# SPOT Bulk Data Upload Quick Reference Guide

### Please contact the Help Desk at <u>916-520-1619</u> if you experience technical difficulties. Please do not send the template to the Help Desk as it contains PHI and PII.

**Overview:** This Quick Reference Guide covers how users can bulk upload SPOT Cases and Contacts.

The SPOT Bulk Uploader will create case and contact records in SPOT. As a reminder, only users with the Bulk Upload permission can submit SPOT Bulk Data Uploads.

### SPOT Bulk Data Upload Process Overview:

- 1. SPOT Liaison downloads the SPOT Bulk Upload template from the Bulk Upload page in SPOT.
- 2. SPOT Liaison completes the excel template.
- 3. SPOT Liaison uploads the completed template in SPOT, which sends it to CalCONNECT.
- 4. CalCONNECT User downloads the completed template sent by the SPOT Liaison.
- 5. CalCONNECT User completes the remaining required fields in the template and reviews the data.
- 6. CalCONNECT User processes the completed template in CalCONNECT.
- 7. SPOT Records are created in SPOT and visible to the SPOT Liaison (along with other records entered manually in SPOT).
- 8. The SPOT Batch creates records in CalCONNECT per the normal process and frequency.

## **Key Points:**

- SPOT Liaisons are responsible for completing the Excel Bulk Upload template with positive case and close contact data.
- LHJ CalCONNECT users (not Liaisons) are responsible for processing the completed SPOT Bulk Upload template in CalCONNECT.
- SPOT Bulk Upload creates records in SPOT, not CalCONNECT.
- SPOT Records created via Bulk Upload will be visible in SPOT to Liaisons.
- SPOT Records created via SPOT Bulk Upload will be picked up by the SPOT Batch and will create records in CalCONNECT per the normal SPOT Batch process (this may take 5-10 minutes).





## This guide covers the following processes for CalCONNECT Users:

- <u>Receive and Download SPOT Bulk Upload Template via SPOT Updates</u>
- <u>Review and Edit Template</u>
- <u>Upload and Submit File for Processing</u>
- <u>View SPOT Bulk Uploads</u>
- SPOT Error Checker
- <u>Common Errors</u>

## **Receive and Download SPOT Bulk Upload Template via SPOT Updates**

**Steps** Step Action **Screenshot** In the SPOT Portal, Liaisons 1 Contact Tracing Home  $\sim$ can submit completed **SPOT Bulk Upload** Change Owner Merge Records Send SMS Q SPOT Updates 8 Close Records templates. These templates Status • Q. Search this list... 10 - C' / Apps will appear in CalCONNECT No results  $R_{\cdots} \ \lor \ R_{\cdots} \ \lor \ Pr_{\cdots} \ \lor \ La_{\cdots} \ \lor \ H_{\cdots} \ \lor \ St_{\cdots} \ \lor \ D_{\cdots} \ \lor \ Q_{\cdots} \ \lor$ attached to Bulk SPOT Items COVI... Suspe... Medi... English Outre... Updates. SPOT Updates COVI... Suspe... Medi... Outre.. View All COVI... Suspe... Medi.. Outre.. To view the templates that have been submitted by SPOT Liaisons, navigate to the 9-dot App Launcher and type the keyword "SPOT Updates" in the search field. Click the drop-down arrow 2 Contact Tracing Home ✓ ♣ Recently Viewed | SP... ✓ × from the list view options SPOT Updates Recently Viewed and select "SPOT Updates Q. Search this list 8 · . . . . / 1 item · LIST VIEWS for Bulk Uploads". Recently Viewed (Pi POT Updates SPOT Updates for Bulk Uploads SPOT Updates for Exposure E SPOT Updates for Records On this list view, you will 3 see Bulk SPOT Updates that have been submitted





