

Patient Demographics Upload Service for SpringCharts EMR VAR Instructions

When you have a customer who wants to upload a current patient list from another program (billing system or another EMR), you need to follow the procedure below. This should only happen once the customer has purchased SpringCharts and has paid the upload fee. We will provide you with a secure FTP site for you to provide the data to us. Call our support number below when you have the information ready. Please advise your VAR Regional Sales Director at least 3 days in advance of when you will be providing this data to us. Depending on the condition and size of the demographic file, this service could take several days. If there are problems with the data file, we will contact you with suggestions but it will be your responsibility to resend a clean file. We will also delete our master copy after you download the completed file. It is your responsibility to make a copy in case there are any problems.

Information Needed:

1. A Word or text document with the following:
 - Practice Name, Address, City, ST, ZIP, Phone, Fax
 - Primary Doctor Name (including MI), Degree, Preferred Initials, Print Name as, UserName, Password, DEA#, SS#, UPIN, email, State License #
2. A text file of all of the patient demographics in the following format:

Data Format

The text file is a plain text file, comma delimited with a carriage return at the end of each line. Blank lines are ignored. Improperly formatted data is ignored.

Each line should contain: lastname,firstname,mi,DOB(yyymmdd),address,city,state(XX),zip(xxxxx or xxxxx-xxxx),sex(M or F),ss#(xxxxxxxx or xxx-xx-xxxx),homephone (xxxxxxxx or xxx xxx-xxxx),workphone(xxxxxxxx or xxx xxx-xxxx)

lastname, firstname and DOB are mandatory fields, blank fields are separated by commas with no space, every line must have 11 commas.

Valid examples:

- Smith,John,C,19551210,100 Elm St, Sherman,TX,77345,M,232456784,2143456789,2149383736
- Smith,John,,19551210,,,,,,,,,
- Smith,John,,19551210,,,,,,,,,322-15-1987,214 345-6789,

We will create a new zipped file of the SpringCharts Server directory and place it back on the secure FTP site.

Installation of the New File:

To install the new software you must do the following:

1. Install the current version of SpringCharts Server on the actual server (do not activate the software, just run the installation program that puts SpringCharts on the server). Note: you must use the current version of SpringCharts downloaded from the VARCENTER website. This is the version we will be using to load the patient data.
2. Find the SCServer directory (c:\program files\SCServer) and delete all files in the directory leaving the directory in place.
3. Extract all of the files in the zipped file to the SCServer directory.

Your SpringCharts Server is now ready for configuration. Use the doctor's user name and password to access the Administer button on SpringCharts Server and complete the configuration of the software for the practice. If you have any questions, please call our support line at 281-537-1377.