Coolcare CSV upload top tips

If you're new to Coolcare or have recently added a new home to your system, you have the option to upload staff and residents in bulk rather than individually, you can add all records with relevant information you need as a starting point. This guide offers some tips for filling out the upload templates, as well as some common problems you may come across when uploading data and how to fix them. For more information on the data uploads please check our CSV upload guide [here](#).

what information do we need?

Whether you're uploading staff or residents, there will be some information required in order to create the records. These will be indicated on the upload template files with a red column header, typically covering basic details (name, DOB etc.,) as well as some things more specific to Coolcare (Position, Start Date, Holiday Entitlement for staff, Room no, funding/permanency info for residents). Most other fields are optional, but there are a few to keep an eye out for.

staff template:

- **Marital Status** – This is a required field but can be easily missed. Make sure you use one of the options from the drop down menu provided, rather than typing in the field.
- **End Date** – This is an optional field but can be filled in if you want to add in historic staff records to Coolcare. Having an end date will upload the staff member as a leaver. Be sure to leave this empty for all current staff.
- **Hours per Week/Average Days per Week** – This is technically an optional field but will need to be filled in for permanent staff with contracted hours, as it's used to work out their holiday entitlement. **If left empty**, the staff will be added to Coolcare as bank staff.
- **Holiday Entitlement** - This is a required field but can be confusing. This field should have the staff member's annual holiday entitlement in number of days, **not** hours. This is then used alongside the Hours per Week and Average Days per Week to calculate the staff member's annual holiday entitlement in hours.
    - o **Important - 28 days is based on a standard worker, working a 5-day week. If you are inputting anything other than 5 into the average days field, you will need to look at calculating the entitlement for the relevant amount of days.**
- **Evidenced** – There are two fields with this name at the end of the template and are used for Covid vaccination tracking. If you are not filling in the vaccine details, you will still need to fill these in, just select *FALSE* for each staff member. This also ensures the CSV file is the correct size to avoid errors when uploading.

resident template:

- **Room Number/Bed –** These are required fields but should only be filled in for rooms that have residents in them. Empty rooms can be created on Coolcare separately once the residents are uploaded. The Bed field would be used to distinguish different beds in any shared rooms; if the room is single, it still requires a bed to be uploaded (1, A etc.,)
- **Marital Status** - This is a required field but can be easily missed. Make sure you use one of the options from the drop down menu provided, rather than typing in the field.
- **Weekly Fee** – This field is optional but an important one for residents and is better to add while uploading instead of after.
- **Evidenced** – There are two fields with this name at the end of the template and are used for Covid vaccination tracking. If you are not filling in the vaccine details, you should still fill these in, just select *FALSE* for each staff member. This also ensures the CSV file is the correct size to avoid errors when uploading.

On both upload files you have the option to include Next of Kin details, including contact information. You can only have one next of kin when uploading, but you will have the option to create more contacts on both staff and resident records once they are uploaded to Coolcare.

common upload errors

When uploading the CSV files to Coolcare, you may get an error if there is an issue with the data. Usually, the error will include the exact piece of information that caused the issue, but the error may not always be obvious. Here are some common errors that you may come across when attempting to upload data and how to fix them. For a full list of errors, please check our full CSV upload guide.

staff upload errors:

- **Line #: The position supplied is not valid** – The name of the staff member's position is too long, this is in Column D, and can only be 20 characters long. For example, *Activities Co-Ordinator* would be too long and would have to be shortened.
- **Line #: Marital Status must be one of the following: Divorced/Dissolved, Married/Civil Partnership, Not Disclosed, Separated, Single, Widowed/Surviving Civil Partner** – The staff member's marital status was input incorrectly, and must match one of the options listed exactly. For example, just *Divorced* would not work, it must be *Divorced/Dissolved*.
- **Line #: Both Weekly Hours and Average Days Per Week must either be set or not set at all** – You have filled in either the *Hours per Week* or *Average Days per Week* for a staff member, but not both. If the staff member is bank staff, leave both fields empty.
- **CSV does not have correct number of columns. Has 54 but requires 55** – The *Evidenced* field at the end of the file has been left empty. You will need to add FALSE to column BC for each staff member.

resident upload errors:

- **Line #: Care Type is required** – This error will appear if you are trying to upload an empty room. Remove this row from the upload file, empty rooms can be created in Coolcare after the upload is completed.
- **Line #: Bed is required** – The *Bed* field has been left empty. All rooms require a bed identifier, even if there is only one bed in the room. For example, just *A* would work.
- **Line #: Funding Type does not exist** – The funding type entered in the field is not on Coolcare. The default funding types on Coolcare are *Deferred, LA, LA (Private Rate), LA + TopUp, NHS, NHS (Private Rate), Private, Unknown*. Funding types can be edited in Coolcare, but for uploading residents it's best to stick with these defaults to ensure they upload correctly.
- **Line #: Martial Status must be one of the following: Not Disclosed, Single, Divorced/Dissolved, Married/Civil Partnership, Separated, Widowed/Surviving Civil Partner** - The resident's marital status was input incorrectly, and must match one of the options listed exactly. For example, just *Divorced* would not work, it must be *Divorced/Dissolved*.
- **CSV does not have correct number of columns. Has 35 but requires 36** - The *Evidenced* field at the end of the file has been left empty. You will need to add FALSE to column AJ for each resident.