

Documents Import - Data Migrations

07/24/2024 1:50 pm EDT

The **standard** bulk import of documents (including, but not limited to, scans, photos, rendered clinical notes, and rendered lab results) requires two items:

1. A spreadsheet file (CSV, XLSX or delimited TXT) containing discrete details regarding the file, also referred to as an "index" file. This index is used to automate the import of files into matching patient records.
2. A folder containing the documents desired to be imported of proper formats.

Accepted file formats for Documents Imports are: PDF, JPG/JPEG, TIFF, and PNG.

The index file provided for import must have column headers and is listed below (alongside required formats and field-specific notes). Each field must exist in a separate column of the index file and formatted properly. The fields may exist in any order but must be present. If your index file has different column names than the ones shown below, DrChrono will attempt to match the provided fields with our accepted field names as closely as possible. To facilitate this matching process, it is helpful to send these details along with your data import request.

You may find a template attached to the bottom of this page.

Column Name	Format	Example	Required?	Notes
Last Name	plain text	Smith	YES	Patient's last name. Must be present.
First Name	plain text	John	YES	Same as above
Date of Birth	YYYY-MM-DD, MM/DD/YYYY, or MM-DD-YYYY	01/01/1970	YES	Same as above
Chart ID	LLFF000001	SMJO000001	NO	Same as above, must be unique
Description	plain text	"X-Ray: Left Arm" or "xray_left_arm.pdf"	YES	A short label indicating v also be the file's name
Date	YYYY-MM-DD, MM/DD/YYYY, or MM-DD-YYYY	2023-01-01	NO	Date of file's creation. If date in which the file was
Metatags	plain text	"Radiology" or "X-Ray" or "Fax"	NO	Used to filter documents metatags if separated by value (ex: "Radiology, X-l
Path	plain text	"D:\\ExternalStorage\\MyFiles\\ xray_right_arm.pdf" (Win) or "/Volumes/ExternalStorage/MyFiles/ xray_left_arm.pdf" (Mac/Linux)	YES	Must reflect the absolute the folder of documents

If your files live in a database with no option to provide an export into a folder or to provide an index, please contact us by [submitting a support ticket](#) to discuss further.