

The new Smart Census upload feature leverages an AI model that understands the various census file formats and structures utilized by health carriers and brokerage houses for employer census documentation. When the census is uploaded, the AI model applies data standardization rules, offering greater flexibility for how the data can be entered.

Listed below are the data elements expected to be seen in the census files. The Smart Census solution does not enforce rules around these fields. For example,

- **Date values** - Accepted in MM/DD/YYYY or MM/DD/YY format.
- **Zip codes** - Numeric values are accepted and must be 5 digits.
- **Gender** – Is NOT case sensitive. M/F or Male/Female/Unknown are acceptable values.
- **Primary Member Identifier and Member Identifier** – The Primary Member Identifier and the Member Identifier are NOT required.
- **Relationship** - The **Relationship** field indicates family groupings.

Each family grouping starts with the **Employee** listed first, with each family member to follow. The next Employee entry in the spreadsheet indicates the start of a new family grouping. The Employee must be listed first for each family grouping.

- **TRUE/FALSE and YES/NO** - Treated the same. Either option can be entered.

Census information required for the following quote types:

Small Group Quote

- **First Name**
- **Last Name**
- **Gender** - Is NOT case sensitive. M/F or Male/Female/Unknown are acceptable values.
- **Birthdate** - Accepted in MM/DD/YYYY or MM/DD/YY format.
- **Cobra** – Yes or No
- **Out of Area**– Yes or No
- **Primary Member Identifier** – Not required
- **Member Identifier** – Not required
- **Postal Code** – 5-digit zip code
- **Relationship** – Indicates Family Groupings - Employee/Spouse/Child

Mid-Market Quote

- **First Name**
- **Last Name**
- **Gender** - Is NOT case sensitive. M/F or Male/Female/Unknown are acceptable values.
- **Birthdate** - Accepted in MM/DD/YYYY or MM/DD/YY format.
- **Cobra** – Yes or No
- **Out of Area**– Yes or No
- **Primary Member Identifier** – Not required

- **Member Identifier** – Not required
- **Postal Code** – 5-digit zip code
- **Relationship** – Indicates Family Groupings - Employee/Spouse/Child
- **Number of children** – entered on employee line
- **Product line**

BusinessEDGE Quote

- **First Name**
- **Last Name**
- **Gender** - Is NOT case sensitive. M/F or Male/Female/Unknown are acceptable values.
- **Birthdate** - Accepted in MM/DD/YYYY or MM/DD/YY format.
- **Cobra** – Yes or No
- **Out of Area**– Yes or No
- **Primary Member Identifier** – Not required
- **Member Identifier** – Not required
- **Postal Code** – 5-digit zip code
- **Relationship** – Indicates Family Groupings - Employee/Spouse/Child
- **Tobacco user** - Yes or No
- **Smoking Cessation Class** - Yes or No

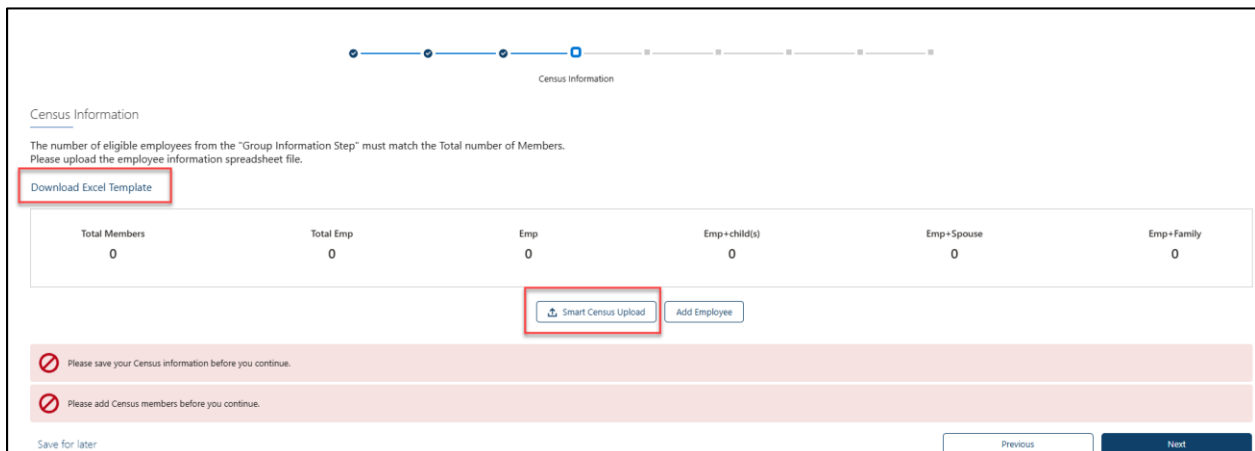
Smart Census Template

To download a Census Template, select the **Download Excel Template** button and save the document to a location on your computer.

Enter the census information in the spreadsheet as detailed above.

Smart Census Upload

To upload a completed census, select the **Smart Census Upload** Button on the Census Information Screen and upload the document from your computer.



Census Information

The number of eligible employees from the "Group Information Step" must match the Total number of Members.
Please upload the employee information spreadsheet file.

[Download Excel Template](#)

Total Members	Total Emp	Emp	Emp + child(s)	Emp + Spouse	Emp + Family
0	0	0	0	0	0

[Smart Census Upload](#) [Add Employee](#)

⊘ Please save your Census information before you continue.

⊘ Please add Census members before you continue.

Save for later [Previous](#) [Next](#)

Broker User Guide - Smart Census Upload

If census spreadsheet was successfully loaded, click the **disc icon** to **Save** the information and then click **Next** to move forward in the quoting process.

Upload Membership

[Download .CSV Template](#)

Total Employees	Employees	Employee + Child(s)	Employee + Spouse	Employee + Family
17	3	0	1	3

Delete All Data
Upload Employees
⏏

	Employee	Dependents	
>	Employee 1 Aurthur Weasley	3 dependents	⏏
>	Employee 2 Harry Potter	2 dependents	⏏
>	Employee 3 Hermoine Granger	1 dependent	⏏
>	Employee 4 Neville Longbottom	0 dependents	⏏
>	Employee 5 Rubeus Hagrid	0 dependents	⏏
>	Employee 6 Dobby Elf	0 dependents	⏏
>	Employee 7 Padme Amidala	4 dependents	⏏

Next