

Appointments Import - Data Migrations

07/08/2024 7:30 pm EDT

DrChrono supports the import of appointment data for patients from external spreadsheet files for records that exist in DrChrono.

When provided this way, the spreadsheet must follow these formatting guidelines:

- All column headers must exist on the very first row of the spreadsheet.
- There must exist ONE appointment per row, per patient.

Prerequisite: A demographics import should already have been completed before attempting to load appointments. We can only import appointments for patients who already exist in DrChrono.

The following columns and values are accepted for the bulk-creation of appointments:

| Column Header | Description | Format | Required? | example values |
|-------------------------------|--|-----------|-----------|---|
| Last Name | Patient Name | text | Yes | Smith |
| First Name | Patient Name | text | Yes | John |
| Date of Birth | Patient DOB | date | Yes | 01/01/1970 |
| Chart ID | DrChrono Chart ID | text | No | SMJO000001 |
| Scheduled Time | Appointment date & time. | date-time | Yes | 01/01/2023 04:00 PM (or 01/01/2023 16:00) |
| Doctor Full Name | First/last of provider assigned to appt | text | Yes | "Jonathan Smyth, MD" or "Jonathan Jonathan" |
| Duration | Length of appointment (in minutes) | numerical | Yes | 15 |
| Reason | Reason for visit | text | No | "Leg Pain", "New Patient Consult", "Op", etc. |
| Notes | Internal (not visible to patients) notes related to appointment. | text | No | "Patient has new insurance card", "wheelchair upon arrival" |
| Office Name | Name of office in DrChrono where appt is scheduled | text | Yes | "Primary Office", "Dallas Branch", etc. |
| Exam Room | Number of exam room patient treated in (1 to 15 (max)) | numerical | Yes | 3 |
| Primary Insurer Name | Name of health plan for this appointment | text | No | "Anthem Blue Cross", "United Health Self Pay" |
| Primary Insurance ID Number | Subscriber number for primary insurer | text | No | DZVAN01234567 |
| Secondary Insurer Name | Name of second health plan for this appointment | text | No | "AARP", "Medicaid-CA", "Medicare", etc. |
| Secondary Insurance ID Number | Subscriber number for second insurer | text | No | 0123456789 |

| | | | | |
|-------------|---|--------|----|--|
| Status | Current status. One of: ""(blank-default), "Arrived", "Checked In", "Checked In Online", "In Room", "In Session", "Complete", "Confirmed", "Not Confirmed", "Rescheduled", "Cancelled", "No Show" | choice | No | In Session |
| ICD10 Codes | Comma-separated list of ICD-10 codes affiliated with this appointment | text | No | Single Entry: "G47.33" Multi-Entry: "G47.33","I10", |

In addition to the fields above, Vital Signs can also be imported with appointments. The column headers and values below can be added to your spreadsheet to record patient vitals:

| Column Header | Description | Format | Required? | Example values |
|---------------------------|--|-------------------|-----------|-----------------------------|
| Vitals:Blood Pressure 1 | Systolic BP value | numerical/decimal | No | 120 |
| Vitals:Blood Pressure 2 | Diastolic BP Value | numerical/decimal | No | 80 |
| Vitals:BMI | Body Mass Index value (also auto calculates based on "Height" and "Weight" vitals values if omitted) | numerical/decimal | No | 25.9 |
| Vitals:Head Circumference | Head Circumference (inches) | numerical/decimal | No | 35 |
| Vitals:Height | Height (inches) | numerical/decimal | No | 75 |
| Vitals:Weight | Weight (lbs) | numerical/decimal | No | 145 |
| Vitals:Oxygen Saturation | O2 Sat Value (%) | numerical/decimal | No | 99 |
| Vitals:Pain | 0 - 10 pain scale. | choice | No | 5 |
| Vitals: Pulse | Heart Rate (bpm) | numerical/decimal | No | 92 |
| Vitals:Respiratory Rate | Breathing rate (rpm) | numerical/decimal | No | 8 |
| Vitals:Temperature | Fahrenheit temp value | numerical/decimal | No | 98.6 |
| Vitals:Smoking Status | SNOMED Concept Code (or Preferred Name) indicating smoking status. See here for more. | choice | No | 8517006, or "Former Smoker" |

You may use the appointment import template attachment on this page for reference.

Once your file is ready, please submit it to your DrChrono Representative to have completed.