

- **LastName (column B):** Required field. Only use letters and spaces. No numbers or special characters.
- **UserName (Column C):** Required field. Allows for letters, numbers, and special characters.
- **Email (Column D):** Conditional field. Either email or phone number (Column E) must be populated. Email must include “@” and “.”
- **PhoneNumber (Column E):** Conditional field. Either email (Column D) or phone number must be populated. Phone numbers must only contain numbers and be 10 numbers long.
- **User IvrPin (Column F):** Optional field. IvrPin allows numbers only and must be 7 numbers long.
- **Users MedicaidID (Column G):** Optional field. MedicaidID must only contain letters or numbers and be 9 to 13 digits long.

Note: If MedicaidID starts with zero, replace the zero with the letter “M.” The system will remove the letter “M” after the import is successful.

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

	A	B	C	D	E	F	G
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897
3							
4							



- **UserRole (Column H):** Required field. UserRole may **only** contain the specific 4 letter code for the following:
 - PRAD (Provider Administrator) which allows full Admin permissions
 - CARE (Caregiver) which only allows mobile login access
 - PMON (Provider Monitor) which allows Admin permissions with read-only access
- **UserStatus (Column I):** Required field. UserStatus may **only** contain the specific values as follows:
 - ACTIVE (Can login)
 - INACTIVE (Not allowed to login)
- **CaregiverType (Column J):** Required field. CaregiverType may **only** contain the specific 3-4 letter code for the following:
 - CNA (Certified Nursing Assistant)
 - LPN (Licensed Practical Nurse)
 - RNS (Registered Nurse)
 - ABA (Assistant Behavior Analyst)
 - RBT (Registered Behavior Technician)
 - LA (Lead Analyst)
 - OTHR (Other)

B	C	D	E	F	G	H
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole
Doe	Jane12	JaneDoe12@gmail.com	5555555555	11111111	M3412234560897	CARE

B	C	D	E	F	G	H	I
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus
Doe	Jane12	JaneDoe12@gmail.com	5555555555	11111111	M3412234560897	CARE	ACTIVE

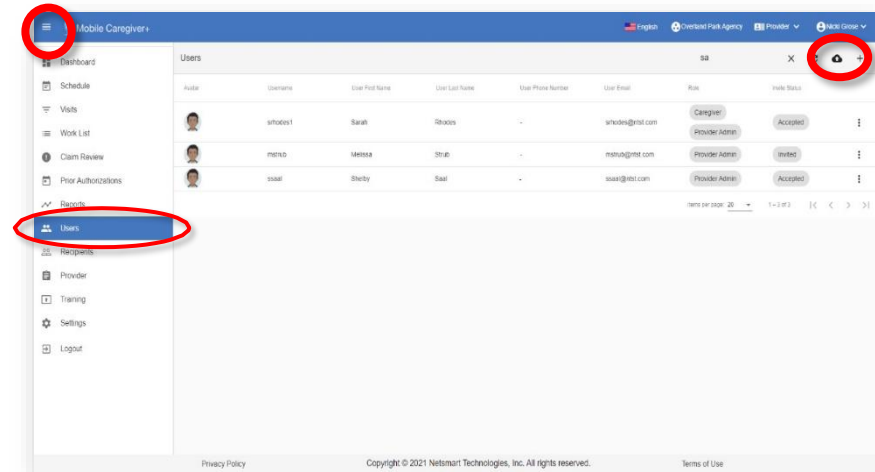
C	D	E	F	G	H	I	J
UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus	CaregiverType
Jane12	JaneDoe12@gmail.com	5555555555	11111111	M3412234560897	CARE	ACTIVE	RNS

Step 2

- Save the file as a .csv (comma separated values) file and rename in any way that helps you remember the import.

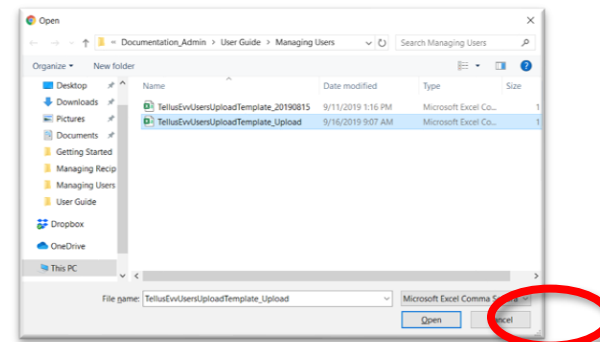
Step 3

- Import the file:
 - In Netsmart's Mobile Caregiver+ EVV, expand the **Main Menu** by clicking on the menu icon (3 lines in the top left corner).
 - Click on **Users** to view the **Users** page.
 - Click on the "cloud" icon in the upper right corner of the page and a pop-up window will appear.

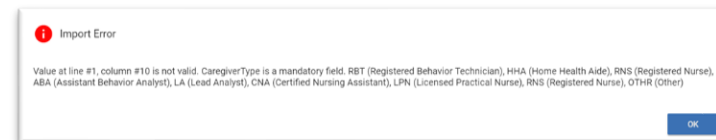


Step 4

- Find and select the import file to upload.
- Click **Open**.



If there are errors in the file, a pop-up window will appear to give you information about the location of the error in the import file and how to correct it. Click **OK** to close the pop-up window.



Note: If there are any errors detected by the system, no records from your file will upload. The entire file must be error free before any User records will upload.

If your import is successful, a message will display at the bottom of the User page to let you know the import file has been successfully uploaded.

