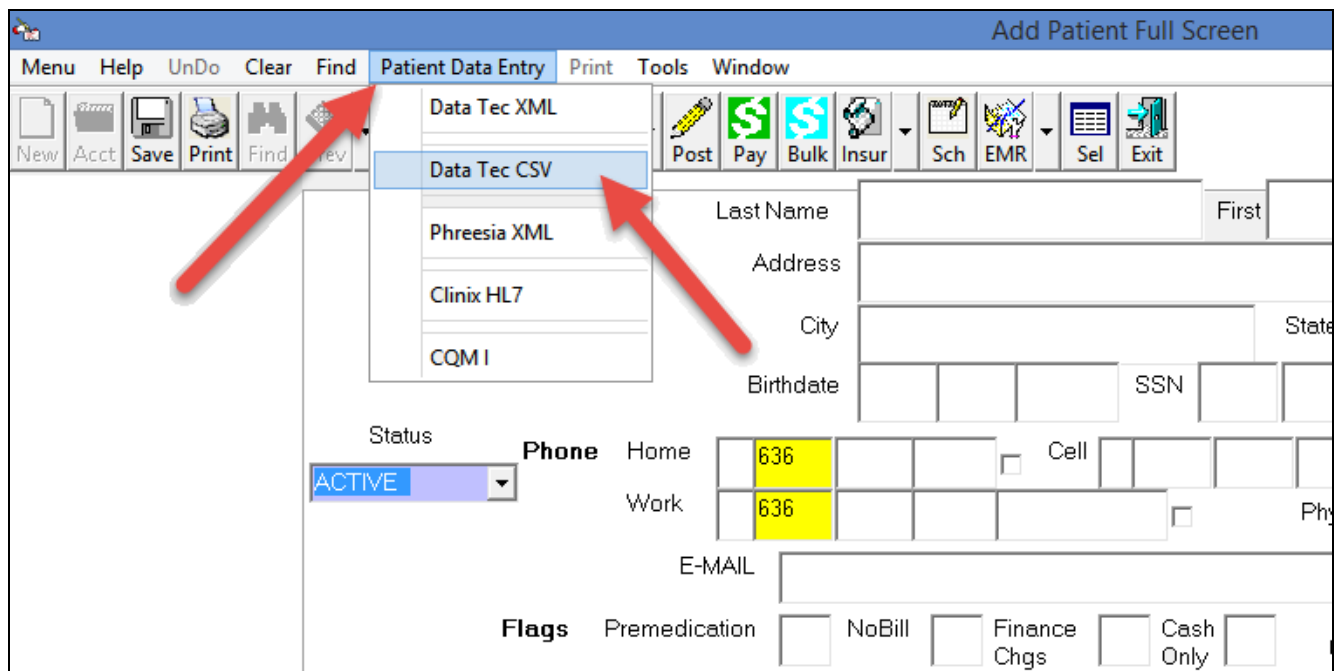


Importing Patient Demographics CSV Files

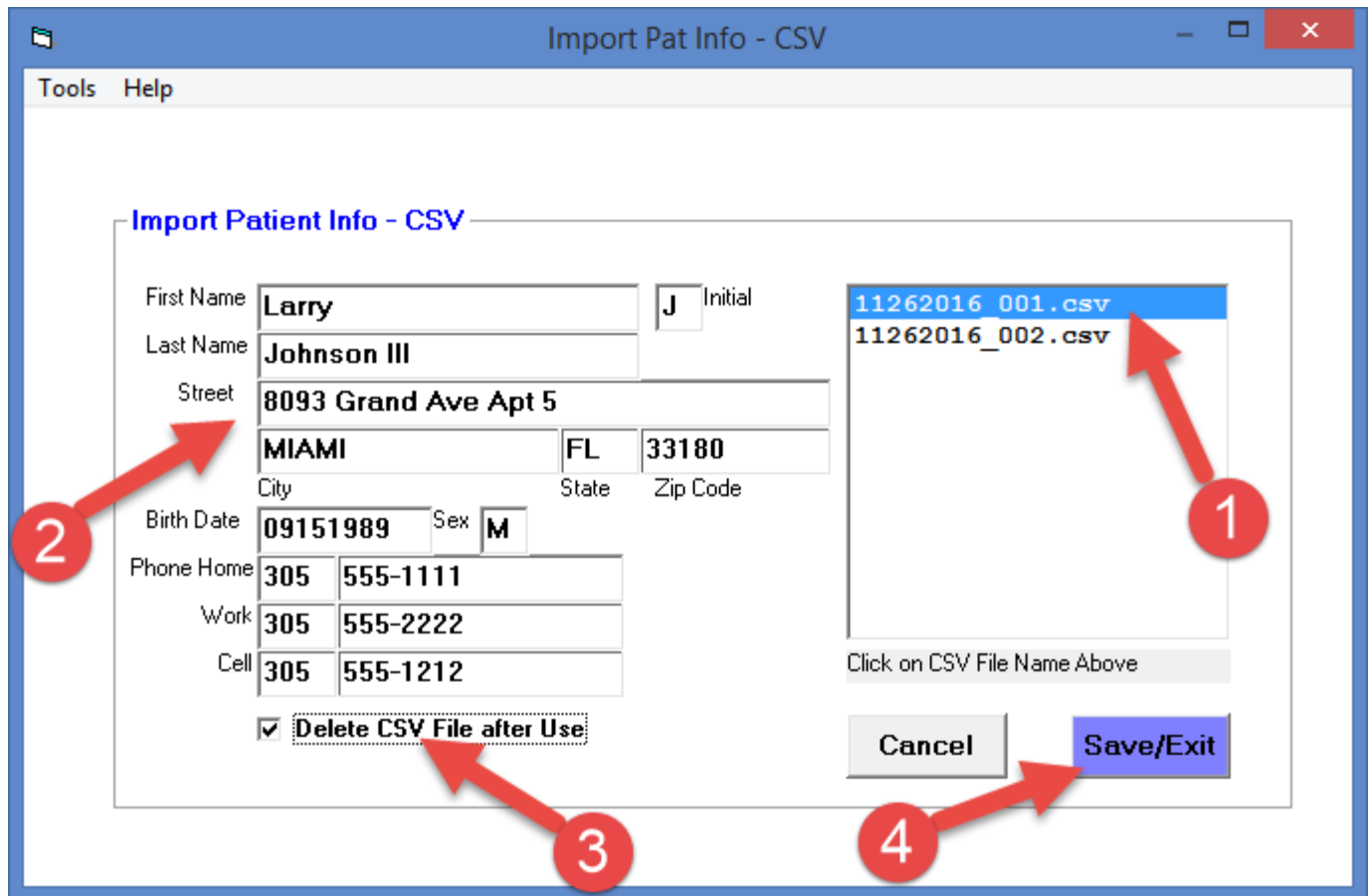
From the full screen Patient Add you can import basic patient demographics from CSV (comma-separated values or comma delimited) files.

On the top of the Add screen select the top toolbar “Patient Data Entry” option, then select “Data Tec CSV”.



Next on the Import screen you will see a list of CSV files on the right to select from. These files have been stored in a specific folder you specify using the “Tools” option on this screen.

- 1) Select the CSV file on the right side.
- 2) See the information displayed, you can edit it if you wish.
- 3) We suggesting having the option “Delete CSV File after Use” checked.
- 4) Click the Save and Exit button to return to the Add screen.



When you return to the Add screen the data fields will be filled in.

The screenshot shows the 'Add Patient Full Screen' application window. The menu bar includes 'Menu', 'Help', 'Undo', 'Clear', 'Find', 'Patient Data Entry', 'Print', 'Tools', and 'Window'. The toolbar contains icons for 'New', 'Acct', 'Save', 'Print', 'Find', 'Prev', 'Next', 'Fam', 'Gen', 'Led', 'Post', 'Pay', 'Bulk', 'Insur', 'Sch', 'EMR', 'Sel', and 'Exit'. The patient data is as follows:

