



# SMART CENSUS IMPORT TOOL • SCIT Blue Balance Funded (BBF) Reference Guide Version 1.1

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

## **Before You Start**

Compatibility	Version 1.1 is compatible with Excel 2013 and newer versions.
Enable Macros	Enable Macros feature using instructions provided in Technical References.
Using SCIT	<ul> <li>NOTE: Save Smart Census Import Template (SCIT) on your local drive before using. If working from a network drive, SCIT performance may be slower.</li> <li>Keep only one SCIT file open at a time. If multiple windows are open, SCIT will not behave as expected.</li> </ul>
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 1.1 Release Notes**

**Enrollment** *Middle Market* 

• Applicable for all states EXCEPT Texas.

## **Steps for Entering a Group Census**

- 1. Open Smart Census Import Tool (SCIT) and save under the group's name.
- 2. Complete Census Tool Setup Form.
- 3. Enter data in the **Census Template** tab.
- 4. If the Census is provided on a separate spreadsheet, click Map button on the Setup Form OR click the Green button to enter data. Click AutoFill button to systematically default a value for select columns, as applicable.
- 5. Click **File > Save** to validate data.
- 6. An **Error List** will be generated.
- 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.

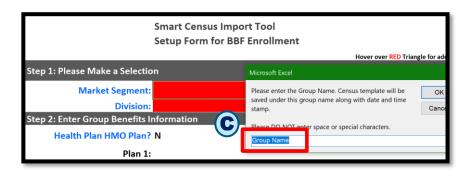


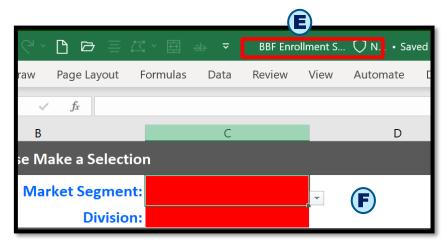


## **Open SCIT and Save Under Group Name**

- A. From Excel menu, select File > Open and navigate to the folder where SCIT is saved, select SCIT and click Open.
- B. On File > Open, click Enable Content button. Skip this step if macros are enabled through File > Options menu. Please see "Enable Macros" in Technical References for instructions.
- C. In the pop-up box, type in the Group Name and click OK. Do not include spaces or any special characters.
- D. Select a Folder to save the Group's Census, and click OK.
- E. The file is saved under the group's name along with the date and time stamp.
  - Original SCIT file stays intact and is not overwritten.
- F. Setup Form will display.
  - Select Market Segment: SMALL GROUP OR MID MARKET
  - Select a Division from dropdown list.







Smart Census Import Tool (SCIT) – BBF

## **Complete Setup Form**

#### **Setup Form** values are used to:

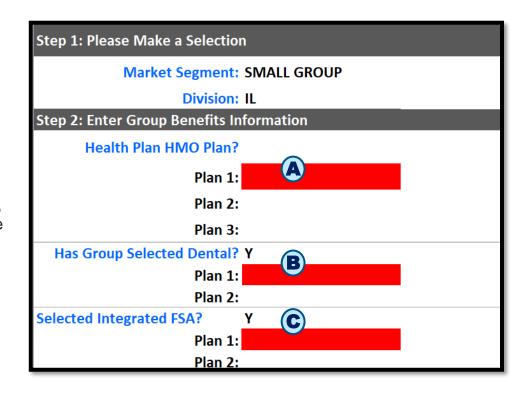
- Display/hide Census columns in the Import Census Template tab.
- Display dropdown values for some columns based on Division.

Complete the required fields highlighted in red.

- A. Health Plan HMO Plan? Select Y or N and add Plan(s).
- **B.** Has Group Selected Dental? If Y, add Plan(s).

#### **NOTE on Plans:**

- When Plan codes are changed in Setup Form, the old codes will be highlighted in yellow in the Import Census Template tab.
- SCIT only validates the Plan codes entered. It does not check against the Small Group & Middle Market Enrollment Tool to validate that an eligible Plan code has been entered.
- When Plan codes are changed in the Setup Form, the old codes will be highlighted in yellow in the Import Census Template tab.
- C. Selected Integrated FSA? If Y, add Plan(s).

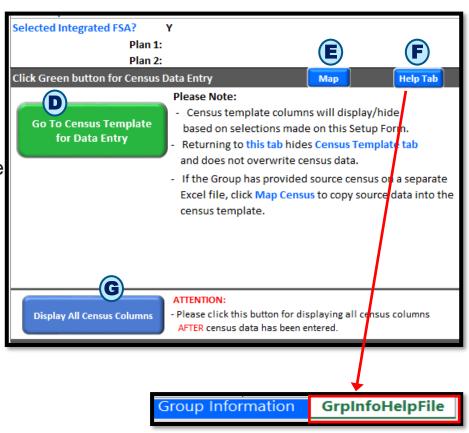


## Complete Setup Form (con't)

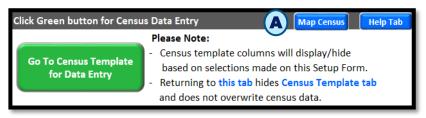
- D. Click the Green button to navigate to the Import Census Template for manual data entry.
- E. Click Map button if you received the Census from the group on a separate spreadsheet (Source).

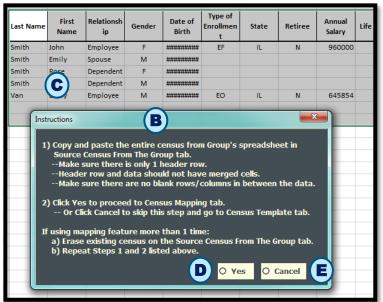
This feature will enable you to copy and map the Source columns to the Template columns. After columns are mapped, data will be copied over to the **Import Census Template** systematically per the mapping.

- F. Click the Help Tab button to navigate to the GrpInfoHelpFile tab. This tab has detailed specifications for all the entries on the Group Information tab.
- G. Click Blue button to display all Census columns on the Import Census Template.



