Appointments Import - Data Migrations

07/24/2024 12:24 pm EDT

DrChrono supports the import of appointment data for patients from external spreadsheet files for records that exist in DrChrono.

When provided this way, the spreadsheet must follow these formatting guidelines:
- All column headers must exist on the very first row of the spreadsheet.
- There must exist ONE appointment per row, per patient.

Prerequisite: A demographics import should already have been completed before attempting to load appointments. We can only import appointments for patients who already exist in DrChrono.

The following columns and values are accepted for the bulk-creation of appointments:

Column Header	Description	Format	Required?	example values
Last Name	Patient Name	text	Yes	Smith
First Name	Patient Name	text	Yes	John
Date of Birth	Patient DOB	date	Yes	01/01/1970
Chart ID	DrChrono Chart ID	text	No	SMJO000001
Scheduled Time	Appointment date & time.	date-time	Yes	01/01/2023 04:00 PM (or 01/01/2023 16:00)
Doctor Full Name	First/last of provider assigned to appt	text	Yes	"Jonathan Smyth, MD" or "Jonatha Jonathan"
Duration	Length of appointment (in minutes)	numerical	Yes	15
Reason	Reason for visit	text	No	"Leg Pain", "New Patient Consult", Op", etc.
Notes	Internal (not visible to patients) notes related to appointment.	text	No	"Patient has new insurance card", " wheelchair upon arrival"
Office Name	Name of office in DrChrono where appt is scheduled	text	Yes	"Primary Office", "Dallas Branch", e
Exam Room	Number of exam room patient treated in (1 to 15 (max)	numerical	Yes	3
Primary Insurer Name	Name of health plan for this appointment	text	No	"Anthem Blue Cross", "United Heal "Self Pay"
Primary Insurance ID Number	Subscriber number for primary insurer	text	No	DZVAN01234567
Secondary Insurer Name	Name of second health plan for this appointment	text	No	"AARP", "Medicaid-CA", "Medicare
Secondary Insurance ID Number	Subscriber number for second insurer	text	No	0123456789

Status	Current status. One of: ""(blank-default), "Arrived", "Checked In", "Checked In Online", "In Room", "In Session", "Complete", "Confirmed", "Not Confirmed", "Rescheduled", "Cancelled", "No Show"	choice	No	In Session
ICD10 Codes	Comma-separated list of ICD-10 codes affiliated with this appointment	text	No	Single Entry: "G47.33" Multi-Entry: "G47.33","I10",

In addition to the fields above, Vital Signs can also be imported with appointments. The column headers and values below can be added to your spreadsheet to record patient vitals:

Column Header	Description	Format	Required?	Example values
Vitals:Blood Pressure 1	Systolic BP value	numerical/decimal	No	120
Vitals:Blood Pressure 2	Diastolic BP Value	numerical/decimal	No	80
Vitals:BMI	Body Mass Index value (also auto calculates based on "Height" and "Weight" vitals values if omitted	numerical/decimal	No	25.9
Vitals:Head Circumference	Head Circumference (inches)	numerical/decimal	No	35
Vitals:Height	Height (inches)	numerical/decimal	No	75
Vitals:Weight	Weight (lbs)	numerical/decimal	No	145
Vitals:Oxygen Saturation	O2 Sat Value (%)	numerical/decimal	No	99
Vitals:Pain	0 - 10 pain scale.	choice	No	5
Vitals: Pulse	Heart Rate (bpm)	numerical/decimal	No	92
Vitals:Respiratory Rate	Breathing rate (rpm)	numerical/decimal	No	8
Vitals:Temperature	Farenheit temp value	numerical/decimal	No	98.6
Vitals:Smoking Status	SNOMED Concept Code (or Preferred Name) indicating smoking status. See here for more.	choice	No	8517006, or "Former Smoker"

You may use the appointment import template attachment on this page for reference.

Once your file is ready, please submit it to your DrChrono Representative to have completed.