	ALIFORNI	
	by SPOT Liaisons. Select	Contact Tracing Home V 🐥 SPOT Updates for Bu V X
	the SPOT Update you want	SPOT Updates SPOT Updates Change Owner Chang
	to work on by clicking on	2 items + sorted by SHOT Update ID + Hitered by All spot updates - Record type + Updated a few seconds ago
	the SPOT Update ID.	SPOT Update ID *         Exposure Event         Exp         Comments         St         Q         H         Created Date         V           1         SPOT Update 001010         SCH. Lincoh High School Storamento 7/2021 #         S88         Sondrig completed line L         New         J         Ø 9/10/2021, 10:39 A         V
	· ·	2 SPOT-Update-001011 SCH - School ABC 7/2021 + 58853
4	You will now see the details	SPOT Update
4		SPOT-Update-001042
	of the Bulk SPOT Update,	Related <b>Details</b>
	like Comments, the	
	Exposure Event the	SPOT Update 0 SPOT-Update-001042 Hecord Type Bulk SPOT Update 01
		Comments Example Bulk Upload template
	template is for, and the	Status New
	Liaison who submitted the	Exposure Event SCH - Mary's Test UAT School 8/2021 -# 58858
	template.	Exposure Event 58858
	b	Record #
		Attachment Acries Test.xisx
		Name(s) Owner Martha Adams - SPOT School Lia
		ison
	Additionally, you will also	
		Exposure Event a3Or000000G3GfEAK
	see the "Exposure Event	
	Salesforce ID" and the	Salesforce ID
	"SPOT Liaison Salesforce	
		SPOT Liaison 001r00000b4wFJAAY
	ID", which are needed to	Salesforce ID
	complete the LHJ portion of	
	the template.	
	the templater	
5	To download the completed	SPOT Update SPOT-Update-001010
	template, click on the	
	"Related" tab next to	
	"Details."	Related Details
	Details.	
		SPOT Update ID SPOT-Update-001010
		Record Type Bulk SPOT Update
		Comments Sending completed line list
		Status New
		Exposure Event SCH - Lincoln High School -
		Sacramento - 7/2021 -# 58859
		Exposure Event 58859
		Record #
		Has Attachment
		Attachment Shared Portal Bulk Upload Template.xlsx
		Name(s) Owner SPOT School Liais
		SPOT Update SPOT-Update-001010
	Click on the file to	
	download it.	Related Details
		Notes & Attachments (1)         Upload Files
		Shared Portal Bulk Upload Template.xlsx
	1	
		Sep 10, 2021 • Attachment
		Sep 10, 2021 • Attachment View All





