PATIENT DEMOGRAPHIC IMPORT UTILITY INSTRUCTIONS

Introduction

The *Patient Demographic Import Utility* is an optional add-on function that may be purchased. It is used to upload and process data files containing patient demographic information to register, pre-register or update patient accounts. The data files must adhere to the *File Specifications* provided.

Pre-requisites

- Each data file must adhere to the *File Specifications* provided.
- Each data file must be created as a comma-separated file. The file extension can be .csv or .txt; either extension is acceptable.
- Unique filenames should be used for each data file. For example, 2023-10-16_Patients_DB1.txt (YYYY-MM-DD_Patients_DB(database#).txt
- The data file must have commas present in between each piece of data including commas in place for the columns/fields that have no information in them.

Setup Steps

The *Patient Demographic Import Utility* function is located on the *Patient* menu *(Patient > Patient Demographic Import Utility)*. Upon accessing the function, a listing of any files that have already been uploaded but not yet imported will display. The **Filename** and **Date Created** will be listed for each file.

When you first access the *Patient Demographic Import Utility* you must perform the following setup steps using the Action Column buttons before you upload and import files.

1. Define the Default Values.
2. Complete the Integration Options.
3. Print File Specifications and prepare data file(s).
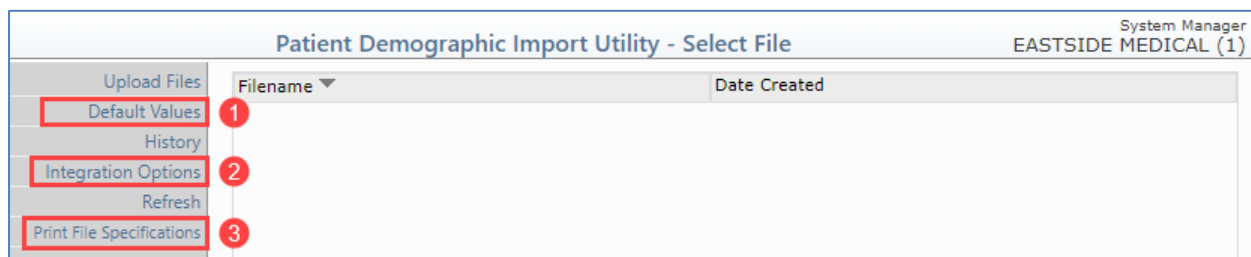
1. **Define the Default Values**. These values will be used when the patient accounts are imported. When you first access this function, the values from the *CGM webPRACTICE Default Values* function will be automatically populated but you can change them if needed. The values stored in this function will be used each time each time a file is imported.

- **Rel to Guarantor** - Select the default relationship you want to use for each imported patient account from the Relationship list.
- **Default Location** - Type the location code you want to use for each imported patient account or select from the Location list.
- **Responsible Doctor** - Type the doctor code you want to use for each imported patient account or select from the Doctor list.
- **Referral Source** - Type the referral source code you want to use for each imported patient account or click the magnifying glass to search the table.
- **Date of First Visit** - Type the date you want to use for each imported patient account or click the calendar icon to select a date.
- **Billing Group** - Type the billing group code you want to use for each imported patient account or click the magnifying glass to search the table.
- **Medicare Patient** – If every imported patient account will have Medicare, select this check box.
- **Benefits Assigned** – Select the applicable option you want to use for each imported patient account.
- **Send Statement** – If you want each imported patient account to receive statements, select this check box.
- **Suppress Collections** - If you want each imported patient account to be suppressed from collections, select this check box.

- **Print Aging Messages** - If you want to print statement aging messages for each imported patient account, select this check box.
- **Finance Charges** - If you want to generate finance charges for each imported patient account, select this check box.
- **Erase Statement Comment** - If you want the statement comment contained in the Billing Information screen to be erased when the Erase Statement Comments function is run for each imported patient account, select this check box.
- **Internal Comment** – Type any text you want to display whenever an imported patient account is accessed using Patient Look-Up.
- **Alert User** - If you want any Internal Comment text to display each time an imported patient account is accessed, select this check box.
- **Release of Information** - If each imported patient account will have authorized the release of medical information to other organizations, select this check box.

2. **Complete the Integration Options**. The integration options allow you to configure how patient records are handled during the import process.

Patient Demographic Import Utility - Integration Options

Register All Patients in the File	☑
Use the Account # in the file for the Patient Account #	☑
Allow Patient Information to be Updated	☑
Convert Text to Uppercase	☑
File Contains a Header Line	☑

- **Register All Patients in the File** - If you want to patients to be registered, select this check box. Otherwise, they will be loaded as unregistered.
- **Use the Account # in the file for the Patient Account #** - If you want to use the Account # provided in the file, select this check box. Otherwise, each patient will be automatically assigned a unique account number. **WARNING**: If you elect to use an account # in the file and if a patient account with that same account # already exists, the data contained in the file will overwrite the existing account.
- **Allow Patient Information to be Updated -** If you want existing patient account information to be updated with data provided in the file, select this check box.
- **Convert Text to Uppercase** – If want the text in the file to be converted to Uppercase, select this check box.
- **File Contains a Header Line** – If the first line in the file contains headers, select this check box.

