

Compliance Portal Files

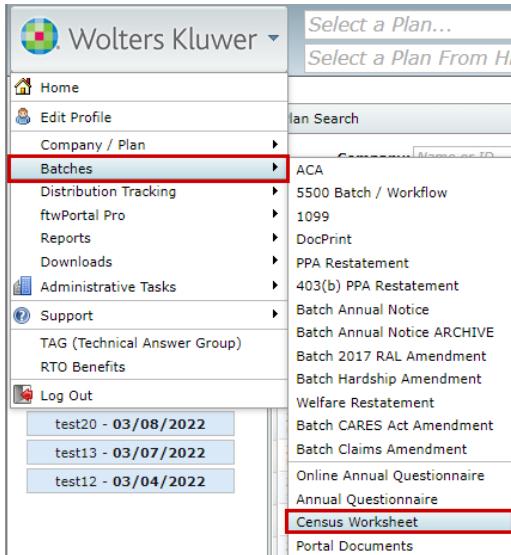
01/30/2026 10:10 am CST

*To utilize the Census functions, you must be a Compliance and ftwPortal Pro Subscriber

How to Access the Census Batch Dashboard

The Census Batch Dashboard may be accessed from multiple locations within the software:

1. Select the Wolters Kluwer Logo > Batches > Census Worksheet.



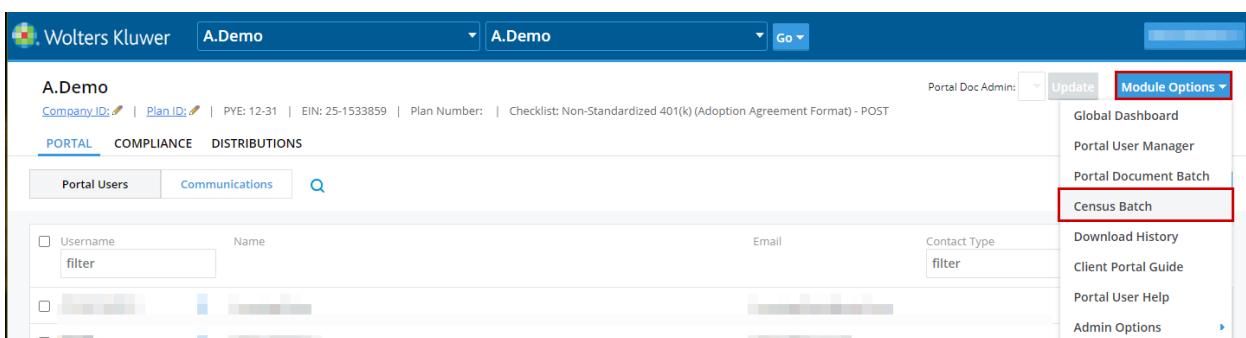
The screenshot shows the Wolters Kluwer software interface. The left sidebar has a 'Batches' menu item under 'Company / Plan' which is highlighted with a red box. The right pane shows a list of 'Census Worksheet' options, with the 'Census Worksheet' item also highlighted with a red box.

2. Navigate to the Portal Global Dashboard and select the 'Census Batches' tab.(Wolters Kluwer Logo > ftwPortal Pro > Global Dashboard)



The screenshot shows the ftwPortal Pro Global Dashboard. The top navigation bar has a 'Census Batches' tab which is highlighted with a red box. The main content area shows a 'Select A Batch' button.

3. Navigate to the Plan Level Dashboard and select Module Options> Census Batch



The screenshot shows the ftwPortal Pro Plan Level Dashboard. The top navigation bar has a 'Module Options' button which is highlighted with a red box. The 'Census Batch' option in the dropdown menu is also highlighted with a red box.

4. Navigate to the Compliance Module of a plan, within the Compliance Menu, hover over census and select 'Portal Files'. Within the menu grid, select the stack of papers in the 'Census Worksheet' row.

Wolters Kluwer

A.Demo

Select a Plan From History...

Home > Edit Company > Edit Plan > Compliance > Census > Portal Files

Updates Help

Company: A.Demo ID:

Plan: A.Demo ID:

Year End: 12/31/2023

File Type	To Portal User	From Portal User	Final	Batch
Census Worksheet	<input type="button" value="Upload"/>	<input type="button" value="Upload"/>	<input type="button" value="Upload"/>	<input type="button" value="Batch"/>
Annual Questionnaire	<input type="button" value="Upload"/>	<input type="button" value="Upload"/>	<input type="button" value="Upload"/>	<input type="button" value="Batch"/>
Participant Statements	<input type="button" value="Upload"/>			
Client Package	<input type="button" value="Upload"/>			
Online Annual Questionnaire	Edit / Publish		<input type="button" value="Batch"/>	

Compliance Menu

- Census
- Tasks
- Transactions
- Miscellaneous
- Tools/Settings
- Plan Specifications

Census Batch Dashboard Navigation

Note: A subscription to both the Compliance Software and Portal is needed to use the batch features.

The Census Batch Dashboard is located on the Global Dashboard of the Portal Module. The following features are available from the select a batch screen:

Wolters Kluwer

Select a Company... Select a Plan... Go

Portal Users Communications **Census Batches**

Module Options 1

Create Batch 2

Select A Batch

<input type="checkbox"/>	Batch Name	Batch ID	Count	Posted	Invited	Completed
<input checked="" type="checkbox"/>	CensusBatchExample	698584	3	-	-	-
<input type="checkbox"/>	Currentyeartest			06/18/2024	-	-
<input type="checkbox"/>	CustomTest.withupload			06/25/2024	-	06/26/2024
<input type="checkbox"/>	DE6327	698241	1	04/03/2024	-	-
<input type="checkbox"/>	loadprior	698394	2	04/03/2024	-	06/26/2024
<input type="checkbox"/>	prioryeartest	698552	2	06/18/2024	-	-
<input type="checkbox"/>	Rons12/31PYE	698543	1	07/22/2024	07/22/2024	-
<input type="checkbox"/>	sample	697938	1	04/03/2024	-	06/26/2024
<input type="checkbox"/>	Testing5.29	698477	1	06/10/2024	-	-
<input type="checkbox"/>	US11419	697673	2	05/25/2022	09/20/2023	03/28/2024
<input type="checkbox"/>	US13258-prioryear.term.checked	698527	2	06/12/2024	-	-
<input type="checkbox"/>	US13528-currentyear	698537	2	06/12/2024	-	-
<input type="checkbox"/>	US13528DOWN1NADPOSTED	698594	2	06/10/2024	-	-

Do with Selected 4

Current View Total: 18 / Number Selected: 0 5

Export CSV 6

- 1. Module Options:** Like the 'Portal User' and 'Communications' tab, the same Module Options button is available in the Census Batch.
- 2. Create a Batch:** Selecting this button will allow users to create a new census batch. For further steps please see the article entitled: '[How to Post a Census Batch](#)
- 3. Tricolon Menu:** Selecting the tricolon next to the individual batch will allow users to open the batch (which is also available by selecting the batch name) as well as delete a batch. Deleting a batch will remove the census posted to the portal users as well as enable the plan to be added to another batch. **Note:** If a portal user has returned a response, the response will NOT be removed with the deletion of the batch. To add this plan to a new batch, the

portal user's response will need to be removed from the plan level Compliance Portal files.

