

# Creating and Importing Staff/Resident CSVs to CoolCare4

CoolCare4 offers the ability to upload multiple staff or residents all at once using the **Import CSV** option. This guide will explain how to create the CSVs using our templates and then upload them to CoolCare4.

## CSV Upload Templates

As the uploads require the data within a certain format for CoolCare to import, we have created template files for you to follow. These are formatted to only allow you to enter data the same way CoolCare would let you, ensuring it is correct for uploading. They can be found here:

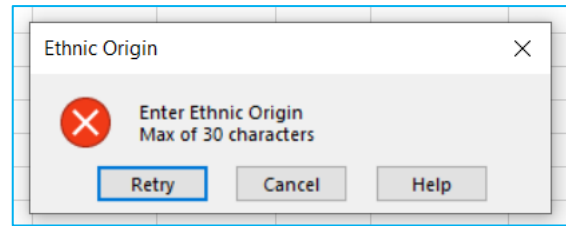
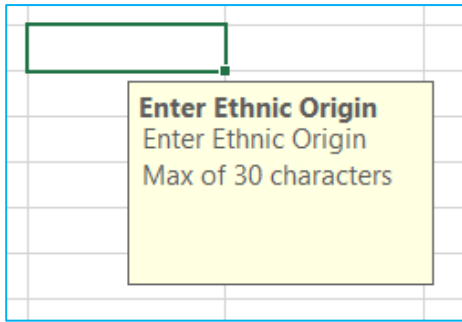
- [Click here to access the Staff upload template](#)
- [Click here to access the Resident upload template](#)

### Staff Upload Template

The staff upload template includes all the information needed to create a new staff member; including general information, contact details, next of kin and payroll information.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Do not move, change, delete or add in columns.																	
2	All fields in Red are mandatory and case sensitive																	
3	Enter all dates in DD/MM/YYYY																	
4	<b>Title</b>	<b>First Name</b>	<b>Last Name</b>	<b>Position</b>	<b>Department</b>	<b>Sex</b>	<b>Ethnic Origin</b>	<b>DOB</b>	<b>Start Date</b>	<b>Payroll Number</b>	<b>Address1</b>	<b>Address2</b>	<b>Address3</b>	<b>Address4</b>	<b>Address5</b>	<b>Telephone</b>	<b>Mobile</b>	<b>NOK F</b>
5	Miss	Sarah	Smith	Carer	Core	Female	White British	01/02/1952	06/06/2015	555444555	1 White Houl	Sturton	Leeds	LS1 1RY		0113 2587458	07558558558	Peter P
6																		
7																		
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The template only allows you to enter information in the format CoolCare will allow, some fields will be drop down selections such as **Title**, others will only allow a certain number of characters or be in a certain format i.e., **DOB**. The template includes a header on each column as well as an example underneath. Any column header that is in red is a required field and will need information for it to be entered in to CoolCare, all others are optional. When you click an empty field any formatting rules will be shown and you will be given a prompt if the field breaks any formatting rules.

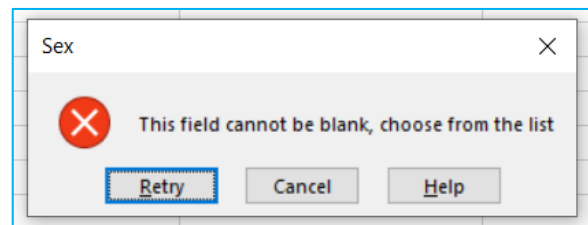
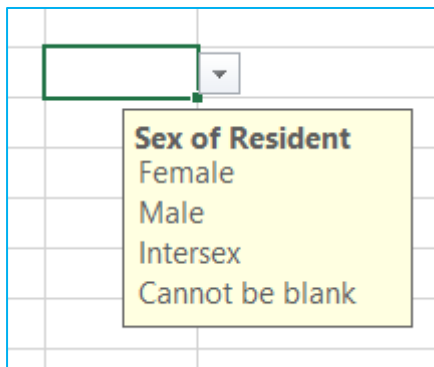


## Resident Upload Template

The resident upload template includes all the information needed to create a new resident in the home; including general information, funding/care type and next of kin contact information.

