



**BlueCross BlueShield
of Texas**

ACA SMALL GROUP ENROLLMENT Import Census Template Reference Guide

**Release 2017.1
October 2017**

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Census Import Template for Enrollment (CITE)

REMAINS THE SAME	<ul style="list-style-type: none">▪ Template Structure▪ Census Columns and values to be entered for each of the Columns▪ Restrict Column Edits	<ul style="list-style-type: none">▪ 1st data row starts with “Employee” Relationship Code▪ Census data validation▪ Census Import feature in ACA Small Group Enrollment Tool
WHAT’S NEW	<ul style="list-style-type: none">✓ Easy to use and maintain✓ Group Information tab drives Census Template✓ Visual cues for data entry✓ Open up Excel features	<ul style="list-style-type: none">✓ Upfront data validation and “Error List”✓ Same template for both Small Group (2-50) and Mid Market (51-150) segments. Use of the template for Mid Market groups will be available in the near future.
RELEASE	New version of Census Import Template for ACA Small Group Enrollment Tool	
FUTURE STATE	New Census Import Template <ul style="list-style-type: none">• Mid Market Enrollment Import Census Template assessment is underway• Enhancements based on feedback from user community	

Before You Start

Compatibility

Refer to the [Compatibility with Excel Versions](#) in the Appendix to determine if **CITE** is compatible with the Excel version you are using.

Enable Macros

Consider turning on [Enable Macros](#) feature using instructions provided in the Appendix.

Using CITE

Important: Save **CITE** on your local/network drive **before** using.

- If working from a network drive, please note **CITE** performance may be a bit slower.
- Keep only one **CITE** file open at a time. If multiple **CITE** files are open, you may encounter issues and data may get corrupted.

Excel 2010 Window

Open only one window when working with **CITE**.

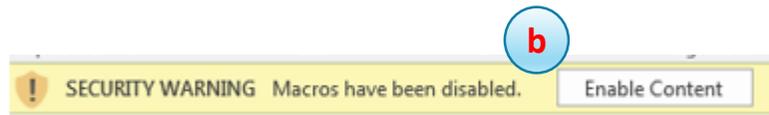
- If multiple windows are open, **CITE** will not behave as expected.
- You can have multiple files open within one window; to view all windows at one time select [View / Arrange All](#) from the Excel menu.

Steps for Entering a Group's Census



1. Open **CITE** and save under the Group's Name.
2. Complete **Census Template Setup** form.
3. Enter data in **Import Census Template** tab.
4. Click **File Save** to validate data.
5. An **Error List** will be generated.
6. Upon successful validation, upload **CITE** into **ACA Small Group Enrollment Tool**.
7. Enter census for the next Group.

1 Open CITE and Save Under Group Name



a) From Excel menu, select **File Open**. Go to the folder where **CITE** is saved, select **CITE** 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**.

