Bulk Upload Instructions for Registration Section of the Claim Form

Overview

The Bulk Upload function allows Claimant representatives, such as law firms, the ability to enter, update, and submit registration information for a large number of Claimants.

Before using the Bulk Upload function, we recommend that you become familiar with the claim form instructions and the claim form and training videos that are located at the How to File a Claim website at http://www.vcf.gov/register.html. In addition, assistance is available from the September 11th Victim Compensation Fund (VCF) staff. For details about availability and contact information, see the Assistance and Accessibility website at http://www.vcf.gov/webmaster.html.

General Instructions

The Bulk Upload function allows you to enter or update Claimant registrations. Once a Bulk Upload template is successfully uploaded, registrations will automatically be created for the Claimants on that template.   Bulk Upload is only available for Claimant registration. Eligibility and Compensation information must be manually entered and submitted in the VCF Claim System.

Instructions are included within the template. It is important to enter all required information on the templates and to enter data in the required format. Missing information or improperly formatted data can cause an error that will stop a Bulk Upload template from being uploaded. The fields in the template are color-coded to show which ones are required. When you upload a template, you will receive a status message of success or failure with the errors listed. Enter all required fields whether the line is an add, update, or continue. **If you enter a blank in any field on an update, it will remove the data in that field in the VCF Claim System for that claimant.**

Bulk Upload Registration Instructions

Bulk Upload for Registration has 3 steps:

1. Download the registration template from the VCF Claimant website as noted in the instructions below.
2. Complete the template.
3. Upload the template (correct any errors as necessary and re-upload).

   Note: If there are any data errors on the template encountered during the upload, they will need to be corrected and the entire template uploaded again.

Details about each step and error correction instructions are included on the following pages of this document.

1) Download the Registration Template

You must request and be granted access to the Bulk Upload function by the VCF in order to perform this process.

Once you have been granted access, begin by logging into your account and selecting **Bulk Upload, Registration** from your menu bar.
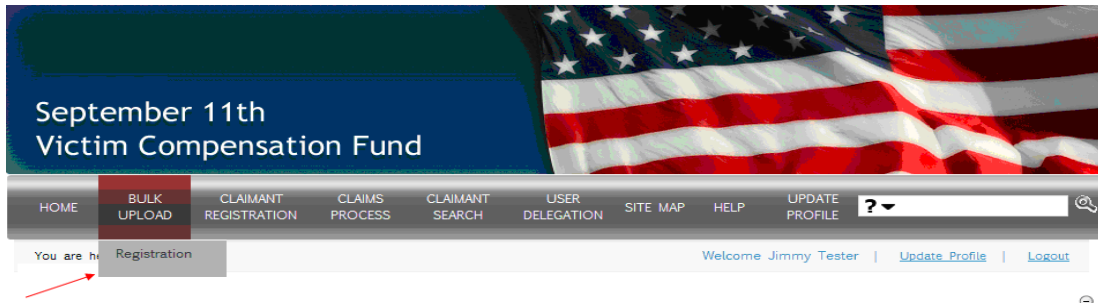
The Registration Bulk Upload page will be displayed. Click on the links to download the Registration help file (these instructions) and the template file.

2) Complete the Registration Template

The Registration Template is a Microsoft Excel file that has five (5) tabs: Instructions, Country Codes, State Codes, Data, and Look Ups.

Instructions and Helpful Hints Tab: Provides instructions and helpful hints regarding the completion of the Registration Template.

Country Codes Tab: Provides a list of valid country codes. Country fields must display the valid code to be recognized by the VCF Claim System. The country codes are in the dropdown for each field where a country is requested.

State Codes Tab: Provides a list of valid state codes. State fields must display the valid code to be recognized by the VCF Claim System. Enter the appropriate state code in any field where a state is requested. US state codes are listed in the dropdown for each field where a state is requested. For a non-US Claimant, please enter province – province values are not listed in the dropdown, but may be entered manually.

Data Tab: Provides fields for the entry of registration data. It has 77 columns (A through BY), each representing a data field in the Registration portion of the claim.

Look Ups: Provides the data for the items in the dropdown lists throughout the spreadsheet. This tab is non-editable.