4. **Do with Selected:** There are two options included in the dropdown menu:

- **Mark a Batch as Completed:** Marking a batch as completed locks it from further edits, disables the 'Post Batch' and 'Send Invites' buttons, and prevents any changes except updating portal user permissions. Batches cannot be marked as completed if they haven't been posted but can be if invites were not sent.
Note: This action cannot be undone.
- **Download Batch Info:** This option will create a .csv export of all the information associated with the batches. This includes:
 - Batch Name
 - Batch ID
 - Plan Count
 - Year (*the plan year end as MM/DD/YYYY for each plan in the batch*)
 - Portal Users associated with the plan that have Compliance permissions.
 - Census (*the name of the census file if the batch has been posted. If not posted either Not Customized or Customized will populate*)
 - Posted Date(*the date the census was posted to the portal*)
 - Invited Date(*the date the portal user was invited to view items in the portal. Specify a Server is required*)
 - Downloaded Date(*the date the portal user downloaded the census if applicable*)
 - Completed Date(*when the batch was marked completed*)

5. **Current View/Number Selected :** This shows a count of all batches in the Census Batch Dashboard. The 'Number Selected' indicates there is a checkmark to the left of the batch. The number selected is used to show how many plans will either be marked as complete, or how many plans are selected for the 'Download Batch Info' option under 'Do with Selected'.

6. **Export CSV:** This button creates a .csv file that contains the information shown on the Census Batch>Select a Batch screen.

- Batch Name
- Batch ID
- Plan Count
- Posted Dates
- Invited Dates
- Completed Dates

How to Roll Forward Compliance Users

Rolling Forward Users for an Individual Plan

1. Select the **Portal Module** of the desired plan.
2. Click the **Menu icon** (three vertical dots) on the right-hand side of the screen.
3. Choose '**Bring Forward Compliance Portal Users**' from the menu.

Wolters Kluwer Example Company Example Company (ID: Plan ID only) Go

Example Company
Company ID: Plan ID: Plan ID only PYE: 04-30 EIN: 25-1533392 Plan Number: 001 Checklist: Non-Standardized 401(k) (Individually Designed Format) - POST

PORTAL COMPLIANCE DISTRIBUTIONS

Portal Users Communications Q

Username Name Email Contact Type

Module Options

- Upload Portal Users
- Portal User Edit Grid
- Download Current Portal User CSV File
- Portal Link
- Bring Forward Compliance Portal Users**
- Portal User Help

Rolling Forward Users for All Plans

1. Navigate to the **Global Dashboard** (WK logo > ftwPortalPro > Global Dashboard).
2. Click the **Menu icon** (three vertical dots) on the right-hand side of the screen.
3. Select '**Bring Forward Compliance Portal Users**.' This action will pull forward all users across all plans.

Wolters Kluwer Select a Company... Select a Plan... Go

Portal Users Communications Census Batches Q

Module Options

- Upload Portal Users
- Portal User Edit Grid
- Download Current Portal User CSV File
- Portal Link
- Bring Forward Compliance Portal Users**
- Portal User Help

How to Post a Batch Census Worksheet

Note: A subscription to both the Compliance Software and Portal is needed to use the batch features. Specify a Server will need to be set up within the Compliance tab of the global email settings to send a communication to portal users.

Before creating a current year census batch, it is recommended to roll forward Compliance Portal Users from the previous year. Please review '[How to Roll Forward Compliance Users](#)' for steps on completing this process.

To create a new census batch, select the 'Create Batch' button above the grid and enter a batch name:

Wolters Kluwer Select a Company... Select a Plan... Go Ron Swanson

Portal Users Communications Census Batches

Select A Batch

Batch Name Batch ID Count Posted Invited Completed

Module Options

Create Batch

Once the batch is created, a new screen will populate with Batch Options.

Batch Options:

The screenshot shows the 'Batch Options' screen of the Wolters Kluwer Compliance Portal. The top navigation bar includes 'Select a Company...', 'Select a Plan...', 'Go', and 'Module Options'. The main content area has tabs for 'Portal Users', 'Communications', and 'Census Batches' (selected). A 'Select A Batch' section shows a table with columns: Plan Name, Company Name, Year, Portal User(s), Census, Posted, Invited, Downloaded, and Response. The table displays 'No results found.' A 'Module Options' sidebar on the right contains sections for 'Default Worksheet' (with 'Upload File' and 'Load Prior Year Census' buttons), 'Delivery Option' (set to 'Download Only'), 'Email Template' (set to 'Default Census Email'), and 'Post Batch' (with a 'Send Email Invites' toggle and a 'Post Batch' button). The bottom navigation bar includes 'Do with Selected', 'Export CSV', and copyright information: '© 2007-2024 CCH Incorporated or its affiliates | License Agreement | Help Center | Contact Us'.

- 1. Select a Batch:** This button will return users to the main census batch screen to select a batch. Batches display in alphabetical order.
- 2. Edit Name:** Select the pencil next to the batch name to make alterations.
- 3. + Add Plans:** Select the plans to add to the batch. Plans that have already uploaded a census in the Compliance Portal (either through another batch or at the plan level) will not appear in the 'Add Plans' screen. Any plan year may be included (e.g., 2021, 2022, 2023) in the same batch. **+Add Plans** screen includes the following filters for easy searching (hit the **enter** key on your keyboard for the filter to be retained).
 - Plan Name/ Plan ID
 - Company Name/ Company ID
 - EIN
 - Year End (*Search for plans by Year End using the following formats: by MM/DD, MM/DD/YYYY, MM-DD, MM-DD-YYYY, YYYY-MM-DD, YYYY/MM/DD, and YYYY. **Note:** The year must be entered as YYYY, not YY.)
 - Checklist Type
 - Checklist Version
 - Administrator (listed on the Edit Plan screen for the Compliance Module)

Things to note when adding plans:

- Multiple filters may be used at the same time.
- After entering filters and selecting the plans to add, click on the **Add Selected Plans** button in the lower left-hand corner.

- The add plans grid is exportable both in the full and filtered view by selecting the Export CSV button in the bottom right-hand corner.
- Only plans that are unlocked in the compliance module will populate in the Add Plans window.