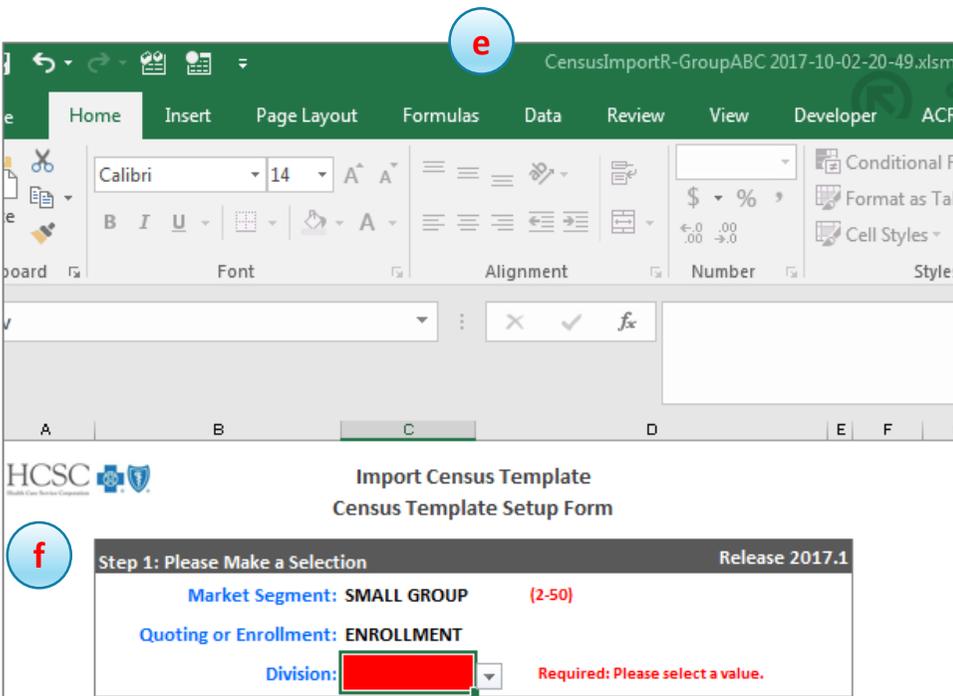
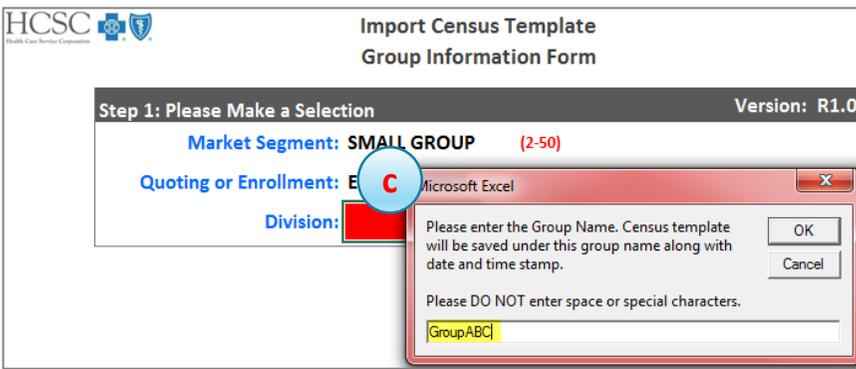
- Please do not include spaces or any special characters.

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 **CITE** file stays intact and is not overwritten.

f) **Census Template Setup Form Step 1** will display.



2 Complete Census Template Setup Form

a

Step 1: Please Make a Selection Release 2017.1

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

Quoting or Enrollment: **ENROLLMENT**

Division: Required: Please select a value.

IL
TX
OK
NM
MT

- a) Complete Step 1 on the Census Template Setup Form.
- Market Segment defaults to **SMALL GROUP**.
 - Quoting or Enrollment defaults to **ENROLLMENT**.
 - Select a **Division** from the drop down list.

b

Step 2: Enter Group Benefits Information

Has Group Selected Health? Required: Please select a value.

HMO Plan?

Plan 1:

Plan 2:

Plan 3:

Plan 4:

Plan 5:

Plan 6:

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

Plan 1:

Plan 2:

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

Is Life or STD Salary Based?

- b) After **Division** is selected, Step 2 section will display. Complete Step 2 by filling in the required fields.
- Life section is applicable to IL and TX only.
 - Life section will not display for OK, NM and MT.

i

Is Life or STD Salary Based?

- c) Click the **Green** button to navigate to the **Import Census Template** tab and start entering data.
- d) For reference, click the **Help tab** for column format specifications.

c

Navigate to: Census Template **d** help tab

Please Note:

- Health/Dental/Life census template columns display/hide based on above Y or N selection.
- Returning to **this tab** hides **Import Census Template** tab and does not overwrite census data.

Go To Import Census Template for Data Entry

- e) When you need to see all the columns on the **Import Census Template** tab, click the **Blue** button.

e

Display All Columns

ATTENTION:

- **DO NOT** enter data in Health/Dental/Life columns if corresponding flags above are "N".
- Column data will be **erased** if Health/Dental/Life flags above are "N".

Census Entry Is Complete. Display All Columns

- f) **Please Note:** **Census Template Setup Form** fields can be edited and changed at any point.

2 Complete Census Template Setup Form Continued

Step 2: Enter Group Benefits Information

a Has Group Selected Health? Required: Please select a value.

