

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*)

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: Please contact your administrator if you have forgotten your Password

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:

Enable Census Validation?

Restrict census file upload to

Selecting the Validation checkbox prompts users to validate their census data before submitting. It adds a 'Validate' button in the Sponsor Portal > Edit Census Worksheet to check for missing fields. Users must complete the fields or accept the census as is before submitting. *This applies only to portal users with 'Edit Census Worksheet' permissions.

Close Save Changes

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.

Actions	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Hire (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Hire (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Hire (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Hire (2)
	Last Name	First Name	SSN	Birth Date	Date of Hire (1)	Date of Hire (2)

Column Description

- Last Name** Enter the employee's last name
- First Name** Enter the employee's first name
- SSN** Enter the employee's social security number
- Birth Date** Enter the employee's date of birth
- Date of Hire (1)** Select first employment status in plan year
- Date of Term (1)** Enter first employment status date (effective date)
- Term Reason (1)** Indicate reason for termination (first employment status in plan year)
- Date of Hire (2)** Select second employment status in plan year
- Date of Term (2)** Second employment status in plan year (effective date)
- Term Reason (2)** Indicate reason for termination (second employment status in plan year)

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*)

Validation Results

Errors/Warnings Found

Acknowledge Hours Worked is blank or zero for 1 participant(s)
 Acknowledge Statutory Compensation is blank or zero for 1 participant(s)
 Acknowledge Termination Reason is not provided for 2 participant(s)

▼ Row 1 - Brenatto Yeza

Column Header	Severity	Value	Message
Birth Date	Error		Birth Date is a required field and cannot be blank
Term Reason (1)	Warning		Termination Reason is not provided

▼ Row 2 - Clay Caduceus

Column Header	Severity	Value	Message
Hours	Warning	0	Hours Worked is blank or zero
Statutory Comp	Warning	0	Statutory Compensation is blank or zero

▼ Row 10 - Tealeaf Mollymauk

Column Header	Severity	Value	Message
Term Reason (1)	Warning		Termination Reason is not provided

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.**

Validation Results

No Errors Found

Acknowledge Hours Worked is blank or zero for 1 participant(s)
 Acknowledge Plan Compensation is blank or zero for 1 participant(s)
 Acknowledge Statutory Compensation is blank or zero for 1 participant(s)

▼ Row 2 - Clay Caduceus

Column Header	Severity	Value	Message
Hours	Warning	0	Hours Worked is blank or zero
Statutory Comp	Warning		Statutory Compensation is blank or zero

▼ Row 3 - Dosal Babenon

Column Header	Severity	Value	Message
Plan Comp	Warning		Plan Compensation is blank or zero

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.