Import employees from a CSV file

Upload a spreadsheet of employees, review the preview, handle duplicates, and check the results.

For: Administrators, Managers · Updated November 23, 2026 · https://hipaacertify.com/index.php/support/article/import-employees-csv

1. Prepare your file

1. Go to **Employees** and click **Download CSV Template** in the **Import from CSV** box.
2. Fill in one row per person. Columns:

Column	Required	Notes
`name`	Yes	Full name
`email`	Yes	Each email once per file
`job_title`	No	
`department`	No	Matches an existing department by name. If no department has that name, a new one is created.
`hire_date`	No	`YYYY-MM-DD`, `MM/DD/YYYY` or `DD/MM/YYYY`
`job_codes`	No	Separate several with a vertical bar, for example `RN|CNA`. Must match job codes you've already created.

3. Save it as **CSV**. In Excel: **File → Save As → CSV UTF-8**. Maximum file size is 10 MB.

> **TIP**
> Header names are flexible. `Email Address`, `e-mail`, `Full Name`, `Dept`, `Start Date` and similar headers are all recognized.

2. Upload and preview

1. Click **Choose CSV File**, pick your file, then click **Upload & Preview**.
2. The **Import Preview** page shows three groups:
   - **New Employees**: everyone who will be added. Uncheck anyone you don't want.

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- **Duplicate Employees**: emails already in your organization. For each one choose **Skip** (keep what's there) or **Override** (update their name, job title, department and hire date from the file). Training history is always kept.
- **Invalid Rows**: rows that will be skipped, with the reason, such as **Invalid email format.**

3. Click **Confirm Import**.

If your plan's employee limit would be exceeded, the preview tells you how many you can import and lets you choose which ones.

3. Check the results

The import runs in the background. You'll get an email titled **Employee Import Complete** with totals and any errors.

To see every import and its errors, go to **hipaacertify.com/admin/employees/import-history**.

4. Send invitations

Imported employees are **not** emailed automatically. When you're ready, click **Send All Invites** on the Employees page. See Invite employees.

Tips and troubleshooting

- **"CSV must contain at least "name" and "email" columns"** means the header row is missing or misspelled. The first row must be the headers.
- **"The CSV file appears to be empty or could not be parsed"** usually means the file was saved as `.xlsx`. Save it as CSV and try again.
- **Large files:** if your file has more than 50 new people, remove unwanted rows from the file before you upload. Don't uncheck rows on the preview page.
- **Re-adding people you removed:** use **Add Employee** with their email instead of the CSV. Their account and training history come back. See Remove an employee.
- If an import added fewer people than expected, check Import History for the reasons, then contact support if it isn't clear.
- **"That import preview was started from a different account or organization, so nothing was imported."** The preview page was opened under a different sign-in. For example, you signed in to a different organization in another tab. Nothing was imported. Upload the CSV

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file again from **Employees**.

Need more help? Visit https://hipaacertify.com/index.php/support or contact us at https://hipaacertify.com/index.php/contact.

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