Print File Specifications

After you have completed the setup steps, you will need to print the file specifications using the **Print File Specifications** Action Column button, so you can prepare your data file(s).
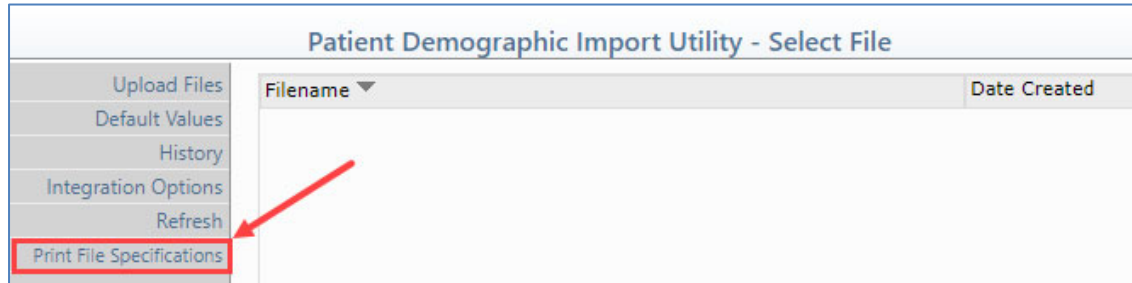
The Default Values listed in the File Specifications are the values that you defined during the setup steps. Field numbers are provided to easily identify fields in a .txt file and letters are provided to easily identify fields in a .csv file.

Partial sample of File Specifications

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                          EASTSIDE MEDICAL                    Page 1
            File Specifications for Patient Demographic Import Utility

Field    Description              Req  Default
-----------------------------------------------------------------------

