*Here are some general tips when sending us your data:*

**Duplicates**

We cannot detect duplicates during the import process, so please de-dupe your data before sending. Any duplicate records will have to be deleted or merged once the site is ready for use.

**Columns and Rows**

Each person must have all of their data on one row with a separate column for each data field.

**Phone Numbers and Dates**

Phone numbers and dates can be formatted with - or / characters but the year MUST be in a 4 digit (1923) format.

**Zip Codes**

If your zip codes begin with “0”, you must format the zip code column as text. If the column is formatted as a number, the leading 0 will be dropped.

**Date of Birth (DOB)**

All records must have a DOB, since MySeniorCenter relies on the seniors’ DOB to run many statistics/reports:

1. DOB must be in the xx/xx/xxxx format
2. If no DOB is provided the person's DOB will be set to 1/1/1901

**Yes or No Questions**

For "Yes" or "No" questions, 1 = Yes and 0 = No

**Enterprise Version**

If you have signed up for the enterprise version of MySeniorCenter with multiple centers logging into one site, submit the member data on separate sheets/tabs.

Please direct any questions about your data import to [bill@myseniorcenter.com](mailto:bill@myseniorcenter.com).

*Next: Instructions for retrieving your data from specific databases*

**Excel and Access Database Retrieval**

If your center currently uses either an Excel or Access database, please use the process below to export the data to MySeniorCenter:

1. If using Access, create a report from Access and export the data to Excel
2. Import the Excel data to the Senior Member Data template
3. Email us the file
4. If the file is too large to email, please contact Bill at [bill@myseniorcenter.com](mailto:bill@myseniorcenter.com) to receive the URL for uploading your file

**COATS Database Retrieval**

If your center currently uses the COATS database, listed below is the process to export the data to MySeniorCenter:

1. If your COATS database is on one of the computers in your office, proceed to Step 2. If not, proceed to Step 3
2. Locate the machine that must be turned on in order to access COATS
3. Go to [www.myseniorcenter.com/support](http://www.myseniorcenter.com/support) to download our remote screen sharing tool (TeamViewer)
4. Click Open/Run or Save/Run (depending on your browser)
5. Call MSC tech support at 866-739-9745 so we can remote in to your system and retrieve the data

**ServTracker Database Retrieval**

If your center currently uses the **ServTracker** database, listed below is the process to export the data to MySeniorCenter:

1. Identify the person in your organization who handles your ServTracker server
2. Ask him/her for a back-up of the data
3. Email it to us, or…
4. Go to [www.myseniorcenter.com/support](http://www.myseniorcenter.com/support) to download our remote screen sharing tool (TeamViewer)
5. Click Open/Run or Save/Run (depending on your browser)
6. Call MSC tech support at 866-739-9745 so we can remote in to your system and retrieve the data

**SAMS Database Retrieval**

If your center currently uses the **SAMS** database, listed below is the process to export the data to MySeniorCenter:

1. Please retrieve the initial client export in Excel from the Area Agency or County
2. Import the Excel data to the Senior Member Data template
3. Email us the file
4. If the file is too large to email, please contact Bill at [bill@myseniorcenter.com](mailto:bill@myseniorcenter.com) to receive the URL for uploading your file
5. After your center is live with MSC and events are set up, our SAMS expert will help map events to SAMS Service names
6. Each month we will work with you to export your data to SAMS