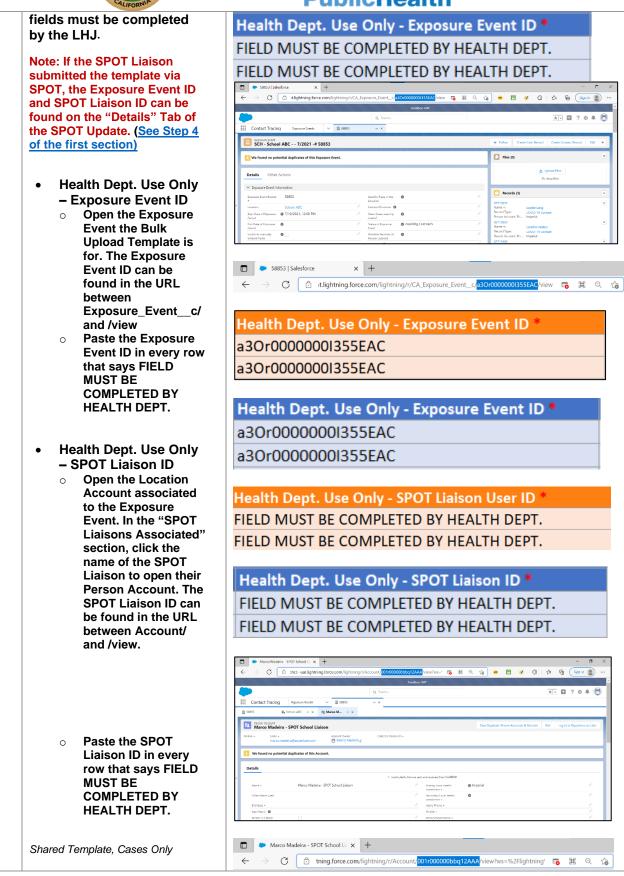
# **Review and Edit Template**

# Steps

Step	Action		Screenshot	
1	CalCONNECT users will			
	receive a "Shared Portal	В	С	D
	Bulk Upload Template" or a "School Bulk Upload Template" from the SPOT Liaison. There are two tabs in the		CONTACT	Date (YYYY-MM-DD)
	template that can contain data: Contact Data Entry	First Name *	Last Name *	Birthdate *
	and Case Data Entry. Information entered on the			
	Contact Data Entry tab will create contact records in SPOT. Similarly,	< ► Instru	ctions Case Data Entry	Contact Data Entry
	information entered on the Case Data Entry tab will	В	С	D
	create case records in SPOT. The bulk upload will accept templates with information in both tabs and only one tab.	CASE	Data Entry	Date (YYYY-MM-DD)
	Review the data on each	First Name *	Last Name *	Birthdate *
	tab. Verify there are no			
	formatting errors, and all required fields are			
	completed. Required fields are marked with a red asterisk and the column is	< → Instru	uctions Case Data Entry	Contact Data Entry
	shaded light orange (Contact Data Entry tab) or light blue (Case Data Entry		Colifornia must be entered as "California" not "CA"	Indicate whether person is a student or staff/faculty.
	tab).	Home Street Address 111 Main St 222 Broadway Ave	City         State         ▼           Sacramento         California           Sacramento         California	Zip * Student or Staff? * 90000 Yes, staff/faculty or volunteer 90000 Yes, staff/faculty or volunteer
	DO NOT modify the template rows or columns as this will cause an upload error. No records will be created if there is an error in the template.			
2	On the Contact Data Entry tab, complete the columns		Jse Only - Exposure I	
	within the orange section of	Health Dept.	ose only - Exposure i	event ID
	within the orange section of template. On the Case Data		E COMPLETED BY HE	
	within the orange section of	FIELD MUST B		ALTH DEPT.





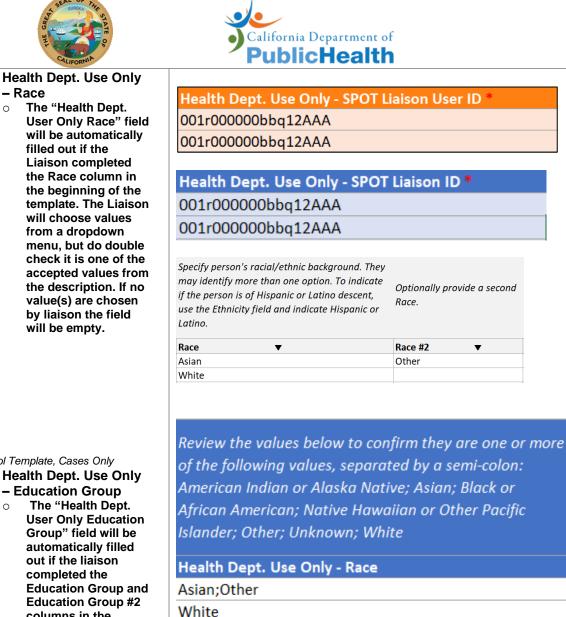




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Race

0



School Template, Cases Only

- Health Dept. Use Only Education Group
  - The "Health Dept. 0 User Only Education Group" field will be automatically filled out if the liaison completed the Education Group and Education Group #2 columns in the beginning of the template. The liaison will choose values from a dropdown menu, but do double check it is one of the accepted values from the description. If no value(s) are chosen by liaison the field will be empty.

Optionally provide a second Education Group.

