CLAREMONT
INSURANCE SERVICES

How to Complete the Excel Census Template

To expedite quoting, ensure quote accuracy and minimize data entry errors, use this ACA-Compatible Excel Employee and Dependent Census Template (census). Download the census from Claremont's website, in PRISM (the Employee Census page), or request one from the Claremont quote team (quotes@claremontcompanies.com).

This census can be used for quoting small group health and specialty insurance plans (generally 1-100 FT + FTE employees, depending on carrier underwriting guidelines).

Below are guidelines for completing the census. If you subscribe to PRISM - Claremont's self-service quoting system - you will find a number of additional PRISM tips at the end of this guide. Please follow the instructions in this Claremont guide instead of the instructions in the census itself.

Completing The Census

The census consists of 11 columns, 7 of which are required (indicated in orange in the census). To complete, add census information for each employee and each dependent in individual rows. Below is a table summarizing each column.

Column#	Column Name	Required?	Notes
A	First Name	N	
B	Last Name	N	
C	Date of Birth	Y	Only Date of Birth OR Age is required.
D	Age	Y	
E	Medical Status	Y	See section below on Family Coverage Status Codes.
F	Dental Status	Y	
G	Vision Status	Y	
H	Zip	Y	Employer Zip Code.
I	Gender (M/F)	Y	
K	Job Description	N	
L	Salary	N	Required for quotes including Life Insurance.

Family Coverage Status Codes

Family Coverage Status Codes need to be entered for each employee and each dependent. Below is a table summarizing which status codes should be used.

Type of Code	Status Code	Use	Notes
Codes for Employees	**EE**	When coverage is for the employee only.	
	ES	When coverage is for the employee and their spouse only.	Enter spouse information in the row directly below that of the employee.
	EC	When coverage is for the employee and their children only.	Enter information for each child in the row(s) directly below that of the employee.
	EF	When coverage is for the employee and their entire family.	Enter spouse information in the row directly below that of the employee. Enter information for each child in the row(s) directly below that of the spouse.
Codes for Dependents	**SP**	For the employee's spouse.	
	CH	For the employee's children.	

Example Census

Below is a screenshot of a completed example census.

	A	B	C	D	E	F	G	H	I	K	L
2	Required Fields in Orange Lettering										
3	First Name	Last Name	Date of Birth	Age	Medical Status (EE,ES,EC or EF) for EE (SP or CH) for Dependents	Dental Status (EE,ES,EC, EMC or EF)	Vision Status (EE,ES,EC,EMC or EF)	Zip	Gender (M,F)	Email	Salary
5	Anne			20	EE	EE	EE	94597	F		
6	Bill			30	ES	ES	ES	94597	M		
7	Belinda			28	SP			94597	F		
8	Carmen			40	EC	EC	EC	94597	F		
9	Clarissa			12	CH			94597	F		
10	Connor			10	CH			94597	M		
11	David			50	EF	EF	EF	94597	M		
12	Donna			48	SP			94597	F		
13	Daniel			17	CH			94597	M		
14	Dakota			15	CH			94597	F		
15	Dennis			13	CH			94597	M		

In this example census, the group has four employees: Anne, Bill, Carmen and David. Below is a description of the family coverage requirements for each employee, along with how this information is entered in the census.

Anne is the only member of her family requiring coverage. Anne's status is EE – employee only coverage. No additional family information is required. Anne's information is entered in row 5.

Bill and his wife Belinda are the only members of their family requiring coverage. Bill's status is ES – employee and spouse only coverage. Bill's information is entered in row 6. In the row directly underneath Bill's information – row 7, his wife Belinda's information is entered. Belinda's status code is SP – spouse.

Carmen and her two children Clarissa and Connor are the only members of their family requiring coverage. Carmen's status is EC – employee and children only coverage. Carmen's information is entered in row 8. In the rows directly underneath Carmen, information on each of her two children Clarissa and Connor is entered – in separate rows. The status code for each of Clarissa and Connor is CH – child. Clarissa's information is entered in row 9. Connor's in row 10.

