

# Bulk Importing Patient Demographics

07/08/2024 7:47 pm EDT

You can import your patient demographics from a spreadsheet into your DrChrono account.

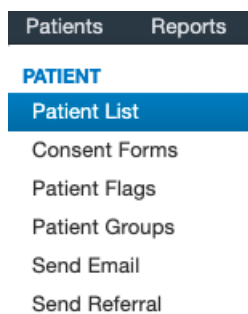
You can use a standard Microsoft Excel spreadsheet (.xls) or a basic comma-separated value file (.csv) with your patient's demographic information. You can find a template and more information [here](#).

We can upload any C-CDA XML or CSV/XLS (Excel) files that your existing software can produce.

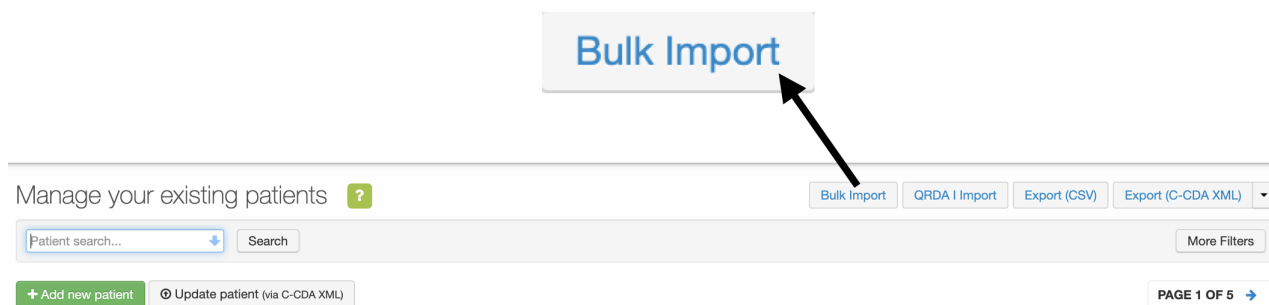
For CSV/XLS (Excel) files, a header row must define what data is in each column. The only required fields for a patient are First/Last name, though email and cell phone are required for email and SMS text appointment reminders. The more data you can include with your import the better.

You can create [custom patient demographics](#) for the unique data fields you collect. After you create the custom demographics field in DrChrono, you can include them in your import as long as there is a column header for the custom data in your spreadsheet and a corresponding field in your DrChrono account first.

To upload a spreadsheet of patient demographics, go to **Patients** then click **Patient List** from the drop-down menu.



Now click **Bulk Import** in the upper right corner and follow the instructions.



On the import screen, you can download a .csv or .xls template to use for your import. Click **Choose File** to select the file from your computer then click **Upload**.

## Import Patients From File

### Instructions:

You can use a standard Microsoft Excel spreadsheet ([patients.xls](#)) or a basic CSV (comma separated value [patients.csv](#)) file with your patient's demographic information. [Download Excel template file and add your patients.](#)

We can upload any custom file that your existing software can produce, but 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 are required for email and SMS Text appointment reminders.

**Example (your file can have different columns):**

|   | A       | B          | C                      | D            | E                             | F               |
|---|---------|------------|------------------------|--------------|-------------------------------|-----------------|
| 1 | First   | Last       | Email                  | Cell Phone   | Insurance                     | Insurance Id    |
| 2 | George  | Washington | first@email.com        | 555-555-555  | Empire Blue Cross/Blue Shield | 555-1342-A53224 |
| 3 | Thomas  | Jefferson  | independence@email.com | 777-777-7777 | Humana                        | 555A-0x432A     |
| 4 | Abraham | Lincoln    | honest-abe@email.com   | 888-888-8888 | Uninsured                     |                 |

### Upload File:

Patients File (.csv or .xls)  No file chosen

Next, there will be a message stating that the upload is processing. An email will also be sent when the import is complete. You can return to the patient import screen to view your uploaded file. Our team will review and upload the file. When it is complete, there will be checkboxes under the processing fields.

### Upload Processing...

Thanks! Our staff are now processing your upload. A full report will be sent to [sample.email@drchrono.com](mailto:sample.email@drchrono.com) when the process is complete. You can check the progress of your past imports at the [Patient Import](#) screen.

## Import Patients From File

### Previously Uploaded Files:

| ID    | Uploaded on        | Header Processed | File Processed | File Imported | Notes |
|-------|--------------------|------------------|----------------|---------------|-------|
| 10292 | 6/17/2022 02:12 PM |                  |                |               |       |

## Import Patients From File

### Previously Uploaded Files:

| ID    | Uploaded on        | Header Processed | File Processed | File Imported | Notes             |
|-------|--------------------|------------------|----------------|---------------|-------------------|
| 10292 | 6/17/2022 02:12 PM | ✓                | ✓              | ✓             | Patients Added: 6 |

**Note:** This feature is only available for paid plans. For more information regarding plans please get in touch with [sales@drchrono.com](mailto:sales@drchrono.com).