HMO Plan?

b Plan 1:

Plan 2:

Plan 3:

Plan 4:

Plan 5:

Plan 6:

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

b Plan 1:

Plan 2:

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

Is Life or STD Salary Based?

Navigate to Census Template [help tab](#)

Please Note:

Go To Import Census Template for Data Entry

- Health/Dental/Life census template columns display/hide based on above Y or N selection.
- Returning to **this tab** hides **Import Census Template** tab and does not overwrite census data.

Display All Columns

ATTENTION:

Census Entry Is Complete. Display All Columns

- **DO NOT** enter data in Health/Dental/Life columns if corresponding flags above are "N".
- Column data will be **erased** if Health/Dental/Life flags above are "N".

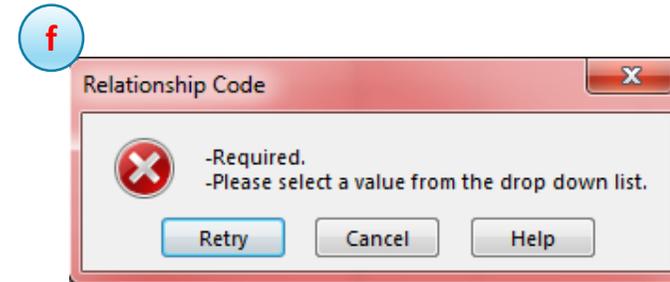
Please note:

- If Health, Dental or Life flags are changed from "Y" to "N", clicking the **Green/Blue** button will **erase** any existing data in the corresponding census columns.
- Health and Dental plans
 - CITE** only validates that a 7-digit plan code has been entered. It does not check against the [ACA Small Group Enrollment Tool](#) to validate that an eligible Plan code has been entered.
 - When Plan codes are changed in the [Census Template Setup Form](#), the old codes will be highlighted in **Yellow** in the [Import Census Template](#) tab.
- [Census Template 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](#).
- [Group Information](#) tab displays throughout the census entry process.

3 Enter Data in Import Census Template Tab

General Information			
Relationship Code	Waive All Coverage	Waive Reason Code	First Name
Employee	N		John
Employee	N	Waiving - Has other coverage	

Relationship Code
 -Required.
 -Please select a value from the drop down list.
 -Red cell = Value required
 -Yellow cell = Update value



- 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 [Census Template 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 #4**, 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.
- 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 onto the census columns.
 - 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 [CITE](#), click [File Save](#) to unlock the cells.
 - Values are validated on [File Save](#).
- h) [Hover](#) help box displays for each column. You can reposition the box by clicking anywhere on the box, dragging and dropping to another location.

3 Data Entry, 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 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 **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 **Help** tab button.

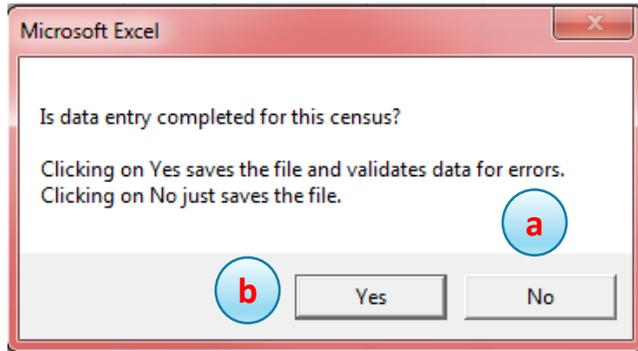
- k) **SSN – Leading zeros & dashes**
 - Be sure to type leading zeros, if applicable.
 - When copying/pasting, make sure source data has leading zeros.
 - If the source SSN value has dashes, paste into **CITE** as is. These values will be highlighted in **Yellow**. On **File Save** validation, dashes will be removed systematically.

- l) **Extended ZIP Codes**
 - i) If source has extended ZIP Codes, paste in **CITE** 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 not MM/DD/YYYY, you can still copy and paste it into **CITE** as is.
 - The date will be reformatted systematically to MM/DD/YYYY when you click **File Save**.

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

4 Click File Save to Validate Data



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.

