![SimpleReport]

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
LastName	Yes	Any	

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FirstName	**Yes**	Any
MiddleName		Any
Suffix		Any

Race	**Yes**	Select from these values: `American Indian or Alaska Native` `Asian` `Black or African American` `Native Hawaiian or other Pacific Islander` `White` `Other` `Unknown` `Ask but unknown`	
DOB	**Yes**	MM/DD/YYYY or M/D/YYYY	✔ **Yes:** *07/01/1993* ✔ **Yes:** *7/1/1993* ✗ **No:** *07/01/93*
biologicalSex	**Yes**	Select from these values: `Male` `Female` `Other` `Ambiguous` `Refused`	
Ethnicity	**Yes**	Select from these values: `Hispanic or Latino` `Not Hispanic or Latino`	
Street	**Yes**	500 characters or fewer	
Street2		500 characters or fewer	
City		500 characters or fewer	

County		500 characters or fewer	
State	**Yes**	Any 2-character state or U.S./Canada territory code	✔ **Yes:** *CA* ✔ **Yes:** *MO* ✘ **No:** *Arkansas*
ZipCode	**Yes**	00000 or 00000-0000	✔ **Yes:** *53421* ✔ **Yes:** *53421-7890*
PhoneNumber	**Yes**	000-000-0000	✔ **Yes:** *123-456-7890* ✘ **No:** *(123) 456-7890* ✘ **No:** *456-7890*
PhoneNumber Type		If including, select from one of these values: ● `Mobile` ● `Landline`	
employedIn Healthcare	**Yes**	Select from one of these values: ● `Y` or `Yes` ● `N` or `No` ● `Unk` or `Unknown`	
Resident Congregate Setting	**Yes**	Select from one of these values: ● `Y` or `Yes` ● `N` or `No` ● `Unk` or `Unknown`	
Role		If including, select from one of these values: ● `Staff` ● `Resident` ● `Student` ● `Visitor` ● `Unknown`	If you leave this field blank, it will default to `Unknown`.
Email		Full email address, including @ symbol	✔ **Yes:** *name@site.com* ✘ **No:** *name.com*

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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.