

Bulk upload patients

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 guide walks through the bulk upload process, including how to format your spreadsheet and how to upload it.

Preparing your spreadsheet data

Before you upload your spreadsheet on SimpleReport, make sure your patient data closely follows the guidance below. You can also refer to the spreadsheet template with example data. 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 Native Asian Black or African American Native Hawaiian or other Pacific Islander White Other Unknown Ask but unknown 	
date_of_birth	Yes	MM/DD/YYYY, M/D/YYYY, M/D/YY, or MM/DD/YY	<ul style="list-style-type: none"> Yes: 07/01/1993 Yes: 7/1/1993 Yes: 7/1/93
biological_sex	Yes	Select from these values: <ul style="list-style-type: none"> Male Female Other Ambiguous Unknown Not applicable 	
ethnicity	Yes	Select from these values: <ul style="list-style-type: none"> Hispanic or Latino Not Hispanic or Latino Unknown 	
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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> • Yes: 53421 • Yes: 53421-7890
phone_number	Yes	000-000-0000	<ul style="list-style-type: none"> • Yes: 123-456-7890 • No: (123) 456-7890
phone_number_type	Yes	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.

Uploading your patient CSV

To upload your patient spreadsheet to SimpleReport, follow these steps:

1. Make sure the patient data in your spreadsheet matches formatting requirements. SimpleReport will validate your data when you upload the CSV, and any errors will prevent you from successfully submitting results (you'll have the chance to fix errors and resubmit).

- When you're ready to upload your spreadsheet, click **Patients** at the top of the page.



- Click the **Add patients** button at the top right of the screen. From the dropdown menu that appears, select **Import from spreadsheet**.



- If you've already formatted your data, skip to the second step on this page. To add the patients in your spreadsheet to a single facility, select **One facility**. To add the patients to all facilities in your organization, select **All facilities**. You can't select a subset of facilities in your organization.

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).

2. Would you like to import these patients to one facility OR all facilities?

One facility All facilities

Which facility?



5. Drag your CSV file into the upload box, or choose it from your computer browser. Once the right file is selected, click **Upload CSV file**.

3. Upload your spreadsheet.

The system will check the data for errors before adding your patients to SimpleReport.

Drag file here or choose from folder to change file

[Choose File](#)

Upload CSV file

6. SimpleReport will check to make sure your data is in the correct format. If the data is incorrect, SimpleReport will show an error message with guidance below about what you need to fix.
7. (If you get errors) Following the error message guidance, edit your spreadsheet and save it again. Try uploading it again (step 5).
8. Once SimpleReport confirms that your data is properly formatted, it will process and add the patients. This can take up to 10 minutes or more. The process will continue even if you leave SimpleReport, and we'll send an email to alert you when it's done.

Once you get an email confirming the upload is complete, you can view and report test results for the new patients on SimpleReport.