Education Group	▼	Education Group #2	▼
Sport Team/Club		Academic Class	
Social Organization			

of the following values, separated by a semi-colon: American Indian or Alaska Native; Asian; Black or African American; Native Hawaiian or Other Pacific

Optionally provide a second

▼

Race.

Race #2

Other

#### Health Dept. Use Only - Race

Indicate the primary relationship to

the exposure, including classroom,

sports team, workplace, etc.





		Review the values below to confirm they are one or more of the following values, separated by a semi-colon: Academic Class; Campus Residential; Carpool/Shared Transportation; Off-Campus Residential; Social Gathering; Social Organization; Sport Team/Club; Summer Camp; Workplace; Other Health Dept. Use Only - Education Group Sport Team/Club;Academic Class Social Organization
3	Save the revised template after completing the additional fields.	Save a Copy

# Upload and Submit File for Processing

1	After the SPOT Template has been updated, navigate to the 9- dot App Launcher and type the keyword "SPOT Bulk Data" in the search field.							
	Select "SPOT Bulk Data Upload"	000	C	ontact Tracing	Records	~	🕀 All   SPOT Re	egistration $ \lor   imes $
	and it will route you to the SPOT Bulk Data Upload page.		Apps	oot bulk data	⊗ 8		egistration • Updat	ted 11 minutes ago
	NOTE:		No resu	lts		Last Name	~	Email
	SPOT Bulk Data Upload			ulk Data Upload		Smith		sandboxsmith@s
	will create SPOT case		View A			Riordan		christina.riordan
	and contact records in		3	KS-00002	вugs	Bunny		bugsbunny@yah
	SPOT, not directly in CalCONNECT.		4	RS-00003	Bill	Murray		billmurray@yaho
	(Records will not be visible		5	RS-00004	Bill	Murray		billmurray@yaho
	<ul> <li>in CalCONNECT for up to 5 minutes until they are processed by the SPOT batch)</li> <li>Please use CalCONNECT Bulk Data Upload to create CalCONNECT records that are not related to SPOT nor from a SPOT liaison.</li> </ul>							





