Importing your Contact Lists

07/24/2024 6:10 pm EDT

If you're on our paid plan, you can submit a support ticket.

If you're still in implementation, be sure to check with your implementation specialist.

You can use a basic CSV (comma-separated value) file with referral contact information. See the attached template.

There must be a header row that defines what data is in each column. The required fields are in bold.

First Name	Last Name	Email	Organization Name	Direct Address	Phone Number	Fax Number	Address	Specialty	Npi	Provider Number	Middle Name	Salutation	Suffix	Full Name
Example data…														

Sample Columns - You can list whatever information you would like as long as each column has a header describing the information in that column. The only two required fields are First Name and Last Name. The others listed are suggestions.

- **First Name**
- **Last Name**
- Address
- City
- Direct Address
- Email
- Fax Number
- Middle Name
- NPI
- Organization Name
- Phone Number
- Provider Number
- Salutation
- Specialty
- State
- Suffix
- Zip Code
- Full Name

- Fax Number
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