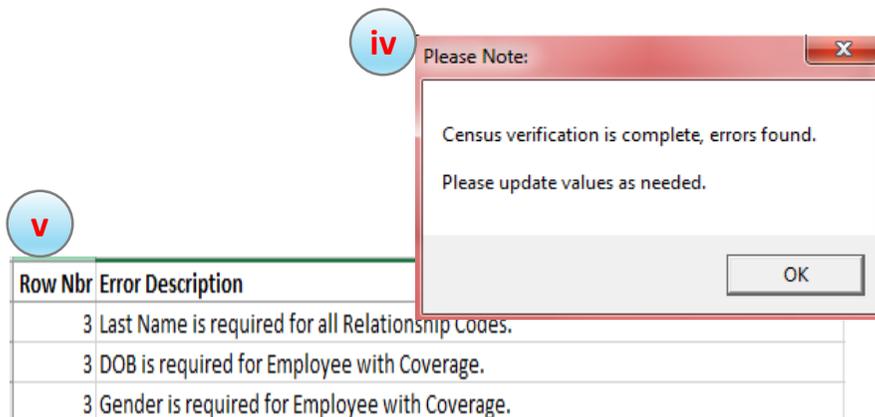
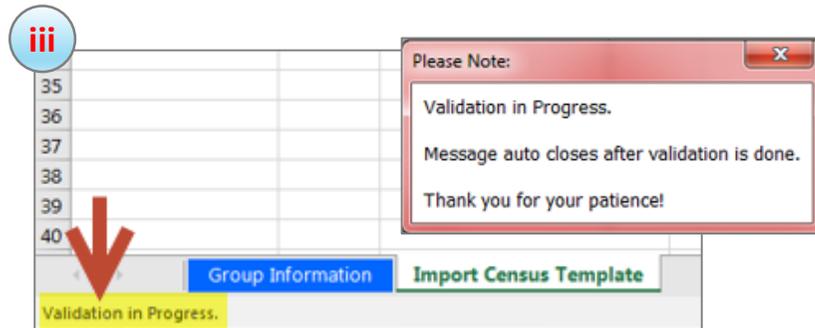
ii. Final validation rules will run.

iii. **Validation In Progress** indicators will display.

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

iv. After the validation rules finish running, if there are any errors, a message box displays indicating that errors have been found. Click **OK**.

v. **Error List** tab displays errors.



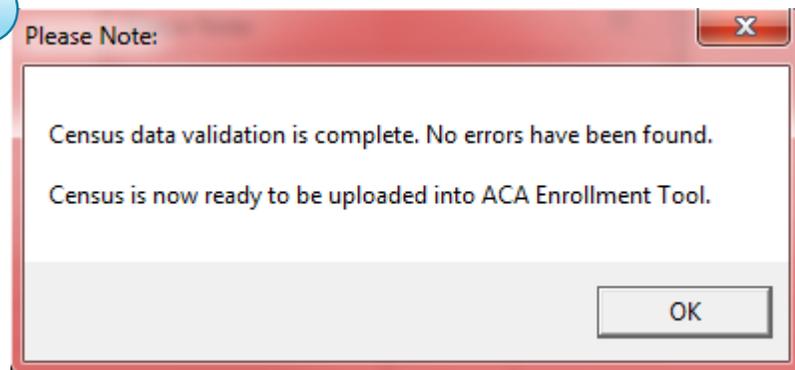
5 An Error List will be Generated

a

A	B
Row Nbr	Error Description
3	First Name is required for all Relationship Codes.
3	Last Name is required for all Relationship Codes.
3	DOB is required for Employee with Coverage.
3	Gender is required for Employee with Coverage.
3	SSN is required for Employee with Coverage.
3	Address 1 is required for Employee with Coverage.
3	City is required for Employee with Coverage.
3	State is required for Employee with Coverage.
3	Zip Code is required for Employee with Coverage.
3	Employment Status is required for Employee with Coverage.
3	Hire Date is required for Employee with Coverage.
3	Health Coverage is required for Employee with Coverage.
3	Signature Date is required for Employee.

