

Importing Data into DrChrono - Official FAQ

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Moving patient data to DrChrono has never been easier. The FAQ below addresses most questions you may have about transferring your data. If your question/answer is not listed here, please reach out to your DrChrono representative or log a support ticket.

Q: What makes up "Patient Data"?

A: Patient data is comprised of Demographics & Insurance, Appointments, Clinical Notes, Documents, Images, Immunizations, Medications, Allergies, Problems (diagnosis history), and Lab Results.

Q: What makes up "Practice Data"?

A: Practice Data is comprised of Fee Schedules, Inventory Items, Contact Lists, and Custom Procedure Codes.

Q: Can Billing Data be transferred to DrChrono?

A: Billing data, including, but not limited to, claims data, patient payments, ERAs/EOBs, credits, and balances, cannot be transferred to DrChrono from any external source.

Q: How do I begin the process to transfer Patient Data and Practice Data to DrChrono?

A: In order to get started, follow the steps below:

1. Sign an annual contract (required)
2. Get REQUIRED file formats for each component of Patient Data. (this table is shown below)
3. Obtain Patient Data from previous EHR companies in the required format. Contact your previous EHR vendor for instructions on how to obtain your data.
4. Provide obtained from your EHR to DrChrono (upload to Box.com or other cloud-based storage).
5. Wait approximately three weeks* for the data transfer to complete.

What are the required data formats for each type of data?

Patient Data Type	Format(s)
Demographics	.csv, .xls/.xlsx, .txt(delimited), .xml/CCDA
Appointments	.csv, .xls/.xlsx, .txt(delimited)
Clinical Notes	.pdf, .tiff, .png, .jpeg (one or more files per patient, per encounter, uploaded as "Documents")
Documents and other media	.pdf, .jpeg/.jpg, .tiff, .png (one or more files per patient, per encounter)
Images	.pdf, .jpeg/.jpg, .tiff (one or more files per patient, per encounter, uploaded as "Documents")

Lab Results	Structured results can be imported from .csv, .xls/.xlsx, and .txt. Non-structured (Image-based) results use the same types as "Documents and other media" above.
Immunizations	.csv,.xls/.xlsx, .txt(delimited)
Medications, Allergies, Problems	.csv, .xls/.xlsx, .txt(delimited), .xml/CCDA

Practice Data Type	Format
Fee Schedules, Contact Lists , Custom Codes , and Inventory	.csv, .xls/.xlsx

Q: My patient data is contained within a database (SQL, MS SQL, etc). Can DrChrono import this type of data?

A: DrChrono supports SQL database exports for certain EHRs whose only export option is the SQL database (e.g., AdvancedMD) on a case-by-case basis. Not all SQL databases are created equal and may require additional time and effort to complete by DrChrono agents. Maintaining data integrity is our #1 priority when importing your data. All efforts will be made to work with your SQL database file if no other option is available; however, we may not be able to complete this project if the file(s) provided is/are too complex. If this is the case, we may refer you to a data migration company such as [Healthjump](#). Additional fees may apply for this service

Note: At this time, DrChrono does not support the SQL database for eClinicalWorks EHR; therefore, the full export must be obtained in order to import data.

Please contact your DrChrono representative for additional details.

Q: I've exported a spreadsheet from my old EHR containing patient demographics, but some patients have duplicate records. Can DrChrono merge these duplicate records into one record or filter the duplicates to avoid creating them?

A: DrChrono imports data in its original format. This means that if duplicate patient records exist in your original data, then duplicate records will be created in DrChrono. To avoid this, please review and edit your patient demographics spreadsheet to remove the duplicate patients before submitting your import request.

Q: I've already entered some patient records manually (or I've already had demographics imported once), and I'd like to import a spreadsheet containing patients who exist in DrChrono and those who do not. Can we update existing records and create new records for non-existing records without creating duplicates?

A: Yes. This is possible. As long as the patient name and/or date of birth match a patient in DrChrono, the patient record will be updated with the information contained within the spreadsheet row. A new patient record will be created if the patient's name does not match an entry in your DrChrono account.

Q: A DrChrono engineer has reviewed my data and determined that there are issues halting the import process. What should I do?

A: DrChrono engineers will provide you specific information about the issues with the set of data provided as well as suggestions on how to correct this data. Please review the notes and data to make those corrections. If corrections are not made, the data transfer process cannot continue. Please contact your DrChrono Representative for additional details.

Q: How do I export my patient data (demographics, appointments, clinical/visit notes, and media files) from my

current EHR?

A: Please contact your current EHR vendor for data export instructions. DrChrono is unable to assist with this step in the Data Transfer process.

Q: Is it possible for a DrChrono representative to log into my old EHR account or server and extract all the data necessary to transfer to DrChrono?

A: Unfortunately, no. DrChrono takes no part in retrieving data from an external vendor or competitor. It is the account holder's responsibility to obtain this data on his/her own. If you require assistance with obtaining your Patient and Practice data, please contact the support department of your current EHR vendor.

Q: My previous EHR refuses to provide my Clinical Data, and I'm not sure how to export this data. Can I connect with a DrChrono Engineer for guidance on the next step?

A: The data engineers at DrChrono can only import data provided to us by the external vendor. If the vendor is unable to provide your patient data, the Data Transfer process cannot continue. Please contact your DrChrono Representative for more details.

Q: My previous EHR provided me with an external hard disk or flash drive containing all of my patient data. How do I ensure DrChrono receives and imports my data?

A: DrChrono exclusively uses [Box.com](https://www.box.com/) to store sensitive information. Your DrChrono representative will send an email invitation to join a designated Box folder as a collaborator. Follow the provided link in the invitation and log in with your Box account to begin uploading data. If you do not have a Box account, you may obtain one free of charge by clicking the "Sign Up" button.

DrChrono may also connect to and download from SFTP servers. To proceed with this process, you must provide all connection details (IP address, username, password, and port number).

You may employ a third-party cloud storage provider with appropriate certifications to ensure that the data stored in this manner is HIPAA-compliant.

Due to data-integrity restrictions, we do not support using Google Drive to retrieve Patient Data.

Effective June 23, 2020, DrChrono no longer accepts hard drives shipped to our physical and remote offices. Any packages shipped to these offices will be immediately returned to the sender.

Reach out to your DrChrono representative for more details regarding this section.

Q: My clinical notes have been imported into my account. Where can I find them?

A: Any and all clinical note data that originates from outside of the DrChrono account can be found under the patient's chart > Documents.

Q: I have custom demographics for our patient charts. Can this data be imported?

A: Currently, custom demographics cannot be imported into DrChrono. Should you require the use of custom demographics, this data must be entered manually. Please visit Account > Custom Fields to get started.

Q: My EHR does not allow the download of one clinical record file per patient. Instead, all clinical records are combined into a single PDF file. Is it possible to import the combined PDF data into each respective patient's chart?

A: At this time, it is not possible for DrChrono to split a PDF into multiple files and import it into multiple charts. DrChrono can accept one or more files per patient; however, a single file **cannot contain multiple patients**. Please contact your EHR vendor to discuss further export options.

Q: I'd like to remove patient charts from my account because some information was missing. Is this possible?

A: At this time, imported records cannot be removed. Please review your patient record data to ensure that the data provided is 100% accurate before importing, as this **cannot be undone**. Please contact your DrChrono representative should you have any concerns regarding your imported patient demographic data.

Q: How much does DrChrono charge for transferring Patient Data?

Talk with your Account Executive for options and pricing.
