

# How to Provide Portal Users Access to Complete the Census within the Portal

01/09/2025 8:32 am CST

Portal User permissions for the Compliance module may be accessed from within the Compliance module as shown below or from the Edit Portal User screen under the Compliance tab within the Portal Module.

From within the Compliance Module under the Compliance Menu>Census> Portal Files, Edit Portal Users:

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [Compliance](#) > [Census](#) > Portal Files

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Company:	A.Demo	ID:	
Plan:	A.Demo	ID:	
Year End:	12/31/2024		

Compliance Menu	
◀	Census
	Tasks
◀	Transactions
◀	Miscellaneous
◀	Tools/Settings
◀	Plan Specifications

File Type	To Portal User	From Portal User	Final	Batch
Census Worksheet	✓	⬆	⬆	📄
Annual Questionnaire	⬆	⬆	⬆	📄
Participant Statements	⬆			
Client Package	⬆			
Online Annual Questionnaire	Edit / Publish			📄

[Edit Portal Users](#) ←

[Portal](#)

Portal Files								
Description	Year	File Name	Size	Posted Date	Review	Status	Options	
<b>CenSpreadSheetDL Census Worksheet (Download)</b>	12/31/2024	ADemo_2024-12-31.* ftw Primary 1 Census (comp and comp after elig) .csv	4099	06/18/2024 14:46:17	Review	OK	Remove	
<b>None</b>								

From here the compliance tab of the Edit Portal User screen will populate. For users to be able to edit the Census directly in the portal, ensure the 'Edit Census Worksheet' is set to yes. (The Census Worksheet (download) and Census worksheet (upload) options may be set to 'Yes' to allow users to download, edit and return the .CSV file).

Ensure the 'Save Changes' button is selected before closing the window.

**Edit Portal User Options**

All Contacts: Barney Fife (bfife2) Manage Add

**A.Demo - Compliance Permissions**  
**Selected Year: 12/31/2024**

Portal Users: Barney Fife (bfife2)

**Compliance Options**

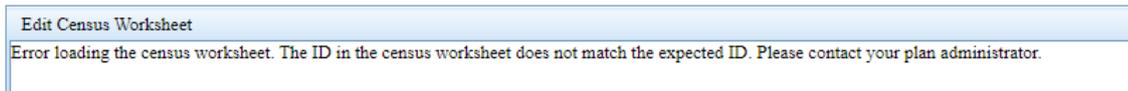
Census Worksheet (Download):	No
<b>Edit Census Worksheet:</b>	<b>Yes</b>
Census Worksheet (Upload):	No
Annual Questionnaire (Download):	No
Annual Questionnaire (Upload / Complete Online):	No
Participant Statements (Download):	No
Client Package (Download):	No

**Email Settings**  
From Name: alicia.bailey@wolterskluwer.com

• **RED** indicates the portal user does not currently have the plan or permission.  
• **Bold** indicates the required permission.

Help **Save Changes** Close

**Please note:** for the portal user to open and edit the census within the portal, the template must match a grid available within the compliance module dropdown list. If the format does not match, the user will receive the following error message:



After selecting the “Invite XX to the portal”, the portal user will see the option to ‘Edit Census Worksheet’. Each cell of the spreadsheet is editable. Participants may also be added or removed within this screen

Wolters Kluwer A.Demo (View) Barney Fife Log Out

Plan Home Inbox (0) ToDo List (1) **Edit Census Worksheet**

	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Term (1)	Term Reason
<input type="checkbox"/>	Brenatto	Yeza	123-00-0012	8/19/1974		1/1/2021	
<input type="checkbox"/>	Clay	Caduceus	123-00-0003	1/19/1977			
<input type="checkbox"/>	Dosal	Babenon	123-00-0011	3/16/1958			
<input type="checkbox"/>	Lavorre	Jester	123-00-0004	5/28/1981			
<input type="checkbox"/>	Lavorre	Marion	123-00-0010	6/18/1961			
<input type="checkbox"/>	Lionett	Beauregard	123-00-0007	10/10/1989			
<input type="checkbox"/>	Nydoorin	Yasha	123-00-0001	8/9/1983			
<input type="checkbox"/>	Sol	Pumat	123-00-0009	6/29/1982			
<input type="checkbox"/>	Stone	Fjord	123-00-0008	8/3/1981			
<input type="checkbox"/>	Tealeaf	Mollymauk	123-00-0002	2/14/1976		12/14/2020	
<input type="checkbox"/>							

Delete Rows Download / Print Note: Be sure to save changes periodically in case of timeout. **Save Changes** I'm Done

After editing the census, the portal user will need to select the “Save Changes” before navigating away from the page. Once completed selecting the 'I'm Done' done button will and submit the census.

Wolters Kluwer A.Demo (View) Barney Fife Log Out

Plan Home  
Inbox (0)  
ToDo List (1)  
Edit Census Worksheet

**Edit Census Worksheet**

Ownership	Family Group	Family Group Relation	Employee Class	Employee Type (HCE)	CT Group Code
0.00	B	Spouse	Normal		Group 2
14.00	None	N/A	Normal		Group 1
0.00	A	Principal	Normal		Group 4
14.00	A	Child	Normal		Group 1
0.00	A	Spouse	Normal		Group 4
14.00	None	N/A	Normal		Group 1

Delete Rows Download / Print Note: Be sure to save changes periodically in case of timeout. Save Changes **I'm Done**

Once selected the user is asked to confirm their selection:

**Confirmation**

Are you ready to submit the census worksheet? By clicking 'Yes', you agree that the information in this worksheet is true and accurate.

Yes No

Selecting 'I'm Done' pushes the updated census to the plan as census (Upload). The portal user will not be able to make any additional changes after pressing "I'm Done". *If changes are needed, the census (Upload) file will need to be removed and the portal user re-invited.*

Home > Edit Company > Edit Plan > Compliance > Census > Portal Files Updates [Help](#)

Company: A.Demo ID:  
Plan: A.Demo ID:  
Year End: 12/31/2024

**Compliance Menu**

- ◀ Census
- Tasks
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Participant Statements	⬆			
Client Package	⬆			
Online Annual Questionnaire	Edit / Publish			📄

[Edit Portal Users](#)  
[Portal](#)  
[Invite Barney Fife to the portal](#)

**Portal Files**

Description	Year	File Name	Size	Posted Date	Review	Status	Options
<b>CenSpreadSheetDL Census Worksheet (Download)</b>	12/31/2024	ADemo_2024-12-31.*_ftw Payroll Census.csv		07/25/2024 17:00:48	Review	OK	Remove
<b>CenSpreadSheetUL Census Worksheet (Upload)</b>	12/31/2024	ADemo_2024-12-31._ftw Primary 1 Census (comp and comp after elig) .csv	4099	07/25/2024 17:06:50	Review	Approve	Remove   Make Final   Unlock

None