2	ALIFORN	
	Upload the template. Click	SPOT Bulk Data Upload
~		Short buik bata opioad
	"Upload File" and select the	Step 1- Upload the file
	template you just reviewed	
		Use this functionality to create SPOT contact records in a bulk failors. This Bulk Uploader will creater records in SPOT, next directly in CalCONNECT, Note the records may not be visible in CalCONNECT or serveral minister with they are proceeded by SPOT. Preser we CalCONNECT bulk Data Tabland to conte CalCONNECT records that are not related to 2010 not from a SPOT billion.
	and click "Open." Click "Next	We want to see a second s
	step" to proceed to the upload	<ul> <li>Income the submound in the SEOT Build Basic grant Quark Determine Structure that Hord Taming Area CaCOMECT Exchange a before uploading the temporation. These marks right of the temporation of the submound the temporation.</li> <li>Braves the data extension is the structure basic and temporative them are not formating structure.</li> <li>Braves the data extension of the structure basic and temporative them are not formating and temporative fields.</li> <li>Structure the data extension of the structure basic temporative them are not formating ensures and all required fields are compliated.</li> <li>Structure the data extension of the structure of the structure temporative tempor</li></ul>
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	page.	<ul> <li>Once the template is uploaded, please wait for CalCONNECT to process the data. It may take a few mixutes depending on how much information is contained in the</li> </ul>
		services A Mar the template inside proceeding the SPOT Records will be valide in SPOT to the Lances. The SPOT Backs will not and under CaCCOMSCT Contact exclusion in CaCCOMSCT por the common SPOT backs process The Table hypothic contact the under the SPOT Records cannot be estimated after they are created. The Table hypothic contact the under the SPOT Records cannot be estimated after they are created.
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		Δ.
		Upload File
-	Click the "Submit the file for	
3		SPOT Bulk Data Upload
	processing" button to start the	· · · · · · · · · · · · · · · · · · ·
	data creation process in	Step 3- Start the data upload
	SPOT.	Click the Submitt the Ne for Proceeding builton to start data creation process in CalCONNECT Plasse note that It might take 5 minutes or longer for CalCONNECT to create the
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		B you have any questions, please reach out to the Help Desk (HelpDesk CA.Connextgaccentum com).
	time. It might take 5 minutes or	
	longer depending on how	Subwit the Ma for processing
	much information is contained	Ge back River thep
	in the template. DO NOT close	
	or refresh the page while the	
	file is processing.	
4	A message will appear on your	SPOT Bulk Data Upload
	screen to notify you that the	
		0
	bulk upload was successful.	Step 3-Start the data upload
		Citie the <b>Solution that that for phonounding</b> to a state sensition process in SuCCONNECT these not that the integrits and a solution process. The SuCCONNECT these notes that it might table about 15 to 20 minutes to proceed. Do NOT drose your between data depending on how much information is contained in the sensitive. All these manys, 400 neur might table about 15 to 20 minutes to proceed. Do NOT drose your between during them 15 three weather motions and the to owners it universitive in a sense sense that the subgroups and table table about 15 to 20 minutes to proceed. Do NOT drose your between during them 15 three weather motions and table tables are submitted and tables are sense that the subgroups and tables are submitted and ta
	Click the "Go to bulk record"	Guing this time! If the web browser notifies you that the boowark is unresponsible, please setting that under the web browser notifies you that the boowark is unresponsible, please setting the web that the calculate the setting that the setting the setti
	to check for the SPOT Bulk	If an error which is the template, the splaten will be out all of the errors and no records will be crueted in CaCONRECT with all the errors are advecased. There are some instances where you'll be given a "We'nt a spage" error, for more datals passe error outs the hirty Deal's integrade CACCentracity Deal are used on the order parallel to the map Deal are considered "Deal are error how the error deals in the error deal passes in the first deal parallel error or the data the hirty of the integrade content content the data the error how the error deals in the error deal parallel error or the error how the error deals in the error deal parallel provide content the data the error how the error deals in the error how the e
		Heip Disks as it contains PII. Once the errors have been addressed in the template, please start the Buik Data Upload process again by clicking on the Go Back button to return to the first page.
	Upload details.	If you have any questions, please reach out to the Help Desk (HarpDesk CA Connectge contune com).
	NOTE: If there are errors in the	Subwit the file for processing
	template, the system will notify	Data is loaded succesfully, go to the bulk record Go to bulk record
	you. NO records will be created if	Go back Next step
	an error is encountered. You must	
		🗧 🔶 🖒 https://cdphctuat.lightning.force.com/lightning/n/SPOT_Bulk_Data_Upload 🎲 🖷 🖪 😵 🔇 🕼 🧐 Sign h 🜒 …
	resolve the errors in the template	Sandbor: UAT
	and begin the process again.	🔪 0, Seech 🖈 🖓 🖽 ? 🌣 🐥 🐻
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	within the template were duplicates.				
5	The SPOT Bulk Upload details include:	SPOT Bulk Upload 009297			Sharing Change Owner Sharing Hierarchy
	Exposure Event # from the Bulk Upload	Details			
	# of Case records	SPOT Bulk Upload Name	009297	Exposure Event #	127673
	created in the Bulk	# of Contact Records		# of Case Records	10
	Upload	Owner	Supervisor1 QA	Created By	Supervisor1 QA, 1/20/2022, 9:45 PM
	# of Contact records				
	created in the Bulk Upload				
	• The name of the				
	person who submitted				
	the template				
	• Date and time when				
	the Bulk Upload was submitted.				
	submitted.				
	Note: You will not see any				
	records on the SPOT Bulk				
	Upload. This is because the				
	SPOT Bulk Data Upload creates SPOT Records, which				
	cannot be viewed in				
	CalCONNECT. After 5 minutes,				
	check the SPOT Cases and				
	Contacts records list view to				
	see the CalCONNECT records				
	created from the SPOT				
	Records created from the				
	SPOT Bulk Data Upload you				
	just completed.				





