

Bulk upload patients

How to format and upload a CSV file to add patients to SimpleReport in bulk

To report results for patients in SimpleReport, you first need to add their information to the system. You can [add people individually](#), ask them to [register themselves](#), or upload multiple people at once using a spreadsheet.

This page guides you through the bulk upload process, including [how to format your spreadsheet](#) and [how to request uploading it](#).

Preparing your spreadsheet data

Before you upload your spreadsheet on SimpleReport, make sure your patient data closely follows the guidance below. In general, you must:

- ✓ **Match all your field headers to the column names listed below**
- ✓ **Include all required columns below in your CSV**
- ✓ **Include values in all required fields, following guidance below**
- ✗ **Leave out text in cells for optional fields you don't want to include (for example, don't write "N/A" in a field)**

Note: If you want to add certain patients to specific facilities in your organization, create a separate spreadsheet for each facility (for example, if you work for a school district, you can create a file for each school that includes the relevant students and staff). If you want to add the same patients across facilities, you can create one spreadsheet and upload patients to all facilities in your organization.

Data elements

Column name	Required?	Format	Notes
last_name	Yes	Any	



first_name	Yes	Any	
middle_name		Any	
suffix		Any	
race	Yes	Select from these values: <ul style="list-style-type: none">American Indian or Alaska NativeAsianBlack or African AmericanNative Hawaiian or other Pacific IslanderWhiteOtherUnknownAsk but unknown	
date_of_birth	Yes	MM/DD/YYYY or M/D/YYYY	✓ Yes: 07/01/1993 ✓ Yes: 7/1/1993 X No: 07/01/93
biological_sex	Yes	Select from these values: <ul style="list-style-type: none">MaleFemaleOtherAmbiguousUnknownNot applicable	
ethnicity	Yes	Select from these values: <ul style="list-style-type: none">Hispanic or LatinoNot Hispanic or LatinoUnknown	
street	Yes	500 characters or fewer	
street_2		500 characters or fewer	
city		500 characters or fewer	
county		500 characters or fewer	

state	Yes	Any 2-character state or US/Canada territory code	✓ Yes: CA ✓ Yes: MO ✗ No: Arkansas
country		Any 3-letter country code	If you leave this blank, it will default to USA .
zip_code	Yes	00000 or 00000-0000	✓ Yes: 53421 ✓ Yes: 53421-7890
phone_number	Yes	000-000-0000	✓ Yes: 123-456-7890 ✗ No: (123) 456-7890
phone_number_type		If including, select from one of these values: <ul style="list-style-type: none"> • Mobile • Landline 	
employed_in_healthcare	Yes	Select from one of these values: <ul style="list-style-type: none"> • Y or Yes • N or No • Unk or Unknown 	
resident_congregate_setting	Yes	Select from one of these values: <ul style="list-style-type: none"> • Y or Yes • N or No • Unk or Unknown 	
role		If including, select from one of these values: <ul style="list-style-type: none"> • Staff • Resident • Student • Visitor • Unknown 	If you leave this blank, it will default to Unknown .
email		Full email address, including @ symbol	✓ Yes: name@site.com ✗ No: name.com



Next steps

After you've completed setting up your CSV file, you'll upload it to a secure folder.

Email support@simplereport.gov to request the folder.

SimpleReport will review the data and ask for revisions to fix any potential errors.

Once the file is ready, SimpleReport will upload the information into your account.