A screenshot of a spreadsheet template for resident upload. The spreadsheet has columns labeled A through M. The header row (row 3) contains the following fields: Room Number, Bed, Title, First Name, Last Name, Admission Date, DOB, Sex, Funding Type, Permanency Type, Care Type, Marital Status, and National Insurance. The fields "Title", "First Name", "Last Name", "Admission Date", "DOB", "Sex", "Funding Type", "Permanency Type", "Care Type", "Marital Status", and "National Insurance" are highlighted in red, indicating they are mandatory. The spreadsheet also contains instructions: "Do not move, change, delete or add in columns.", "All fields in Red are mandatory", and "Enter all dates in DD/MM/YYYY".

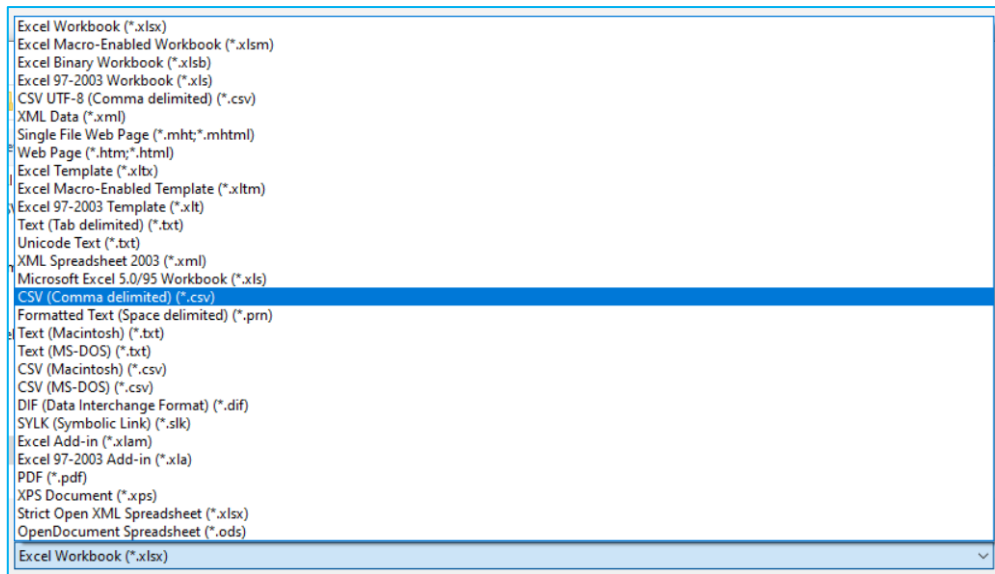
The template only allows you to enter information in the format CoolCare will allow, some fields will be drop down selections such as **Title**, others will only allow a certain number of characters or be in a certain format i.e., **DOB**. The template includes a header on each column as well as an example underneath. Any column header that is in red is a required field and will need information for it to be entered in to CoolCare, all others are optional. When you click an empty field any formatting rules will be shown and you will be given a prompt if the field breaks any formatting rules.



## Saving the Data in CSV Format

Once you have filled out the data according to the template the next step is to ensure it is in the correct file format for CoolCare to import. Importing the template file will not work as this includes the column headers and example data. You will need to:

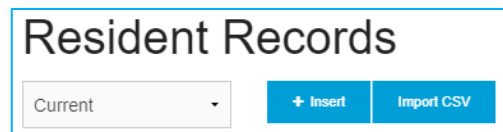
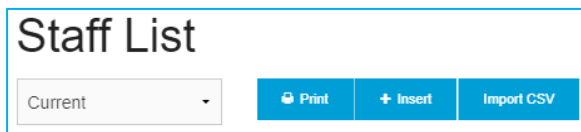
- Select the data you have inputted on the template file. (Row 6 and below, columns A-AJ for staff, columns A-Z for residents)
- Copy this data and paste it into a blank excel spreadsheet
- Save the new spreadsheet with the pasted data as a CSV (Comma delimited) (\*.csv) file