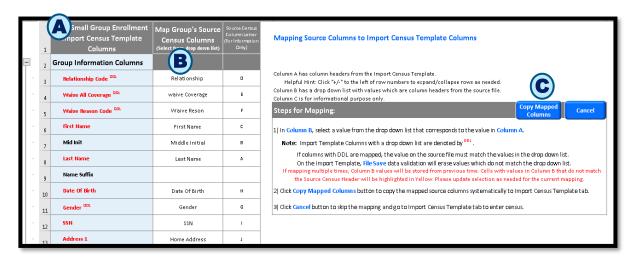
- A. Click Map button if you have Census on a separate spreadsheet from the group.
- B. Source Census From The Group tab displays along with an Instructions box.
- C. Copy and paste Census information from the Source spreadsheet to this worksheet.
  - **NOTE:** Paste copied data as VALUES to avoid overwriting Excel formatting via Paste Special.
  - There should only be one header row.
  - Header row and data should not have merged cells.
  - Make sure there are no blank rows OR columns in between the data.
- D. Click Yes to proceed to the Census Mapping tab after pasting the Source Census.
- E. Click Cancel to skip Map Census feature and go to the Census Template.





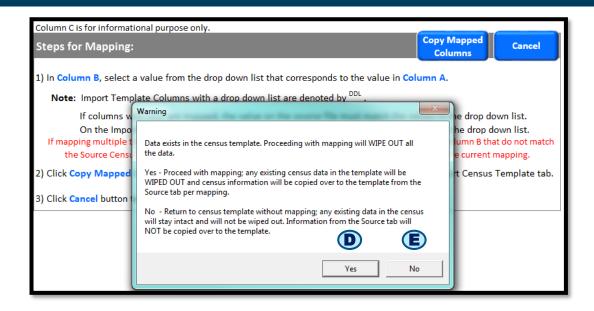
**NOTE**: If using mapping feature more than once:

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



#### A. Census Mapping tab displays.

- Column A displays column headers from the ACA Small Group / Mid Market Enrollment Import Census Template Columns.
- Column B has a dropdown list with values which are column headers from the source file.
- Column C is for information purpose only.
- Instructions display to the right.
- B. In Column B, select a value from the dropdown list that corresponds to the value in Column A.
- C. Click the Copy Mapped Columns button to copy the mapped source columns systematically to the Import Census Template tab.
  - Click the Cancel button to skip the mapping and go to Import Census Template tab to enter Census.

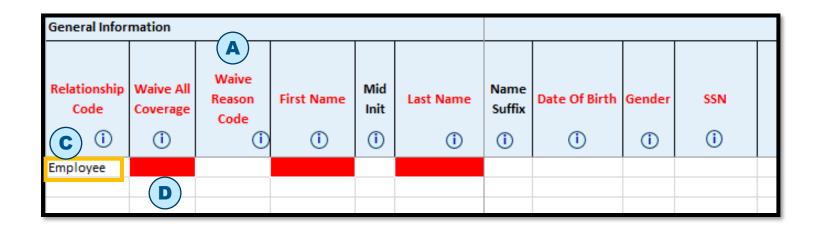


D. Click Yes to proceed with mapping. If data exists on the Census Template, a Warning message displays.

**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 dropdown list values, are determined by **Setup Form** values. See Technical References for details.
- C. Row #3 Relationship Code value is defaulted to Employee.

  Do not change this value.
- D. Starting from Row #3, rows can be Inserted or Deleted as needed.

#### **Enter Census Data**

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



- **F.** After entering in **Zip Code**, click the **State from Zip** button in State cell to populate the **State** for all members. State will fill in if there is no State code already.
- G. The entire cell is highlighted in red for required columns. The entire cell is highlighted in yellow when there is a data mismatch. For DOB column over-age dependents (26 & over), the cells are highlighted in purple and 65 & over entries are highlighted in green for information purposes.
- **H.** When you type in a value and click **Enter**:
  - 1) If the value is invalid, an error message displays with **Retry**, **Cancel** and **Help** buttons.
  - 2) Retry returns you to the typed-in value for editing and Cancel wipes out the typed-in value and returns you to the cell.
- I. Help icons and AutoFill buttons are available in the column headers.

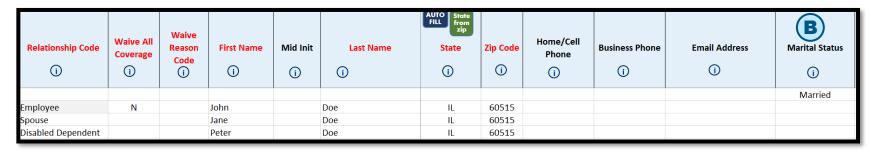
## **Enter Census Data - Speed Jumps and Medicare**

A. Speed Jump – quickly jump to sections of SCIT

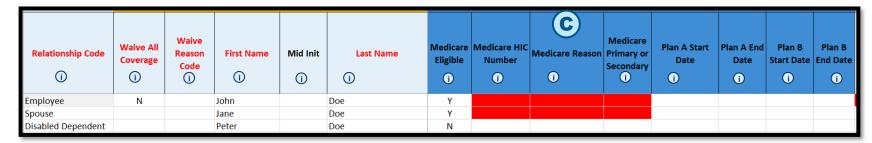
General Info 

Emp Status Health Cov Signature Date Language

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



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 Technical References.
- Returning to the Group Information tab hides other tabs: Import Census Template tab, Error List tab and Help File tab.
  - To return to, and display the Import Census Template tab, click the Green button.
  - To return to, and display the Error List tab, click
     Green button and click File > Save.
  - To return to, and display the Help File tab, click the Help File tab.

#### SSN dashes

If the source SSN value has dashes, paste into SCIT "as is".
 These values will be highlighted in yellow. On File > Save validation, dashes will be removed systematically.

#### Date values

- While typing dates include "/"
- If the date format in the source file is formatted with a different date format than MM/DD/YYYY, you can still copy and paste it into SCIT "as is". The date will be reformatted systematically to MM/DD/YYYY when you click File > Save.

#### Text values

- If source values are longer than the expected length, they are truncated systematically when you click File > Save.
- Values can be copied and pasted as needed onto the Census columns.

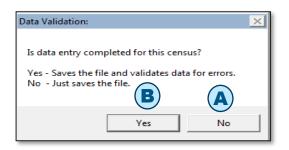
**NOTE**: Paste copied data as VALUES to avoid overwriting Excel formatting via Paste Special.