Last Name	Johnson III	First	Larry	Initial	J	Nickname	
Address	8093 Grand Ave Apt 5						
City	MIAMI	State	FL	Zip	33180		
Birthdate	09	15	1989	SSN		Sex	M
						Race	
						Marital	
Status	ACTIVE	Phone Home	305 555 1111	Cell	305 555 1212	Resp Acct#	
		Work	305 555 2222			Physician	
E-MAIL						Recall Interval	06

From the Import screen if you click the “Help” (1) top option you will see the “Format” (2) for the CSV file. Note you can use the “Print” button to give a copy to your technicians.

The screenshot shows the 'Import Pat Info - CSV' application window. The menu bar includes 'Tools' and 'Help'. A red arrow labeled '1' points to the 'Help' menu item. A dialog box titled 'CSV Import Help' is open, showing the following text:

```
CSV Import Help
1) Use Tools to Define Import Directory Path
2) CSV File Sequence of Fields:
-----
LastName (1) , FirstName (2) , Initial (3) , Street (4) , City (5) , State (6) ,
ZipCode (7) , CellAreaCode (8) , CellPhone (9) , HomeAreaCode (10) ,
HomePhone (11) , WorkAreaCode (12) , WorkPhone (13) , Gender (14) ,
BirthDate (15)
```

A red arrow labeled '2' points to the 'Print' button at the bottom of the dialog box.