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

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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:

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.

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:

Edit Census Worksheet

Error loading the census worksheet. The ID in the census worksheet does not match the expected ID. Please contact your plan administrator.
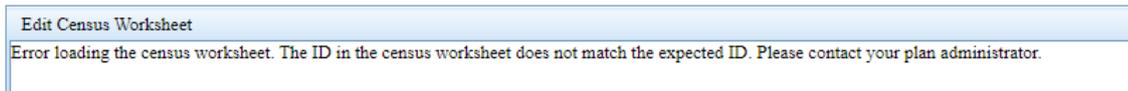
After selecting the "Invite XX to the portal", the portal user will see the option to 'Edit Census Worksheet'. Each cell of the spreadsheet is editable. Participants may also be added or removed within this screen

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

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.

Once selected the user is asked to confirm their selection:

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.*