COVID-19 Community Team Outreach Tool

Uploading Multiple Contacts Using Excel

Administrators can upload multiple contacts or case patients at once using an Excel template:

Completing the Template

TO COMPLETE THE TEMPLATE:

- Under the **Contact Tracing and Movement and Monitoring** header in the CD Manual, **download the file** under *Contact and Case Patient Import Template (Excel)*.
  - Fill out all information as appropriate using the CCTO Glossary as a guide, **noting required fields (First Name, Last Name, Contact or Case Patient, State, Last Date of Exposure, and County) in red.** Use the dropdowns provided for any fields that are not free text. **You do not need to complete all fields** and should leave unknown information blank.
- After you complete your changes, remember to **save this file as a .CSV.**
- *Any additional spaces or information in this template will be interpreted as blank contacts or errors by the system, so please use a new template for each set of contacts uploaded.*

Uploading the Template

This functionality is only visible to users designated as administrators within the CCTO Tool. Please note that we do not recommend using the "Import from Excel" button, as this will not allow you to see where errors have occurred.

1. Navigate to the gear icon in the top right corner and select "Advanced Settings."
2. Click the dropdown arrow next to "Settings" at the top of the screen. In the menu that appears, select "Data Management."
3. Select "Imports" to view the "My Imports" screen.
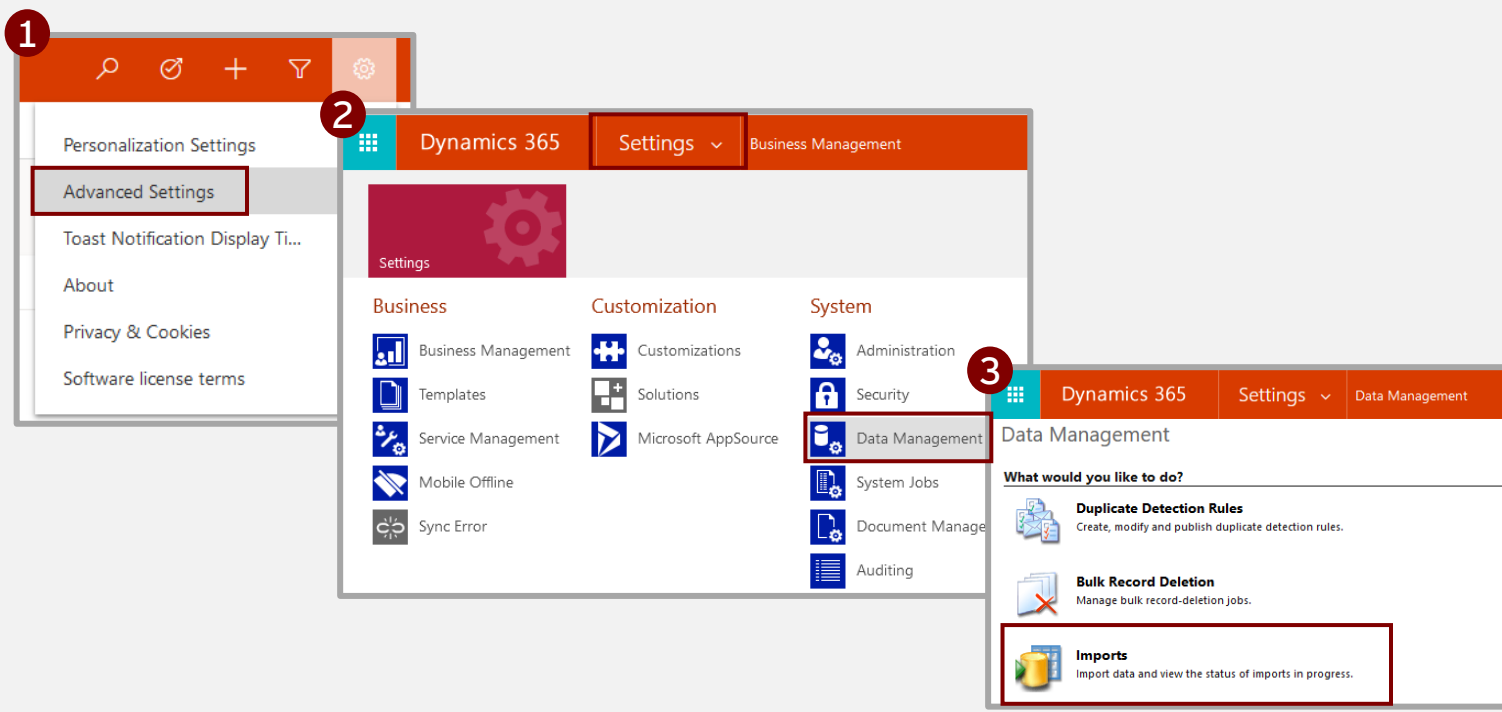
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4. Click "Import Data" at the top of the screen to open the Import Wizard.
5. Click "Browse" to upload your completed .csv template. Click "Next."
6. Click "Next."
7. Select "Default (Automatic Mapping)" from the Data Map list and then click "Next."
8. Select "Monitoring Event" from the dropdown and note that the "Success" message appears. Click "Next" and proceed to the data mapping process below.

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Mapping & Submitting Your Upload

1. Confirm that the "Source Fields" from your .csv file have mapped as expected to the "Dynamics 365 Fields." Note that if the headers have been altered in any way, the information may not have mapped properly. Then, click "Next."
2. Click "Next" again on the screen that follows.
3. Under "Allow Duplicates," we suggest choosing "Yes." If you choose "No," any duplicates detected, such as people with a last name or birth date already present in the system, may not be uploaded.
4. Set an owner as appropriate.
5. If you wish, you can add a name for your data map to save it as a default for future imports.
6. Click "Submit" and then "Finish" to close the window.

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Reviewing Import Results

1. After clicking "Finish" to close the window, your new upload will be immediately visible in the "My Imports" Screen.
2. Note the status column. If the file is large, you may need to refresh the page until the status reads "Completed."
3. If any errors occur, they will appear as counts in the "Partial Failure" or "Errors" columns. If you notice a nonzero value in these columns, you can review what occurred by clicking on your upload.
4. Clicking on your upload produces a profile screen that will allow you to drill into failures, successes, and partial failures itemized on separate tabs.

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5. As an example, this screenshot shows an error that can occur if duplicate detection is not turned off and a new contact has the same full name as an existing contact. The new contact will not be uploaded. ***Please note that you should only attempt to re-upload records (monitoring events) that have failed and NOT the entire original file. Re-uploading the original file may result in duplicating successfully imported records.***

6. Successfully uploaded records will appear normally in the Monitoring Events Tab, assigned to the owner you selected during upload.