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

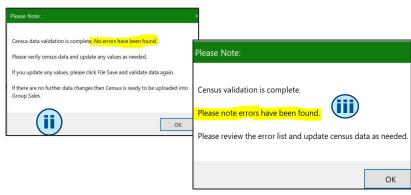
#### **Data Validation**

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

- A. Click No if you want to save existing data and return to complete the Census entry later.
   NOTE: Validation rules do not run.
- B. Click Yes if Census entries are complete. Existing data is saved. If values are blank in columns where the AutoFill feature is available, a default value will be entered systematically. Final validation rules will run.
  - i. Validation In Progress indicators will display:
    - Excel Status bar (bottom left corner)
    - Validation in Progress pop-up box
  - ii. If no errors are found, confirmation box displays and completed Census can be processed per current business process.
  - iii. If there are any errors, a message box displays indicating that errors have been found. Click OK.





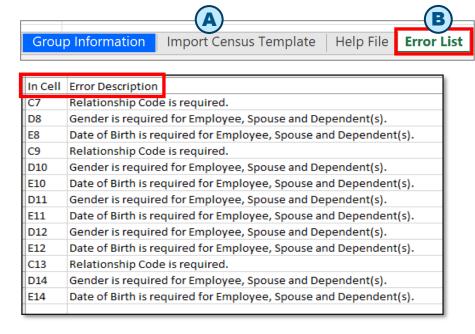


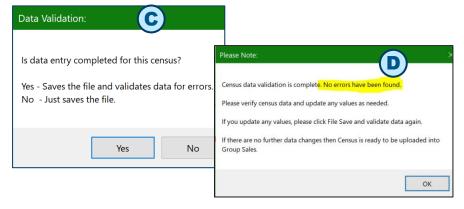
#### **Data Validation Error List**

- A. To update the values, click the Import Census Template tab. Change the values as needed. You can toggle between the Error List and Import Census Template tabs.
- **B.** If there are data errors, the **Error List** tab will display:
  - In Cell column specifies the cell location of the error.
  - Error Description column specifies the column and the nature of the error.

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

- C. Select Yes in the Is data entry completed for this census? message box.
- D. If no errors are found, a confirmation box displays and completed Census can be processed per current business process.



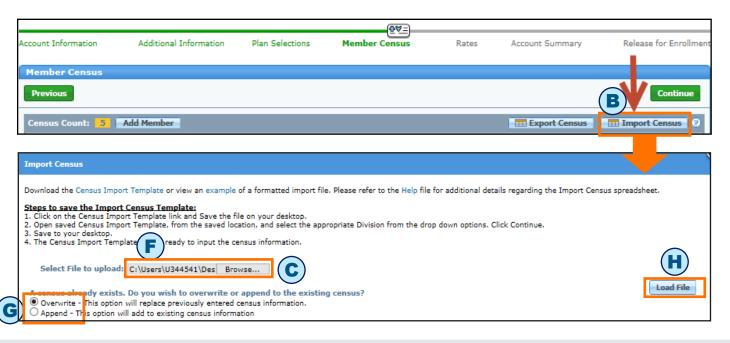


# On Successful Validation, Upload SCIT into Small Group & Middle Market Enrollment Tool

#### The upload steps have not changed.

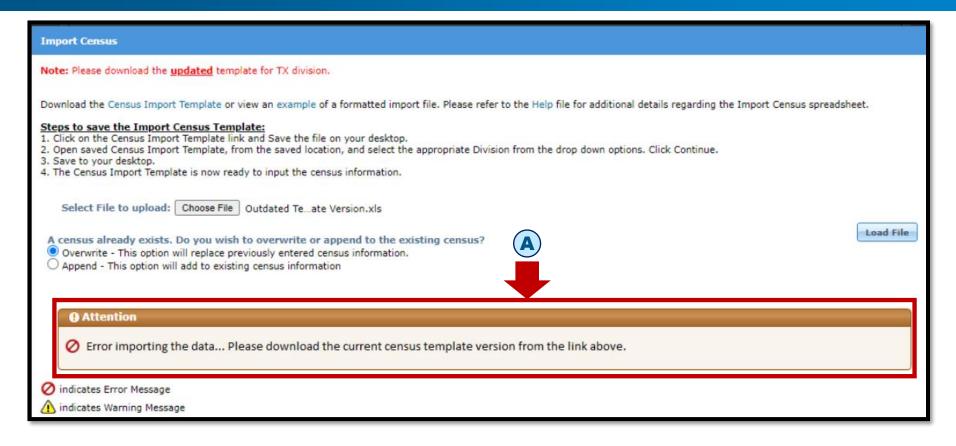
- A. In the Small Group & Middle Market Enrollment Tool, navigate to the Group's Member Census page.
- B. Click the **Import Census** button.
- C. When the **Import Census** pops up, click **Browse**.
- D. Navigate to the folder that has SCIT with the group's filename.

- **E.** Select the file and click **Open**.
- F. Filename displays in the **Select File to upload** box.
- G. Overwrite existing Census information is selected by default. If needed, select Append radio button to add to existing Census information.
- H. Click the Load File button.



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

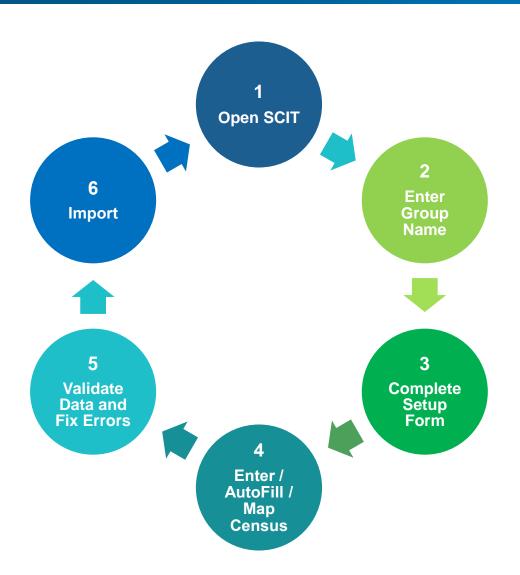
#### Latest Version Required....



