Census Validation

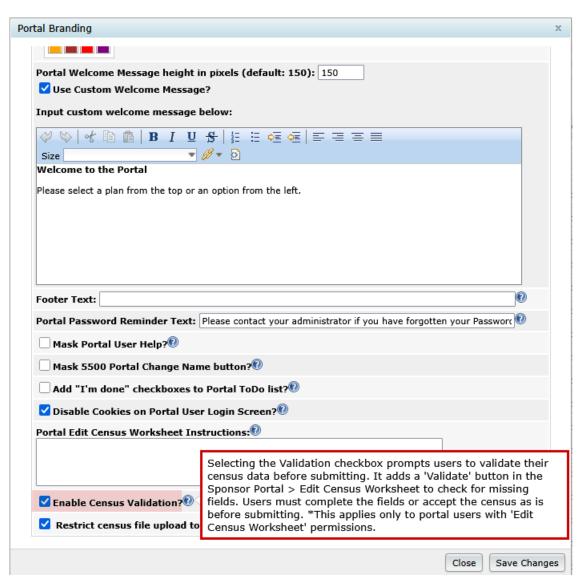
08/04/2025 11:39 am CDT

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:

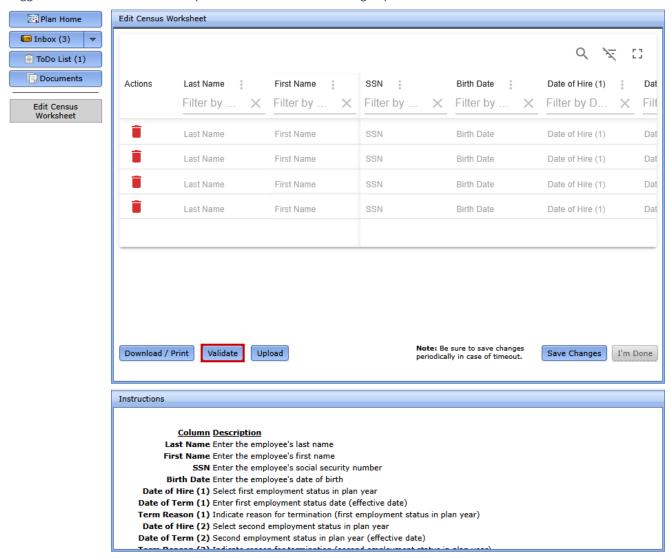
- The Edit Census Worksheet permission is set to Yes
- Validation is enabled in Portal Branding (Wolters Kluwer Logo> Administrative Tasks > Portal/Workflow > Portal Branding)



How Validation Works

Validation must be run before Portal Users can select the I'm Done button and submit the census. Selecting Validate

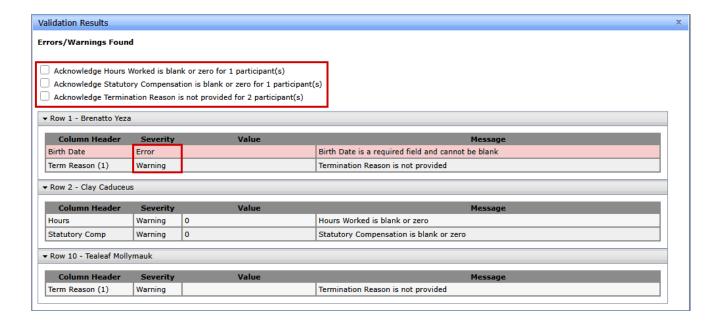
triggers a review of the data and opens a results window showing any issues.



Validation Results

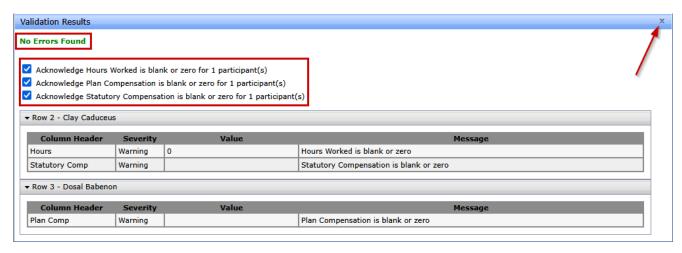
Results are grouped into two categories:

- 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)



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.



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.