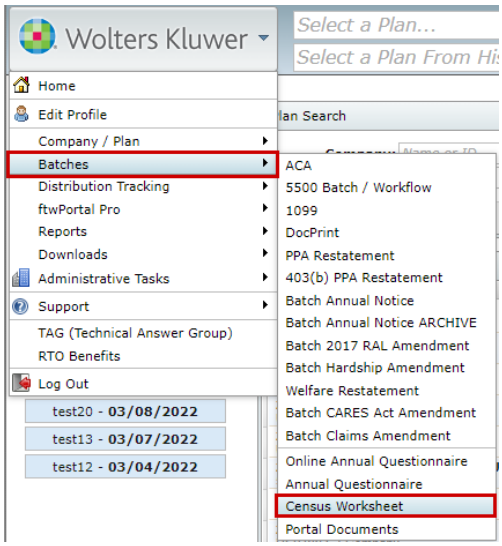
How to Access the Census Batch Dashboard

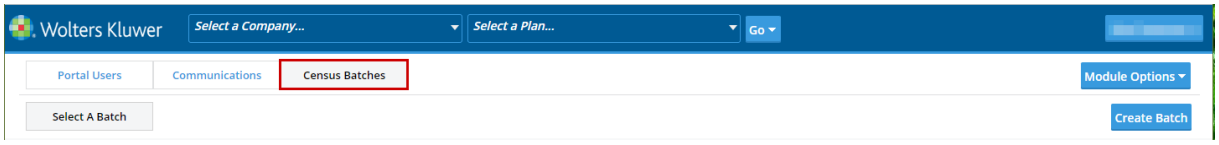
07/31/2024 1:00 pm CDT

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

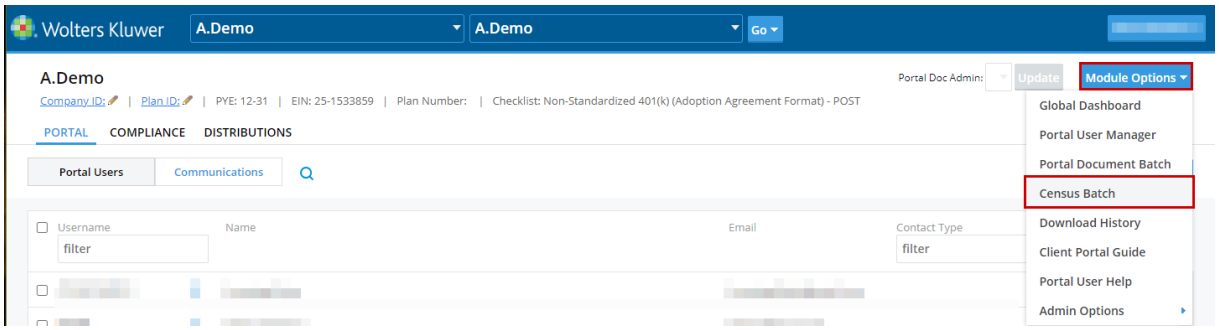
1. Select the Wolters Kluwer Logo > Batches > Census Worksheet.



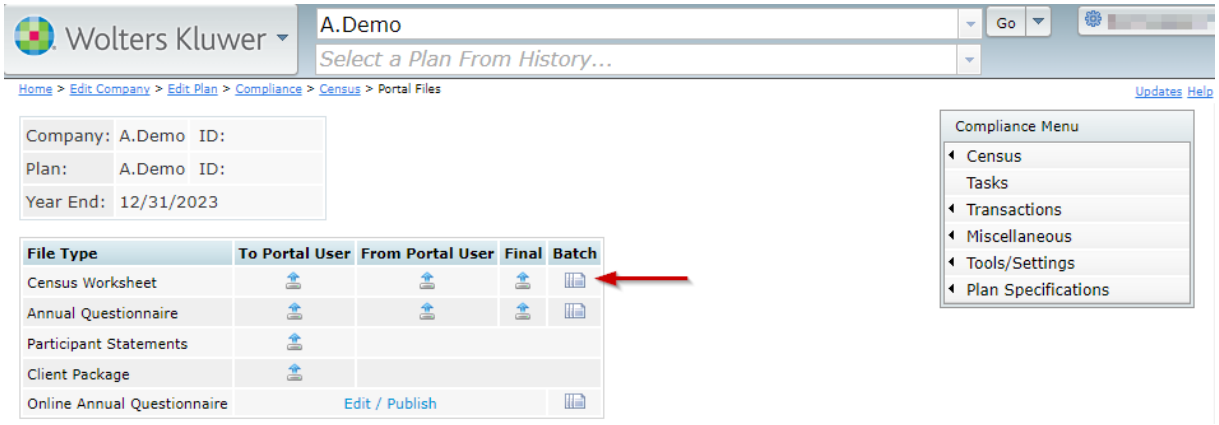
2. Navigate to the Portal Global Dashboard and select the 'Census Batches' tab.*(Wolters Kluwer Logo > ftwPortal Pro > Global Dashboard)*



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



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
Go
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
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