

# Compliance Manager Employee Upload Spreadsheet

## Available Fields and Description

Note: A red asterisk (\*) denotes a required field.

Required fields are:

- Client ID
- First Name
- Last Name
- Email

**Client ID\*** – See Client ID column of location list, accessible by clicking on Admin > My Organization > Locations.

**First Name\*** - Free text

**Middle Initial** – Free text

**Last Name\*** - Free text

**Email\*** – This is the username and must be email address format.

**Notification Email** - Must be email address format. This field will populate with username email from spreadsheet column B if left blank but can be populated with a different email address.

**Phone** – Free text with (000)000-0000 or without 0000000000 dashes and parentheses.

**Date Of Birth** - Format: mm/dd/yyyy.

**Social Security Number** – Free text with 000-00-0000 or without 000000000 dashes.

**Gender (M/F/U)** - Limited options. Select from two available options M, F, or U.

**Street Address** – Free text

**City** – Free text

**State** – Free text

**Zip** – Free text limited to 5 digits.

**Time Zone** – UTC Format (examples below)

(UTC-05:00) Eastern Time (US & Canada)

(UTC-06:00) Central Time (US & Canada)

(UTC-07:00) Mountain Time (US & Canada)

(UTC-08:00) Pacific Time (US & Canada)

**Emergency Contact Name** – Free text

**Job Code** – Free text

**Role** – Free text. Defaults to Employee User if left blank. Other options include Administrator Access, Manager, or Employee User upon initial upload. Because of related customization options, the recommendation is that Manager roles should be assigned individually from the related user's Compliance Manager profile.

**Access Type** – Free text. Related to Role of Manager. Available options below.

Incidents  
Risk Assessment  
Attestations  
Audits  
Documents  
Legal Manager  
User Management  
Third Party

**Employee Number** – Free text/alpha numeric. If this field is not populated on the upload spreadsheet, a system generated employee number is applied (this field is not updated via the bulk import)

**Date Of Hire** - Format: mm/dd/yyyy

**Position Title** – Free text

**Position Type** – Free text but must match the list located in Admin > Template Library > Lists > Position Type

**Termination Date** –Format: mm/dd/yyyy

**Employment Type** – Free text. Options are limited to the following.

Contract  
Exempt  
Hourly  
Non-Exempt  
Permanent  
Temp  
Executive

**Department** – Free text but must match the list located in Admin > Template Library > Lists > Departments

**Emergency Contact Phone** – Free text with (000)000-0000 or without 0000000000 dashes and parentheses.

**Background Check Status (Complete/Incomplete)** – Free text. Limited options of Complete or Incomplete.

**Background Check Date**– Format: mm/dd/yyyy

**Manager**– Free text/alpha numeric. Manager's employee number.

**Is Provider**– Y/N

**State License #1** – Free text

**State License #1 Expiration Date** - Format: mm/dd/yyyy

**State License #2** – Free text

**State License #1 Expiration Date** - Format: mm/dd/yyyy

**NPI** – Free text

**DEA License** – Free text

**License Status (Complete/Incomplete/N/A)** – Free text. Limited options of Complete, Incomplete, or Not Applicable

**DEA License Expiration Date**– Format: mm/dd/yyyy

**Credentialing Status** – Limited options of Complete, In Process, Not Applicable.

**Credentialing Date** - Format: mm/dd/yyyy

**Current Credentialing Date** - Format: mm/dd/yyyy

**Expected Re-Credential Date** - Format: mm/dd/yyyy

**Direct Reports** - Free text/alpha numeric. User's employee number, in Compliance Manager. Separate multiples with a space between each.

**Active/Inactive (A/I/X)** – Limited options of A, I, or X. If left blank will default to A.

- I = Inactive. Populate this field with I to archive a user from a single location, identified in Client ID column A.
- A = Active. Designates the user as active in the system. This field defaults to active if left blank. No need to populate with A when adding a new user via upload spreadsheet.
- X = Inactive. Populate this field with X to archive a user from all locations.

**Template Name** – Free text. Relevant only if custom employee profile template(s) created. If left blank, will default to system standard employee profile template.