

Compliance Manager Employee Upload Spreadsheet

Available Fields and Description

Note: * 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. No spaces allowed

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 a 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, 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
Business Associates

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 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.