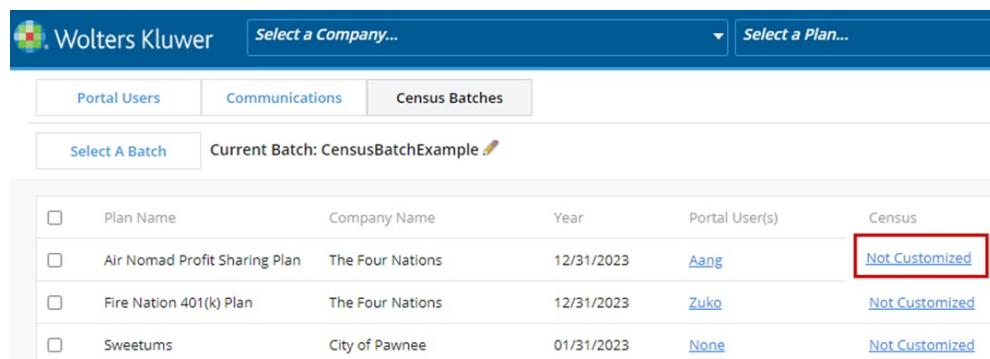
The screenshot shows the 'Compliance' section of the software. At the top, there are navigation links: Home, Edit Company, Edit Plan, Compliance, and Tasks. On the right, there is a 'Compliance Menu' with options: Census, Tasks, Transactions, Miscellaneous, Tools/Settings, and Plan Specifications. The main area displays a checklist for 'Non-Standardized 401(k) (Adoption Agreement Format) - POST'. It includes fields for Company (A. Demo Corp), Plan (A. Demo 401(k) Plan), ID (a.demo), EIN (86-7530932), PN (117), PYE (12-31), Year End (12/31/2025), and a 'Plan Year Unlocked' status with a lock icon. The 'Plan Year Unlocked' field is highlighted with a red box.

4. Default Worksheet: There are 3 options for sending the census to the Portal:

- **Upload File:** Upload a custom census that is not generated by ftwilliam.com.
- **Load Prior Year Census:** This radio dial selection will load the prior year census for the listed plans, it will contain census data and participants from a prior year. ***Please note:** if the prior year census grid selection is different than the current year grid selection in compliance, the software will enter the applicable data into the new grid format.
- **Load Current Year Census:** This radio dial selection will load the current year census for the listed plans, this will be a blank census (or will contain any data entered into the compliance module census for the current year) and will match the census grid selection in the Compliance for the current year.

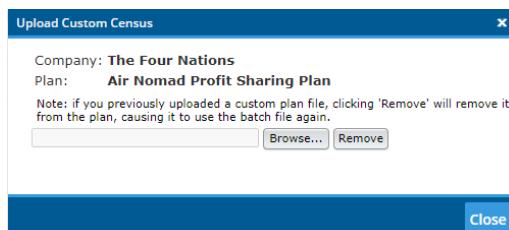
***Note: Customized Option:** in addition to selecting one of the options outlined above, users may also add custom census to specific plans.

- Select the 'Not Customized' link in the grid.
- A pop-up window with the Company and Plan Name selected will populate.
- Select the 'Browse' button and add the unique custom census template.
 - The name of the file will populate in the blank box to the left once the upload is complete.
- Select the 'Close' button and the grid will then show with 'Customized' for that plan listing.



The screenshot shows the 'Census Batches' section. At the top, there are buttons for 'Select a Company...' and 'Select a Plan...'. Below that, there are tabs for 'Portal Users', 'Communications', and 'Census Batches'. The 'Census Batches' tab is selected. A sub-menu 'Select A Batch' is open, showing 'Current Batch: CensusBatchExample'. The main table lists four plans:

Plan Name	Company Name	Year	Portal User(s)	Census
Air Nomad Profit Sharing Plan	The Four Nations	12/31/2023	Aang	Not Customized
Fire Nation 401(k) Plan	The Four Nations	12/31/2023	Zuko	Not Customized
Sweetums	City of Pawnee	01/31/2023	None	Not Customized



The screenshot shows a modal dialog titled 'Upload Custom Census'. It displays the following information:

Company: The Four Nations
 Plan: Air Nomad Profit Sharing Plan

Note: if you previously uploaded a custom plan file, clicking 'Remove' will remove it from the plan, causing it to use the batch file again.

Buttons: Browse... and Remove.

At the bottom right is a 'Close' button.

The screenshot shows a software interface for managing census batches. At the top, there are dropdown menus for 'Select a Company...' and 'Select a Plan...'. Below these are tabs for 'Portal Users', 'Communications', and 'Census Batches', with 'Census Batches' being the active tab. A sub-menu 'Select A Batch' is open, showing the current batch 'CensusBatchExample'. A table below lists four entries, each with a checkbox, a plan name, a company name, a year, a portal user, and a 'Census' status. The 'Custom Census' status for the first entry is highlighted with a red box.

<input type="checkbox"/>	Plan Name	Company Name	Year	Portal User(s)	Census
<input type="checkbox"/>	Air Nomad Profit Sharing Plan	The Four Nations	12/31/2023	Aang	Custom Census
<input type="checkbox"/>	Fire Nation 401(k) Plan	The Four Nations	12/31/2023	Zuko	Not Customized
<input type="checkbox"/>	Sweetums	City of Pawnee	01/31/2023	None	Not Customized

5. **Delivery Options:** There are 3 options for delivering the census to portal users

- **Download only:** Allows the portal user to download the census but is unable to make changes within the portal screen or re-import the information. This is often used for review purposes only. ***Not a commonly used feature.**
- **Download and Upload CSV:** Allows the portal user to download the census to make alterations and then provides an import option to send respond with the updated census. ***This will create two separate To-Do list tasks (Download and Upload.)**
- **Edit CSV on the Portal:** This allows the portal user to alter the census directly in the Portal screen.

***Note:** Portal users will automatically be updated with the delivery option permissions set by the batch. **The batch delivery options will only add permissions, it will not alter other existing permissions.** For example, if prior to a batch the user has permissions to upload and download the census only, and the batch allows them to edit the CSV on the portal, once the batch is posted, this user will have permissions to Upload/Download and complete in portal.

When plans have been added, if a Portal User is not assigned to a plan, they may be added by selecting the **None** link under the Portal User(s) column on the grid. **(A Portal User must be listed in the Portal User column in order to post the batch. If None is displayed, a warning will populate to correct prior to posting.)**

- Selecting this link will open the 'Edit Portal User Options' window.
- Select a user from the 'All Contacts' drop down.
- The user will be added to the year specified in the batch with the permissions defined by the Delivery Options for the batch.
- Ensure the 'Save Changes' button is selected.

Portal User(s): **None**

Selected Year: 01/31/2024

Portal Users: Tom Haverford (TomHaverford)

Compliance Options

Census Worksheet (Download):	No
Edit Census Worksheet:	Yes
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: allison.Bailey@wolterskluwer.com
 From Email: allison.Bailey@wolterskluwer.com
 Reply To:
 CC:
 BCC:

Email defaults are set by users with administrative privileges. You will need to contact a user with administrative privileges if you would like any of the default values changed, or if you would like the ability to specify a value for any of the fields displayed in this box.

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

Help Save Changes Export CSV

BATCH OPTIONS

Default Worksheet:
 Upload File
 Load Prior Year Census
 Load Current Year Census

Delivery Option:
 Edit CSV on the Portal

Email Template:
 Default Census Worksheet
[Edit Templates](#)

Send Email Invites

Post Batch

6. **Email Template:** Here the template sent to the portal user may be viewed/edited or a new template may be selected. This template will automatically default to the selected template in the Global E-mail Settings> Compliance Tab> Census Worksheet Default.

