Upload Patient Demographics

07/24/2024 10:01 pm EDT
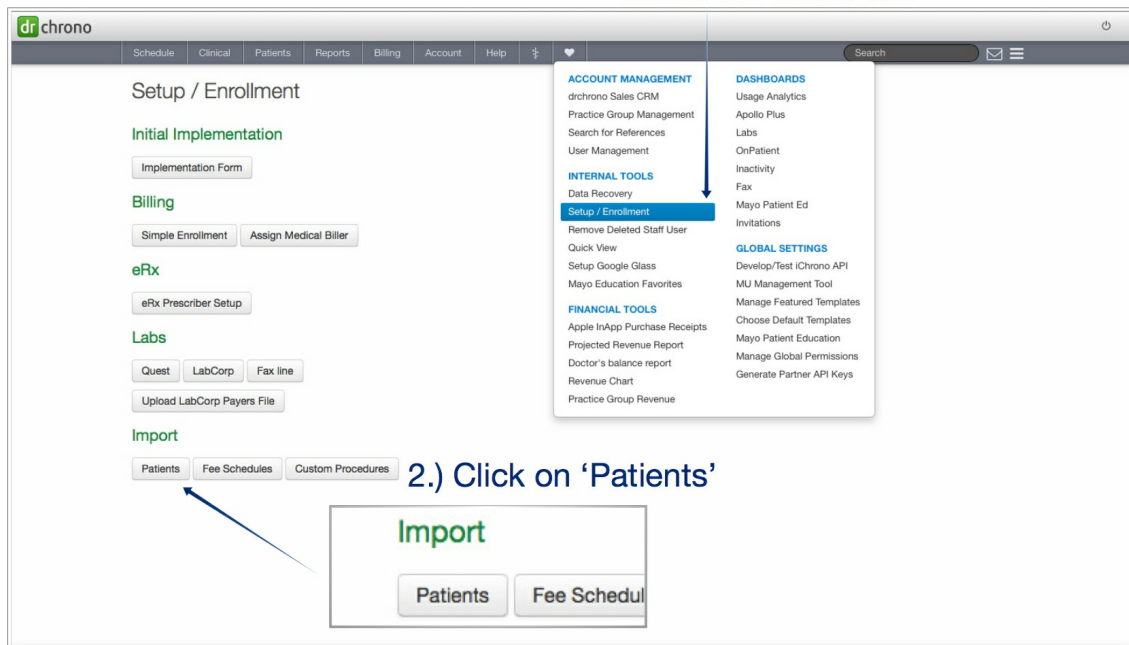
Please verify the provider ID (With IS or Account Manager) before you begin the process.

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.

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)

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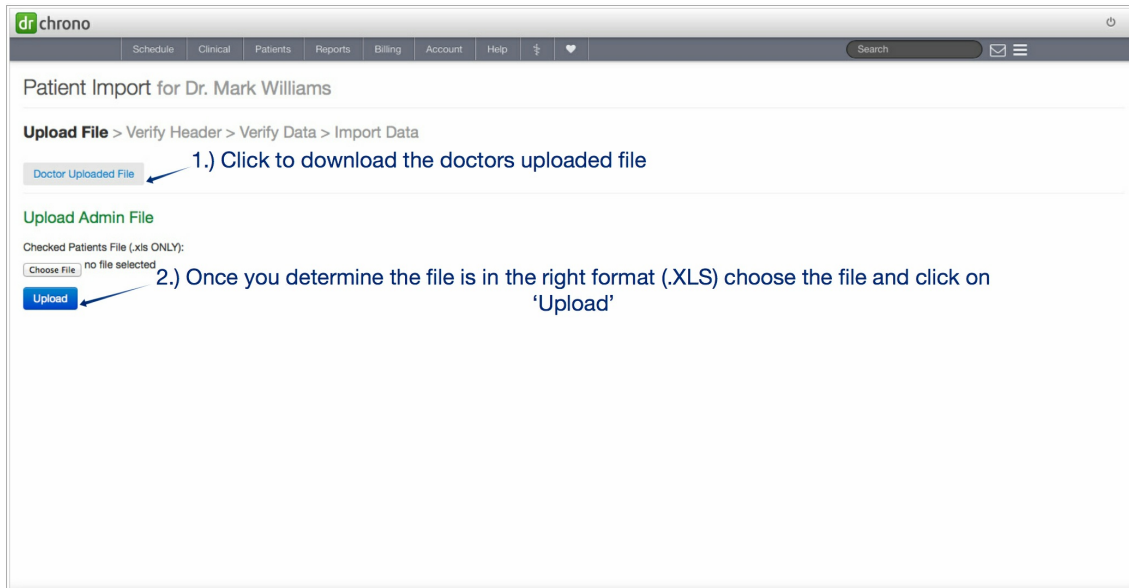
5. Click on the doctor's name that shows up under the search bar.

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.

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.

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.