View SPOT Bulk Uploads

Step	Action	Screenshot
1	To access the "SPOT Bulk Uploads" list view, navigate to the 9-dot App Launcher	Contact Tracing Records
	and type the keyword "SPOT Bulk" in the search field.	Q SPOT Bulk Up ⊗
	Select "SPOT Bulk Uploads".	Apps No results
		Items
		SPOT Bulk Uploads
		View All
2	Click the drop-down arrow from the list view options and select "All." This will show all the SPOT Bulk Uploads that have been submitted in your LHJ.	SPOT Bulk Uploads       Recently Viewed •       0 Rems       LIST VIEWS       All       ✓ Recently Viewed (Pinned list)
		Sport Ruik Uploads  New Import Change C  sport Buik Uploads  New Import Change C  sport Buik Upload Name + Fittered by All sport buik uploads - Updated a few seconds app  Sport Buik Upload Name + Fittered by All sport buik uploads - Updated a few seconds app
	Click on the number in the SPOT Bulk Upload Name column to view the details about the SPOT Bulk	SPOT Bulk Upload Name *           1         000001           2         000003           3         000005           4         000006           5         000007
	Upload.	6 00008 V

## **SPOT Error Checker**

os		
Step	Action	Screenshot
1	The SPOT Error Checker is provided as an additional means of identifying errors in the template prior to	Hide Unhide
	upload in CalCONNECT. Use of the Error Checker is entirely optional.	Select All Sheets           Instructions         Case Data Entry         Contact Data Entry         Contact Data Entry





	To open the Error Checker, right click at the bottom of the template. Click Unhide			
2	There is an error checker for each of the Contact Data Entry and Case Data Entry tabs. Select "Contact Error Checker" and/or "Case	Unhide <u>U</u> nhide one or more sheets: Case Error Checker	? >	<
	Error Checker". Do not unhide any of the tabs that start with "DO NOT USE".	Contact Error Checker DO NOT USE_Contact Formu DO NOT USE_Case Formulas DO NOT USE_School Picklist		~
3	checker correspond to the cells on the Data Entry tab and will indicate if required	Error If the row contains values in any cell and Mark and two contains. Mark and two contains	C     C	Колариана Стор Краза In or one of the second content of the second content of the second content of content water in the second content
	fields are missing or an error was found.	In all anguards follow ar completed A required follow ar completed Man all required follows are completed Man all required follows are completed A region of follows a	end for of and in comerce format Making Press (or and formation Press) (***********************************	the difference of the approximation of the other other of the other othero
	If the cell is shaded green and displays "OK", this indicates there were no	Error if Occupation is blank and Student or Staff? Is Yes, staff/faculty or volunteer Occupation/Job Title (for Staff)	Error if Date last on school campus/facility? is blank and row contains values in any other cells Date last on school campus/facility? *	
	errors found in the corresponding cell on the Data Entry tab.	) Title is required if Student or Staff? is Yes, staff/fac #N/A #N/A		Last Exposure Date is required #N/A #N/A
	If the cell is shaded red and contains a message, this indicates there was an error found in the corresponding cell on the Data Entry tab.			
	Review the sheet. Correct any errors found on the corresponding Data Entry tab. Note that the error checker is limited in the type of errors it can find.			
	You may encounter additional errors when uploading the template in CalCONNECT that cannot be caught by the excel sheet.			





4	Once all the errors have been corrected, all the cells will be shaded green and display "OK". The Overall Status will display "No Errors Found".	OVERALL STATUS>	No errors found!	
	Note: You may share these			
	instructions with your SPOT Liaison, so that they may unhide the tab to		Frror if First Name is	Frror if Last Name is
	check for errors prior to	Error if the row contains values in any cell and		blank and row contains
	sending it back to the LHJ.	not all required fields are completed		values in any other cells
	Note that instructions for	All required fields completed?	First Name *	Last Name *
	unhiding and using the	ОК	ОК	ОК
	error checker are not	#N/A	#N/A	#N/A
	provided in the template for Liaisons.			