- To select a pre-existing e-mail template, select the drop-down menu. This menu will populate with all of the available compliance default e-mail options:

Email Template:

Default Census Email

Default Annual Questionnaire Email

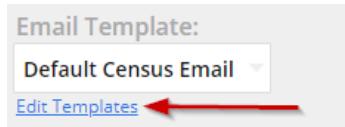
Default Census Email

Default Census Worksheet Email

Default Client Package Email

Default Participant Statements Email

- To alter, edit, or create a new template for this batch, select the Edit Templates Link directly below the 'Email Template' drop-down.



- This will open the 'Email Template Editor' for the Compliance module to add or edit templates. For additional guidance on this feature please review the article entitled: '[How to Edit Or Clone Default E-mail Templates.](#)'

Email Template Editor

Email Templates

Module: **Compliance**

Template	Modules	Last Change
Default Annual Questionnaire Email	Compliance	04/08/2022 9:12 AM
Default Census Email	Compliance	04/08/2022 9:12 AM
Default Census Worksheet Email	Compliance	07/22/2024 3:16 PM
Default Client Package Email	Compliance	04/08/2022 9:12 AM
Default Participant Statements Email	Compliance	04/08/2022 9:12 AM

Edit Template: Default Census Worksheet Email

Subject: !@!PlanName Census Worksheet Ready

!@!CustomLanguage The census worksheet for !@!PlanName is ready for your response. You can log on at:
!@!loginlink

You can log in using the following credentials:

Username: !@!Username
Password: !@!Password

Thank You

HTML Email Placeholder List

Email: Enter test email address Save and Send Test Email Save Template Revert to Default

Close

7. Post Batch: Selecting this button will post the Census Worksheet to the User Portal. If the '**Send Email Invites**' toggle is **green**, an invitation (using the **Email Template** selected for the batch) will also be sent to the Portal Users associated with the plan.

8. Do with Selected: Based on the status of the batch, the 'Do with Selected' options will vary as described below:

- Prior to posting** a batch, the 'Do with Selected' option allows a user to select all or individual plans and remove them from the batch.
- After posting** a batch, the 'Do with Selected' option allows a user to:
 - Remove Plan(s)**- when a batch has been posted and removed from the batch a confirmation window will populate alerting that the census posted to the users portal, as well as posted in the compliance module will be removed. However, responses from the portal user will remain unaffected and will still be both in the compliance module and associated with this plan if added to another batch unless manually removed.
 - Send E-mail Invites**- allows users to select specific plans to send initial invites to, or re-invite to complete the census without sending invitations to the entire batch of plans.
 - Download Posted Census**- selecting this option will export the census that was posted to the user portal in bulk. These are downloaded into a zip file with the following naming convention: 'NameOfBatch Posted Census'.
 - Download Census Responses**- selecting this option will export the census responses from portal users. These are downloaded into a zip file with the following naming convention: 'NameOfBatch Census Received'.

9. **Export CSV:** The export CSV option from below the grid will export all the data within the census batch grid into an editable .csv file.

Enforcing .CSV Format for Census File Uploads

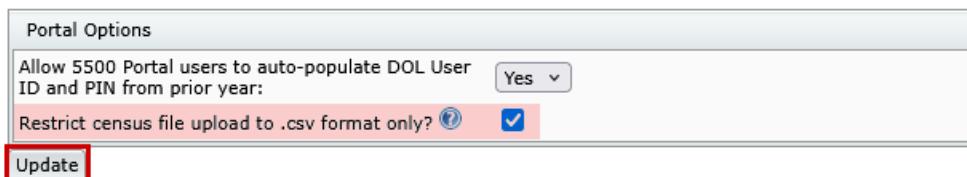
This guide outlines the steps to require .CSV file format for census uploads—both when sending census files to portal users and when receiving census uploads from them. This ensures consistency, reduces processing errors, and aligns with system requirements.

Enforcing .CSV Format for Internal Users

This setting is only accessible to the Master User on the account.

Access Account Profile Settings

- Navigate to **Wolters Kluwer Logo > Administrative Tasks > Account Profile**
- On the **Account Profile** page, locate the **Portal Options** section.



Portal Options

Allow 5500 Portal users to auto-populate DOL User ID and PIN from prior year? Yes

Restrict census file upload to .csv format only?

Update

Enable Restriction

- Check the box labeled: **Restrict census file upload to .csv format only?**
- Once selected:
 - Users will be **unable to upload census files** in any format other than .CSV.
 - If a non-CSV file is uploaded, the system will display the following error:
➢ **Error:** The file format selected is not acceptable. Uploaded files must be in .csv format to be submitted. Please correct and re-upload.

Enforcing .CSV Format for Portal Users

This option is accessible by Users with Designated Admin permissions.

Access Portal Branding Settings

- Navigate to **Wolters Kluwer Logo > Administrative Tasks > Portal/Workflow> Portal Branding**

Portal Branding

Portal Welcome Message height in pixels (default: 150):

Use Custom Welcome Message?

Input custom welcome message below:

Welcome to the Portal

Please select a plan from the top or an option from the left.

Footer Text:

Portal Password Reminder Text:

Mask Portal User Help? [?](#)

Mask 5500 Portal Change Name button? [?](#)

Add "I'm done" checkboxes to Portal ToDo list? [?](#)

Disable Cookies on Portal User Login Screen? [?](#)

Portal Edit Census Worksheet Instructions: [?](#)

Click on a cell to edit the cell's contents. New rows are added automatically while editing the last row in the table. Be sure and scroll to the right to avoid missing any columns you need to complete. When you are done editing, click the "I'm Done" button to submit the census worksheet.

Enable Census Validation? [?](#)

Restrict census file upload to .csv format only? [?](#)

Close **Save Changes**

Enable Restriction

- In the Portal Branding section, check the box: “**Restrict census file upload to .csv format only?**”
- Once selected:
 - Portal users will be **restricted to uploading only .CSV files**.
 - If a non-CSV file is uploaded, they will see:

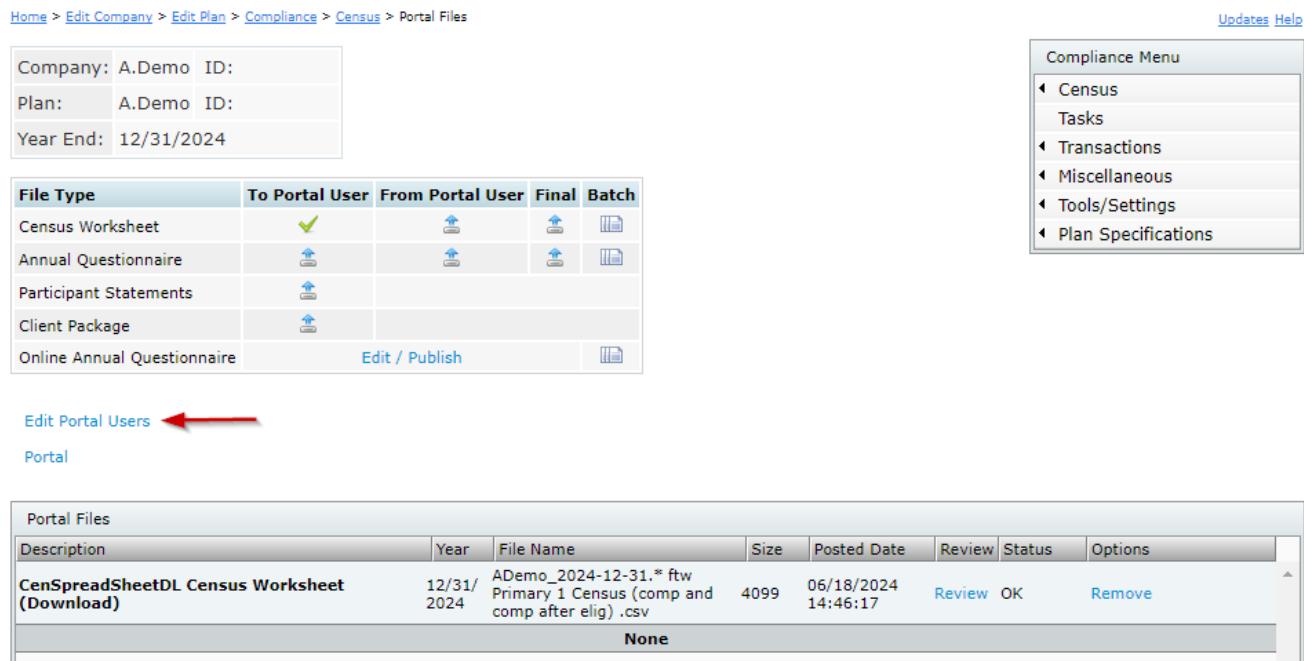
> Error: The file format selected is not acceptable. Uploaded files must be in .csv format to be submitted.
Please correct and re-upload.

Division-Specific Configuration

- Each division can configure its own settings.
- If a portal user is associated with multiple divisions, their settings will default to the **first company listed** in the **Plan Association** drop down on the **Edit Portal User** page.

Access to Edit the Census Worksheet within the Portal

When sending a census to be completed in the portal, portal user permissions can be managed directly through the **Compliance Module** via the Compliance Menu>Census> Portal Files, Edit Portal Users:



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
- ◀ Transactions
- ◀ Miscellaneous
- ◀ Tools/Settings
- ◀ Plan Specifications

File Type	To Portal User	From Portal User	Final	Batch
Census Worksheet	✓	<input type="button" value="Upload"/>	<input type="button" value="Download"/>	<input type="button" value="Batch"/>
Annual Questionnaire	<input type="button" value="Upload"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Batch"/>
Participant Statements	<input type="button" value="Upload"/>			
Client Package	<input type="button" value="Upload"/>			
Online Annual Questionnaire		<input type="button" value="Edit / Publish"/>		

[Edit Portal Users](#) ←

Portal

Portal Files

Description	Year	File Name	Size	Posted Date	Review	Status	Options
CenSpreadSheetDL Census Worksheet (Download)	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
None							

Enabling Census Editing in the Portal

To allow a portal user to edit the census directly within the portal:

- Set **Edit Census Worksheet** to Yes on the Compliance tab.
- (Optional) Set **Census Worksheet (download)** and **Census Worksheet (upload)** to Yes to allow .CSV file download and upload.
- Select **Save Changes** before closing the screen.

Edit Portal User Options

All Contacts: Aerith Gainsborough (AerithG)

A Demo - Compliance Permissions
Selected Year: 12/31/2025

Portal Users: Aerith Gainsborough (AerithG)

Compliance Options

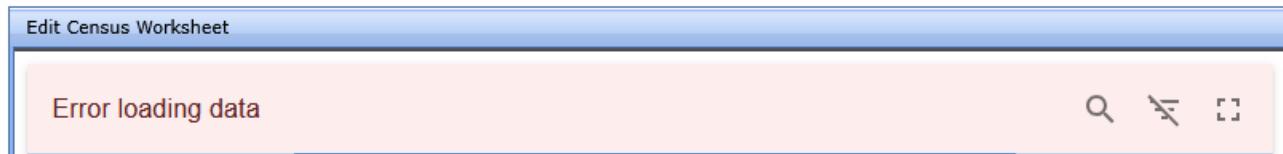
Census Worksheet (Download):	No
Edit Census Worksheet:	Yes
Census Worksheet (Upload):	No
Annual Questionnaire (Download):	No
Annual Questionnaire (Upload / Complete Online):	No
Participant Statements (Download):	No
Client Package (Download):	No

Email Settings

From Name: Allison.Bailey@wolterskluwer.com

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

NOTE: The census template must match a grid available in the Compliance module dropdown. If not, an error will appear when attempting to open the worksheet.



Portal User Experience

After being invited to the portal, the user will see the **Edit Census Worksheet** option. Each cell in the worksheet is editable, and participants can be added or removed directly on the screen. For a detailed explanation of the grid features please see [Edit Census Worksheet Grid](#).

A screenshot of the 'Edit Census Worksheet' grid interface. On the left, a sidebar shows navigation links: 'Plan Home', 'Inbox (3)', 'ToDo List (3)', 'Documents', and 'Edit Census Worksheet', with the last one highlighted by a red box. The main area is titled 'Edit Census Worksheet' and contains a data grid. The grid has columns for 'Actions', 'Last Name', 'First Name', 'SSN', 'Birth Date', 'Date of Hire (1)', and 'Date of Hire (2)'. Each row represents a participant with these fields. Below the grid are buttons for 'Download / Print', 'Validate', and 'Upload'. A note at the bottom says 'Note: Be sure to save changes periodically in case of timeout.' and buttons for 'Save Changes' and 'I'm Done'.

Edit Census Worksheet Grid

When editing access is enabled, selecting **Edit Census Worksheet** (via button or to-do list) opens a grid for direct data entry into the census template.

Plan Home
Inbox (0)
To Do List (2)

Download Census Worksheet
Upload Census Worksheet
Edit Census Worksheet

Edit Census Worksheet

Actions	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of
<input type="button" value="Filter by ..."/>	<input type="text" value="Last Name"/>	<input type="text" value="First Name"/>	<input type="text" value="SSN"/>	<input type="text" value="Birth Date"/>	<input type="text" value="Date of Hire (1)"/>	<input type="text" value="Date of"/>
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<input type="button" value="Last Name"/>	<input type					

Grid Overview

Top Toolbar Features

1. Search (Magnifying Glass)

Opens a search bar that scans the entire grid for matching values. Useful for quickly locating participants or data points without filtering by column.