The imported template is the minimum version (**one version minus the current version**). If user imports a template outside minimum version, the following error message will display:

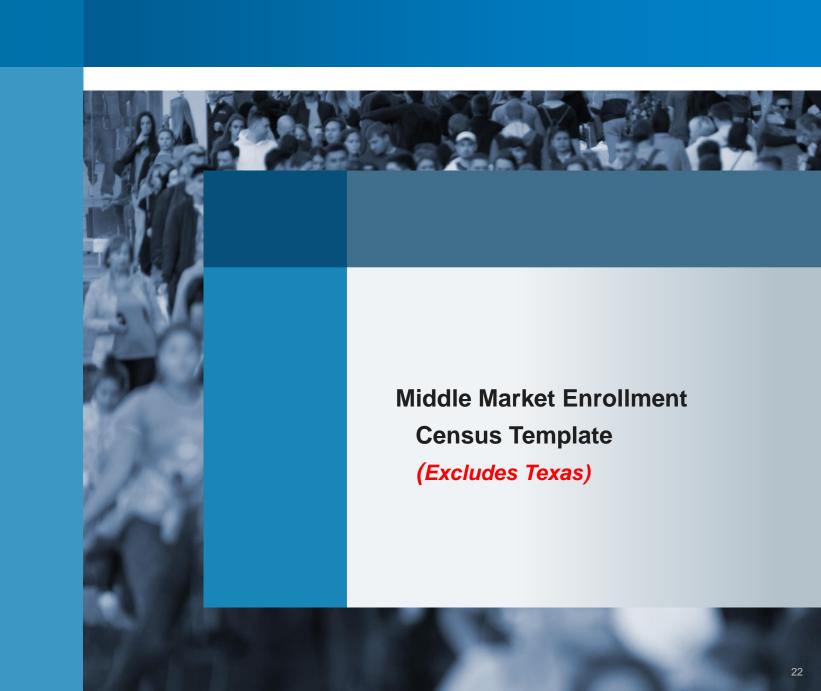
A. The imported census template version is out of date and is only valid until <MM/DD/YYYY>. Please download the current census template version from the link above.

## **Enter Census for the Next Group**



To enter Census for the next Group, File Close prior group's open SCIT file.

Repeat Steps 1 through 6.



#### **Complete Setup Form**

#### **Setup Form** values are used to:

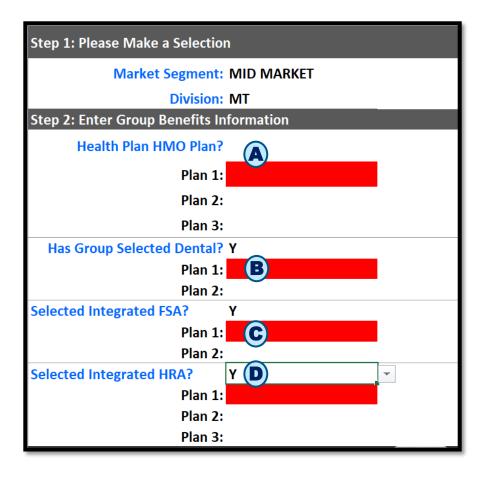
- Display/hide Census columns in the Import Census Template tab.
- Display dropdown values for some columns based on Division.

Complete the required fields highlighted in red.

- A. Health Plan HMO Plan? Select Yor N and add Plan(s).
- B. Has Group Selected Dental? If Y, add Plan(s).

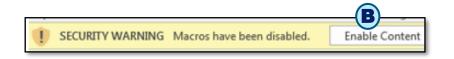
#### **NOTE on Plans:**

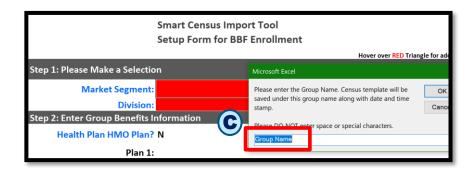
- When Plan codes are changed in Setup Form, the old codes will be highlighted in yellow in the Import Census Template tab.
- SCIT only validates the Plan code has been entered.
   It does not check against the Small Group & Middle
   Market Enrollment Tool to validate that an eligible
   Plan code has been entered.
- When Plan codes are changed in the Setup Form, the old codes will be highlighted in yellow in the Import Census Template tab.
- **C.** Selected Integrated FSA? If Y, add Plan(s).
- **D.** Selected Integrated HRA? If Y, add Plan(s).

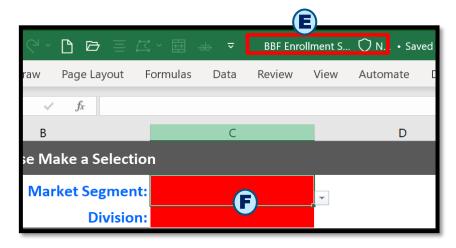


## **Open SCIT and Save Under Group Name**

- A. From Excel menu, select File > Open and navigate to the folder where SCIT is saved, select SCIT and click Open.
- B. On File > Open, click Enable Content button. Skip this step if macros are enabled through File > Options menu. Please see "Enable Macros" in Technical References for instructions.
- C. In the pop-up box, type in the Group Name and click OK. Do not include spaces or any special characters.
- D. Select a Folder to save the Group's Census, and click OK.
- E. The file is saved under the group's name along with the date and time stamp.
  - Original SCIT file stays intact and is not overwritten.
- F. Setup Form will display.
  - Select Market Segment: SMALL GROUP OR MID MARKET
  - Select a Division from dropdown list.

