Importing 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.

> **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.

   > 🪄 Ensure that the header row describes the data in each column (or the import will fail). If any changes are needed, cancel the process and edit the file(s).

   1. *If you have never uploaded a file from this software/template*. Enter the **EHR/Other System Name** (name of the Software where the file is coming from) and the **Export/Report Name** (name of the report or export used for the data).

Universal Import: Template Selection

Universal Import detected that you haven't imported a file that looks like this yet. You'll be able to use the below information to select this template the next time you import this kind of file.

EHR / Other System Name

Export / Report Name

Did you expect this file to match a template? Your EHR or other system may have changed its export format. Show Other Templates

Next   Cancel

2. *If you have previously imported from this kind of file/template*: The system will automatically match the template/format with an existing one from your list.

Universal Import: Template Selection

You've previously imported this kind of file.

Template Name	Matches This File	File Type
DUPLICATE NAME MAPPING - EXCEL	✓ 44 of 44 columns match.	✓ Excel

Did you expect this file to match a template? Your EHR or other system may have changed its export format. Show Other Templates

Other Templates

Template Name	Matches This File	File Type
HELLO - PATIENT PIPE	❗ 2 of 44 columns match.	❗ Pipe-Delimited
PIPE WITH ONE MORE COLUMN - PATIENT	❗ 2 of 44 columns match.	❗ Pipe-Delimited
HELLO - PATIENT PIPE - VERSION 2	❗ 2 of 44 columns match.	❗ Pipe-Delimited
EXCEL - SIMPLE	❗ 0 of 44 columns match.	✓ Excel

If the import didn't work quite right last time, you can create a new template

☐ Create a new template

Next   Cancel

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

7. 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 and try again.

Universal Import: Review

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 |

Header from File	CMD Field	Value from File
Account #	Other Account Number	ABC0000001
Patient Last Name	Last Name	SampleLast1
Patient First Name	First Name	SampleFirst1
Patient DOB	Birth Date	12/14/1964
Patient Gender	Gender	F
Patient Street1	Address Line 1	1006 Ashford Pkwy
Patient City	City	Houston
Patient State	State	TX
Patient Zip Code	ZIP Code	77077
Guarantor Last Name	Guarantor Last Name	SampleLast1
Guarantor First Name	Guarantor First Name	SampleFirst1
Guarantor DOB	Guarantor Birth Date	12/14/1964
Guarantor City	Guarantor City	Houston
Guarantor State	Guarantor State	TX
Guarantor Zip_Code	Guarantor ZIP Code	87078

Insurance #1		
Header from File	CMD Field	Value from File
Primary Policy Number	Member ID	ZGZ814476993

Import   Back   Cancel

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

9. Click **Import**.

10. 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.