

# Bulk person upload guide

This guide will help you prepare a spreadsheet, known as a Comma-Separated Value (CSV) file, for bulk uploading data about people who will be tested at your facilities to SimpleReport.

## Setting up your CSV:

- **All column names must match the template.** If they don't match exactly, the upload will fail.
- **IF** you have only one facility **OR** you have multiple facilities and want to allow everyone to be tested at all facilities:
  - Create a single spreadsheet that includes everyone who will be tested.
- **IF** you have multiple facilities **AND** you want some people to be tested at one facility only:
  - Create a separate spreadsheet for each facility, and add the appropriate people. Include the facility name in the file name.
  - Each person should appear on only one spreadsheet.

## CSV Fields

Column name	Required	Formatting instructions
LastName	<b>required</b>	Max length 500 characters
FirstName	<b>required</b>	Max length 500 characters
MiddleName	<i>optional</i>	Max length 500 characters
Suffix	<i>optional</i>	Max length 500 characters
Race	<i>optional</i>	Must exactly match one of the following (not case-sensitive): <ul style="list-style-type: none"><li>• American Indian or Alaskan Native</li><li>• Asian</li><li>• Black or African American</li><li>• Native Hawaiian or other Pacific Islander</li><li>• White</li><li>• Unknown</li><li>• Refused to answer</li></ul>
DOB	<b>required</b>	Must be in the format mm/dd/yyyy (like 07/01/1993 or 7/1/1993)
biologicalSex	<i>optional</i>	Must exactly match one of the following (not case-sensitive): <ul style="list-style-type: none"><li>• Male</li><li>• Female</li><li>• Other</li></ul>
Ethnicity	<i>optional</i>	Must exactly match one of the following (not case-sensitive): <ul style="list-style-type: none"><li>• Hispanic</li></ul>

Column name	Required	Formatting instructions
		<ul style="list-style-type: none"> <li>Not_Hispanic</li> </ul>
Street	<b>required</b>	Max length 500 characters
Street2	<i>optional</i>	Max length 500 characters
City	<i>optional</i>	Max length 500 characters
County	<i>optional</i>	Max length 500 characters
State	<b>required</b>	2-character state or U.S. territory code. Must exactly match one of the following (not case-sensitive): AK, AL, AR, AS, AZ, CA, CO, CT, DC, DE, FL, GA, GU, HI, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, PR, RI, SC, SD, TN, TX, UT, VA, VI, VT, WA, WI, WV, WY
ZipCode	<b>required</b>	5 digits
PhoneNumber	<b>required</b>	10-digit format. You may include other characters such as . - / or ( ) , but they will be removed along with any extra spaces when you upload. For example, (321) 456-7890 will be changed to 3214567890.
employedInHealthcare	<b>required</b>	Must exactly match one of the following (not case-sensitive): <ul style="list-style-type: none"> <li>Y</li> <li>Yes</li> <li>N</li> <li>No</li> </ul>
residentCongregateSetting	<b>required</b>	Must exactly match one of the following (not case-sensitive): <ul style="list-style-type: none"> <li>Y</li> <li>Yes</li> <li>N</li> <li>No</li> </ul>
Role	<i>optional</i>	Must exactly match one of the following (not case-sensitive): <ul style="list-style-type: none"> <li>Staff</li> <li>Resident</li> <li>Student</li> <li>Visitor</li> <li>Unknown</li> </ul> If you leave this field blank, it will default to “Unknown”.
Email	<i>optional</i>	Must contain a “@” symbol