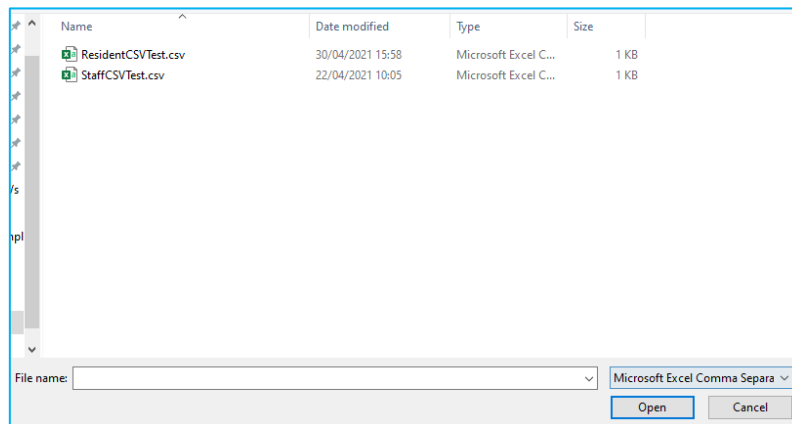
This new file you have saved will be the one you import to CoolCare4.

## Importing the CSV file to CoolCare

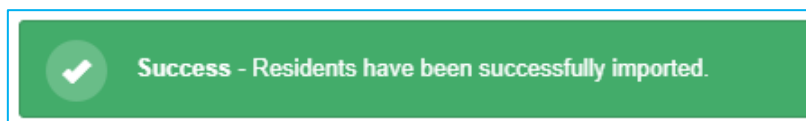
Now that you have the file ready, you can import it to CoolCare. Navigate to the **Staff Records** or **Resident Records** page within CoolCare and the **Import CSV** button can be found at the top of the staff/resident list.



Click the **Import CSV** button and select the file you created. The system will only recognise .CSV files, so they should be the only ones available to select.



If the upload is successful, you will see the staff/resident list update with the new staff or residents you have imported, as well as the following message at the top of the page.



If the upload fails you will be given an error message explaining which row and field has stopped the upload from being successful. The tables below contain each error message and an example of the data that would cause that error.

## Staff Upload Errors

<i>Position</i>	<i>Column</i>	<i>Data</i>	<i>Error message</i>
1	Title	Ds	Line 1: Title must be one of the following: Dame, Dr, Miss, Mr, Mrs, Ms, Mx, Sir
1	Title	(Blank)	Line 1: Title is required
2	Forename	ThisForenamesTooLongToBeAccepted	Line 1: First Name must be no longer than 30 characters
2	Forename	(Blank)	Line 1: First Name is required
3	Surname	ThisSurnamesTooLongToBeAccepted	Last Name must be no longer than 40 characters
3	Surname	(Blank)	Line 1: Last Name is required
4	Position	Positionistoolonglong	Line 1: The position supplied is not valid
5	Department	DepartmentistoolongDepartmentis	Line 1: Department must be no longer than 30 characters
5	Department	(Blank)	Line 1: Department is required
6	Sex	Males	Line 1: Sex must be one of the following: Male, Female, Intersex
7	Ethnic Origin	EthnicOriginLonglongEthnicOrigin	Line 1: Ethnic Origin must be no longer than 30 characters
8	Date of birth	30/13/1991	Line 1: DOB date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
9	start date	12-12-2020	Line 1: Start Date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
10	Payroll Number	thisIsAPayrollNumberOver20Chars	Line 1: Payroll Number must be no longer than 20 characters
11	Address1	ThisAddressLinesTooLongAndShouldNotBeUsed	Line 1: Address1 must be no longer than 30 characters
12	Address2	ThisAddressLinesTooLongAndShouldNotBeUsed	Line 1: Address2 must be no longer than 30 characters
13	Address3	ThisAddressLinesTooLongAndShouldNotBeUsed	Line 1: Address3 must be no longer than 30 characters
14	Address4	ThisAddressLinesTooLongAndShouldNotBeUsed	Line 1: Address4 must be no longer than 30 characters
15	Address5	ThisAddressLinesTooLongAndShouldNotBeUsed	Line 1: Address5 must be no longer than 30 characters
16	Telephone	01234567890123456790	Line 1: Telephone must be no longer than 20 characters
17	Mobile	01234567890123456790	Line 1: Mobile must be no longer than 20 characters