- a) On **File Save** validation, errors will be displayed in the **Error List** tab.
- b) **Error List** tab will display:
 - **Row Nbr** column – specifies the row with the error.
 - **Error Description** column – specifies the column and the nature of the error.
 - **Please note:** **Filter** functionality is available but **Sort** functionality is **NOT** available.
- c) To update the values, click on the **Import Census Template** tab. Change the values as needed.
 - You can toggle between the **Error List** and **Import Census Template** tabs.
- d) Once you have corrected any errors, validate data again by clicking **File Save**. Select **Yes** in the **Is Data Entry Complete?** message box.
- e) If there are no errors, a message box displays indicating that no errors were found and census is ready to be uploaded.

e



6 On Successful Validation, Upload CITE into ACA Small Group Enrollment Tool

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The image shows two screenshots from the ACA Small Group Enrollment Tool. The top screenshot is the 'Member Census' page, which has a navigation bar with tabs for 'Account Information', 'Additional Information', 'Plan Selections', 'Member Census', 'Rates', 'Account Summary', and 'Release for Enrollment'. The 'Member Census' tab is active. Below the navigation bar, there are buttons for 'Previous' and 'Continue'. A red arrow points to the 'Import Census' button. Below the 'Import Census' button, there are buttons for 'Export Census' and 'Add Member'. The 'Census Count' is displayed as 5. The bottom screenshot is the 'Import Census' dialog box. It contains instructions to download the 'Census Import Template' and provides a list of steps to save the template. Below the instructions, there is a 'Select File to upload' field with a file path 'C:\Users\U344541\Desktop' and a 'Browse...' button. At the bottom, there is a question 'A census already exists. Do you wish to overwrite or append to the existing census?' with two radio button options: 'Overwrite - This option will replace previously entered census information.' (which is selected) and 'Append - This option will add to existing census information.' A 'Load File' button is also present.

In **CITE** once census data is validated and no errors are found, the Group's census is ready to be uploaded into **ACA Small Group Enrollment Tool**.

The upload steps have not changed.

- a) In **ACA Small Group Enrollment Tool**, navigate to the Group's **Member Census** page.
- b) Click **Import Census** button.
- c) When the **Import Census** pops up, click **Browse**.
- d) Navigate to the folder that has **CITE** 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.

6

Upload into ACA Small Group Enrollment Tool Continued

Import Census

Download the [Census Import Template](#) or view an [example](#) of a formatted import file. Please refer to the [Help](#) file for additional details regarding the Import Census spreadsheet.

Steps to save the Import Census Template:

1. Click on the Census Import Template link and Save the file on your desktop.
2. Open saved Census Import Template, from the saved location, and select the appropriate Division from the drop down options. Click Continue.
3. Save to your desktop.
4. The Census Import Template is now ready to input the census information.

Select File to upload: C:\Users\U344541\Desktop Browse...

A census already exists. Do you wish to overwrite or append to the existing census?

Overwrite - This option will replace previously entered census information.

Append - This option will add to existing census information

Attention

- ⊗ Please enter the valid data for these census members before continuing...
- ⊗ Please click here to view the error messages...

Download Error Messages

indicates Error Message

indicates Warning Message

- a) ACA Small Group Enrollment Tool will display any errors during the group's census upload.
- b) If no errors are found then click **Override and Import** button.
- c) Census from the group's **CITE** is uploaded and will be displayed on the **Member Census** table.
- d) Complete the rest of the **Member Census** page as needed.

Import Census

Download the [Census Import Template](#) or view an [example](#) of a formatted import file. Please refer to the [Help](#) file for additional details regarding the Import Census spreadsheet.

Steps to save the Import Census Template:

1. Click on the Census Import Template link and Save the file on your desktop.
2. Open saved Census Import Template, from the saved location, and select the appropriate Division from the drop down options. Click Continue.
3. Save to your desktop.
4. The Census Import Template is now ready to input the census information.

Select File to upload: C:\Users\U344541\Desktop Browse...

A census already exists. Do you wish to overwrite or append to the existing census?

Overwrite - This option will replace previously entered census information.

Append - This option will add to existing census information

Note: "Override and Import" will upload the census ignoring the warning messages.

