**Patient File**

It lets you add patients in Medisoft using input in the form of CSV file. Note that row 1 is not used. This row can contain column names or a comment.

Key for Type column:  
Text = alpha characters (e.g. a, b, c)  
Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)  
Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| See notes below | Column# | Data Element | Data Type | Max. Length | Remark |
| \* | 1 | Chart | Text | 15 | This data gets copied to 'Patient Id #2'. Import Wizard auto-generates medisoft style chart numbers for each patient record imported. |
| \*\* | 2 | First Name | Text | 20 |  |
| \*\* | 3 | Last Name | Text | 20 |  |
| \* | 4 | Middle Initial | Text | 1 |  |
| \* | 5 | Address Line 1 | Text | 39 |  |
| \* | 6 | Address Line 2 | Text | 39 |  |
| \* | 7 | City | Text | 25 |  |
| \* | 8 | State | Text | 2 |  |
| \* | 9 | Zip Code | Text | 10 |  |
| \* | 10 | Work Phone | Numeric | 14 |  |
| \* | 11 | Work Phone Ext. | Numeric | 6 |  |
| \* | 12 | Home Phone | Numeric | 14 | Telephone numbers must not use any brackets or dashes e.g. 8015620111 |
| \* | 13 | Social Security # | Text | 11 | e.g. 528-33-3333 |
| \*\* | 14 | Sex | Text | 1 | F (or Female)=Female else Male |
| \* | 15 | Marital Status | Text | 1 | S=Single; M=Married; X=LegallySeparated; D=Divorced; W=Widowed; empty=Unknown/Not Applicable |
| \* | 16 | Birth Date | Date | 8 | American or universal date format e.g. 03/14/1977 or 19770314 |

Note:  
\* field improves quality of imported data, but can be left empty  
\*\* field requires a value

**Guarantor File**

It lets you add guarantors in Medisoft using input in the form of CSV file. Note that row 1 is not used. This row can contain column names or a comment.

Key for Type column:  
Text = alpha characters (e.g. a, b, c)  
Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)  
Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| See notes below | Column# | Data Element | Data Type | Max. Length | Remark |
| \* | 1 | Chart | Text | 15 | This data gets copied to 'Patient Id #2'. Import Wizard auto-generates medisoft style chart numbers for each patient record imported. |
| \*\* | 2 | First Name | Text | 20 |  |
| \*\* | 3 | Last Name | Text | 20 |  |
| \* | 4 | Middle Initial | Text | 1 |  |
| \* | 5 | Address Line 1 | Text | 39 |  |
| \* | 6 | Address Line 2 | Text | 39 |  |
| \* | 7 | City | Text | 25 |  |
| \* | 8 | State | Text | 2 |  |
| \* | 9 | Zip Code | Text | 10 |  |
| \* | 10 | Work Phone | Numeric | 14 |  |
| \* | 11 | Work Phone Ext. | Numeric | 6 |  |
| \* | 12 | Home Phone | Numeric | 14 | Telephone numbers must not use any brackets or dashes e.g. 8015620111 |
| \* | 13 | Social Security # | Text | 11 | e.g. 528-33-3333 |
| \*\* | 14 | Sex | Text | 1 | F (or Female)=Female else Male |
| \* | 15 | Marital Status | Text | 1 | S=Single; M=Married; X=LegallySeparated; D=Divorced; W=Widowed; empty=Unknown/Not Applicable |
| \* | 16 | Birth Date | Date | 8 | AAmerican or universal date format e.g. 03/14/1977 or 19770314 |

Note:  
\* field improves quality of imported data, but can be left empty  
\*\* field requires a value

**Insurance Carrier File**

It lets you add insurance carriers in Medisoft using input in the form of CSV file. Note that row 1 is not used. This row can contain column names or a comment.

Key for Type column:  
Text = alpha characters (e.g. a, b, c)  
Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)  
Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| See notes below | Column# | Data Element | Data Type | Max. Length | Remark |
| \* | 1 | Insurance Code | Text | 5 | Import Wizard auto-generates when blank |
| \*\* | 2 | Insurance Type | Text | 2 | 0=Commercial 1=Medicaid Physician 2=Medicare with Crossover 3=Medicare 4=Blue Shield 5=Champus 6=Worker's Compensation 7=Blue Cross ? Physician 8=HMO 9=PPO |
| \*\* | 3 | Insurance Name | Text | 40 |  |
| \* | 4 | Address Line 1 | Text | 39 |  |
| \* | 5 | Address Line 2 | Text | 39 |  |
| \* | 6 | City | Text | 25 |  |
| \* | 7 | State | Text | 2 |  |
| \* | 8 | Zip Code | Text | 10 |  |
| \* | 9 | Phone | Numeric | 14 | Telephone numbers must not use any brackets or dashes e.g. 8015620111 |
| \* | 10 | Extension | Numeric | 5 |  |
| \* | 11 | Fax | Numeric | 14 |  |

Note:  
\* field improves quality of imported data, but can be left empty  
\*\* field requires a value

**Addresses File**

It lets you add adresses in Medisoft using input in the form of CSV file. Note that row 1 is not used. This row can contain column names or a comment.

