Instructions for Creating Your Venops Account
and
Uploading Your Personnel/Vendor Lists to Venops

Registration to Begin Using Venops:

1. Begin by going to www.venops.com.

2. Click on the "Login" button at the top-right of the page.

    a. Click on "**New User? Click here to register**" at the bottom of the login menu and proceed to enter the requested information for your practice.

    b. Passwords should be at least seven characters and include a mix of letters and number.

    c. Required fields on the initial signup page are marked with an asterisk "*". However, you are encouraged to fill in as much information as possible. Venops does not share this information with third parties under any circumstances.

3. With the fields completed, click to complete your registration. You will receive a verification email, but you will already be clear to log in.

4. This concludes registration. The next page explains the simple process of uploading your list of providers, employees, and vendors to your Venops dashboard.

Uploading Your Personnel and Vendor Lists to Venops:

1. After logging in, you will come to the dashboard.

2. Click "Download Template" on the right and copy and paste the information for your providers and employees ONLY into the relevant columns (See step 5 for vendors). Use caution to avoid altering the headers for each column as the first row (header) must be on your spreadsheet to upload properly. It is acceptable to delete the Sample Employee **row** if you wish.

VENDOR COMPANY NAMES **ONLY** (NOT PRACTICE NAME)	LAST NAME (only)	FIRST NAME (only)	MIDDLE NAME (only)	DOB mm/dd/yy	SSN or DUNS	PREFIX	SUFFIX
DO NOT ENTER YOUR PRACTICE NAME IN THIS COLUMN	JOHNSON	CLAIRE	ELLEN	1/18/77	XXXXXXXXX		
ALL AMERICAN MED TAXI					XXXXXXXXX		

3. Save your populated template to your computer. You will need it in a moment. ***Do not add password protection as your file is transferred securely through our encrypted system***.

4. Click the "Browse" tab under your dashboard menu bar and then double click your populated template saved on your computer. Next, click the "Upload Report" button.

    a. You will see an "Upload successful" message on your screen to verify that the steps are complete.

    b. ***If the upload was not successful:***

- Check to be sure the first and last names are in the correct columns as labeled.
- Verify the "Vendor Company Name" column is empty for rows containing names of your staff.
- Do not password-protect the personnel list before saving or uploading.
- The document must be saved in .xls or .xlsx format.
- Disable any and all macros on your source document for the staff/vendor information.

    c. If you attempt to upload a Personnel Template to Venops with critical information missing from information fields, the Personnel Template will not upload.
    Instead of uploading, Venops will automatically create a Format Error Report that you can quickly download and view. *This formatting assistant easily tells you where to fix your Personnel Template before it will upload.*

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
VENDOR COMPANY NAMES ONLY (NOT PRACTICE NAME)	LAST NAME (ONLY)	FIRST NAME (ONLY)	FULL MIDDLE NAME	DOB (mm/dd/yy)	SSN or DUNS	PREFIX (IF APPLIC-ABLE)	SUFFIX (SR, JR, III)	First/Last Name Missing	DOB Missing	Middle Name Missing	Cannot Have Info In Column "A" and Also In Other Columns	Split Up First/Middle Names	Put Suffix in its own Field	Full Names Needed. No puncuation.
	SMITH		JENNIFER	2011-01-01	111111111		Jr	X						
		LISA	JENNIFER	2011-01-01	111111111		Jr	X						
	SMITH	LISA	JENNIFER		111111111		Jr		X					
	SMITH	LISA	JENNIFER	2011-01-01			Jr							
	SMITH	LISA		2011-01-01	111111111		Jr			X				
PRACTICE NAME	SMITH	WILLIAM	ROBERT	2011-01-01	111111111		Jr				X			
	SMITH	WILLIAM	ROBERT	2011-01-01	111-11-1111		Jr							

    d. After you use the information on columns I through O to fix your errors, simply highlight and delete those columns (drag headers and highlight, right-click and delete). You can then upload the remnants of the error report as your new Personnel Template. With the formatting errors gone, it will upload and successfully screen the names.

Please contact Member Services at memberservices@venops.com or 855.567.3552
if any issues arise.

5. It is not necessary to upload a second template for vendors, but many practices do this to keep their personnel list separate from their vendor list. Companies may be pasted onto the same template, as seen on the example above.

    a. To complete a separate Vendor Template, please repeat steps 2 through 5.

    b. On the Venops Personnel Template, **the column labeled "Vendor Company" is utilized for your vendor screening only. It will always remain empty for portions of the Personnel Template that list your own staff/providers.**

We will email you within a couple of days to let you know that your tracking report is complete and you can log back in to retrieve it. Remember: we keep your monthly tracking reports on your login page dashboard if you ever need to retrieve a report from prior months. Once you download the template, this should take less than 5 minutes every month.