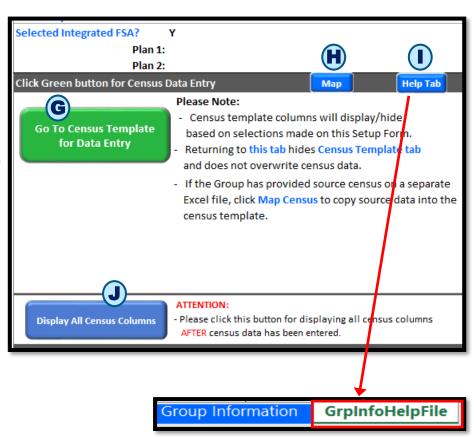






## **Complete Setup Form**

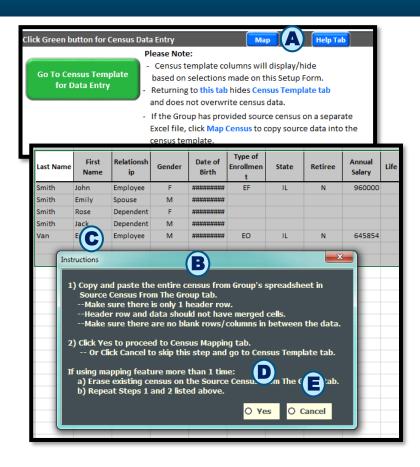
- G. Click the Green button to navigate to the Import Census Template for manual data entry.
- H. Click Map button if you received the Census from the group on a separate spreadsheet (Source).
  - This feature will enable you to copy and map the Source columns to the Template columns.
     After columns are mapped, data will be copied over to the Import Census Template systematically per the mapping.
- Click the Help Tab button to navigate to the GrpInfoHelpFile tab. This tab has detailed specifications for all the entries on the Group Information tab.
- J. Click Blue button to display all Census columns on the Import Census Template.



- 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.

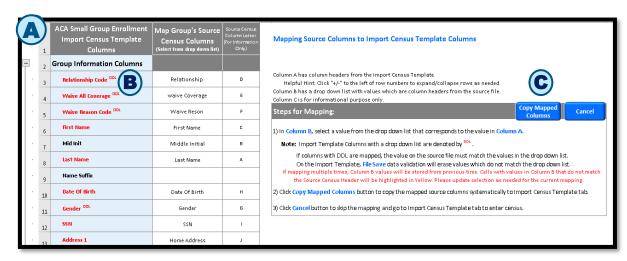
- There should only be one header row.
- Header row and data should not have merged cells.
- Make sure there are no blank rows OR columns in between the data.
- D. Click Yes to proceed to the Census Mapping tab after pasting the Source Census.
- E. Click Cancel to skip Map Census feature and go to the Census Template.



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

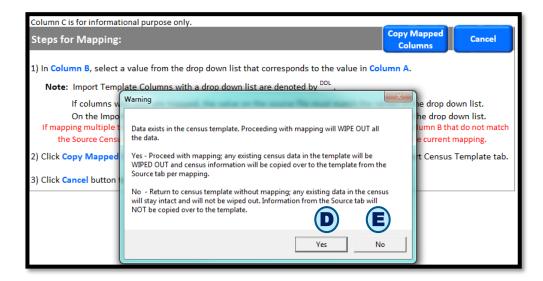
- Delete the existing Census on the Source Census From The Group worksheet (tab).
- Repeat steps C and D listed above.

Smart Census Import Tool (SCIT) - BBF



#### A. Census Mapping tab displays.

- Column A displays column headers from the ACA Small Group / Mid Market Enrollment Import Census Template Columns.
- Column B has a dropdown list with values which are column headers from the source file.
- Column C is for information purpose only.
- Instructions display to the right.
- **B.** In **Column B**, select a value from the dropdown list that corresponds to the value in **Column A**.
- C. Click the Copy Mapped Columns button to copy the mapped source columns systematically to the Import Census Template tab.
  - Click the Cancel button to skip the mapping and go to Import Census Template tab to enter Census.

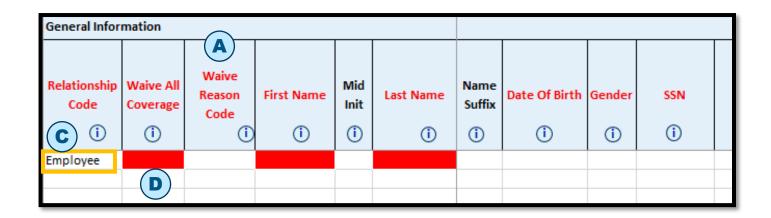


D. Click Yes to proceed with mapping. If data exists on the Census Template, a Warning message displays.

**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 dropdown list values, are determined by Setup Form values. See Technical References for details.
- C. Row #3 Relationship Code value is defaulted to Employee.

  Do not change this value.
- D. Starting from Row #3, rows can be Inserted or Deleted as needed.

#### **Enter Census Data**

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



- F. After entering in **Zip Code**, click the **State from Zip** button in State cell to populate the **State** for all members. State will fill in if there is no State code already.
- G. The entire cell is highlighted in red for required columns. The entire cell is highlighted in yellow when there is a data mismatch. For DOB column over-age dependents (26 & over), the cells are highlighted in purple and 65 & over entries are highlighted in green for information purposes.
- H. When you type in a value and click **Enter**:
  - 1) If the value is invalid, an error message displays with Retry, Cancel and Help buttons.
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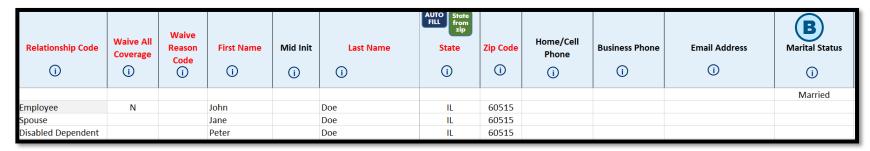
## **Enter Census Data - Speed Jumps and Medicare**

A. Speed Jump – quickly jump to sections of SCIT

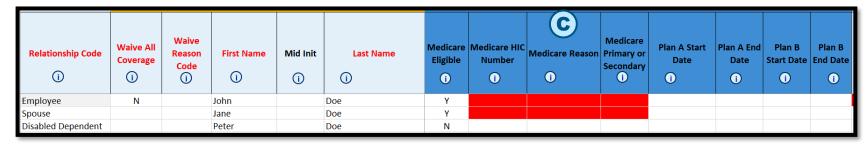
General Info 

Emp Status Health Cov Signature Date Language

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



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 Technical References.
- Returning to the Group Information tab hides other tabs: Import Census Template tab, Error List tab and Help File tab.
  - To return to, and display the Import Census Template tab, click the Green button.
  - To return to, and display the Error List tab, click
     Green button and click File > Save.
  - To return to, and display the Help File tab, click the Help File tab.

#### SSN dashes

If the source SSN value has dashes, paste into SCIT "as is".
 These values will be highlighted in yellow. On File > Save validation, dashes will be removed systematically.

