



Census Upload Instructions

There are two ways to upload census information to the system. This document describes how to use each format.

Excel Templates

1. Download the Excel Template from the census upload page. Use either the “Basic Template” or the “Basic ACA Template” based on your needs.
2. Enter the information into the Template.
3. Upload the Excel Template to the website.

Custom Excel Document

The provided Excel Templates only includes basic required fields for medical quoting. To upload additional details, a custom Excel document can be used. In order to use this format:

1. Create an Excel document with the census information using whatever extract or other mechanism is easiest for you.
2. Change or add column headers to match our required naming convention.
3. Ensure that the data in each column matches the data format.
4. Upload the Excel document.

Data Rules

The ‘Excel Column Name’ is the header at the top of the column in the spreadsheet in Row #1. This name must be spelled exactly as it appears in the table however case DiFFeRenCes are okay. ‘Validation Rule or Data’ indicates what rules will be applied to the column or what data values are acceptable. If validation fails, the census will not be uploaded. The last column shows the default values that will be used if the column is not in the Excel document.

Excel Column Name	Dep	Validation Rule or Data	Default
MemberType	Y	Employee, Spouse or Dependent	
DOB	Y	MM/DD/YYYY	today
Status		Numeric or abbreviation 1 / EE: Single 2 / EEC: EE+Child 3 / EEC2: EE+Children 4 / EESP: Husband/Wife 5 / FAM: Family	EE
Children		numeric	based on actual Status.
Gender		M or F	M



Excel Column Name	Dep	Validation Rule or Data	Default
Tobacco	Y	Y or N	N
Medicare	Y	Y or N	< age 65 N, > age 65 Y
ZipCode		5 numbers, Pad with leading 0s if < 5	Employer zip code.
Salary		numeric	10000
QuoteMedical	Y	Y or N	Y
DentalStatus		Numeric or abbreviation 0 / WAV: Waive 1 / EE: Single 2 / EEC: EE+Child 3 / EEC2: EE+Children 4 / EESP: Husband/Wife 5 / FAM: Family	Default to actual status.
VisionStatus		Numeric or abbreviation 0 / WAV: Waive 1 / EE: Single 2 / EEC: EE+Child 3 / EEC2: EE+Children 4 / EESP: Husband/Wife 5 / FAM: Family	Default to actual status.
LifeStatus		Numeric or abbreviation 0 / WAV: Waive 1 / EE: Single 2 / EEC: EE+Child 3 / EEC2: EE+Children 4 / EESP: Husband/Wife 5 / FAM: Family	Default to actual status.
STDStatus		Numeric or abbreviation 0 / WAV: Waive 1 / EE: Single 2 / EEC: EE+Child 3 / EEC2: EE+Children 4 / EESP: Husband/Wife 5 / FAM: Family	Default to actual status.
Occupation		First 20 characters	
Cobra		Y or N	N
FirstName		First 50 characters, alpha, also allow '-'	Employee
LastName		First 50 characters, alpha, also allow '-'	Index



Excel Column Name	Dep	Validation Rule or Data	Default
Class		NY Only. First 20 characters, alpha	Default class.
SSN		9 numbers, Pad with leading 0s if < 9	null

Dependent Information

Dependent information can be entered in two formats. By Row or By Column. They are described below. Columns above with a Y in the “Dep” column can be populated for dependents. Columns that do not apply to dependents can be left blank.

By Row

To enter dependents by row the user must supply a “MemberType” value. These values are Employee / Spouse / Dependent. Any spouse or dependent will be assumed to be associated with the previous Employee.

This is an example of that:

MemberType	FirstName	LastName	DOB
Employee	John	Smith	1/1/1975
Spouse	Liz		1/1/1976
Dependent	Luke		1/1/2005
Employee	Rob	Thomas	1/1/1975

In the example above, Luke and Liz would be dependents associated with “John”. Columns that do not apply to dependents can be left blank.

By Column

To enter dependents by column the user enters dependent data in new columns. The above example in “By Column” format would be:

First	Last	DOB	SpouseFirst	SpouseDOB	Dependent1First	Dependent1DOB
Dan	Masciopinto	1/1/1975	Liz	1/1/1976	Luke	1/1/2005
Rob	Beattie	1/1/1975				



The accepted dependent columns are as follows:

Excel Column Name	Validation Rule or Data	Insert Rule or Data	Default
SpouseFirstName	alpha, also allow '-	first 50 chars	Spouse
SpouseDOB	MM/DD/YYYY		today
SpouseTobacco	Y,y,N,n		N
SpouseMedicare	Y,y,N,n		N
SpouseQuoteMedical	Y,y,N,n		Y
DependentNFirstName	alpha, also allow '-	first 50 chars	Spouse
DependentNDOB	MM/DD/YYYY		today
DependentNTobacco	Y,y,N,n		N
DependentNMedicare	Y,y,N,n		N
DependentNQuote	Y,y,N,n		Y

N represents a dependent and can be from 1. There is no limit.
This should be sequential (eg. 1,2,3,4 and not 1,2,4,5).