

Internal Guide for Data Imports

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This document provides a breakdown of which data elements we can import from other EHRs. Items that are classified as “Low Effort” sometimes use [internal tools](#) to import the data - as long as the file comes in the correct format, we shouldn't have an issue importing the data.

The items that are classified as medium effort require developer work. These tasks can have a lot of variation depending on where the data is coming from, so fitting it to the correct formats will only help our developers complete the import quickly and accurately.

[Here is a quick reference sheet](#) you can review when discussing our import capabilities.

Details on the Data Transfer Process

For more information on the Data Import process, view this [guide here](#).

Note: For all .csv options, DrChrono support can also take the file as .xls or .xlsx and convert it to .csv internally.

Patient Demographics

- .CSV - Low Effort
 - See our own CSV export as an example.
- C-CDA .xml - Low Effort
 - We can also take a .zip file of these, one per patient. This includes medications and allergies.

Fee Schedule

- .CSV - Low Effort
 - See the existing tool (Setup / Enrollment → Fee Schedule) for an example of the format.

Referral Contacts

- .CSV - Low Effort
 - See the existing tool (Setup / Enrollment → Referral Contacts) for an example of the format.

Appointments

- .CSV - Moderate Effort
 - This should have the patient's name, the office/exam room, and the date/time of each appointment. We don't typically attach any of the other import data to past appointments. This creates empty shells of the appointment on the calendar.

Clinical Notes

- .pdf - Low Effort
 - We will not parse data out of the clinical note. The filename of the PDF should have the patient's name, DOB, and the date of the appointment. These will be added to the documents section of the patient's chart, not attached to appointments.

Documents & Images

- .jpg, .tiff, etc. - Low Effort
 - The filename should have the patient's name, DOB, and optionally a date associated with it. These will be added to the documents section of the patient chart. Example: Last_First_Middle_1969-12-31_Document Label.jpg

Lab Results

- C-CDA .xml - Moderate Effort
 - We don't currently parse lab results out of the C-CDA files, but we should be able to add support for it.
 - .pdf - Low Effort
 - We would treat this like clinical notes/documents. The filename should have the patient's name, DOB, and the date of the result.
 - .hl7 - High Effort
 - We don't have support for arbitrary .hl7 files, but we could possibly parse these for high-value clients.
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