<b>18</b>	Nok Name	(Over 100 characters)	Line 1: NOK Name must be no longer than 100 characters
<b>19</b>	NOK address 1	ThisNextOfKinAddress LineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address1 must be no longer than 50 characters
<b>20</b>	NOK address 2	ThisNextOfKinAddress LineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address2 must be no longer than 50 characters
<b>21</b>	NOK address 3	ThisNextOfKinAddress LineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address3 must be no longer than 50 characters
<b>22</b>	NOK address 4	ThisNextOfKinAddress LineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address4 must be no longer than 50 characters
<b>23</b>	NOK address 5	ThisNextOfKinAddress LineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address5 must be no longer than 50 characters
<b>24</b>	NOK day telephone	01234567890123456790012345678901234567900123456790	Line 1: NOK Day Telephone must be no longer than 50 characters
<b>25</b>	NOK evening telephone	01234567890123456790012345678901234567900123456790	Line 1: NOK Evening Telephone must be no longer than 50 characters
<b>26</b>	NOK Mobile	01234567890123456790012345678901234567900123456790	Line 1: NOK Mobile must be no longer than 50 characters
<b>27</b>	NOK relationship	ThisNOKRelationshipFieldIsTooLong	Line 1: NOK Relationship must be no longer than 30 characters
<b>28</b>	Marital Status	ivil Partnership	Line 1: Marital Status must be one of the following: Divorced/Dissolved, Married/Civil Partnership, Not Disclosed, Separated, Single, Widowed/Surviving Civil Partner
<b>29</b>	National insurance number	AB 12 34 56 C	Line 1: National Insurance Number must not contain spaces
<b>30</b>	End Date	12/12-2020	Line1: End Date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
<b>31</b>	Hours Per Week	Forty	Line1: Hours Per Week must be a number
<b>32</b>	name of bank	ThisBankNameIsTooLong	Line 1: Name of Bank must be no longer than 20 characters
<b>33</b>	bank account name	ThisBankAccountNameIsTooLongToWork	Line 1: Bank Account Name must be no longer than 30 characters
<b>34</b>	bank sort code	12345678912	Line 1: Bank Sort Code must be no longer than 10 characters

<b>35</b>	bank account number	01234567890	Line 1: Bank Account Number must be no longer than 10 characters
<b>36</b>	Notes	(input longer than 4000 characters)	Line 1: Notes must be no longer than 4000 characters

## Resident Upload Errors

<b>Position</b>	<b>Column</b>	<b>Data</b>	<b>Error message</b>
<b>1</b>	Room Number	1234567890123456789012345678901	Line 1: Room Number must be no longer than 30 characters
<b>1</b>	Room Number	(blank)	Line 1: Room Number is required
<b>2</b>	Bed	AB	Line 1: Bed must be no longer than 1 character
<b>2</b>	Bed	(blank)	Line 1: Bed is required
<b>3</b>	Title	Ds	Line 1: Title must be one of the following: Dame, Dr, Miss, Mr, Mrs, Ms, Mx, Sir
<b>3</b>	Title	(blank)	Line 1: Title is required
<b>4</b>	Forename	ThisIsAForenameThatIsTooLongAndShouldNotBeUsed	Line 1: First Name must be no longer than 30 characters
<b>4</b>	Forename	(blank)	Line 1: First Name is required
<b>5</b>	Surname	ThisIsASurnameThatIsTooLongAndShouldNotBeUsed	Line 1: Last Name must be no longer than 40 characters
<b>5</b>	Surname	(blank)	Line 1: Last Name is required
<b>6</b>	Admission Date	67/12/2023	Line 1: Admission date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
<b>6</b>	Admission Date	(blank)	Line 1: Admission date is required
<b>7</b>	DOB	30/13/1991	Line 1: DOB date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
<b>7</b>	DOB	30/10/2900	Line 1: Resident Date of Birth cannot set to a date in future
<b>8</b>	Sex	males	Line 1: Sex must be one of the following: Male, Female, Intersex