## **Common Errors**

Error		Exam	ple	How to Resolve
Row(s) that contain data do not have a number in the first		ample, the re will not be cr	cords for Monica reated.	Always use the latest version of the template.
column.	#	First Name *	Last Name *	If a Liaison sends an
		1 Sophie	Lang	older version of the
		2 Caroline	Walker	•••••••••••••••
		3 John	Doe	template, each row that
		Monica	Doe	contains data MUST
		Josh	Doe	have a number in the
				first column.
Values are copy and pasted into	In this exa	ample, the sy	stem will think	Confirm that there is
rows that do not contain First			eing created since	only data in rows that
Nama and Last Nama (ar other	thora is a	data nanulat		contain information.
Name and Last Name (or other	l unere is a	date populat	ed in the last	contain information.
Name and Last Name (or other contact data)			ed in the Last	contain information.
contact data).	Exposure		for the fourth	contain information.
•				contain information.
•	Exposure			contain information.
•	Exposure row. First Name * Sophie	Last Name *	Last Exposure Date * 2021-10-01	contain information.
•	Exposure row.	Last Name *	Image: for the fourth           Last Exposure Date *           2021-10-01           2021-10-01	contain information.
•	Exposure row. First Name * Sophie	Last Name *	Image: Image and the second	contain information.
•	Exposure row.	Last Name *	Image: for the fourth           Last Exposure Date *           2021-10-01           2021-10-01	contain mormation.
contact data).	Exposure row. First Name * Sophie Caroline John	Last Name * Lang Walker Doe	Image: Image and the second	Confirm that the
contact data). The Exposure Event ID and	Exposure row. First Name * Sophie Caroline John	Last Name *	Last Exposure Date * 2021-10-01 2021-10-01 2021-10-01 2021-10-01 2021-10-01 will be an issue	Confirm that the
contact data). The Exposure Event ID and SPOT Liaison ID fields are not	Exposure row. First Name * Sophie Caroline John In this exa with the E	ample, there solutions	for the fourth           Last Exposure Date *           2021-10-01           2021-10-01           2021-10-01           2021-10-01           2021-10-01           2021-10-01           will be an issue           ince the required	Confirm that the Exposure Event ID and
contact data). The Exposure Event ID and SPOT Liaison ID fields are not populated for each row that	Exposure row. First Name * Sophie Caroline John In this exa with the E	ample, there solutions	Last Exposure Date * 2021-10-01 2021-10-01 2021-10-01 2021-10-01 2021-10-01 will be an issue	Confirm that the Exposure Event ID and SPOT Liaison ID fields
•	Exposure row. First Name * Sophie Caroline John In this exa with the E	ample, there solutions and solutions and solutions and solutions are associated as a solution of the solution	for the fourth <u>Last Exposure Date *</u> <u>2021-10-01</u> 2021-10-01	Confirm that the Exposure Event ID and





**Privacy Notice:** We take the security and privacy of Californians very seriously, so please don't send any confidential health or personally identifiable information. Instead, please reference the CalCONNECT record ID or person ID so we can support you.

Here are some considerations to keep in mind to help you follow the privacy and security policies that protect the personal information in CalCONNECT. Remember, all users are responsible for maintaining the public's trust in the contact tracing program by safeguarding individual privacy.

- All use and access of information in CalCONNECT is tracked and any potentially inappropriate access of personal information will be reviewed as part of an official breach of privacy investigation.
- A case or contact's personal information must only be shared for official public health purposes.
- Information that is shared must be the minimum necessary to do case investigation and contact tracing work.
- Users must only look at or share the information that they need to in order to do their work.
- Any information that is obtained from contact tracing work about an individual, a business or other entity, or an exposure event should never be shared outside of a user's work duties, which includes via social media.
- Inform your supervisor or lead if you recognize a case or contact before you contact them.