Edit Census Worksheet

Search
X

Actions	Last Name	First Name	SSN	Birth Date	Show/Hide search	Date of Hire
	Filter by ... X	Filter by ... X	Filter by ... X	Filter by ... X	Filter by D... X	Filter by D...
Delete	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth
Delete	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth

2. Show/Hide Filters (Funnel Icon)

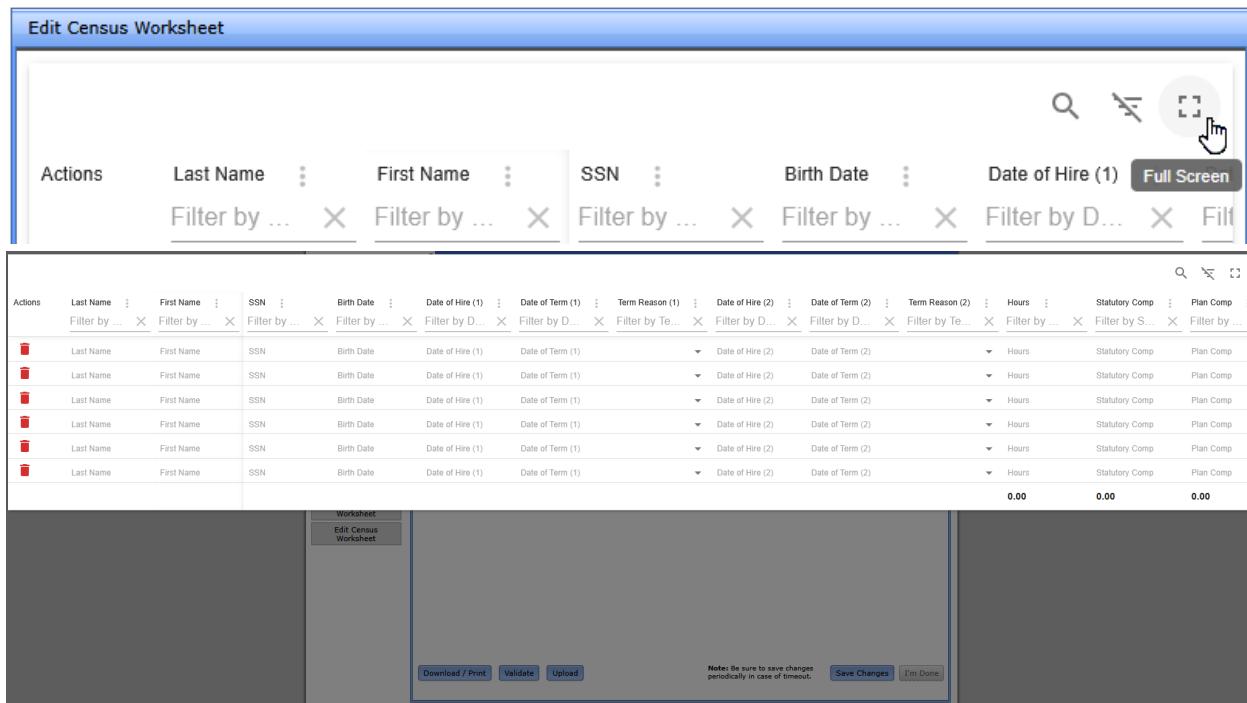
Toggles visibility of column-specific filter fields. These are enabled by default and allow for more targeted filtering within individual columns.



The screenshot shows the 'Edit Census Worksheet' interface. At the top, there is a toolbar with various icons. Below the toolbar, there is a row of columns with filter buttons. A red box highlights the 'Last Name' column, and a hand cursor is pointing at the 'Show/Hide filters' button for that column. The columns shown are Actions, Last Name, First Name, SSN, Birth Date, and Date of Hire (1). Below this row, there is a list of records with columns for Last Name, First Name, SSN, Birth Date, and Date of Hire (1).

3. Full Screen View

Expands the grid to fill the screen, making it easier to view and edit multiple columns. Search and filter tools remain accessible. Select again to return to standard view.



The screenshot shows the 'Edit Census Worksheet' interface in full screen mode. The interface is identical to the standard view, but the grid is larger and occupies most of the screen. The 'Full Screen' button is highlighted with a red box and a hand cursor. The columns shown are Actions, Last Name, First Name, SSN, Birth Date, Date of Hire (1), and Date of Term (1). Below this row, there is a list of records with columns for Last Name, First Name, SSN, Birth Date, Date of Hire (1), Date of Term (1), Term Reason (1), Date of Hire (2), Date of Term (2), Term Reason (2), Hours, Statutory Comp, and Plan Comp. The bottom of the screen shows standard worksheet controls: Download / Print, Validate, Upload, Note (about saving changes), Save Changes, and I'm Done.

Column Features

Each column in the grid also contains additional features.

Edit Census Worksheet

Actions	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Birth

Note: Be sure to save changes periodically in case of timeout.

4. Sort by Column Name:

Hover near a column name to reveal a sort arrow.

- First click: **Ascending** order (*If the census grid contains multiple blank rows, those rows will be moved to the top when put in ascending order.).
 - Second click: **Descending** order.
 - Third click: **Clears** sorting.
 - Only one column can be sorted at a time.

5. Column Actions Menu (Tricolon Icon):

- **Sort:** duplicate functionality of the **Sort by Column Name** (sort ascending, descending, or clear).
 - **Filter:** Enable or clear column-specific filters.
 - **Pin Left/Right:** Keeps selected columns visible while scrolling. First and Last Name columns are pinned left by default. Pinned columns are marked with a dividing line.

Edit Census Worksheet

Actions	Last Name	First Name	Birth Date	Date of Hire (1)	Date	SSN
	Baker	Betsy	Birth Date	Date of Hire (1)	Date	111-00-1234
	Raimi	Sam	Birth Date	Date of Hire (1)	Date	111-00-1235
	Campbell	Bruce	Birth Date	Date of Hire (1)	Date	111-00-1236
	Sandweiss	Ellen	Birth Date	Date of Hire (1)	Date	111-00-1237
	Raimi	Ted	Birth Date	Date of Hire (1)	Date	111-00-1238
	Last Name	First Name	Birth Date	Date of Hire (1)	Date	SSN

Pinned columns are for convenience only and do not affect the exported file. Refreshing the page or uploading a new file resets the view to default (Name columns pinned left). If Name columns are not included in the template, no columns are pinned by default.

- **Hide Column / Show All Columns:**

Temporarily hide columns for a cleaner view. To restore, use **Show All Columns** from another **Column Actions Menu (Tricolon Icon)** or select **Save Changes** and refresh the page.

6. Filter by Column Name

Each column includes a filter field (when enabled) to narrow down entries. Filters apply only to the selected column and support partial matches. This tool can be used alongside the global search tool.

Actions	Last Name	First Name
	Campbell	Bruce

7. Delete Row (Trashcan Icon)

Removes a participant row. If all rows are deleted, refreshing the page restores blank rows. Always save before refreshing to avoid losing data.

Grid Footer (Below the Grid)



8. Download/Print

Exports the current census grid as a .csv file. This file can be used for:

- Record-keeping or offline review.
- Making bulk edits outside the portal.
- Converting an existing census into the correct format for re-import
- The exported file can be re-uploaded using the **Upload** feature (see below).

