# Bulk Upload

Bulk Upload is a process where new enrollees can be added to SUPER in two different areas: Enrollment, and Events.

Note: it is important to use the Excel template that we provide, to ensure that your client information is captured correctly, as explained below.
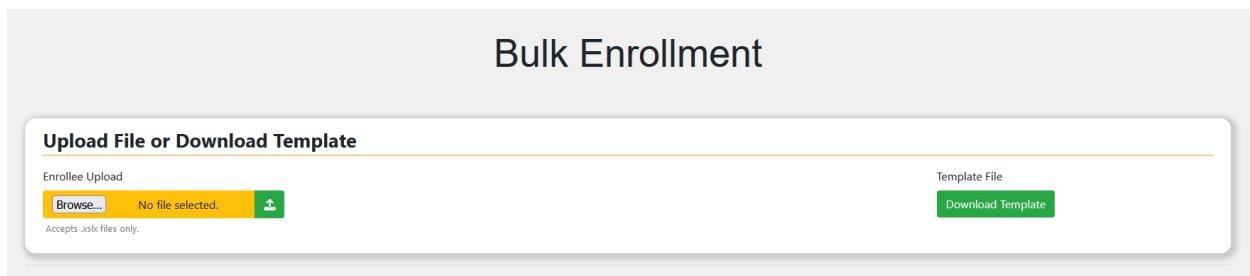
Enrollment

Enrollment has a new area, which lets you upload an Excel file to bulk enroll persons into your county/department. After your enrollees have been bulk enrolled, they can be found on the Enrollee Search page!

You'll find a new option under Manage Enrollment, seen here:
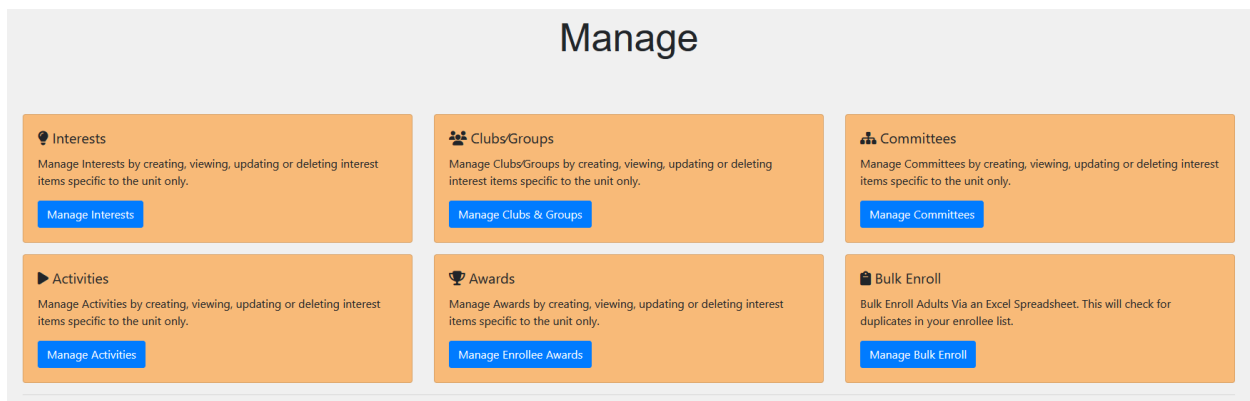
When you select "Manage Bulk Enroll", you will be taken to a new screen within SUPER, seen here:

You can download the Excel template with the green "Download Template" button on the right. You can copy/paste the information that you collect from Qualtrics, Google Surveys, etc., into that template file. You can click the yellow square on the left to find the file you saved and added information to, or you can drag-an d-drop the file into the yellow square.

Press the green upload button, which takes you to a new table in SUPER that shows your client information as shown below.

New Enrollees

Search: [   ]

Enrollee Information		Edit Enrollee	Enroll Anyway?
Johnathan Smith ⚠️		✏️	⚠️ Duplicate Found ☐

> Enrollee needs attention. Please Edit before submitting.

Showing 1 to 1 of 1 entries

[Enroll New Persons and Selected Duplicates]

Please take note of several things going on here. The first is the yellow caution sign near the potential enrollee's name. This indicates that some information was considered default, or an indication that the record needs updating/confirmation. Press the yellow Edit Enrollee button on the next column, which will show you this new form:

New Enrollees

Search: [   ]

Enrollee Information			Edit Enrollee	Enroll Anyway?

Johnathan Smith ⚠️

✱ First Name	✱ Address 1 ⚠️	✱ Date of Birth ⚠️
Johnathan	No Address	1/1/1900
Middle Initial	Address 2	✱ Age Group
		Adult
✱ Last Name	✱ City ⚠️	✱ Gender ⚠️
Smith	No City	Unidentified or Other
Preferred Name	✱ State	✱ Race ⚠️
	Tennessee	Unidentified or Other
Title	✱ ZIP ⚠️	✱ Ethnicity ⚠️
	No Zip	Unidentified
Email ⚠️	Primary Phone	✱ County/Department
		Extension Evaluation and Staff Development

> Birth date uses a default. Please ensure this is correct.

