SimpleReport

bulk upload guide

This guide will help you prepare a spreadsheet, known as a Comma-Separated Value (CSV) file, for bulk uploading large amounts of patient data into SimpleReport. Bulk uploads generally take 1–2 weeks to complete.

Things to keep in mind

- Bulk uploads are a one time courtesy — SimpleReport is unable to do multiple bulk uploads.

- Unless you are downloading pre-filled patient data from another system or spreadsheet, the data entry required to create CSV files for bulk uploads takes about the same amount of time as entering patient information directly into SimpleReport. If possible, we recommend directly entering patient information into your SimpleReport account.

Setting up your CSV

All column names in your file(s) must match the [SimpleReport CSV fields](#) below. If they don't match exactly, the upload will fail.

Option 1: If you have only one testing facility OR you have multiple facilities and want to allow everyone to be tested at all facilities:

- Create a single CSV spreadsheet file that includes everyone who will be tested.

Option 2: If you have multiple testing facilities AND you want some people to be tested or associated with one facility only:

- Create a separate CSV spreadsheet file for each facility, and add the appropriate people. Include the facility name in the file name.

- Each person should appear on only one spreadsheet.

SimpleReport CSV fields

Include all columns below in your CSV file, even if you don't have all of the information listed. Any optional fields that you don't plan on filling out must be left completely blank — make sure not to type in "N/A" or anything else into the cell.

Column name	Required?	Formatting instructions
LastName	required	Maximum length: 500 characters
FirstName	required	Maximum length: 500 characters
MiddleName	optional	Maximum length: 500 characters
Suffix	optional	Maximum length: 500 characters
Race	required	Must exactly match one of the following (not case sensitive): • American Indian or Alaskan Native • Asian • Black or African American • Native Hawaiian or other Pacific Islander • White • Other • Unknown • Refused to answer
DOB	required	Date of birth (DOB) must be in mm/dd/yyyy or m/d/yyyy format. (For example, July 1, 1993 should be 07/01/1993 or 7/1/1993.)
biologicalSex	required	Must exactly match one of the following (not case sensitive): • Male • Female • Other • Refused
Ethnicity	required	Must exactly match one of the following (not case sensitive): • Hispanic • Not_Hispanic
Street	required	Maximum length: 500 characters
Street2	optional	Maximum length: 500 characters
City	optional	Maximum length: 500 characters

County	optional	Maximum length: 500 characters
State	**required**	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	**required**	5 digits
PhoneNumber	**required**	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.
PhoneNumber Type	optional	If provided, must exactly match one of the following (not case sensitive): • mobile • landline
employedInHealthcare	**required**	Must exactly match one of the following (not case sensitive): • Y • Yes • N • No
residentCongregateSetting	**required**	Must exactly match one of the following (not case sensitive): • Y • Yes • N • No
Role	optional	Must exactly match one of the following (not case sensitive): • Staff • Resident • Student • Visitor • Unknown If you leave this field blank, it will default to "Unknown".
Email	optional	Must contain an "@" symbol

Next steps

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