


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

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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

1 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
<input checked="" type="checkbox"/> 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
<input type="checkbox"/> HELLO - PATIENT PIPE	2 of 44 columns match.	Pipe-Delimited
<input type="checkbox"/> PIPE WITH ONE MORE COLUMN - PATIENT	2 of 44 columns match.	Pipe-Delimited
<input type="checkbox"/> HELLO - PATIENT PIPE - VERSION 2	2 of 44 columns match.	Pipe-Delimited
<input type="checkbox"/> EXCEL - SIMPLE	0 of 44 columns match.	Excel

1 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

- 1 If any data does not import correctly, please adjust column names in the imported file and try again
- 2 This file cannot be imported because it doesn't have (or wasn't able to match) enough information to create either claims or patients. See Details **Fix**

Patient	Provider	Facility	Payer	Claim	Charges	Unmatched Columns
Header from File			CMD Field		Value from File	
Account #	Other Account Number		ABC000001			
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			


 If information that is the same across all records is missing, such as a shared DOS, Provider, Diagnosis, Procedure, or Revenue Code, the "Fix" button allows you to enter these details directly during the import process, eliminating the need to modify and re-import files. The "Fix" option applies only when the updated data is identical for all claims imported from the file (i.e. same DOS, Diagnosis, Procedure, etc.). If the missing information varies, update the import file before re-uploading.


- Optional:** Click the "Fix" button, and enter the DOS, Rendering, Diagnosis, Procedure, or Rev Code that will be used for all the imported claims.


Fix Import Data


Import as:


Patients
 Claims

Date of Service 


Rendering Provider 

Diagnosis Code 

Procedure Code 

Revenue Code 

9. Verify your **Unmatched Columns** tab to ensure no relevant data remained mismatched.
10. Click **Import**.
11. 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](#).