 1 (A)   Database                      Uses current database if not specified
 2 (B)   User Code                     Uses current user if not specified
 3 (C)   Patient Account Number
 4 (D)   Patient Last Name        R
 5 (E)   Patient First Name       R
 6 (F)   Patient Middle Name
 7 (G)   Patient Address Line 1
 8 (H)   Patient Address Line 2
 9 (I)   Patient City
10 (J)   Patient State
11 (K)   Patient Zip
12 (L)   Patient Home Phone
13 (M)   Patient Work Phone
14 (N)   Patient Cell Phone
15 (O)   Patient Social Security
16 (P)   Patient Default DX
17 (Q)   Patient Sex              R
18 (R)   Patient Birth Date       R
19 (S)   Patient Rel to Guarantor R   0 - Self
20 (T)   Patient Referral Source  R   1 - Matt Smith M.D.
21 (U)   Patient Responsible Dr   R   1 - CATHY CASTNER, MD, DO
22 (V)   Patient Date of First Visit R  10-12-2023
23 (W)   Patient Default Location
24 (X)   Primary Care Provider
25 (Y)   Patient Status
26 (Z)   Patient Ethnicity
27 (AA)  Patient Race
28 (AB)  Patient Language
```

Overview

The following outlines the process to upload and import files.

- Copy Data Files to the Workstation Folder
- Upload File(s)
- Check File Integrity
- Resolve any Errors or Warnings
- Import Patients
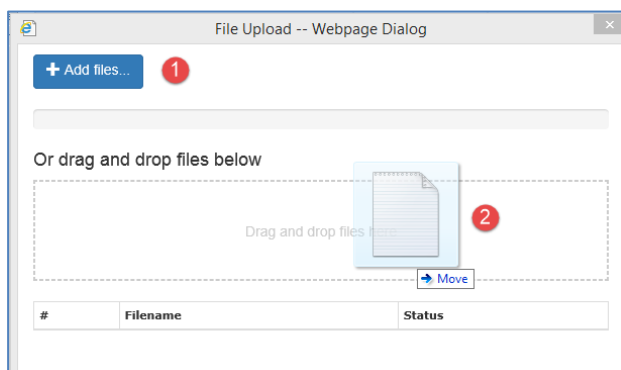
Copy Data Files to the Workstation

Copy the comma-separated data file(s) to the folder on the workstation. For example, *C:\ImportPatients*. Each filename should be unique and must adhere to the *File Specifications* provided.

Upload Files

Click the **Upload Files** Action Column button to upload the data file(s).
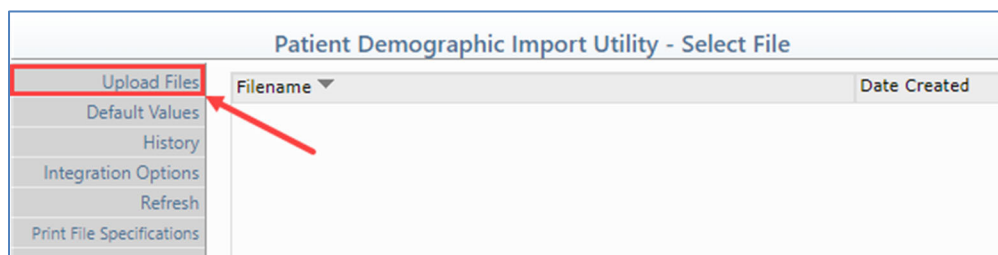
When the **File Upload** dialog box displays, you have two options:

1. Click **Add files**, navigate to the folder where the file(s) is stored, select the file(s) you want and click **Open**.
2. Open Windows Explorer, navigate to the folder where the file(s) is stored, select the file(s) you want then drag and drop the selected file(s) onto the **File Upload** dialog box.

Check the file upload **Status** in the bottom portion of the **File Upload** dialog box to confirm the file(s) successfully uploaded.
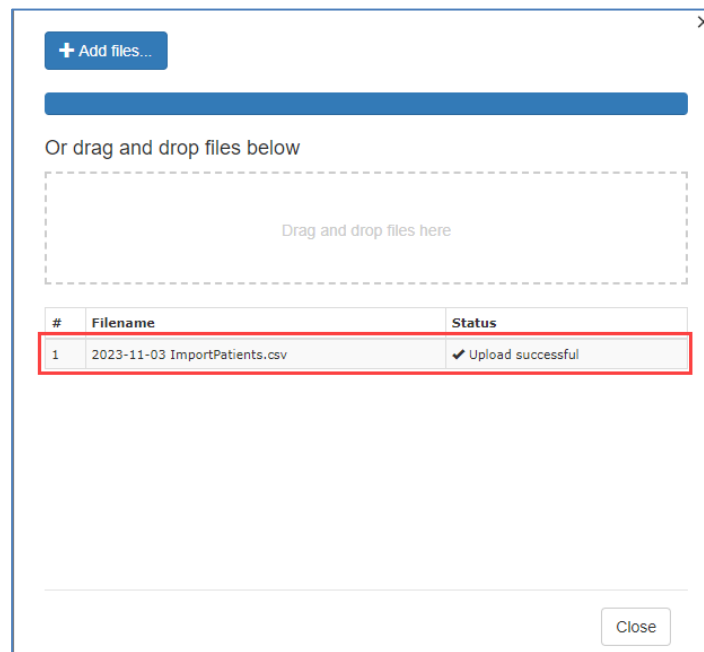
Click **Close** to return to the *Charge Import Utility* screen, which will display the imported file.

Refresh This action column button will refresh the listing of files.

Check File Integrity

The data integrity of each file must be checked to ensure it adheres to the defined File Specifications after you have uploaded it. Click in the File row to select the file you want to process.

The data in the file will be checked and the results will display including the **Status** of the file, **Data Source** and the number of **Records** included in the file.

There are two different Status settings possible:

- **Clean** – No errors or warnings were found with the data and the file is ready to be imported.
- **Errors** – The file cannot be imported until the errors have been corrected. You will need to **Delete** the file, correct the errors within the data file and then **Upload** the corrected file.

Resolve any Errors or Warnings

When a file contains errors, you must delete the file, correct the errors and upload the corrected file. After you select a file and the data integrity has been checked, detailed information for the errors is provided to assist you in correcting the data. The **Record** and **Field** numbers will be listed in addition to the **Value** contained in the Field. An **Error** message will also identify the problem with the data. For easy reference when you are correcting the errors, you can print the detailed information using the **Print** Action Column button.

Note: The **Import Patients** Action Column button will not be available until the file no longer contains errors.

Import Patients

If the file Status is **Clean**, you can proceed with importing the patients.

To import a file, click the **Import Patients** Action Column button. The following will display:

History

Each time you import a file, basic file information is stored and can be accessed using the **History** Action Column function so you can view the results of the imported file.

Upon accessing the **History** function, a listing of every file that has been imported will display. The Filename, User Code, Import Timestamp and the number of Records imported will be listed for each file.

You can view the individual Records contained in each file, the values stored in each field and the Result of the Import by clicking anywhere in the File row to select the file.

Each Record contained in the file will display and every field contained in the File Specifications will be listed for each record. The fields will be listed in the same order as they appear in the File Specifications, starting from the left side of the screen.

History - File Details								System Manager EASTSIDE MEDICAL (1)	
Filename: 2023-11-03 ImportPatients-1.csv File was imported 11/03/2023 16:15:27 By user MGR									
Database ▼	User Code	Patient Account Number	Patient Last Name	Patient First Name	Patient Middle Name	Patient Address Line 1	Patient Address Line 2	Patient City	Patient State
1		100029	Bryant	Mustafa	H	1595 Disney St	Apt # 254	Tracy	CA
1		100030	BRYANT	SAMIM	A	1595 DISNEY ST	APT # 254	TRACY	CA
1		100031	BRYANT	PETER	I	698 DAIRY ST	APT #152	MOUNTAIN HOUSE	CA
1		26624	BRYANT	KENDALL		1898 TERRACE AVE		PLEASANTON	CA
2		100032	BRYANT	SAMANTHA	E	8569 LONE ST	APT#55	UNION CITY	CA

When you are done reviewing the data, click **Proceed** to return to the History screen.