Important Considerations:

- The Template will open to the Data tab when it is downloaded.
- Start entering claims to be added or updated on line #3. The VCF Claim System will ignore everything on lines 1 and 2.
- If there are valid entries for a field, they will be listed in the dropdown for each applicable field.
- Columns with headers that are not shaded (white) are required to complete the template.
- Columns with green headers are recommended but not required to complete the template.
- Columns with blue headers may be required depending on the answer of a preceding question.
- Columns with gray headers indicate responses that are only required for death claims.
- The application may time out if too many rows are entered on one template. It is recommended to limit the number of lines on a spreadsheet template to about 100 to avoid the time out error.
- **Delete column A** and save the file before uploading it to the VCF Claim System. It is recommended that you save the file under a new name in order to preserve your working file.

- The **Continue** action may only be used after an **Add** action and must follow the **Add** action in the row directly preceding the **Continue**. If **Continue** is not used in this fashion, the line will be skipped and no updates will occur.

3) Upload the Registration Template

To upload a Registration Template:

1. Click on the **Browse** button under Attach a File

2. A file upload window will appear. Navigate to the location where you saved your registration file and select the file and click **Open**.
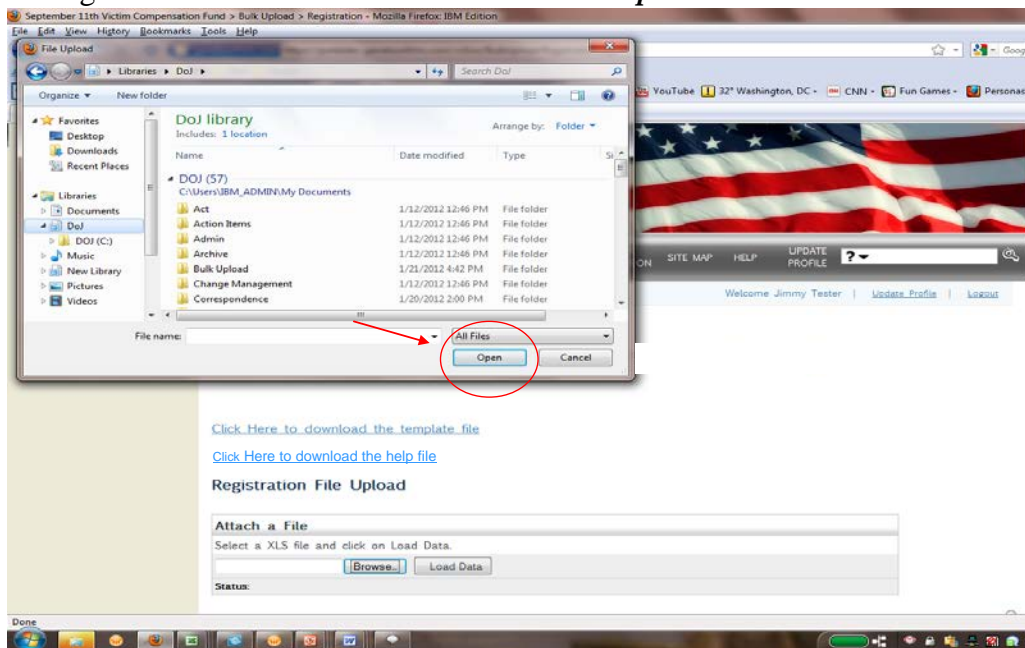
3. Your file path and name will appear in the box as displayed below. Click the **Load Data** button and your template will be uploaded.

4. A message will be displayed warning against clicking on the Load Data button more than one time. Click the **OK** button to continue.

> The page at https://portaldev.garretsonfirm.com says:
>
> ⚠ Uploading file. Do not click Load Data again until status is displayed. Click OK to continue.
>
> [OK]

5. If all necessary information has been entered in the template and if all fields have valid responses, then the file will upload successfully and the following report will be displayed.

    The report will display a message that each line had no errors and that the file was imported successfully

Registration File Upload

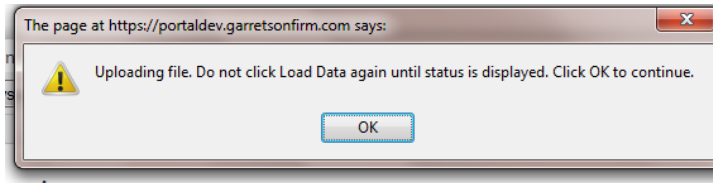**Attach a File**

Select a XLS file and click on Load Data.