#### Date values

- While typing dates include "/"
- If the date format in the source file is formatted with a
  different date format than MM/DD/YYYY, you can still copy
  and paste it into SCIT "as is". The date will be reformatted
  systematically to MM/DD/YYYY when you click File > Save.

#### Text values

- If source values are longer than the expected length, they are truncated systematically when you click File > Save.
- Values can be copied and pasted as needed onto the Census columns.

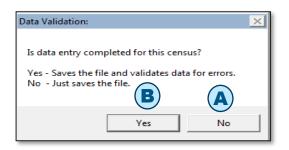
**NOTE**: Paste copied data as VALUES to avoid overwriting Excel formatting via Paste Special.

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

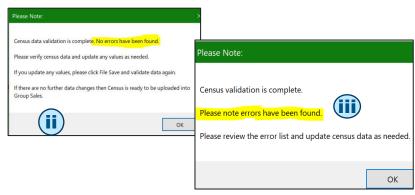
#### **Data Validation**

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

- A. Click No if you want to save existing data and return to complete the Census entry later. NOTE: Validation rules do not run.
- B. Click Yes if Census entries are complete. Existing data is saved. If values are blank in columns where the AutoFill feature is available, a default value will be entered systematically. Final validation rules will run.
  - i. Validation In Progress indicators will display:
    - Excel Status bar (bottom left corner)
    - Validation in Progress pop-up box
  - ii. If no errors are found, confirmation box displays and completed Census can be processed per current business process.
  - iii. If there are any errors, a message box displays indicating that errors have been found. Click **OK**.





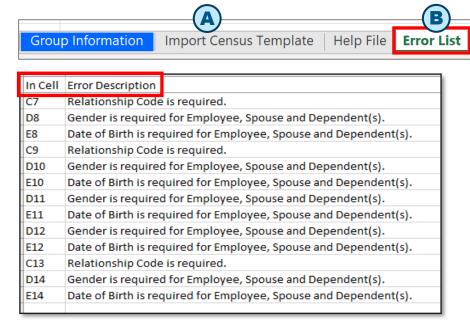


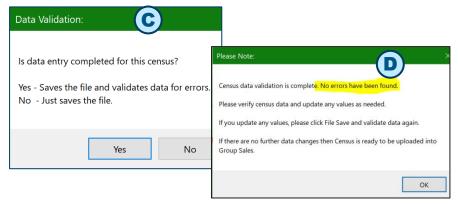
#### **Data Validation Error List**

- A. To update the values, click the Import Census Template tab. Change the values as needed. You can toggle between the Error List and Import Census Template tabs.
- **B.** If there are data errors, the **Error List** tab will display:
  - In Cell column specifies the cell location of the error.
  - Error Description column specifies the column and the nature of the error.

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

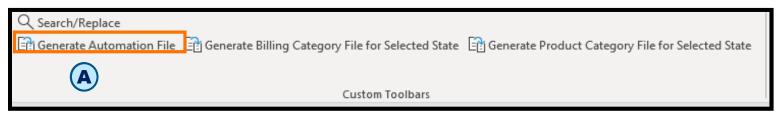
- C. Select Yes in the Is data entry completed for this census? message box.
- D. If no errors are found, a confirmation box displays and completed Census can be processed per current business process.



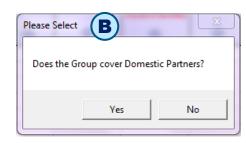


#### **Generate Automation File for Middle Market**

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

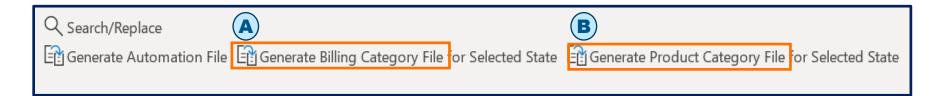


- A. From Excel Menu bar, click Add-ins option, then click Generate Automation file OR use the keyboard shortcut Ctrl + Shift + I.
- B. Does Group cover Domestic Partners? message box displays along with Yes and No buttons.
- C. If Yes button is selected, in the automation extract any DP (Domestic Partner) Relationship Code values will be highlighted in yellow for internal informational use.
- D. Confirmation box displays after the file has been generated. Click OK button to return to the Import Census Template.
- E. Generated file will be open in a separate Excel window and will be stored in the same folder as the Group's SCIT file with date and time stamp.
- F. If file is generated multiple times, a new file will be generated each time along with date and time stamp. The prior generated file(s) will not be overwritten.





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



NOTE: This extract can be generated as needed.

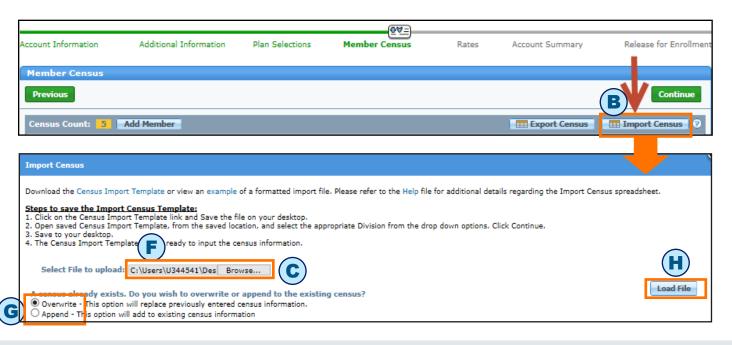
- A. From Excel Menu bar, click Add-ins option then click Generate Billing Category File.
- B. From Excel Menu bar, click Add-ins option then click Generate Product Category File.
- C. A separate file will be generated that lists enrolling Subscribers with Billing Categories.
- D. Confirmation box displays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

