

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:

Home > [Edit Company](#) > [Edit Plan](#) > [Compliance](#) > [Census](#) > Portal Files


Company: A.Demo ID:
Plan: A.Demo ID:
Year End: 12/31/2024

File Type	To Portal User	From Portal User	Final	Batch
Census Worksheet	✓	⬆	⬆	📄
Annual Questionnaire	⬆	⬆	⬆	📄
Participant Statements	⬆			
Client Package	⬆			
Online Annual Questionnaire	Edit / Publish			📄

Updates Help

Compliance Menu

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

[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)

Manage

Add

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@wvlterskluer.com

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

• **Bold** indicates the required permission.

Help

Save Changes

Close

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.

Edit Census Worksheet

Error loading data

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](#).

Plan Home

Inbox (3)

ToDo List (3)

Documents

Edit Census Worksheet

Edit Census Worksheet

Search

Filter

Fullscreen

Actions	Last Name Filter by ... X	First Name Filter by ... X	SSN Filter by ... X	Birth Date Filter by ... X	Date of Hire (1) Filter by D... X	Dat
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Dat
	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