**Bulk upload setup steps:**

1. Create folder on desktop called **“EMResource Uploads”**
2. From the google drive link in the footer, copy the ***date-EMResourceBulkUploadTemplate.xls*** template into the folder.
3. Sign into EMResource
4. From the UPLOAD tab, download the Bulk Upload Template
   1. The only purpose for this file from EMResource is to grab the facility name, the resource type label and the Resource ID without errors. Either copy and paste them into the template from step 2, or type them manually, exactly as they appear in the template from EMResource.
5. Go through the template the first time with the intent of filling out the columns with values. Don’t relabel, add to, or remove columns.
   1. The CRC columns can be filled with 0’s (zeros) if your facility is not a CRC. We are leaving them in the template, so all use the same standard, and in case your facility becomes a CRC at some point.
   2. Some of the columns can be left blank and contain an input message to that effect. These columns relate to lack of some component related to testing and, if such a lack exists, the input permitted is an “X”. If they don’t apply, simply leave the fields blank and it will load without a problem.
6. Save the template into which you just pasted the facility data.
7. Close and don’t save the template grabbed from EMResource.
8. Once you’ve entered in values in the ***date-EMResourceBulkUploadTemplate***, save the file and also save a back-up template file into the same folder, call it “***EMResourceBulkUpload-backup***”

On day one, open the primary (not backup) template and choose “Save as”, add the date in front of the file name, remove the word “Template”, and then save it to the same folder. Example: “***11-8-2021 EMResourceBulkUpload***”

Once saved with a date, each week you can open the file for the previous week, choose “Save As” before editing and save the file with the current date, then go through and amend any values that have changed since the last reporting period. When finished, push save.

Log into EMResource and choose the Upload tab.

Using the select file button, navigate to the file in your **EMResource Uploads** folder with the current date and choose “open”.

The file will begin the upload and show progress.

Once uploaded, it will show as completed. If the upload fails, the failure notice in EMResource will direct you to the columns that failed, make corrections in the upload file, and then retry.

**Entering data into the template and error identification**

When data gets put into the weekly file, any errors in the common math areas will change colors in the cell values. It is normal for the colors to change as the data is entered. Before taking steps to correct errors, fully complete the entry process.

If you see a lot of colors, don’t stress. The math errors relate in groups and so an early entry error will cause a cascade.

Use the error color guide to isolate and correct errors. The guide provides both colors and number guides to aid in pinpointing the fields involved in the error(s).

Once all the field values have no colors, indicating that all math errors are resolved, then the file should be saved, and you can proceed to the upload process.

**Verification of upload**

Once the upload is completed for the week, from the home screen in EMResource click on your facility’s name and review the “last updated” values. All the dates, except for constant values (totals under the CRC board) will all have the same, current date and time stamp. If the dates all match and are not 7 days old, everything worked.

**Troubleshooting**

If you can’t get the template to load, the fall back is to go back to the old process of direct entry into EMResource (sign in, click on each tab, select keys, choose “select all”, update any changed values, push save, proceed to the next event/tab until completed with all of the LTC tabs, click on your facility’s name and verify that data is all updated.

Even if the template won’t load, it can be used to make sure the data values don’t have errors.

If you are not able to resolve an issue (can’t clear the colors), you can reach out to the Regional Healthcare Coalitions for assistance.