Patient Export and Upload Tips

1. Must contain the following <u>6 items for each patient</u>: unique Patient ID, First Name, Last Name, Date of Birth, Gender, Zipcode

2. May also optionally contain: Middle Initial, Street Address 1, Street Address 2, City, State, email address

3. Each file must be fewer than 80,000 patients
4. If the first row in your .csv file contains field names check the "First record is the header of the CSV file" option. If the first row of your .csv file contains data, ignore this option.

5. If your PMS System stores gender as "0" and "1", check the "Set gender male value" option and use the drop down to indicate if male is "0" or "1". If your PMS System does not use "0" and "1" to indicate gender, ignore this option.

6. Check the "Set date format for date of birth field", and in the drop down, select the format of the date of birth field in your .csv file.

7. Map the fields in your .csv file. The fields listed in the right-hand column are the fields in your .csv file. For each of these fields, click the corresponding field in the left hand column (labeled field1, field2, etc.), and select the appropriate title for the column. When you have finished mapping the fields, you can click on the "next"/"prev" buttons to scroll though your data records and confirm that you have set up the mapping correctly.