COMPLIANCE DOCUMENTS IMPORT

PREPARE IMPORT STRUCTURE

Prepare your import by creating a list of all documents and their categories. The list should be stored in a Microsoft Excel format with a single sheet. Column A should be populated with names of the documents and column B should be populated with the categories. There are 7 categories of the compliance documents: background check, vaccination and screening, education, license, certification, professional services, miscellaneous.

	A	B
1	FBI criminal background check	background check
2	Diphtheria	vaccination and screening
3	Hepatitis B vaccine	vaccination and screening
4	Measles (Hard Measles)	vaccination and screening
5	Interpreting in healthcare	education
6	State of Missouri ASL license	license
7	2 day orientation MD courts	certification
8	Over the phone interpreter	professional services
9	Personal CV	miscellaneous

Plan your compliance documents import carefully, once imported, change of categories is not possible. When not sure, use miscellaneous as a default category

VENDOR FOLDERS

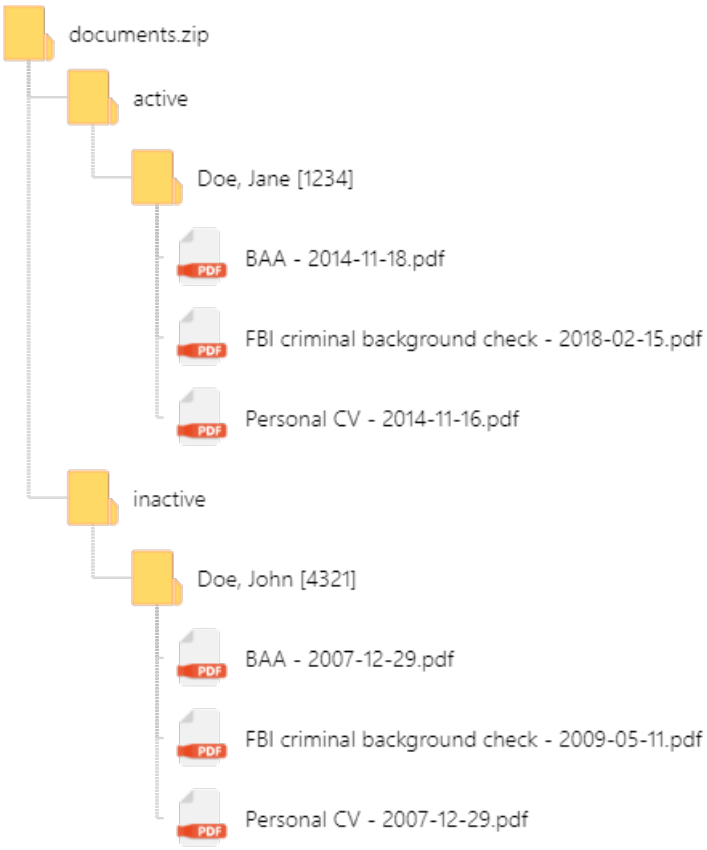
Create two folders and name them **active** and **non active**. If you have vendors who are no longer working with your organization but you need to import their profiles for compliance purpose use **non active** folder to store their information.

When importing documents for the vendors and the vendor ID is known, it should be included in the name of the folder containing all document. For example, Doe, Jane [1234] or Doe, John [4321].

HOW TO PREPARE THE DOCUMENTS

Each document must be stored as a PDF file. Files can contain multiple pages. All protection such as password or encryption must be removed. Documents must be named as they are listed in PREPARE IMPORT STRUCTURE, under column A. All documents must include the date of submission in a format YYYY-MM-DD. For example, Influenza - 2019-06-28.pdf or FBI criminal background check - 2018-02-15.pdf. When all documents are collected, the folder they are stored in should be named documents and compressed using zip tools.

The following diagram provides visual representation on how the documents should be prepared for import.



UPLOADING FOR IMPORT

When import file is completed, use 3rd party solutions supporting uploads of files larger than 4Gb to securely store the file. Share the file, setting support.desk@scheduleinterpreter.com as an authorized e-mail and protect it with a password. Login to your account in ScheduleInterpreter® Community and provide link and password to access the file.

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