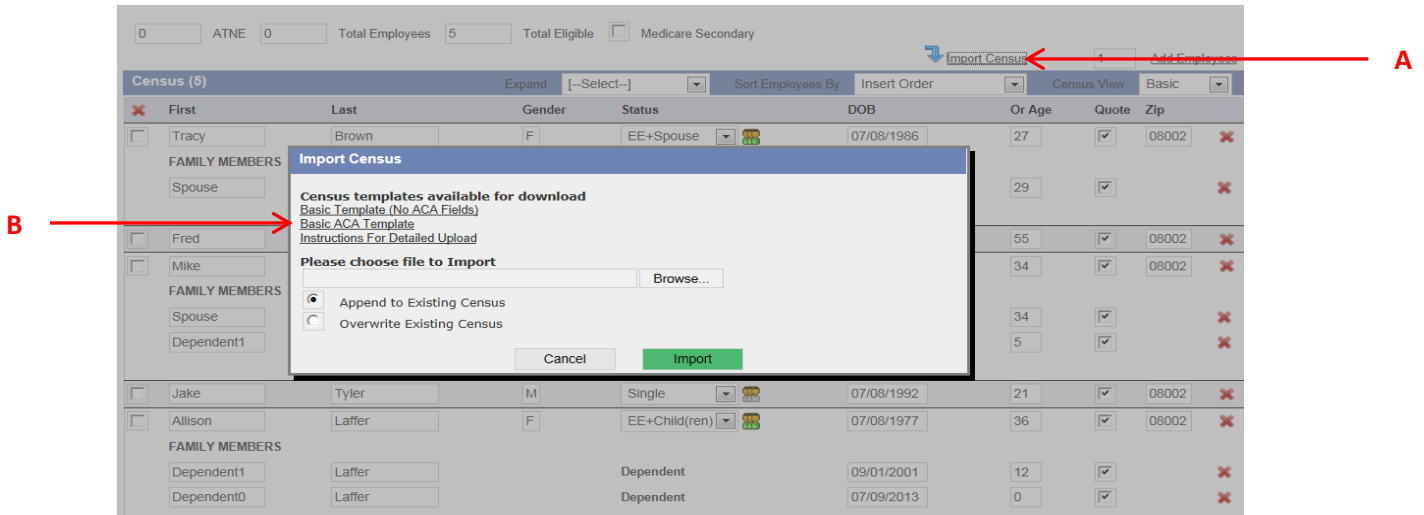


Census Upload

Use the census instructions below to add your groups' censuses into the quoting g system. Utilizing our template is the best option.

Step 1: Locating the template: Your census template can be found through the census screen in the quoting portal (A). Select the template labeled "Basic ACA Template" (B)



Step 2: Filling in the Census Fields: the information in every column must be filled out in the specific format listed below and on the sheet. Dependents must be listed under the associated employee record; the red corners if scrolled over will provide you the information below.

Member Type: Employee, Spouse or Dependent	Status: 1 for Single, 2 for EE & child, 3 for EE and children, 4 for EE and spouse, 5 for Family	DOB: Date of Birth must be entered in mm/dd/yyyy
Quote: included in quote (Y) not included in quote (N)	Tobacco: Tobacco user (Y), Non-Tobacco user (N)	Zip Code: Only needs to be entered for the Employee

MemberType *	FirstName *	LastName	Status	DOB *	Quote	Tobacco *	Zip Code
Employee	Rick	Moore	5	05/12/1970	Y	N	07834
Spouse	Amy			02/01/1969	Y	Y	
Dependent	Jake			11/26/2011	Y	N	
Employee	Matthew	Brown	1	07/01/1990	Y	N	07834

Step 3: Uploading Census: Once the census information is added, save the sheet to an accessible area of the computer and open back up the census upload box from earlier (A). Select the browse button (B) and then search for the saved file. Just like attaching something to an email double click on the file to load it. Select append to add to the current census or overwrite to completely overwrite any existing information (C) then select the green import button on the screen (D). If the census does not load up you will get an error message on the screen, please read the entire message it will let you know what information was missing/incorrect.

