

Universal Import FAQs

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What file formats does Universal Import support?

Universal Import supports HL7, ANSI837, CSV (comma-separated values), Excel, tab-separated, and pipe-delimited flat files.

Can I import files from any EHR?

Yes, as long as your EHR can produce one of the supported flat file formats, you can use Universal Import to bring in your data.

What if my exported file contains columns that don't match fields in CMD?

The system will ignore columns that do not correspond to fields in CollaborateMD. Only the mapped fields needed for importing (like patient and claim info) will be brought into CollaborateMD.

What if my column headers change or aren't recognized by the AI?

If headers are different or unrecognized, you will be prompted to correct the headers in your file. The AI will attempt to recognize them, but manual adjustment may be needed for unusual or unexpected headers. You'll need to rename the column(s) in your export and reload.

The AI is highly accurate in most cases, so a quick header rename (e.g., "PtLastName" → "PatientLastName") typically resolves it.

How are errors in the import process handled?

Errors such as missing required information (e.g., provider or patient data) will generate error messages. You can use CollaborateMD's interface tools to view message content, identify issues, and then either correct the file or add missing info directly in CollaborateMD, and then reprocess the message.

What if I receive a claim import error about a missing provider or payer?

You'll need to create the missing provider or payer in CollaborateMD, then use the reprocess feature to retry the import for the failed items.

Can I share a saved template across multiple customers (such as for a billing service)?

Yes, you can copy saved import formats to multiple customers, making it easier for billing services to standardize import processes.

If my file is large, how fast will the import be?

Import speed depends on file size and location. On production systems, typical performance is less than 1 second per claim, much faster than manual entry.

What happens if required information is missing?

It's important to check the data preview carefully to ensure all required fields are mapped and present. Insufficient information may lead to records being incomplete or rejected.

Will the Universal Import feature replace existing API-based integrations?

No. Direct API integrations remain the preferred and more automated method. Universal Import is intended as a flexible solution when EHRs do not support API integration.
