

# Documents Import - Data Migrations

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Bulk Documents migrations attach external files, scans, photos, X-Ray Images, PDF Clinical Notes, PDF Lab Results and other viewable clinical files to existing patient records within DrChrono. Both single page and multipage documents are accepted. Each document's content must relate to a single patient; files containing multiple pages which relate to different patients cannot be migrated, nor separated by the migrations team.

## Accepted File Formats:

- PDF (typical of clinical notes, lab results, scans and faxes)
- JPEG/JPG (scans, photos)
- TIFF/Tif (photos)
- PNG (photos, screenshots)
- HEIC (high quality mobile phone camera photos)

There are three scenarios in which DrChrono supports autonomous files migrations:

- Scenario 1:
  - Clinical files are saved/stored in a single folder
  - Files are each labeled/named in a way which allows for the identification of the patient (name and date of birth), description and categorization of the document and the date in which the file was created or saved in the previous system.
  - For example: A clinical encounter note for fictitious patient John Smith (1/1/1970) dated January 1, 2025 might appear as "SMITH\_JOHN\_1970-01-01\_VisitNote\_2025-01-01.pdf" in the file system.
- Scenario 2:
  - Clinical files are saved/stored in a file/folder hierarchy with nested container folders
  - Container folders labeled after patient names/dob have all files within labeled with category and date (ex: "Lab Result\_20250101.pdf")
  - Container folders labeled after date categories have all files labeled with the patient name, date of birth and date of document creation ("Smith\_John\_1970-01-01\_2025-01-01.pdf" inside the folder "Lab Results")
- Scenario 3:
  - Clinical files are saved/stored in a file/folder hierarchy with no easily identifiable patient/origin details
  - Folders in this format typically either have labels for the file category, but all files within have a system-generated name containing a mix of hexadecimal characters (a-f, 0-9), also referred to as a GUID in some EMR systems.
  - For this scenario, **we require a files index** to support migration. A **files index** is a spreadsheet file (either Excel (xlsx), CSV, TXT) or a database table from a supported database, which contains details related to when a specific file was created, the related patient, file category and file description. Typical columns found in an index file can be found in the section below titled "Index File Detail".

## Index File Detail

The index file provided for import must have column headers and is listed below (alongside required formats and field-specific notes). Each field must exist in a separate column of the index file and formatted properly. The fields may exist in any order but must be present. If your index file has different column names than the ones shown below, DrChrono will attempt to match the provided fields with our accepted field names as closely as possible. To facilitate this matching process, it is helpful to send these details along with your data import request.

Column Name	Format	Example	Required?	Notes
Last Name	plain text	Smith	YES	Patient's last name. Must be
First Name	plain text	John	YES	Same as above
Date of Birth	YYYY-MM-DD, MM/DD/YYYY, or MM-DD-YYYY	01/01/1970	YES	Same as above
Chart ID	LLFF000001	SMJO000001	NO	Same as above, must be

Description	plain text	"X-Ray: Left Arm" or "xray_left_arm.pdf"	YES	A short label indicating v also be the file's name
Date	YYYY-MM-DD, MM/DD/YYYY, or MM-DD-YYYY	2023-01-01	NO	Date of file's creation. If date in which the file was
Metatags	plain text	"Radiology" or "X-Ray" or "Fax"	NO	Used to filter documents metatags if separated by value (ex: "Radiology, X-l
Path	plain text	"D:\\ExternalStorage\\MyFiles\\ xray_right_arm.pdf" (Win) or "/Volumes/ExternalStorage/MyFiles/ xray_left_arm.pdf" (Mac/Linux)	YES	Must reflect the absolute the folder of documents

If your files live in a database with no option to provide an export into a folder or to provide an index, please contact us by [submitting a support ticket](#) to discuss further.

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