

Contact Template and Report

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Domain and Facility Administrators can use the Contact Template to generate a contact report, as well as add, update, and remove contacts.

The Contact Template is a comma-separated values (CSV) file that is structured with columns and rows. The column header indicates the type of information and rows are populated with the corresponding information for each contact.

Note: Required information may be contingent on other fields. For example, the Login Email is only required for internal contacts that have Facility Access and are expected to log in to eICS.

By downloading the Contact Template, you automatically generate the Contact Report. This report contains the information for all contacts at all facilities you administer.

You can examine the report using a spreadsheet solution that accepts CSV files. The data in the report can be updated or removed, and new data can be added. In this way, you can effectively review and manage your contacts.

After making changes to the data, you can upload it into eICS to update your facility contacts. During the upload, contact information is automatically validated. Validation detects errors and identifies them in the Validated File, which can then be downloaded for review and correction before uploading the file again. When the upload process is complete and the contacts have been created, eICS sends a welcome message to contacts that are new to Juvare solutions and have a login email. For details about the upload process, go to the article, [Manage Contacts with the Template](#).

Note: The system automatically removes the uploaded file 24 hours after processing has been completed.

Formatting and Conventions

To successfully upload contacts, it is helpful to understand the uses, fields, formatting, and conventions for contact data.

The Contact Template can be used to:

- Generate the Contact Report
- Update existing contacts across one or more facilities
- Add new contacts
- Remove contacts
- Automatically identify contacts' phone numbers

Data added to the template must comply with the following formatting and conventions:

- The uploaded file must contain all columns, as in the template.
- The first row in the file must be populated with headers and each column header must contain the name of that data element as specified in the template.
- The contact's First Name and Last Name together cannot duplicate any other contact in the same facility.
- The phone number must be valid and complete and an extension of 1-6 characters is allowed. For example, +1-404-555-1234 X123456.
- The email address must be formatted correctly.
- Any blank rows must be removed from the file before uploading.
- The file cannot be larger than 50 MB.

If the elements in the data file do not meet these requirements, validation errors will occur. You can still upload a file with validation errors, however only the valid records will be processed and added to your facility.

Template Data Fields

The template contains the following data columns.

Column	Format/Valid Values	Required
First Name	Max: 32 alphabetic characters	Either First and Last Name or Organization must be provided.

Last Name	Max: 64 alphabetic characters	Either First and Last Name or Organization must be provided.
Organization	Max: 100 alphabetic characters	Either First and Last Name or Organization must be provided.
Department	Max: 100 alphabetic characters	No
Title	Max: 50 alphabetic characters	No
Login Email	Max: 128 alphanumeric characters in standard format (for example, name@domain.ext)	No
Facility	Max: 30 alphabetic characters	Yes
Facility Access	<ul style="list-style-type: none"> • Facility Admin • Facility Staff • Facility Staff Limited • External Contact 	Yes
Contact Emails	Max: 128 alphanumeric characters in standard format (for example, name@domain.ext). Multiple emails must be separated with a semicolon.	No
Contact Phones Voice	Phone numbers must be entered in the international format, with the plus and country code. For example, +14045551234x123456. Multiple numbers must be separated with a semicolon.	No
Contact Phones Text	Phone numbers must be entered in the international format, with the plus and country code. For example, +14045551234. Multiple numbers must be separated with a semicolon.	No
Plan Positions and Groups	For more information about the position and group names for a facility, go to Planning > Plan Summary ; in the Summary for list, select the facility; in the Plan list, select the plan; on the left, under <i>ICS Chart</i> , review the positions and groups	No

Note: If you think a contact is already using another Juvare solution, such as EMResource or EMTrack, you can include them in the Contact Upload and if available, their details will be imported from the other solution.

Validation

The upload process automatically includes validation of the contact data. Validation entails verifying the file and data formatting against specified conventions. If errors are detected, a message appears in the Upload Contacts window that directs you to download the Validation File, which can be opened for review.