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

#### The upload steps have not changed.

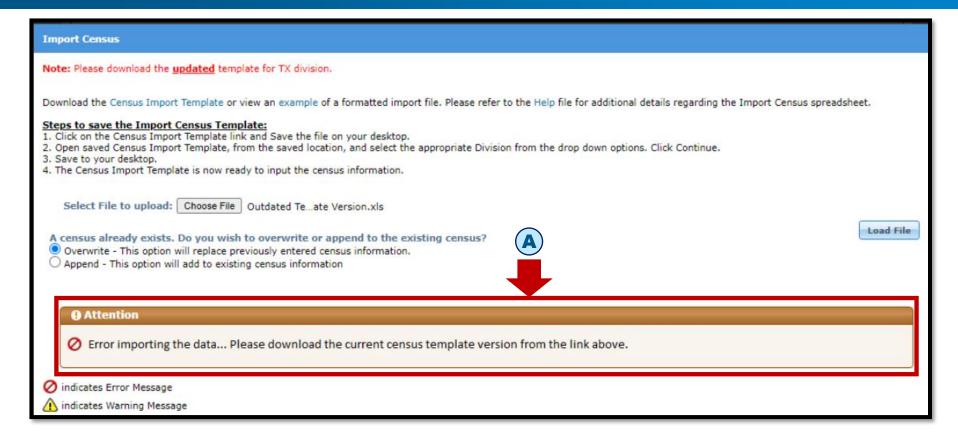
- A. In the Small Group & Middle Market Enrollment Tool, navigate to the Group's Member Census page.
- B. Click the **Import Census** button.
- C. When the **Import Census** pops up, click **Browse**.
- D. Navigate to the folder that has SCIT with the group's filename.

- E. Select the file and click Open.
- F. Filename displays in the **Select File to upload** box.
- G. Overwrite existing Census information is selected by default. If needed, select Append radio button to add to existing Census information.
- H. Click the Load File button.



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

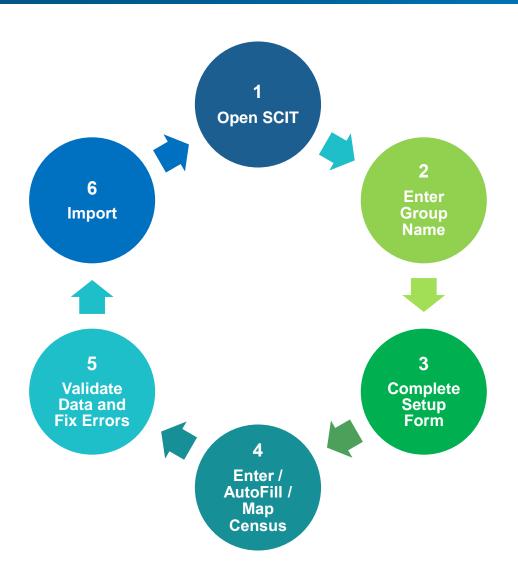
### Latest Version Required....



The imported template is the minimum version (**one version minus the current version**). If user imports a template outside minimum version, the following error message will display:

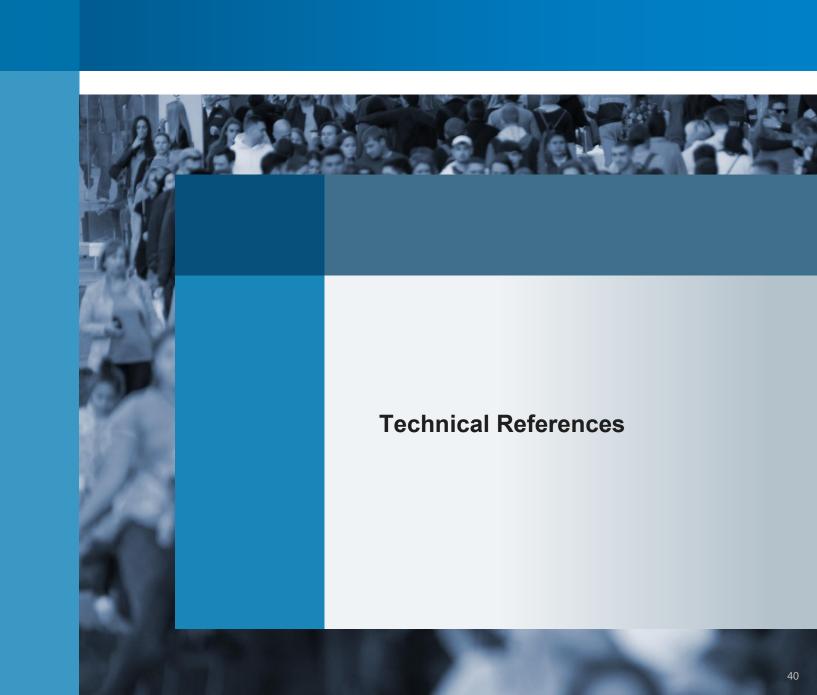
A. The imported census template version is out of date and is only valid until <MM/DD/YYYY>. Please download the current census template version from the link above.

### **Enter Census for the Next Group**



To enter Census for the next Group, File Close prior group's open SCIT file.

Repeat Steps 1 through 6.



### **Enable Macros**

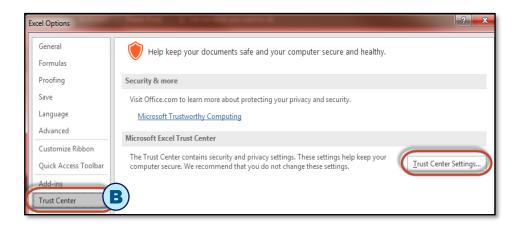
If **Enable Macros** is not enabled each time SCIT is opened, you will need to click the **Enable Content** button to use tool.

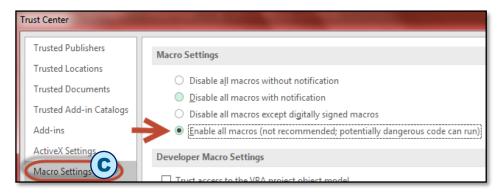
Once Macros have been enabled the first time, you will not need to click the **Enable Content** button each time SCIT is opened.

- A. From Excel menu, select File > Options.
- B. From Excel's Options box, select Trust Center and then click on Trust Center Settings.
- C. From Trust Center box, select

  Macro Settings. Then, select the

  checkbox for Enable all macros





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

### Macros – Security Risk

Throughout last 2023, Microsoft pushed out an updates to disable macros for security purposes. These updates disabled any macros contained in files downloaded from the internet or attached to emails. As a result, some users (depending on their Office version), need to remove the mark of the web due to the Security Risk below. If you see this message, follow the instructions on the next slide "Remove Mark of the Web"..



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

Learn More

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These instructions are to be followed after a new version of SCIT is downloaded. **Each time** a new SCIT version is downloaded, the process will need to be repeated.

