

# Getting Started with Universal Import (CSV, Excel, TSV, or Pipe-Delimited Files)

† Modified on 03/25/2026 11:10 am EDT

Before using the Universal Import feature, consider the following important information.

## Review Your File

- Ensure your file has all the required data needed to create your patients or claims, as well as any additional data that should be included.
  - **For Patients:** To create a patient record, the file should include at least the **First Name, Last Name, Gender, DOB, Address, and Insurance/Policy Info** (Payer, Member ID) if applicable.
  - **For Claims:** To create a claim record, the file should include at least the **Patient Info, Provider, Diagnosis Codes, Procedure Codes, and DOS**.
- It is preferable that each data item occupies a distinct column in the file. For example, separating the street, city, state, and zip code into individual columns within an address, or separating ICD Codes, CP Codes, and Descriptions into their own columns.
- Ensure header names align with the CMD field to which the column data should be mapped. For example, use "Procedure," "Procedure Codes," "CPT," or "Charges" instead of "Items" for a procedure code column.
- Provide the NPI in your import template whenever possible, especially when there are multiple providers or similar names. Matching by NPI is more reliable than by provider name, as abbreviations or nicknames can cause discrepancies.
- Use unique identifiers when available. If your source system has unique patient IDs, use them in the import and map them to the reference number field in Universal Import. This can help avoid duplicate

## Sync Required Data

- Ensure that **Providers, Payers, and Facilities** (if different than the CMD defaults) are added (synced) into CollaborateMD prior to the import and that their spelling matches the EMR/EHR file.

## Additional Tips

- **Start Small:** To ensure a smooth import process, begin by importing a small batch of approximately 10 patients or claims. Importing a handful of records minimizes risk and makes it easier to delete and correct any issues that arise. Using a small-scale test can help to iron out template formatting or field-matching problems before uploading larger datasets.
- **Align Your Template Before Importing:** The key to a successful import is aligning the import template with the required fields. Spend time matching your source data with the template. If the fields do not match correctly, cancel, correct the file, and try again. Once the template accurately aligns with all

fields, it can be used in the future to ensure accurate imports.

 Before uploading your files, Visit our [Universal Import Frequently Asked Questions Article](#) for additional information.

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