9. Validate (Optional)

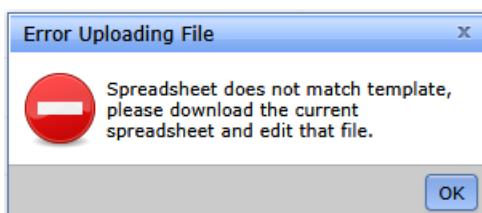
If enabled through Portal Branding, the **Validate** button runs basic edit checks on the census data before submission. These checks help ensure required fields are completed and formatting is correct.

- If errors or warnings are found, they must be resolved before submission is allowed.
- For more information, refer to the Census Validation section of the guide.

10. Upload

Allows a completed or edited census file to be re-imported into the grid.

- The uploaded file must match the original template format exactly.
- If the format does not match, an error message will appear and the upload will fail.



- This feature is especially useful after making bulk updates in the exported .csv file.

11. Save Changes

The grid does not auto-save. It is essential to manually save changes frequently to avoid losing data due to:

- Internet connectivity issues.
- Session timeouts.
- Accidental page refreshes.

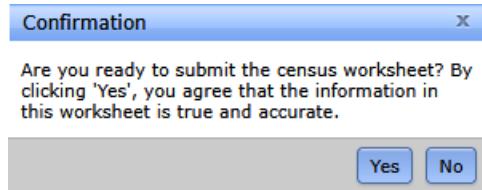
12. I'm Done

This button submits the completed census to the TPA and moves it to the Compliance Portal files. It remains disabled until one of the following conditions is met, depending on Portal Branding settings:

- All columns in the grid have been scrolled through and completed.

- If validation is enabled, all errors and warnings must be cleared using the **Validate** button.

Once enabled, selecting **I'm Done** opens a confirmation window. Choosing **Yes** finalizes the submission.



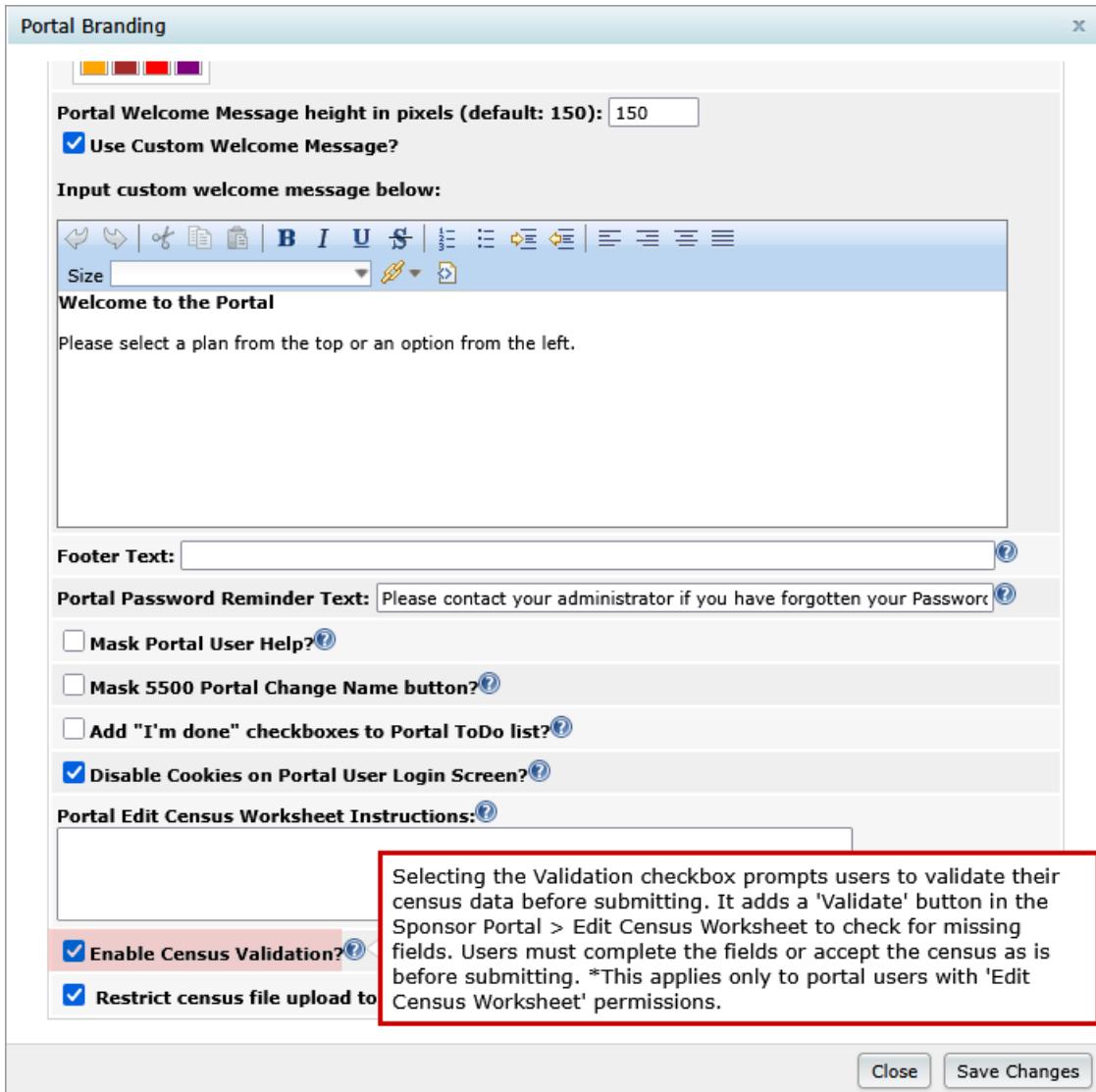
Census Validation

An optional census validation feature is available for the Edit Census Worksheet, requiring basic edit checks to be completed before census data can be submitted.

When Validation Is Available

Validation is active only when both of the following conditions are met:

- The **Edit Census Worksheet** permission is set to **Yes**
- Validation is enabled in **Portal Branding**
(Wolters Kluwer Logo> Administrative Tasks > Portal/Workflow > Portal Branding)



How Validation Works

Validation must be run before Portal Users can select the **I'm Done** button and submit the census. Selecting **Validate** triggers a review of the data and opens a results window showing any issues.

