creating and importing staff/resident CSVs to Coolcare

CoolCare 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 CoolCare.

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. This are formatted to only allow you enter data the same way CoolCare would let you, ensuring it is correct for uploading. They can be found here:
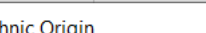
Click here to access the Staff upload template

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.

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.

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-BC for staff, columns A-AJ 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
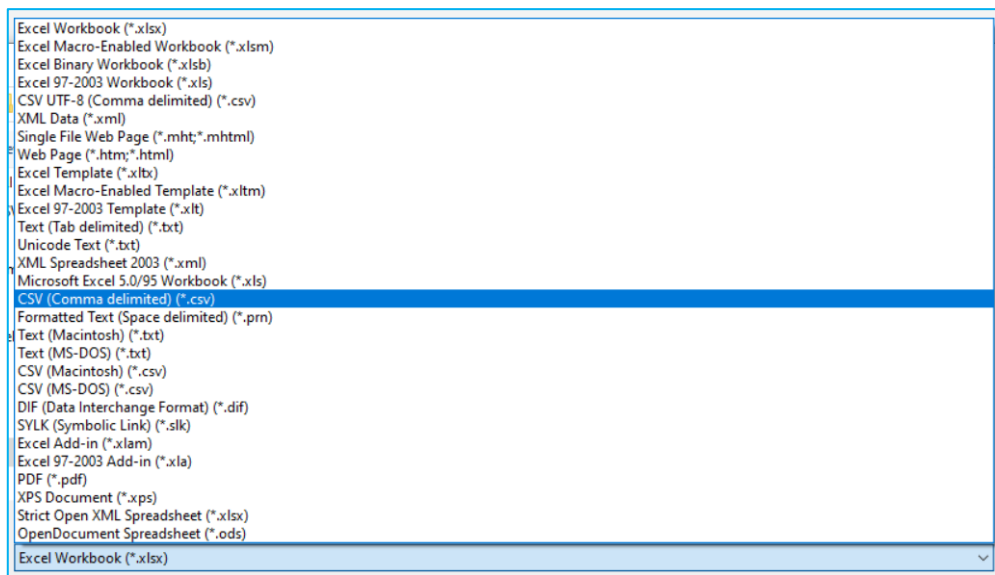
This new file you have saved will be the one you import to CoolCare.

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.
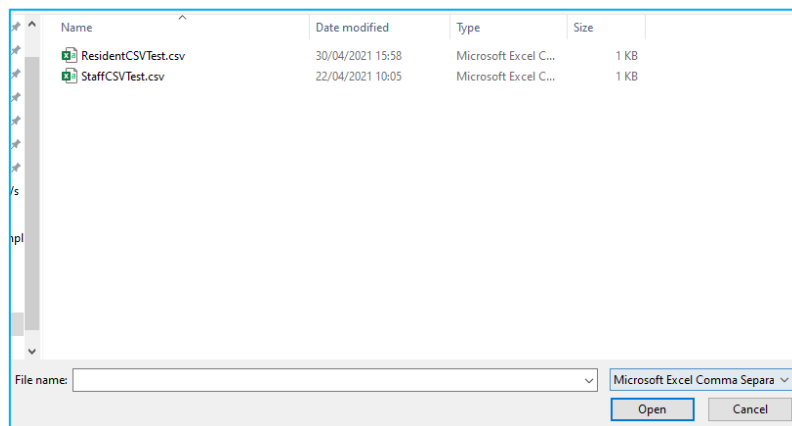
If the upload is successful, you will see the staff/resident list update with the new staff or residents you have imported, as well as the following message at the top of the page.
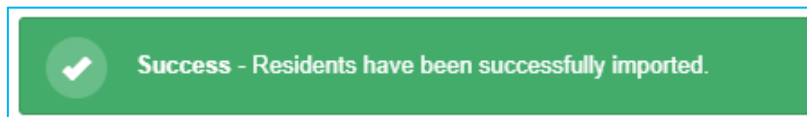
If the upload fails you will be given an error message explaining which row and field has stopped the upload from being successful. The tables below contain each error message and an example of the data that would cause that error.

staff upload errors

Position	Column	Data	Error message
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	ThisForenameIsTooLongToBeAccepted	Line 1: First Name must be no longer than 30 characters
2	Forename	(Blank)	Line 1: First Name is required
3	Surname	ThisSurnameIsTooLongToBeAccepted	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	EthnicOriginLonglongEthnicOrigi	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	ThisAddressLineIsTooLongAndShouldNotBeUsed	Line 1: Address1 must be no longer than 30 characters
12	Address2	ThisAddressLineIsTooLongAndShouldNotBeUsed	Line 1: Address2 must be no longer than 30 characters
13	Address3	ThisAddressLineIsTooLongAndShouldNotBeUsed	Line 1: Address3 must be no longer than 30 characters
14	Address4	ThisAddressLineIsTooLongAndShouldNotBeUsed	Line 1: Address4 must be no longer than 30 characters
15	Address5	ThisAddressLineIsTooLongAndShouldNotBeUsed	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
18	Nok Name	(Over 100 characters)	Line 1: NOK Name must be no longer than 100 characters
19	NOK address 1	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address1 must be no longer than 50 characters
20	NOK address 2	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address2 must be no longer than 50 characters

