Utilizing the Global Address Bulk Upload Tool

The Global Address Bulk Upload Tool

With the release of CA 3.2.9/CA 3.2.10 Message Administration and Super Users can load multiple Global Addresses (HPD) into CareAlign. The Global Address book is available across all vaults in the CareAlign environment and searchable for all Direct Messaging Users.

Global Address Bulk Upload Tool - File **Loading**

1. Log into CareAlign with Message Administration access.
2. Click on “Administration” and select “Message Administration” from the drop down list.

The Message Administration tabs display; **Mailboxes**, **Users** and **Global Addresses**.

3. Select the Global Address tab and **“Bulk Load Addresses”** button.

The Bulk Load Addresses page opens on the right showing basic instructions, the file format needed for the upload and a link to “**Download a blank template to start from**”.

4. Click the “Download a blank template to start from”. The link will allow you to open the template now or save it as a downloaded file to be opened later

Below are the fields and field lengths that need to be created in the Global Address Bulk Upload csv file. The Email address is the minimum requirement for each Global Address. If any of the fields in the upload file are not populated with data the associated fields in CareAlign’s Global Address entry will be left blank. **The more information that is included with each Global Address loaded the easier it will be for CareAlign users to search for and locate Global Addresses.

Column Header	Maximum Length
email_address	255 **(required)**
first_name	255
last_name	255
specialty	255
provider_type	128
npi	10
company_name	255
address1	255
address2	255
city	128
state	2
zip_code	10

5. Complete the **Bulk Load Address** .csv and save the file.
6. Click on either the outlined box or drag-n-drop the **Bulk Load Address**.csv file to the upload area.
7. Click **Upload Files** button

As CareAlign is processing and loading the new Global Addresses the spinner icon will be visible and once the file is completed a green banner will be presented across the top of the Bulk Load Addresses page.
You can verify that the new Global Addresses appear in the Global Address tab list.

Additionally these new Global Address will be published and searchable to all CareAlign Direct Messaging Users by using Address Book search or typing part of the Global Address information into the "To:" or "CC:" fields of a new Direct message.

Global Address Bulk Upload Tool – **Error Handling**
CareAlign will upload all the properly formatted **Bulk Load Address** .csv files. Any errors or entries that are improperly formatted will not be loaded into CareAlign but will be provided to download, correct and resubmit for loading.
If an error is encountered a red error message is displayed across the top of the Bulk Load Addresses page. The error message will include the number of addresses that could not be inserted or updated along with a download link for the error file that includes only the incorrect entries.

1. Click on the download link and review the file, the issue that was found is noted in the error file.
2. Correct the **Global Address** file and save the corrected file.
3. Click on either the outlined box or drag-n-drop the **Bulk Load Address**.csv file to the upload area.
4. Click **Upload Files** button.

Global Address – Exporting
With the release of CA 3.2.9/CA 3.2.10 Message Administration and Super Users can generate a list of all the Global Addresses that are loaded in CareAlign.

Log into CareAlign as a Message Administrator or Super User access;

1. Click on "Administration" and select "**Reports**" from the drop down list.

The **Global Address Export** is located under Secure Clinical Messaging.

2. Click the **Global Address Export** link and the Secure Clinical Messaging Global Address Export banner will pop-up at the bottom of the page, with the "Export CSV" link to download the Global Addresses.

**There will be no on screen view or list of the Global Address lists.

3. Click on the **"Export CSV"** link and the Global Address Export (HPD) will begin.

The size of the Global Address (HPD) list will determine the time that the download process takes.