Import CSV, Excel, TSV, or Pipe-Delimited Files (claims, patients, appointments)

This option allows users to manually import claims, patients, and appointments from their EMR/EHR into CollaborateMD as interface messages.

Important: You must enter all Providers, Payers, and Facilities included in the import into CollaborateMD before importing any file.

Who can import files?

Users with the **Import** permission.

⚠ Only files in **CSV** (.csv, .txt), **Excel** (.xlsx, .xls), **TSV** (.tsv, .txt), and **Pipe-delimited** (.txt) formats are supported in these steps. For HL7 or 837 imports, visit our Import HL7 or Import ANSI 837 Help Articles.

1. Select **Interface** > **Import**.

2. Select your file format **Comma-Separated (CSV)**, **Excel**, **Tab Separated (TSV)**, or **Pipe-Delimited** from the dropdown.

3. Click the **Import** button.

4. Locate the file(s) you want to import from your computer.

5. Select the Files.

   ✨ Use the sample table to ensure that the header row describes the data in that column (or the import will fail). If any changes are needed, cancel the process and edit the file(s).

   1. Select the New Format radio button and enter the name of the Software where the file is coming from. If you have previously created one for the software you are importing from, select it from the "Previously used formats" instead.

Universal Import

① The table below shows a sample of the data that will be imported. The header row must describe the data in that column or the import will fail. If any changes are needed, cancel this process and edit the file(s).

Patient Firs	Patient Las	Patient Ger	Patient DOI	Patient Stre	Patient City	Patient Stat	Patient Zip	Guarantor I	Guarantor I	Guarantor S	Guarantor (	Guarantor S	Guarantor Z	Guarantor S	Guarantor I	Facility	Account #	Invoice #	Invoic
SampleFir st1	SampleLas t1	F	12/14/196 4	1006 Ashford Pkwy	Houston	TX	77077	SampleFir st1	SampleLas t1	1006 Ashford Pkwy	Houston	TX	77077	F	12/14/196 4	West Oaks Urgent Care - Hwy 6	MER00000 01	233888	08/26 5

○ New Format   Format name (Suggestion: What system/software is this file from?)

◉ Previously used format(s)

	Format Name	File Type
☑	EXCEL SAMPLE	Excel

[Next] [Cancel]

2. Verify the format and click **Next**.

3. Verify the imported information in the corresponding tabs (*Patient, Provider, Facility, Payer, Claim Charges*). If any data was not imported correctly, adjust the column names in the imported file an try again.

① If any data does not import correctly, please adjust column names in the imported file and try again

| Patient | Provider | Facility | Payer | Claim | Charges | Unmatched Columns |

Charge #1

Date of Service (SDOS):	08/26/2025
End Date of Service (EDOS):	08/26/2025
Units (Unit):	1.0
Unit Price (Fee):	60
Place of Service (POS):	20
Diag (ICD1, ICD2, ICD3, ICD4):	Z20.822
CPT Code(s) (Code):	87426
Modifiers (M1):	QW

☑ Show header Information

[Import] [Back] [Cancel]

4. Verify your **Unmatched Columns** tab to ensure no relevant data remained mismatched.

5. Click **Import**.

6. Click **Close**.

✨ Once the import is done, click **Review Results**. to view the imported files in Interface Tracker.

Important: The system will upload each of the files and process them as interface messages. Any errors or warnings will be available within Interface Tracker. For more information on retrieving

and troubleshooting messages in interface tracker, visit our Interface Tracker Help Articles.