Bulk Importing Patient Demographics

07/24/2024 12:39 pm EDT

You can import your patient demographics from a spreadsheet into your DrChrono account.
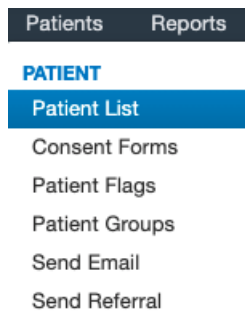
You can use a standard Microsoft Excel spreadsheet (.xls) or a basic comma-separated value file (.csv) with your patient's demographic information. You can find a template and more information here.

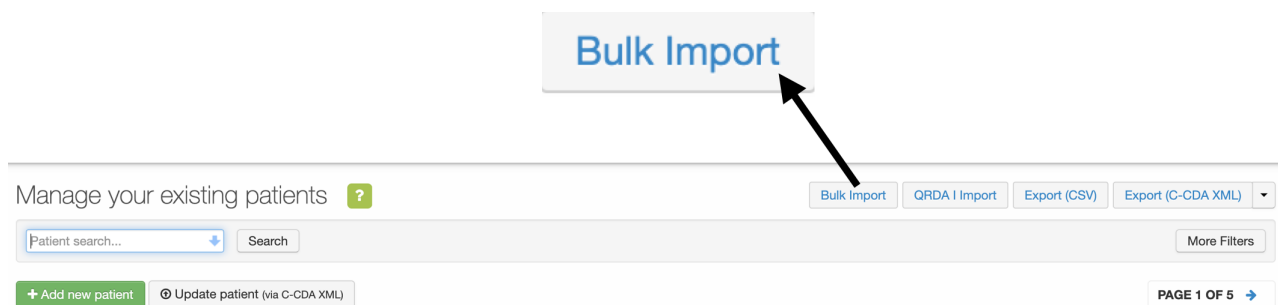We can upload any C-CDA XML or CSV/XLS (Excel) files that your existing software can produce.

For CSV/XLS (Excel) files, a header row must define what data is in each column. The only required fields for a patient are First/Last name, though email and cell phone are required for email and SMS text appointment reminders. The more data you can include with your import the better.

You can create custom patient demographics for the unique data fields you collect. After you create the custom demographics field in DrChrono, you can include them in your import as long as there is a column header for the custom data in your spreadsheet and a corresponding field in your DrChrono account first.

To upload a spreadsheet of patient demographics, go to **Patients** then click **Patient List** from the drop-down menu.

Now click **Bulk Import** in the upper right corner and follow the instructions.

On the import screen, you can download a .csv or .xls template to use for your import. Click **Choose File** to select the file from your computer then click **Upload**.

Import Patients From File

Example (your file can have different columns):

	A	B	C	D	E	F
	First	Last	Email	Cell Phone	Insurance	Insurance Id
1						
2	George	Washington	first@email.com	555-555-555	Empire Blue Cross/Blue Shield	555-1342-A53224
3	Thomas	Jefferson	independence@email.com	777-777-7777	Humana	555A-0x432A
4	Abraham	Lincoln	honest-abe@email.com	888-888-8888	Uninsured	

Upload File:

Patients File (.csv or .xls)   [Choose File] No file chosen

[Upload]

Next, there will be a message stating that the upload is processing. An email will also be sent when the import is complete. You can return to the patient import screen to view your uploaded file. Our team will review and upload the file. When it is complete, there will be checkboxes under the processing fields.

Upload Processing…

Thanks! Our staff are now processing your upload. A full report will be sent to **sample.email@drchrono.com** when the process is complete. You can check the progress of your past imports at the Patient Import screen.

Import Patients From File

Previously Uploaded Files:

ID	Uploaded on	Header Processed	File Processed	File Imported	Notes
10292	6/17/2022 02:12 PM				

Import Patients From File

Previously Uploaded Files:

ID	Uploaded on	Header Processed	File Processed	File Imported	Notes
10292	6/17/2022 02:12 PM	✔	✔	✔	Patients Added: 6

Note: This feature is only available for paid plans. For more information regarding plans please get in touch with sales@drchrono.com.