

Enforcing .CSV Format for Census File Uploads

01/30/2026 10:10 am CST

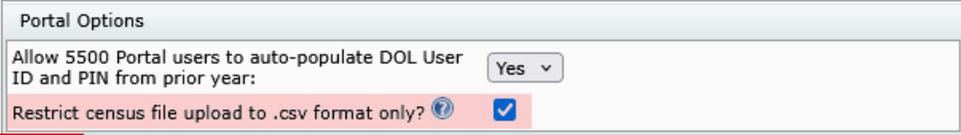
This guide outlines the steps to require .CSV file format for census uploads—both when sending census files to portal users and when receiving census uploads from them. This ensures consistency, reduces processing errors, and aligns with system requirements.

Enforcing .CSV Format for Internal Users

This setting is only accessible to the Master User on the account.

Access Account Profile Settings

- Navigate to **Wolters Kluwer Logo > Administrative Tasks > Account Profile**
- On the **Account Profile** page, locate the **Portal Options** section.



Portal Options

Allow 5500 Portal users to auto-populate DOL User ID and PIN from prior year: Yes ▾

Restrict census file upload to .csv format only?

Update

Enable Restriction

- Check the box labeled: **Restrict census file upload to .csv format only?**
- Once selected:
 - Users will be **unable to upload census files** in any format other than .CSV.
 - If a non-CSV file is uploaded, the system will display the following error:
 - > **Error:** The file format selected is not acceptable. Uploaded files must be in .csv format to be submitted. Please correct and re-upload.

Enforcing .CSV Format for Portal Users

This option is accessible by Users with Designated Admin permissions.

Access Portal Branding Settings

- Navigate to **Wolters Kluwer Logo > Administrative Tasks > Portal/Workflow > Portal Branding**

Portal Branding

Portal Welcome Message height in pixels (default: 150): 150

Use Custom Welcome Message?

Input custom welcome message below:

Size

Welcome to the Portal

Please select a plan from the top or an option from the left.

Footer Text:

Portal Password Reminder Text:

Mask Portal User Help?

Mask 5500 Portal Change Name button?

Add "I'm done" checkboxes to Portal ToDo list?

Disable Cookies on Portal User Login Screen?

Portal Edit Census Worksheet Instructions:

Click on a cell to edit the cell's contents. New rows are added automatically while editing the last row in the table. Be sure and scroll to the right to avoid missing any columns you need to complete. When you are done editing, click the "I'm Done" button to submit the census worksheet.

Enable Census Validation?

Restrict census file upload to .csv format only?

Close Save Changes

Enable Restriction

- In the Portal Branding section, check the box: "Restrict census file upload to .csv format only?"
- Once selected:
 - Portal users will be restricted to uploading only .CSV files.
 - If a non-CSV file is uploaded, they will see:
 - > **Error:** The file format selected is not acceptable. Uploaded files must be in .csv format to be submitted. Please correct and re-upload.

Division-Specific Configuration

- Each division can configure its own settings.
- If a portal user is associated with multiple divisions, their settings will default to the first company listed in the Plan Association drop down on the Edit Portal User page.