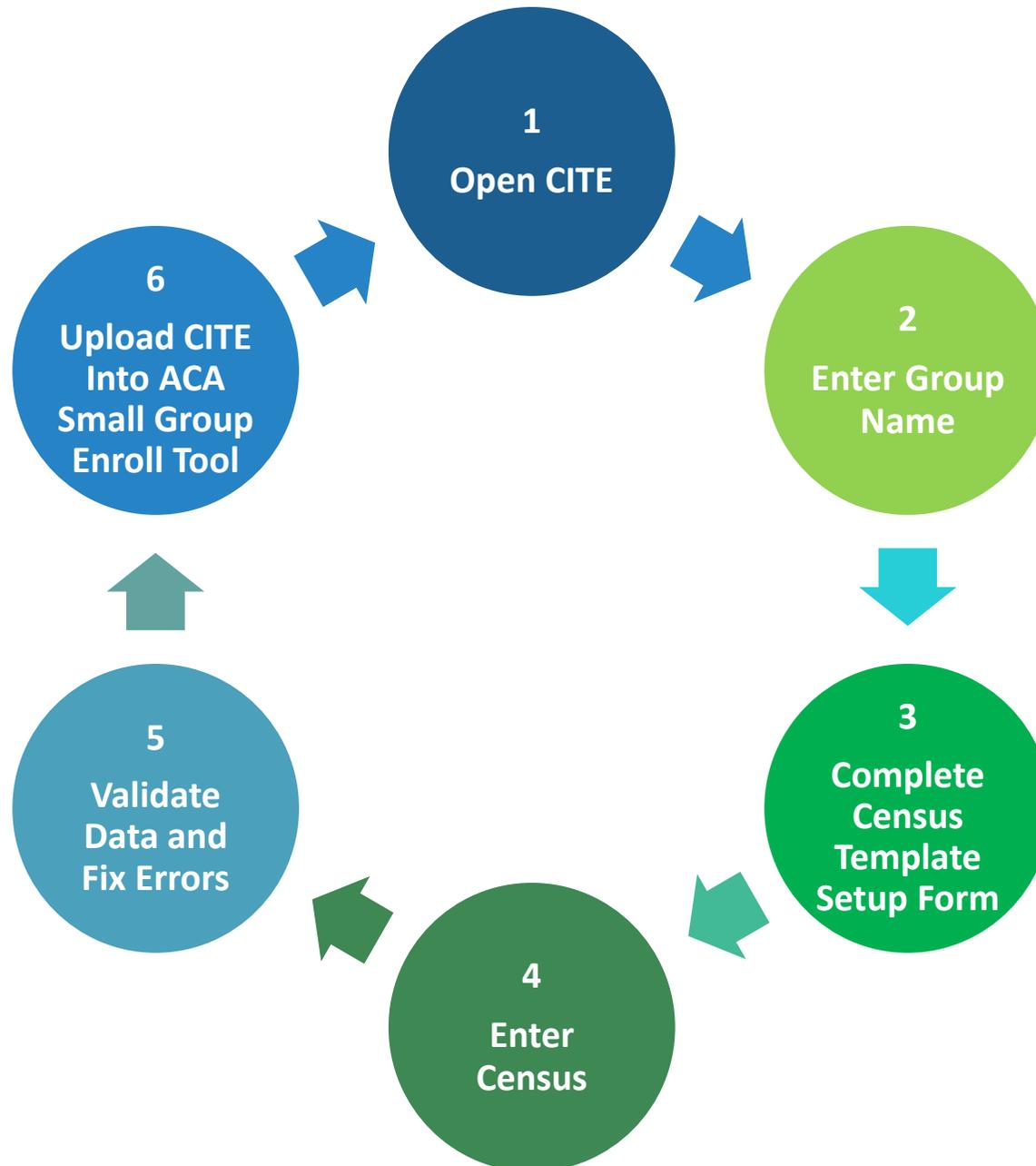
indicates Error Message

indicates Warning Message

Override and Import **Cancel**

7 Enter Census for the Next Group

To enter census for the next group, [File Close](#) prior group's open [CITE](#) file. Repeat Steps 1 through 6.