**NOTE**: BCBS has no control over this security update from Microsoft. Additional information on update can be found via link: Macros from the internet will be blocked by default in Office.

### Macros – Remove Mark of the Web (Instructions)



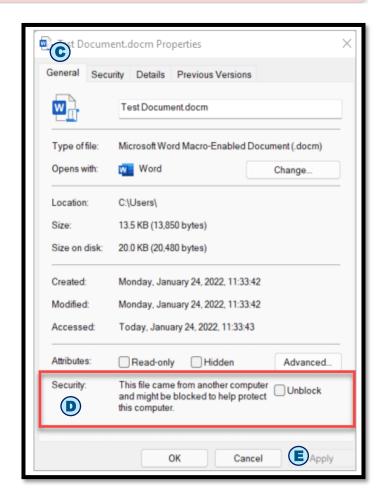
SECURITY RISK Microsoft has blocked macros from running because the source of this file is untrusted.

Learn More

X

For an individual file, such as a file downloaded from an internet location or an email attachment the user has saved to their local device, the simplest way to lock macros is to remove Mark of the Web.

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



Smart Census Import Tool (SCIT) - BBF

### 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.

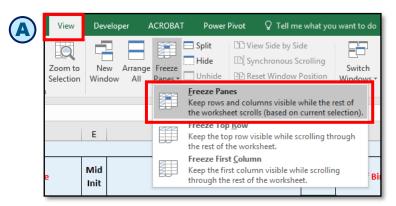
#### B. Filter Census data as needed.

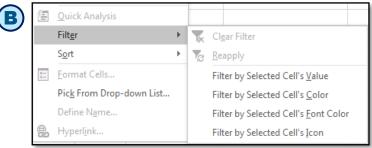
- Click in the cell, then right-click, and select Filter.
- Select a Filter option as needed.
- Apply and clear the Filters as needed.

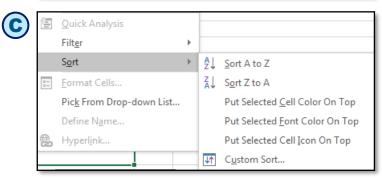
**NOTE**: Even when the **Filters** are cleared the filter arrows will display. They will reset systematically and will not be displayed after you select **File** > **Save**.

#### Sort Census data as needed.

- Click in the cell, then right click, and select Sort.
- Select Sort option as needed.
- Be sure to **highlight all the data rows**, columns A through BK.
- WARNING: If column/row range is not selected correctly and Sort is applied, data will become jumbled.
- Sort functionality is NOT available on the Error List tab.





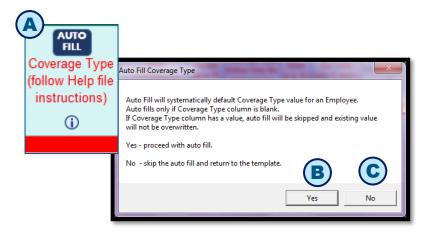


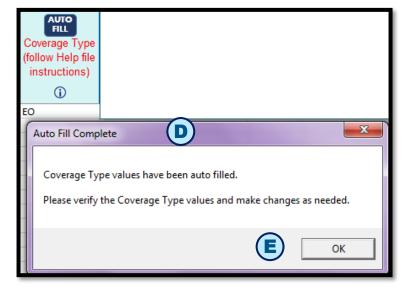
### AutoFill Feature R



AutoFill feature is available for select columns. where **AutoFill** button is displayed in the header.

- A. Click AutoFill. Message box displays with information regarding the **AutoFill** for the column along with Yes and No buttons.
- **B.** Click **Yes** to proceed with AutoFill.
  - If the values in the AutoFill column are blank, then a default value will be systematically populated.
  - If there is an existing value in the AutoFill column then AutoFill will be skipped, and existing value will not be overwritten
- C. Click No to skip AutoFill and return to the Template.
- D. Message box displays after AutoFill is complete.
- E. Click **OK** to close confirmation message "*Please*" verify the auto-filled values and change these values as needed."





**NOTE**: Coverage Type AutoFill is used for illustration.

### **AutoFill Select Columns Reference Table**

Columns with AutoFill	Description	Available In
State	Fills in State when Zip Code is present	SG/MM
Employment Status	AutoFills value of A or Active for Employee	SG/MM
Health Coverage (Y/N)	AutoFills value of Y for Employee choosing coverage	SG/MM
Health Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG/MM
Selected Health Plan	AutoFills value of Plan 1 from Setup Form for Employee	SG/MM
Signature Date	AutoFills value of today's date for Employee	SG/MM
Dental Coverage (Y/N)	AutoFills value of Y for Employee choosing coverage	
Dental Coverage Type	AutoFills value of EO/ES/EC/EF based on Spouse and Dependent row(s) following the Employee/Subscriber row	SG/MM
Selected Dental Plan	AutoFills value of Plan 1 from Setup Form for Employee	SG/MM
Signature Date	AutoFills today's date for Employee	SG/MM
Billing Category and Product Category	AutoFills typed in value for Enrolling Employees	MM

Smart Census Import Tool (SCIT) - BBF

### Reference Tables: Small Group and Middle Market Enrollment

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

Setup Form field on Group Information tab	Column(s)	Displayed or Hidden
Has Group Selected Health? is Y Has Group Selected Health? is N	Columns AD through AH	Display columns (SG/MM) Hide columns (SG/MM)
HMO Plan? is Y	Columns AK and AN Columns AI, AK and AN	Display columns $(SG - NM \& TX / MM - OK)$ Display columns $(SG - IL)$
HMO Plan? Is N	Columns AI through AN	Hide columns (SG/MM)
Has Group Selected Dental? is Y Has Group Selected Dental? is N	Columns AQ through AU	Display columns (SG) Hide columns (SG)
Has Group Selected Integrated FSA? is Y Has Group Selected Integrated FSA? is N	Columns BG through BI	Display columns (SG/MM) Hide columns (SG/MM)
Has Group Selected Integrated HRA? is Y Has Group Selected Integrated HRA? is N	Columns BJ	Display columns (MM) Hide columns (MM)

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

#### State-specific column dropdown variances

Setup Form State	Column(s)	Display
Division (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)

#### 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 AV:AX are displayed (SG/MM)

### **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

