

Census Batch Dashboard Navigation

08/04/2025 12:05 pm CDT

Note: A subscription to both the Compliance Software and Portal is needed to use the batch features.

The Census Batch Dashboard is located on the Global Dashboard of the Portal Module. The following features are available from the select a batch screen:

Batch Name	Batch ID	Count	Posted	Invited	Completed
CensusBatchExample	698584	3	-	-	-
Currentyeartest			06/18/2024	-	-
CustomTest.withupload			06/25/2024	-	06/26/2024
DE6327	698241	1	04/03/2024	-	-
loadprior	698394	2	04/03/2024	-	06/26/2024
prioritytest	698552	2	06/18/2024	-	-
Rons12/31PYE	698543	1	07/22/2024	07/22/2024	-
sample	697938	1	04/03/2024	-	06/26/2024
Testing5.29	698477	1	06/10/2024	-	-
US11419	697673	2	05/25/2022	09/20/2023	03/28/2024
US13258-priority.term.checked	698527	2	06/12/2024	-	-
US13528-currentyear	698537	2	06/12/2024	-	-
US13528-currentyear	698494	2	06/10/2024	-	-

- Module Options:** Like the 'Portal User' and 'Communications' tab, the same Module Options button is available in the Census Batch.
- Create a Batch:** Selecting this button will allow users to create a new census batch. For further steps please see the article entitled: '[How to Post a Census Batch](#)'
- Tricolon Menu:** Selecting the tricolon next to the individual batch will allow users to open the batch (which is also available by selecting the batch name) as well as delete a batch. Deleting a batch will remove the census posted to the portal users as well as enable the plan to be added to another batch. **Note:** If a portal user has returned a response, the response will NOT be removed with the deletion of the batch. To add this plan to a new batch, the portal user's response will need to be removed from the plan level Compliance Portal files.
- Do with Selected:** There are two options included in the dropdown menu:
 - Mark a Batch as Completed:** Marking a batch as completed locks it from further edits, disables the 'Post Batch' and 'Send Invites' buttons, and prevents any changes except updating portal user permissions. Batches cannot be marked as completed if they haven't been posted but can be if invites were not sent. **Note: This action cannot be undone.**
 - Download Batch Info:** This option will create a .csv export of all the information associated with the batches. This includes:
 - Batch Name

- Batch ID
- Plan Count
- Year *(the plan year end as MM/DD/YYYY for each plan in the batch)*
- Portal Users associated with the plan that have Compliance permissions.
- Census *(the name of the census file if the batch has been posted. If not posted either Not Customized or Customized will populate)*
- Posted Date*(the date the census was posted to the portal)*
- Invited Date*(the date the portal user was invited to view items in the portal. Specify a Server is required)*
- Downloaded Date*(the date the portal user downloaded the census if applicable)*
- Completed Dat*(when the batch was marked completed)*

5. **Current View/Number Selected** : This shows a count of all batches in the Census Batch Dashboard. The 'Number Selected' indicates there is a checkmark to the left of the batch. The number selected is used to show how many plans will either be marked as complete, or how many plans are selected for the 'Download Batch Info' option under 'Do with Selected'.

6. **Export CSV**: This button creates a .csv file that contains the information shown on the Census Batch>Select a Batch screen.

- Batch Name
 - Batch ID
 - Plan Count
 - Posted Dates
 - Invited Dates
 - Completed Dates
-