

How To Create A Bulk Upload

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



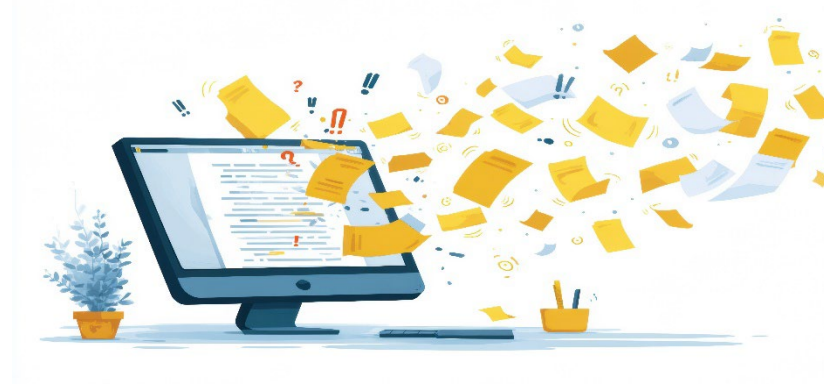
1. Click the link **Preparing a Bulk Upload File¹**. This will route you to the Sandata website.
2. Open the **Spreadsheet** labeled **California Manual Entry Spreadsheet v3.0 – CA61.xlsm**. Ensure that the macro is enabled on your Spreadsheet. Follow the steps below to enable macros:
3. Click **Enable 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**.



- Adding any employee or client in the Bulk Upload File that has already been manually entered into the system will overwrite its existing record.
- Leaving any field blank in the Bulk Upload File will also overwrite the existing field in the system.



For videos on how to perform bulk upload of client and employee records, visit the [CalEVV Training Library Archive](#)³.

For **AltEVV providers**, please access the [CalEVV Alternate Vendor Resources](#)⁴ for some helpful information.



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Here are some helpful links to get you started!

¹[Preparing A Bulk Upload](#)

²[Performing A Bulk Upload](#)

³[CalEVV Training Library Archive](#)

⁴[Alternate EVV Resources](#)

[DHCS CalEVV website](#)

[Sandata website](#)

Need Assistance?

For program policy questions, email EVV@dhcs.ca.gov.

For CalEVV customer support, call 1-855-943-6070 or email CACustomerCare@sandata.com.

For EVV assistance with alternate systems, call 1-855-943-6069 or email CAAltEVV@sandata.com.

To update administrator access to CalEVV, submit a request ticket through [Sandata On-Demand](#).



Questions? E-mail us at: EVV@dhcs.ca.gov