

What Is A Bulk Upload?

This process allows users to quickly add a large number of client or employee records into the Sandata CalEVV system using a provided Excel file. The file contains the necessary data and helps streamline data entry by reducing manual input.



Preparing For A Bulk Upload

1. Click the link **Preparing a Bulk Upload File¹**. This will route you to the Sandata website.
2. Open the **Spreadsheet** labeled **California Manual Entry Spreadsheet v3.0 – CA61.xlsm**. Ensure that the macro is enabled on your Spreadsheet. Follow the steps below to enable macros:
 3. Click **Enable Editing**.
 - For **Windows**, go to **File > Options > Customize Ribbon**, then in the left dropdown choose **Popular Commands**, then in the left column select **Macros**, then press **Ok**.
 - For **Mac**, go to **Excel > Preferences > Ribbon & Toolbar**, then in the **Customize the Ribbon** section, under **Main Tabs**, check the **Developer** check box, and press **Ok**.
 4. Enter your Sandata assigned account number on the **Account** tab.
 5. Click the **Client** or **Employee** tab.
 6. Enter all client or employee information.
 7. Click the **Payer-Program-Service** tab.
 - This must be done for each client entered.
 8. Click the **Account** tab.
 9. Click on **Create Files**.
 10. Select a location to save the spreadsheet.

Creating A Bulk Upload

1. Click the link **Performing a Bulk Upload²**. This will route you to the Sandata website.
2. Sign in to your Sandata account.
3. On the left-hand side, select **Bulk Upload**.
4. Use the dropdown to select an upload type.
5. Click **Browse**.
6. Locate and select your spreadsheet to be uploaded.
7. Click **Open**.
 - A success window displays when the upload is completed.
8. Click the **download icon** to save a copy of the result file.
 - Users must save the result file, as it cannot be access after this screen is closed or navigated away from.
9. Select a location to save the Upload File.
10. Click **Save**.