Reporting Issues



For technical issues with the eSales Enrollment tool:
Contact our ITG Service Center at **1-888-706-0583**



**For questions about information in the user manual
or the new CITE:**

- Email **ACASmallGroupEnrollmentSupport@bcbsil.com**
- Please include “New Census Template” in the Subject line and attach a screen shot, if possible

APPENDIX

Compatibility with Excel Versions

Excel 97-2009

- **Not compatible with CITE.**
- Use old census template **OR**
- Enter your census directly into the ACA Small Group Enrollment Tool.



Excel 2010

- **Mostly compatible.**
- Must have only 1 **CITE** file open at a time.
- If copying data from an external source, please paste data as values or text in **CITE**.



Excel 2013

- **Compatible.**
- Must have only 1 **CITE** file open at a time.

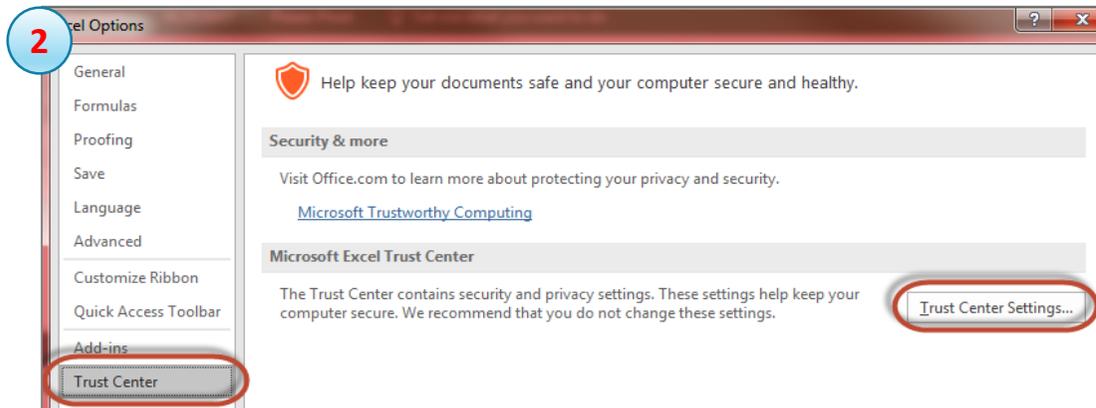


Excel 2016

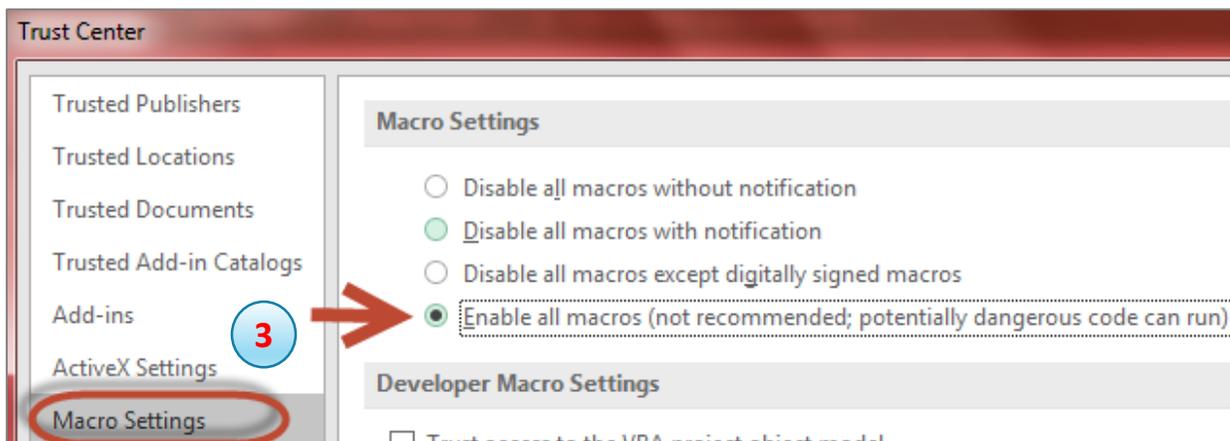
- **Compatible.**
- Must have only 1 **CITE** file open at a time.