David and his entire family require coverage: wife Donna and three children Daniel, Dakota and Dennis. David's status is EF – employee and family coverage. David's information is entered in row 11. In the row directly underneath David, his wife Donna's information is entered (row 12). Belinda's status code is SP – spouse. In the row directly underneath Donna, information on each of the three children Daniel, Dakota and Dennis is entered. The status code for each of Daniel, Dakota and Dennis is CH – child. Daniel's information is in row 13, Dakota's in 14 and Dennis' in 15.

Additional Notes:

- Do not clear any cells, unhide or delete rows.
- Medical rates are calculated for each individual member. Dental and vision rates are not. If selecting EE only for the Medical, but wish to quote coverage for that EE's spouse or dependents under Dental or Vision, then put the codes: ES, EC or EF in the Dental and/or Vision Status as appropriate. No need to add dependents to the census if EE-only coverage is selected for Medical.

Below is a screenshot of a completed example census illustrating this.

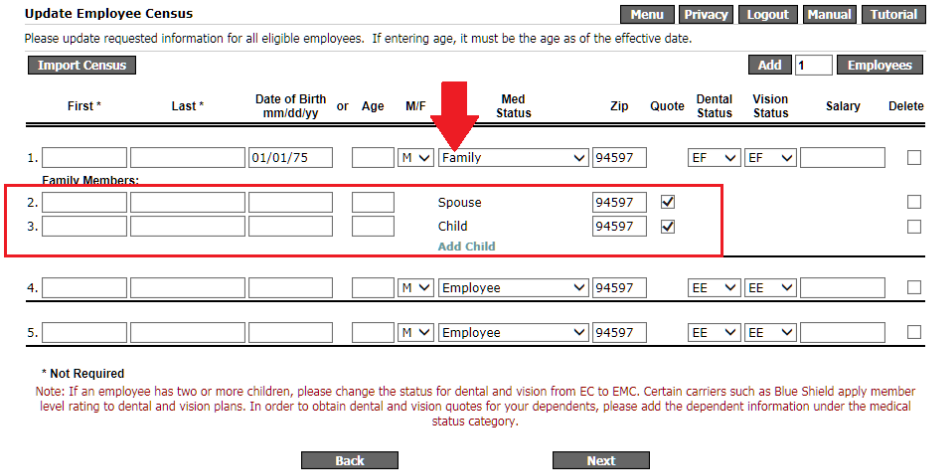
	A	B	C	D	E	F	G	H	I	K	L
2	Required Fields in Orange Lettering										
3	First Name	Last Name	Date of Birth	Age	Medical Status (EE,ES,EC or EF) for EE (SP or CH) for Dependents	Dental Status (EE,ES,EC, EMC or EF)	Vision Status (EE,ES,EC,EMC or EF)	Zip	Gender (M,F)	Email	Salary
5	Anne			20	EE	EE	EE	94597	F		
6	Bill			30	ES	ES	ES	94597	M		
7	Belinda			28	SP			94597	F		
8	Carmen			40	EE	EC	EC	94597	F		
9	David			50	EF	EF	EF	94597	M		
10	Donna			48	SP			94597	F		
11	Daniel			17	CH			94597	M		
12	Dakota			15	CH			94597	F		
13	Dennis			13	CH			94597	M		

This census shows the same group as in the previous example. In this case, though, Carmen (row 8) is selecting employee-only coverage (EE) for medical, but employee and children only coverage (EC) for dental and vision. Because EE coverage is selected for medical, there is no need to add Carmen's children Clarissa and Conner to the census.

- If gender is not indicated in the census, the default is Male. Note that neither medical, dental or vision rates differ between Male and Female.
- The three oldest children under the age of 21 carry a medical rate as dependents. The children in excess of three can be included on the census for reference, but will not populate a premium cost in the proposal.

PRISM Tips

- In the Excel census, if an employee's status indicates employee & dependents in the Medical Status column, but dependent information is not included, then after upload into PRISM, dependent fields will be shown and will need to be completed in PRISM:



- Claremont recommends downloading the census and then uploading with the census data.
- Home Zip Codes on the East Coast with a leading 0 may need to be re entered in PRISM.
- The employee zip code will override any alternative zip codes listed for dependents, as dependents are rated on the location of the employee (subscriber).
- Date of Birth must be entered with a forward slash (/) and without leading zeroes (e.g. 1/1/75). PRISM will not recognize 01/01/1975 or 1-1-75 or 1.1.75.