[   ] [Browse_] [Load Data]

Status:
Row 20 has no errors.

Row 21 has no errors.

Row 22 has no errors.

.

File imported successfully.

Note: After successfully uploading the file, the Claimants included on that file will be registered in the VCF Claim System. At that time, you will still be able to edit the Claimants' registration information in the VCF Claim System or you may begin completing the Eligibility section of the claim form.

Errors and Error Correction

If your template contains any errors or is missing information, an error message will be displayed. This error message will identify the location of the error by row and column and the specific error. The particular error will also be identified. These registrations will not have been created or updated due to the error identified. The errors need to be corrected and the file upload procedures repeated.

Note that if one registration has an error, then the entire upload could fail and no data from that file will be uploaded to the VCF Claim System. Check the error report for the status of your upload. In the example below, the data will not upload due to the errors identified. The errors will need to be corrected and the file uploaded again.

Registration File Upload

Attach a File

Select a XLS file and click on Load Data.

[Browse…] [Load Data]

Status:
Row 20 has errors.
Cell AI20 has invalid entry. Values allowed are blank, married, separated, single, widowed, divorced, or other.
Cell AK20 has invalid entry. Values allowed are blank, self, parent of minor, guardian of minor, guardian of non-minor, representative of 911 deceased, representative of deceased, or other.
Cell Y20 has invalid entry.
Cell AF20 has invalid entry.
Cell AG20 has invalid entry.
Cell AV20 has invalid entry.
Cell BA20 has invalid entry.
Cell BC20 has invalid entry.
Cell BR20 has invalid entry.

Row 21 has errors.
Cell AI21 has invalid entry. Values allowed are blank, married, separated, single, widowed, divorced, or other.
Cell AK21 has invalid entry. Values allowed are blank, self, parent of minor, guardian of minor, guardian of non-minor, representative of 911 deceased, representative of deceased, or other.
Cell Y21 has invalid entry.
Cell AF21 has invalid entry.
Cell AG21 has invalid entry.
Cell AV21 has invalid entry.
Cell BA21 has invalid entry.
Cell BC21 has invalid entry.
Cell BR21 has invalid entry.

Follow the steps below to correct the error:

1. Copy and paste the report information into a separate spreadsheet or word processing document so that it is easily accessible for reference.
2. Review and correct each error.
3. After all the errors have been corrected in your updated file, upload the new file with the corrected claims.

Registration File Upload

Attach a File

Select a XLS file and click on Load Data.

[Browse...] [Load Data]

Status:
Row 20 has no errors.

Row 21 has errors.
Cell AV21 has invalid entry.

Row 22 has no errors.

File import failed.

Duplicate Claim Error

A duplicate claim error will occur if you submit a registration for a Claimant who has already been registered. The error message is shown below.

Registration File Upload

Attach a File

Select a XLS file and click on Load Data.

[Browse_] [Load Data]

Status:
Row 20 has no errors.

Row 21 has errors.
Cell A21 Add action is invalid. The claimant is already registered.

Row 22 has no errors.

File import failed.

Some examples of why this may occur are:
- You are submitting an update for existing information and enter "**add**" instead of "**update**" in column A of the template. Change the "**add**" to "**update**", and the file should upload.
- The Claimant created a registration in the VCF Claim System and did not tell the attorney or law firm. In this case, the attorney or law firm should contact the Claimant and ask him/her to delegate the registration to the attorney or law firm. After the Claimant has delegated the registration, the attorney or law firm will then be able to track and update the registration for the Claimant.
- Someone that does not have the authority to create a claim for a particular individual has done so. Call the Helpline

Bulk Upload Report

The Bulk Upload Report on the Registration Bulk Upload page displays a listing of all attempted Bulk Uploads along with the following information:

- Date of upload
- File Name
- Process Status (Successful / Failed)
- User Name who performed the upload

For questions, contact the VCF helpline at 1-855-885-1555 (or 1-855-885-1558 for the hearing impaired).