

Quick Subscriber Upload and Manually Add Subscribers

On the Subscribers screen, you can upload an Excel file containing census information. This is especially useful for loading a large volume of subscribers.

Click Quick Subscriber Upload. The Upload Census File window opens. If you need the template, click Download Excel Template. Fill out the spreadsheet. There are instructions for filling out the template on the Import Entry Guide Tab. There is also a county list tab containing the California counties. Save the file.

You have two options to attach a file. You can drag and drop the file from your file window into the Drag and Drop File section. You'll see the file name below the field. Click Upload. You can also click Choose File under Upload File and navigate to the file. Whichever way you attach the file, you will see a success message. Click ok.

The uploaded information is listed and you can continue with the workflow. You can also manually add members by clicking Manually Add Subscribers The number of subscribers from the Group Details Tab will be listed. Confirm or change the number of subscribers in that field. Click continue.

The Subscribers section will now show the number of rows you entered.

For each subscriber, enter the first and last name, date of birth, and the zip code where they reside, which will populate the county.

If the subscriber has dependents, enter each dependent's date of birth. When the information has been entered for all subscribers and dependents, continue with the workflow.