Edit Enrollee: ✏️

Enroll Anyway? ⚠️ Duplicate Found ☐

Showing 1 to 1 of 1 entries

[Enroll New Persons and Selected Duplicates]

Each option that has a default value will have a yellow caution sign, which explains what might need updating/confirmation. Additionally, the system will detect duplicate enrollees within the third column:

New Enrollees

Search: [   ]

Enrollee Information		Edit Enrollee	Enroll Anyway?
Johnathan Smith ⚠️		✏️	⚠️ Duplicate Found ☑️

> Duplicate enrollee found, based on First/Last/Email. Would you like to add this person as a new enrollee anyway? If so, check the box.

Showing 1 to 1 of 1 entries
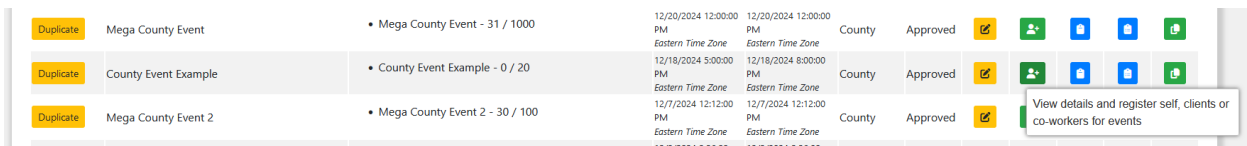
[Enroll New Persons and Selected Duplicates]

This will explain to you that a duplicate enrollee was found (based on first name, last name, and email address), and will not be enrolled by default. You can bypass this by clicking the checkbox on the right, to create a new enrollee. Note: this will create a new

enrollee record with the information you provided. For example, parents/kids that share the same name and a family email address.

When you're finished editing the potential new enrollees, you will click "Enroll New Persons and Selected Duplicates" to bulk enroll new clients, as well as any selected potential duplicates!
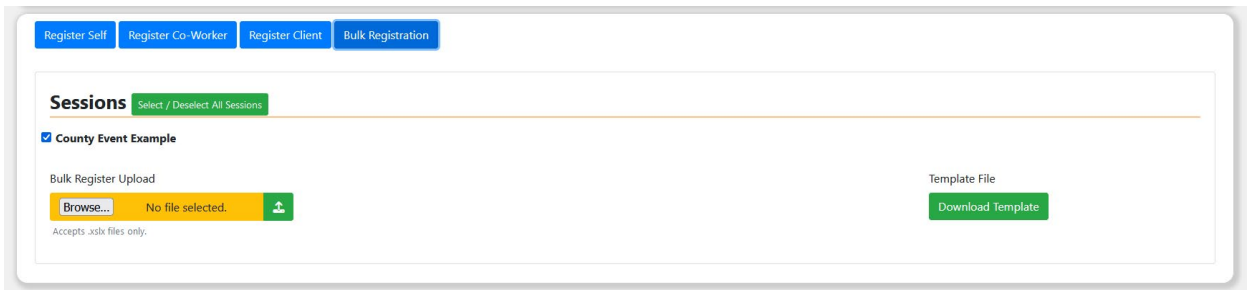
Events

You have the power to bulk upload clients into the Events system! This will enroll the clients within Enrollment, just like the Bulk Enrollment component does. However, it will assign the event to your clients, including session data! You'll find this new area from within Event Registration, found here:

This is where your event registration normally lives. Down at the bottom of the page, you'll see a new option called Bulk Registration:
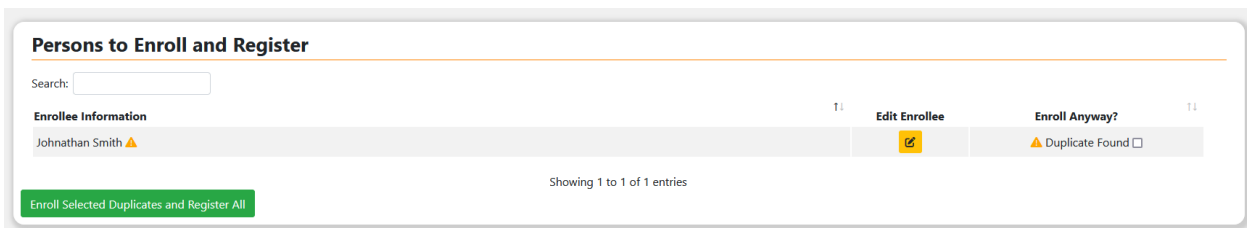
This will bring up a familiar form that allows you to select individual sessions and uses the same formatting as the Bulk Enrollment page. You can download the same Excel template file and upload your Excel spreadsheet stocked with information into Events. You can update potential new enrollees, check to bypass potential duplicates, and enroll them into the system.

After going through your list of enrollees, you'll select the green "Enroll Selected Duplicates and Register All" button, every new client will have an enrollment record

created, duplicates with the checkbox ticked will also have a record created. All clients on the list will be added to the event sessions. When a duplicate enrollee is found and not re-enrolled into the system, it will add the event/sessions to the existing duplicate enrollee. You'll be redirected to the Event Registration event page, where you can then find the enrollee registered to your event:

Because of this new feature, we anticipate questions about how to use Bulk Registration/Enrollment. In the meantime, you may contact the SUPER Support email address directly from within SUPER's top menu: