

Upload Patient Demographics

07/24/2024 10:01 pm EDT

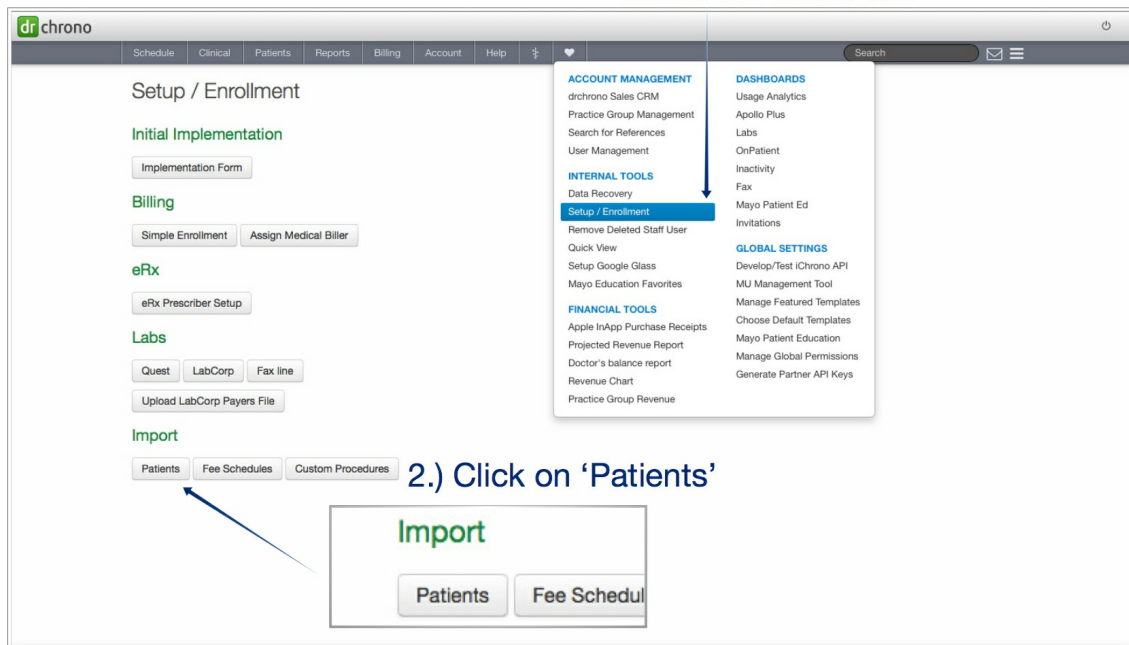
Please verify the provider ID (With IS or Account Manager) before you begin the process.

Follow the below steps to learn how to upload patient demographics.

1. Be logged into your employee account.
2. From the internal tools tab (Swords Icon) choose **Setup/Enrollment** or click [here](#).



1.) Click on 'Setup/Enrollment' under the Heart Tab



2.) Click on 'Patients'

3. Under the 'Import' category click on 'Patients', or click [here](#).

Please Note: The file MUST be in the correct format. The doctor can upload one of the following formats, XLS, or a basic CSV, but when YOU upload the file it will have to be put in XLS. You are able to download an example template by going [here](#). There must be a header row that defines what data is in each column. The only required fields for a patient are First/Last name, though email and cell phone numbers are required for email and SMS text appointment reminders.

(Zoom in to see the below photo in detail)

Example (your file can have different columns):

1	A	B	C	D	E	F
	First	Last	Email	Cell Phone	Insurance	Insurance Id
2	George	Washington	first@email.com	555-555-555	Empire Blue Cross/Blue Shield	555-1342-A5324
3	Thomas	Jefferson	independence@email.com	777-777-7777	Humana	555A-0x432A
4	Abraham	Lincoln	honest-abe@email.com	888-888-8888	Uninsured	

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4. Enter in one of the following criteria into the search field and select that doctor from the drop-down list given. (doctors name, username, or user ID) **Please ensure you verify the provider ID before proceeding further.**

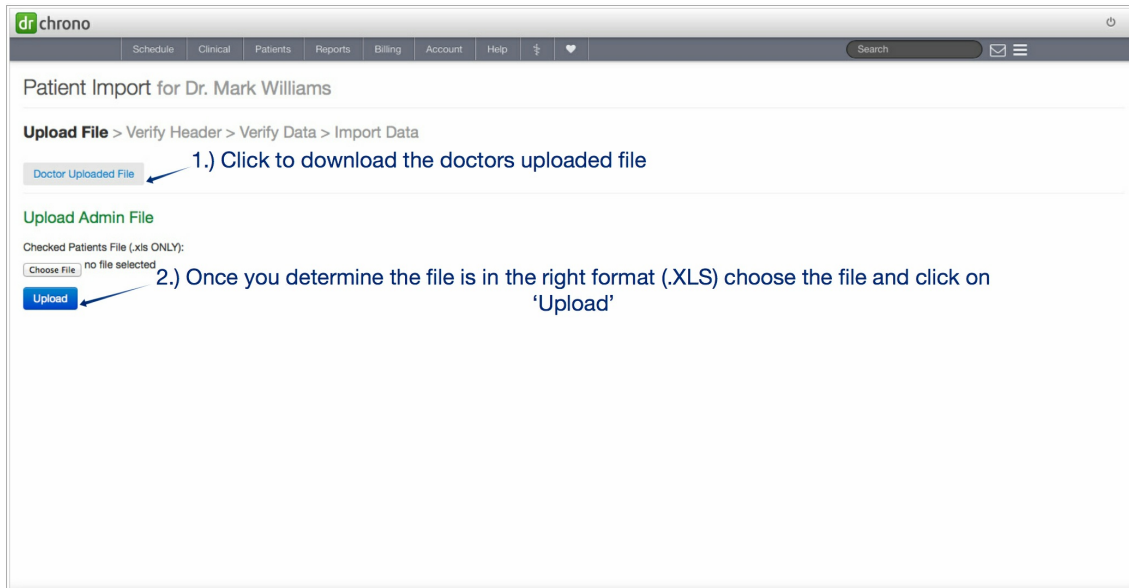
5. Click on the doctor's name that shows up under the search bar.

1.) Enter in the doctors information you are searching for

2.) Click on the doctor you would like to import the demographics for

Upload ID	Doctor	Uploaded on	Doctor Uploaded File	Admin Uploaded File	Header Processed	File Processed	File Imported	Notes
1969	Dr. Mark Williams	2/27/2014 06:15 PM	✓	✓	✓	✓	✓	Patients Added: 4
1968	Dr. Mark Williams	2/27/2014 05:41 PM	✓	✓	✓	✓		Duplicate Patient Already In System: 1 Valid Patients To Be Added: 0
1616	Dr. Mark Williams	9/6/2013 12:28 PM	✓	✓	✓	✓		Duplicate Patient Already In System: 1 Valid Patients To Be Added: 0
1615	Dr. Mark Williams	9/6/2013 12:26 PM	✓	✓	✓	✓	✓	Patients Added: 1
1613	Dr. Mark Williams	9/6/2013 05:47 AM	✓					
1612	Dr. Mark Williams	9/6/2013 05:46 AM	✓					
1610	Dr. Mark Williams	9/6/2013 04:52 AM	✓					
1565	Dr. Mark Williams	9/3/2013 04:08 PM	✓					

6. Click on **Doctor Uploaded File**, and it will then download the file to your computer.



7. Review the file and make sure it is in the right format. If it is not in the right format you can either correct it yourself or tell the doctor it is not correct and have them fix it.

Please note: if you have them fix it, it might be beneficial to send them a copy of the template you downloaded earlier for reference.

Please refer to [Import Patient Demographics from External File](#) for specific guidelines on how data should be prepared.

8. Once you have determined that the file is correctly formatted click on **Choose File** under the **Upload Admin File** section on the same page you download the doctor's file from. Then click on **Upload**.

9. You will then need to match the header in excel with the demographic field in DrChrono. (i.e. Verify the headers are correct.

Patient Import for Dr. Mark Williams

1.) Make sure the headers match the patient data

Upload File > Verify Header > Verify Data > Import Data

Header	Match	Sample Data
patient_id	1.0	2.0 3.0
first_name	First Name ANDRE	ABBAS TARA
middle_name	Middle Name	
last_name	Last Name AABEDI	AALEM AALEM
dob	Date of Birth 36854.0	20110.0 34210.0
sex	Gender Male	Male Female
Street address1	Street Address 1 2711 CASIANO ROAD	1627 LYNDON AVENUE 1627 LYNDON STREET
Street address2	Street Address 2	
city	City LOS ANGELES	SOUTH PASADENA SO.PASADENA
state	State CA	CA CA
zip	Zip Code 90077.0	91030.0 91030.0
Home phone	Home Phone 3108897989.0	6267990688.0 6267990688.0
extension		
Primary insurance id	Primary Insurance Id GYX290A51981	CPR114A66386 CPR114A66386
primary insurance subscriber first name	Primary Insurance Subscriber SHAHRZAD	ABBAS FARNAZ
primary insurance subscriber middle name	Primary Insurance Subscriber	
primary insurance subscriber last name	Primary Insurance Subscriber AABEDI	AALEM ADELI

Reset Save & Verify Continue →

2.) Click Continue

10. After you have determined the headers are correct click **Continue** and it will then start the Verification process.

11. Once verified click on **Import** and it will then upload the patient demographics into the doctor's account.

Patient Import for Dr. Mark Williams

Upload File > Verify Header > Verify Data > Importing Data

9610 of 9610 rows read

Valid Patients To Be Added: 9610

Retry Import Doctor Uploaded File Admin Uploaded File

Once verified click on 'Import'

To confirm the demographics were uploaded correctly break the glass on the customer's account.

Please Note: In the event that the file can not be uploaded you will have to start the process over again. It is recommended that you create separate excel documents each with 50 patients on them and do them one at a time. You will have to also copy over the headers for each document. This usually happens when there are more than 1000 patients. If you are still having issues reach out to a support agent in India to assist you. Currently, Mark Williams is in charge of customer tasks.