Enable Macros

- If **Enable Macros** is not turned on each time **CITE** is opened, you will need to click the **Enable Content** button.
- **Enable Macros** can be turned on once after which you will not need to click the **Enable Content** button each time **CITE** is opened.

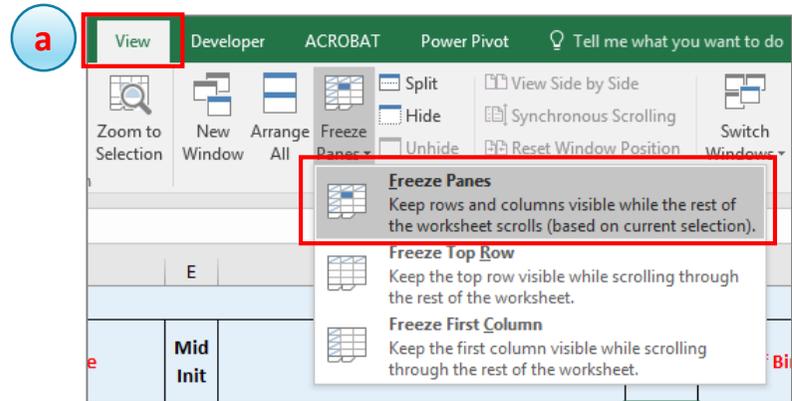


- 1) From Excel menu, select **File Options**.
- 2) From Excel's **Options** box, select **Trust Center** and then click on **Trust Center Settings**.
- 3) From Trust Center box, select **Macro Settings**. Then, select the checkbox for **Enable all macros**.



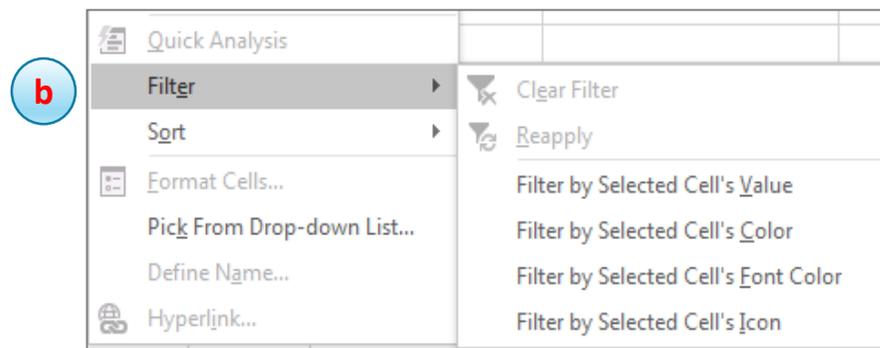
Please note the warning message on the snapshot. Once this option is turned on, open files with macros only from a trusted source.

Freeze Panes, Filter and Sort Features



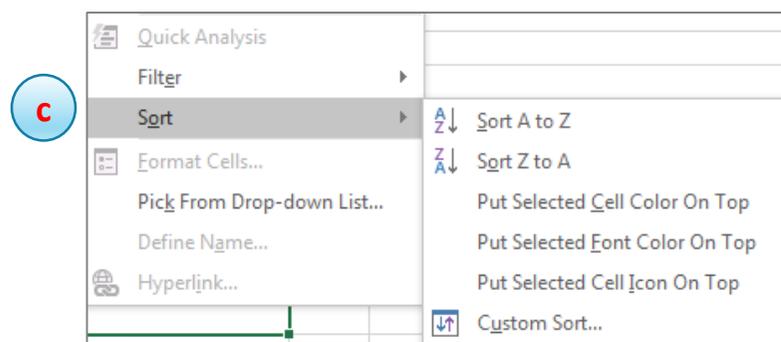
a) Freeze Panes as needed to make data entry easier.

- Click the first cell in the range you want to freeze.
- From Excel menu select **View**, then click **Freeze Panes**.
- Row 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. These arrows will reset systematically on **File Save**, after which, these arrows will not display.



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: Import Census Template

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

Census Template 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	Column A Relationship Code	Display "Civil Union" in drop down
Division is IL	Column T Employment Status	Display "IL Cont" value in drop down
Division is TX	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