill will be skipped and existing value will not be overwritten.

C. Click **No** to skip auto fill and return to the Template.

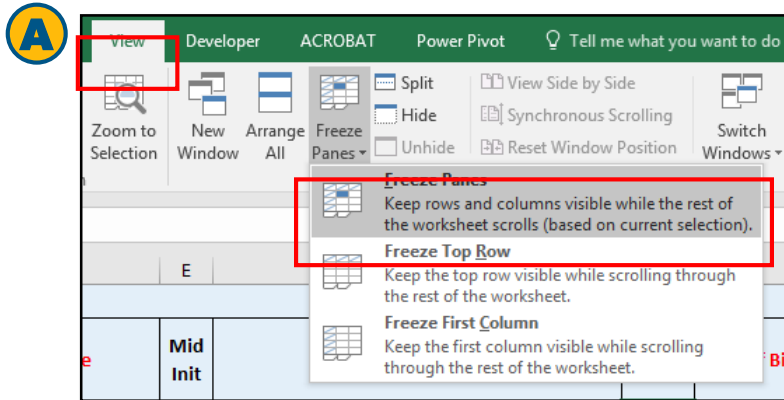
D. Message box displays after auto fill is complete.

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

Note: Coverage Type Auto Fill is used for illustration purpose.



Freeze Panes, Filter and Sort Features



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

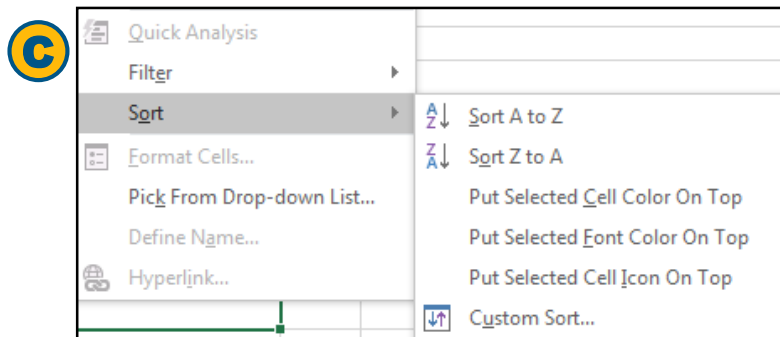
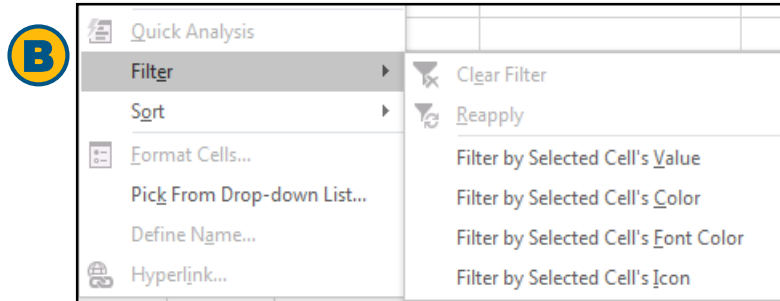
- Click the first cell in the range you want to freeze.
- From Excel menu select [View](#), then click [Freeze Panes](#).
- Rows and columns before the [Freeze Pane](#) will be visible as you scroll through the rest of the columns and/or rows.
- To remove, select [View](#), [Freeze Panes](#) and [Unfreeze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

Table 1: Based On Setup Form fields, Census columns display/hide

Census Tool Setup Form field	Census Template Column(s)	Display/Hide
Has Group Selected Health? Is Y	Columns AD through AH	Display Columns
HMO Plan? is Y	Columns AI through AP	Display Columns
HMO Plan? Is N	Columns AI through AP	Hide Columns
Has Group Selected Health? Is N	Columns AD through AP	Hide Columns
Has Group Selected Dental? Is Y	Columns AQ through AU	Display Columns
Has Group Selected Dental? Is N	Columns AQ through AU	Hide Columns
Has Group Selected Life? Is Y	Columns AV through BB	Display Columns
Has Group Selected Life? Is N	Columns AV through BB	Hide Columns
Division is IL (only)	Column A Relationship Code	Display “Civil Union” in drop down
Division is IL (only)	Column T Employment Status	Display “IL Cont” value in drop down
Division is TX (only)	Column T Employment Status	Display “TX Cont” and “TX Dependent Cont” values in drop down

Table 2: Based On a Column’s Cell Value, Census columns display/hide

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 through Z display
Cursor is on Employment Status column cell and value is IL Cont	IL Cont Columns AA through AC display
Cursor is on Medicare Eligible column cell and value is Y	Medicare Columns BD through BJ display

Auto Fill Select Columns Reference Table

Column with Auto Fill	Description	Available In
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
State Code	Auto Fills value from the Division value entered on the Setup Form	SG Quoting MM Quoting
Retiree (IL Only)	IL Division Only: Auto Fills value of N for Employees	SG Quoting
Zip Code	Auto Fills Zip Code for Spouse and Dependent row(s) with Employee's Zip Code	MM Quoting
Medicare Primary	Auto Fills value of N for Employees	MM Quoting
Employment Status	Auto Fills value of A or Active for Employee	MM Quoting SG Enrollment
Health Coverage (Y/N)	Auto Fills value of Y for Employee choosing coverage	SG Enrollment MM Enrollment
Health Plan	Auto Fills value of Plan 1 from Setup Form for Employee	SG Enrollment MM Enrollment
Dental Plan	Auto Fills value of Plan 1 from Setup Form for Employee	SG Enrollment MM Enrollment
Signature Date	Auto Fills value of today's date for Employee	SG Enrollment MM Enrollment
Employee SSN	Auto Fills value for Spouse and Dependent row(s) with Employee's SSN	MM Enrollment
Billing Category and Product Category	Auto Fills typed in value for Enrolling Subscribers	MM Enrollment

SG: Small Group (2-50); MM: Mid-Market (51-150)