21	NOK address 3	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address3 must be no longer than 50 characters
22	NOK address 4	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address4 must be no longer than 50 characters
23	NOK address 5	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address5 must be no longer than 50 characters
24	NOK day telephone	01234567890123456790012345678901234567900123456790	Line 1: NOK Day Telephone must be no longer than 50 characters
25	NOK evening telephone	01234567890123456790012345678901234567900123456790	Line 1: NOK Evening Telephone must be no longer than 50 characters
26	NOK Mobile	01234567890123456790012345678901234567900123456790	Line 1: NOK Mobile must be no longer than 50 characters
27	NOK relationship	ThisNOKRelationshipFieldIsTooLong	Line 1: NOK Relationship must be no longer than 30 characters
28	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
29	National insurance number	AB 12 34 56 C	Line 1: National Insurance Number must not contain spaces
30	End Date	12/12-2020	Line1: End Date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
31	Hours Per Week	Forty	Line1: Hours Per Week must be a number
31	Hours Per Week	(Blank)	Line1: Both Weekly Hours and Average Days Per Week must either be set or not set at all
32	Average Days Per Week	Five	Line1: Average Days Per Week must be a number
32	Average Days Per Week	(Blank)	Line1: Both Weekly Hours and Average Days Per Week must either be set or not set at all
33	name of bank	ThisBankNameIsTooLong	Line 1: Name of Bank must be no longer than 20 characters
34	bank account name	ThisBankAccountNameIsTooLongToWork	Line 1: Bank Account Name must be no longer than 30 characters
35	bank sort code	12345678912	Line 1: Bank Sort Code must be no longer than 10 characters
36	bank account number	01234567890	Line 1: Bank Account Number must be no longer than 10 characters
37	Notes	(input longer than 4000 characters)	Line 1: Notes must be no longer than 4000 characters

resident upload errors

Position	Column	Data	Error message
1	Room Number	1234567890123456789012345678901	Line 1: Room Number must be no longer than 30 characters
1	Room Number	(blank)	Line 1: Room Number is required
2	Bed	AB	Line 1: Bed must be no longer than 1 character
2	Bed	(blank)	Line 1: Bed is required
3	Title	Ds	Line 1: Title must be one of the following: Dame, Dr, Miss, Mr, Mrs, Ms, Mx, Sir
3	Title	(blank)	Line 1: Title is required
4	Forename	ThisIsAForenameThatIsTooLongAndShouldNotBeUsed	Line 1: First Name must be no longer than 30 characters
4	Forename	(blank)	Line 1: First Name is required
5	Surname	ThisIsASurnameThatIsTooLongAndShouldNotBeUsed	Line 1: Last Name must be no longer than 40 characters
5	Surname	(blank)	Line 1: Last Name is required
6	Admission Date	67/12/2023	Line 1: Admission date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
6	Admission Date	(blank)	Line 1: Admission date is required
7	DOB	30/13/1991	Line 1: DOB date format is incorrect. Please supply dates in the following format: DD/MM/YYYY
7	DOB	30/10/2900	Line 1: Resident Date of Birth cannot set to a date in future
8	Sex	males	Line 1: Sex must be one of the following: Male, Female, Intersex
9	Funding Type	thisIsNotAFundingType	Line 1: Funding Type does not exist
9	Funding Type	(blank)	Line 1: Funding Type is required
10	Permanency Type	(201 or more characters)	Line 1: Permanency Type must be no longer than 200 characters

10	Permanency Type	(blank)	Line 1: Permanency Type is required
11	Care Type	CareTypeCannot20Chars	Line 1: Care Type must be no longer than 20 characters
11	Care Type	(blank)	Line 1: Care Type is required
12	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
12	Marital Status	(blank)	Line 1: Martial Status is required
13	National Insurance	012345678901234567890	Line 1: National Insurance must be no longer than 20 characters
14	NOK title	Ds	Line 1: NOK Title must be one of the following: Dame, Dr, Miss, Mr, Mrs, Ms, Mx, Sir
15	NOK First Name	(51 or more characters)	Line 1: NOK First Name must be no longer than 50 characters
16	NOK Last Name	(101 or more characters)	Line 1: NOK Last Name must be no longer than 100 characters
17	NOK Relationship	ThisIsARelationshipThatIsToLong	Line 1: NOK Relationship must be no longer than 30 characters
18	NOK address line 1	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address1 must be no longer than 50 characters
19	NOK address line 2	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address2 must be no longer than 50 characters
20	NOK address line 3	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address3 must be no longer than 50 characters
21	NOK address line 4	ThisNextOfKinAddressLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Address5 must be no longer than 50 characters
22	NOK Postcode	ThisNextOfKinPostcodeLineIsTooLongAndShouldNotBeUsed	Line 1: NOK Postcode must be no longer than 50 characters
23	NOK Day Telephone	ThisNextOfKinDayTelephoneIsTooLongAndShouldNotBeUsed	Line 1: NOK Day Telephone must be no longer than 50 characters

24	NOK Evening Telephone	ThisNextOfKinNightTelephoneIsTooLongAndShouldNotBeUsed	Line 1: NOK Evening Telephone must be no longer than 50 characters
25	NOK Mobile	ThisNextOfKinDayMobilePhoneIsTooLongAndShouldNotBeUsed	Line 1: NOK Mobile must be no longer than 50 characters
26	NOK Email	(Over 100 characters)	Line 1: NOK Email must be no longer than 100 characters

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