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)

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Portal Users	Co	mmunications	Census Batches				Module Options -
Select A Batch							Create Batch

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

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A.Demo Company ID: // Plan ID: 4 PORTAL COMPLIANCE	PYE: 12-31 EIN: 25-1533859 Plan Number DISTRIBUTIONS	: Checklist: Non-Standardized 401(k) (Adoption	Agreement Format) - POST	Portal Doc Admin: 💌 U	odate Module Options ▼ Global Dashboard Portal User Manager
Portal Users Co	ommunications Q				Portal Document Batch
					Census Batch
Username	Name		Email	Contact Type	Download History
filter				filter	Client Portal Guide
	in the second				Portal User Help
					Admin Options

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.

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Home > Edit Cor	mpany > <u>Edit</u>	Plan >	Compliance >	Censu	<u>is</u> > Portal Files		
Company:	A.Demo	ID:					
Plan: Year End:	A.Demo 12/31/20	ID: 023					
File Type			To Portal	User	From Portal User	Final	Batch
Census Worl	ksheet		1		^	2	
Annual Ques	stionnaire		\$		2	2	
Participant Statements 😩		1					
Client Packa	ge		2				
Online Annu	al Question	naire		E	dit / Publish		