[Plan Home](#)
[Inbox \(3\)](#)
[ToDo List \(1\)](#)
[Documents](#)

Edit Census Worksheet

Actions	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Term (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Term (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Term (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Term (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Term (2)

[Download / Print](#) Validate [Upload](#)
Note: Be sure to save changes periodically in case of timeout.
[Save Changes](#) [I'm Done](#)

Instructions

Column Description

Last Name Enter the employee's last name
First Name Enter the employee's first name
SSN Enter the employee's social security number
Birth Date Enter the employee's date of birth
Date of Hire (1) Select first employment status in plan year
Date of Term (1) Enter first employment status date (effective date)
Term Reason (1) Indicate reason for termination (first employment status in plan year)
Date of Hire (2) Select second employment status in plan year
Date of Term (2) Second employment status in plan year (effective date)

Validation Results

Results are grouped into two categories:

- **Errors (Must** be corrected before submission)
- Triggered when required fields are missing or invalid:
 - Last Name
 - First Name
 - Social Security Number
 - Date of Birth
- **Warnings** (Can be acknowledged and bypassed)
 - Triggered when optional fields are blank or contain zero values. Each warning includes an **Acknowledgement checkbox** that must be selected to proceed.
 - Date of Hire
 - Hours
 - Compensation
 - Term Reason (*only if Termination Date is entered*)

Validation Results															
Errors/Warnings Found															
<input type="checkbox"/> Acknowledge Hours Worked is blank or zero for 1 participant(s) <input type="checkbox"/> Acknowledge Statutory Compensation is blank or zero for 1 participant(s) <input type="checkbox"/> Acknowledge Termination Reason is not provided for 2 participant(s)															
▼ Row 1 - Brenatto Yeza															
<table border="1"> <thead> <tr> <th>Column Header</th><th>Severity</th><th>Value</th><th>Message</th></tr> </thead> <tbody> <tr> <td>Birth Date</td><td>Error</td><td></td><td>Birth Date is a required field and cannot be blank</td></tr> <tr> <td>Term Reason (1)</td><td>Warning</td><td></td><td>Termination Reason is not provided</td></tr> </tbody> </table>				Column Header	Severity	Value	Message	Birth Date	Error		Birth Date is a required field and cannot be blank	Term Reason (1)	Warning		Termination Reason is not provided
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▼ Row 2 - Clay Caduceus															
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Column Header	Severity	Value	Message												
Hours	Warning	0	Hours Worked is blank or zero												
Statutory Comp	Warning	0	Statutory Compensation is blank or zero												
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Column Header	Severity	Value	Message												
Term Reason (1)	Warning		Termination Reason is not provided												

After Validation

- Portal users must Fix all **Errors**, then select **Validate** again.
- If **Warnings** remain, select the appropriate **Acknowledgement** check boxes.
- Close the validation window using the **X** in the upper-right corner. [Acknowledgements are saved automatically.](#)

Validation Results															
No Errors Found															
<input checked="" type="checkbox"/> Acknowledge Hours Worked is blank or zero for 1 participant(s) <input checked="" type="checkbox"/> Acknowledge Plan Compensation is blank or zero for 1 participant(s) <input checked="" type="checkbox"/> Acknowledge Statutory Compensation is blank or zero for 1 participant(s)															
X															
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Hours	Warning	0	Hours Worked is blank or zero												
Statutory Comp	Warning		Statutory Compensation is blank or zero												
▼ Row 3 - Dosal Babenon															
<table border="1"> <thead> <tr> <th>Column Header</th><th>Severity</th><th>Value</th><th>Message</th></tr> </thead> <tbody> <tr> <td>Plan Comp</td><td>Warning</td><td></td><td>Plan Compensation is blank or zero</td></tr> </tbody> </table>				Column Header	Severity	Value	Message	Plan Comp	Warning		Plan Compensation is blank or zero				
Column Header	Severity	Value	Message												
Plan Comp	Warning		Plan Compensation is blank or zero												

Note: If additional changes are made to the census after validation, the process must be repeated before **I'm Done** becomes available.

Submitting the Census

Once validation is complete, portal users may select **I'm Done** in the lower-right corner of the grid. A confirmation window will appear; selecting **Yes** submits the census to the TPA and places it in the Compliance Portal files.

How to Push the Census from Upload to Final

Once the (Upload) census is populated and approved, the "Make Final" link will become active.

Note: The link will not be active if the (Upload) census has not been approved or if the (Final) census already appears in

the Active Documents box.

Portal Files							
Description	Year	File Name	Size	Posted Date	Review	Status	Options
CenSpreadSheetDL Census Worksheet (Download)	12/31/2024	ADemo_2024-12-31.* ftw Primary 1 Census (comp and comp after elig).csv		07/25/2024 17:12:30	Review OK	Remove	
CenSpreadSheetUL Census Worksheet (Upload)	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							

Once approved, select the “Make Final” link.

Portal Files							
Description	Year	File Name	Size	Posted Date	Review	Status	Options
CenSpreadSheetDL Census Worksheet (Download)	12/31/2024	ADemo_2024-12-31.* ftw Primary 1 Census (comp and comp after elig).csv		07/25/2024 17:12:30	Review OK	Remove	
CenSpreadSheetUL Census Worksheet (Upload)	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 OK	Remove Make Final Unlock	
None							

The census file will automatically populate as “Final”. Once made Final, there is a link that will populate below the grid that will allow you to push the portal File Census to the Main grid Census for testing purposes.

Portal Files							
Description	Year	File Name	Size	Posted Date	Review	Status	Options
CenSpreadSheetDL Census Worksheet (Download)	12/31/2024	ADemo_2024-12-31.* ftw Primary 1 Census (comp and comp after elig).csv		07/25/2024 17:12:30	Review OK	Remove	
CenSpreadSheetUL Census Worksheet (Upload)	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 OK	Remove Make Final Unlock	
CenSpreadSheetFinal Census Worksheet (Final)	12/31/2024	ADemo_2024-12-31._ ftw Primary 1 Census (comp and comp after elig).csv	4099	07/25/2024 17:15:39	Review OK	Remove	
None							

[Import Final Census to Compliance System](#) - File must contain 5 header rows and census information only. Participants on the current year census (if any) with no upload record will be deleted.

Please Note: File must contain 5 header rows and census information only. Participants on the current year census (if any) with no upload record will be deleted.

How to Upload a Batch Annual Questionnaire to the Portal (Compliance User)

Note: You do have to subscribe to the Compliance Software, ‘ftwPortal Pro’, and have ‘Specify a Server’ set up to post annual questionnaire batches. Please also know this is an Annual Questionnaire that is uploaded from your files to the

software, and not an item that is generated by ftwilliam.com. These files will populate in the Portal Files of the Compliance Module.

1. Select **Annual Questionnaire** from the **Batches** drop-down list on the **Select Company** screen.

2. You have the option to edit a cover letter by clicking on **Edit Settings**.

Note: Any changes made here will also update the default email setting under the “Admin” tab for “Annual Questionnaire”.

3. ‘Create New Batch’.

4. You will be directed to the ‘Edit Batch’ screen where you can:

1. **Edit Name:** Modify your batch name.

2. **Browse:** Upload the annual questionnaire you want to post to the portal.

3. **Add Plans:** Plans will display based on the current plan year end and if they are not in another batch.

a. When plans have been added, you are able to add/update portal users assigned to the plan with ‘Annual Questionnaire (Download):’ and ‘Annual Questionnaire’(Upload / Complete Online):’ permissions.

b. You are also able to ‘Customize’ the Annual Questionnaire for each of the plans within the batch.

5. **Post Batch:** Sends the Annual Notice to the portal. If the ‘and send invites’ box is checked, you will be able to post the batch and send the invites to the portal users at one time.