<b>9</b>	Funding Type	thisIsNotAFundingType	Line 1: Funding Type does not exist
<b>9</b>	Funding Type	(blank)	Line 1: Funding Type is required
<b>10</b>	Permanency Type	(201 or more characters)	Line 1: Permanency Type must be no longer than 200 characters
<b>10</b>	Permanency Type	(blank)	Line 1: Permanency Type is required
<b>11</b>	Care Type	CareTypeCannot20Chars	Line 1: Care Type must be no longer than 20 characters
<b>11</b>	Care Type	(blank)	Line 1: Care Type is required
<b>12</b>	Marital Status	Divorced	Line 1: Martial Status must be one of the following: Not Disclosed, Single, Divorced/Dissolved, Married/Civil Partnership, Separated, Widowed/Surviving Civil Partner
<b>12</b>	Marital Status	(blank)	Line 1: Martial Status is required
<b>13</b>	National Insurance	012345678901234567890	Line 1: National Insurance must be no longer than 20 characters
<b>14</b>	NOK title	Ds	Line 1: NOK Title must be one of the following: Dame, Dr, Miss, Mr, Mrs, Ms, Mx, Sir
<b>15</b>	NOK First Name	(51 or more characters)	Line 1: NOK First Name must be no longer than 50 characters
<b>16</b>	NOK Last Name	(101 or more characters)	Line 1: NOK Last Name must be no longer than 100 characters
<b>17</b>	NOK Relationship	ThisIsARelationshipThatIsTooLong	Line 1: NOK Relationship must be no longer than 30 characters
<b>18</b>	NOK address line 1	ThisNextOfKinAddressLinesTooLongAndShouldNotBeUsed	Line 1: NOK Address1 must be no longer than 50 characters
<b>19</b>	NOK address line 2	ThisNextOfKinAddressLinesTooLongAndShouldNotBeUsed	Line 1: NOK Address2 must be no longer than 50 characters
<b>20</b>	NOK address line 3	ThisNextOfKinAddressLinesTooLongAndShouldNotBeUsed	Line 1: NOK Address3 must be no longer than 50 characters



<b>21</b>	NOK address line 4	ThisNextOfKinAddressLi nelsTooLongAndShould NotBeUsed	Line 1: NOK Address5 must be no longer than 50 characters
<b>22</b>	NOK Postcod e	ThisNextOfKinPostcode LinelTooLongAndShoul dNotBeUsed	Line 1: NOK Postcode must be no longer than 50 characters
<b>23</b>	NOK Day Telepho ne	ThisNextOfKinDayTelep honselTooLongAndShou ldNotBeUsed	Line 1: NOK Day Telephone must be no longer than 50 characters
<b>24</b>	NOK Evening Telepho ne	ThisNextOfKinNightTele phonelsTooLongAndSho uldNotBeUsed	Line 1: NOK Evening Telephone must be no longer than 50 characters
<b>25</b>	NOK Mobile	ThisNextOfKinDayMobil ePhonelsTooLongAndS houldNotBeUsed	Line 1: NOK Mobile must be no longer than 50 characters
<b>26</b>	NOK Email	(Over 100 characters)	Line 1: NOK Email must be no longer than 100 characters