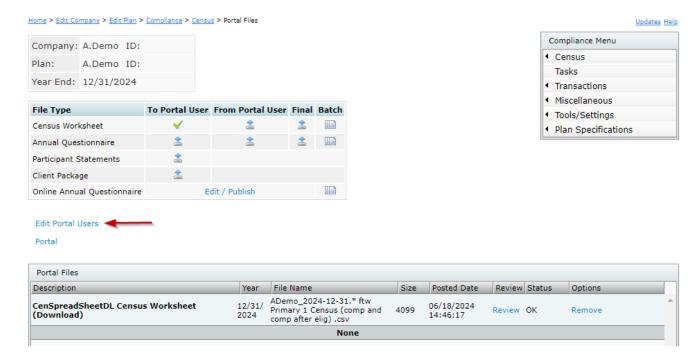# Access to Edit the Census Worksheet within the Portal
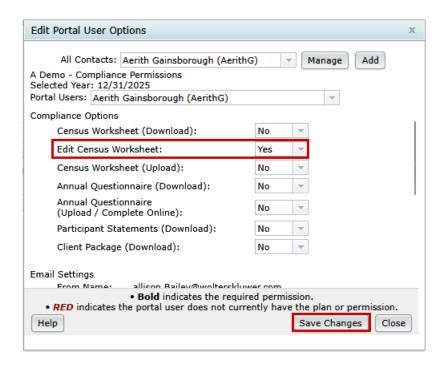
08/04/2025 12:23 pm CDT

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:
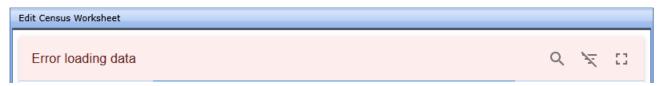

Enabling Census Editing in the Portal

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.

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.

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	Documents

Edit Census Worksheet

Edit Census Worksheet

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Actions	Last Name ⋮	First Name ⋮	SSN ⋮	Birth Date ⋮	Date of Hire (1) ⋮	Dat
	Filter by ... ✕	Filter by ... ✕	Filter by ... ✕	Filter by ... ✕	Filter by D... ✕	Filt
🗑	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
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🗑	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat

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