

Import Checklist



Names - Ensure proper placement of first and last names in respective columns, and ensure existing profile names match the spelling and capitalization in your account.



Identifiers - Check that the unique identifiers in your import file match those of existing profiles in your account to avoid duplicates. Consistently use these identifiers for all imports.



Headers - Make sure the correct headers are included in the first row of each import file.



Email - Include an authorized user's email for each new participant. Missing email means no invitation for profile management and Health Profile completion.



Group Names - Ensure group names in import file match those in your account exactly to avoid import conflicts/errors.