Key for Type column:  
Text = alpha characters (e.g. a, b, c)  
Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)  
Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| See notes below | Column# | Data Element | Data Type | Max. Length | Remark |
| \* | 1 | Address Code | Text | 5 | Import Wizard auto-generates when blank |
| \*\* | 2 | Full Title | Text | 40 | Name of the business |
|  | 3 | Last Name | Text | 20 | Last name of contact at the business |
|  | 4 | First Name | Text | 20 | see above |
|  | 5 | Middle Initial | Text | 1 | see above |
| \* | 6 | Address Line 1 | Text | 39 |  |
| \* | 7 | Address Line 2 | Text | 39 |  |
| \* | 8 | City | Text | 25 |  |
| \* | 9 | State | Text | 2 |  |
| \* | 10 | Zip | Text | 10 |  |
| \* | 11 | Phone | Numeric | 14 |  |
| \* | 12 | Extension | Numeric | 5 |  |
| \* | 13 | FAX number | Numeric | 14 | Telephone numbers must not use any brackets or dashes e.g. 8015620111 |
|  | 14 | Insurance Code 1 | Text | 13 |  |
|  | 15 | Insurance Code 2 | Text | 13 |  |
| \*\* | 16 | Address Type | Text | 1 | A=Attorney E=Employer F=Facility R=Referral source O=Other |

Note:  
\* field improves quality of imported data, but can be left empty  
\*\* field requires a value

**Procedure File**

It lets you add procedures in Medisoft using input in the form of CSV file. Note that row 1 is not used. This row can contain column names or a comment.

Key for Type column:  
Text = alpha characters (e.g. a, b, c)  
Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)  
Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| See notes below | Column# | Data Element | Data Type | Max. Length | Remark |
| \*\* | 1 | Transaction Code | Text | 9 |  |
| \* | 2 | Code Description | Text | 40 | Import Wizard enters *to be determined* when blank |
| \* | 3 | Code Type | Text | 2 | 00=Procedure (CPT) 01=Procedure (unclassified) 02=Insurance Payment 03=Patient Payment 04=Adjustment Charge 05=Adjustment Credit 06=Secondary Insurance Payment 08=Insurance Adjustment 09=Tertiary Insurance Payment 10=Partial Primary Insurance Payment 11=Partial Secondary Insurance Payment 12=Partial Tertiary Insurance Payment 13=Insurance Charge Back 14=Inventory 15=Refund 16=Sales Tax 17=Sales Tax Payment |
| \* | 4 | Payment Type | Text | 2 | 0=Check 1=Cash 2=Credit Card |

Note:  
\* field improves quality of imported data, but can be left empty  
\*\* field requires a value

**Diagnosis codes File**

It lets you add diagnosis codes in Medisoft using input in the form of CSV file. Note that row 1 is not used. This row can contain column names or a comment.

Key for Type column:  
Text = alpha characters (e.g. a, b, c)  
Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)  
Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| See notes below | Column# | Data Element | Data Type | Max. Length | Remark |
| \*\* | 1 | Diagnosis Code | Text | 9 | Preferably ICD Code |
| \* | 2 | Code Description | Text | 40 | Import Wizard enters *to be determined* when blank |
| \* | 3 | ICD9 Code | Text | 9 | Same as *Diagnosis Code* if left empty |

Note:  
\* field improves quality of imported data, but can be left empty  
\*\* field requires a value

**Case File**

This feature is only available in Import Wizard's plus module. It lets you build cases in Medisoft using input in the form of CSV file. Note that row 1 is not used. This row can contain column names or a comment.

Key for Type column:  
Text = alpha characters (e.g. a, b, c)  
Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)  
Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| See notes below | Column# | Data Element | Data Type | Max. Length | Remark |
| \*\* | 1 | Patient's Chart or ID#2 or SSN | Text | 15 |  |
| \*- | 2 | Provider Code or License# or UPIN# | Text | 15 | 00000 when left empty |
| \*- | 3 | Carrier #1 | Text | 5 |  |
| \* | 4 | Policy #1 | Text | 20 |  |
| \* | 5 | Copay | Numeric | 20 |  |
| \*- | 6 | Carrier #2 | Text | 5 |  |
| \* | 7 | Policy #2 | Text | 20 |  |
| \* | 8 | Description | Text | 30 | Same as name of Carrier #1 when left empty |
| \*- | 9 | Guarantor | Text | 15 | Same as chart# when left empty |
| \*- | 10 | Diagnosis #1 | Text | 9 | ICD code |
| \*- | 11 | Diagnosis #2 | Text | 9 | ICD code |
| \*- | 12 | Diagnosis #3 | Text | 9 | ICD code |
| \*- | 13 | Diagnosis #4 | Text | 9 | ICD code |
| \*- | 14 | Referring Provider Code or License# or UPIN# | Text | 15 |  |

Note:  
\* field is desirable  
\*- field can be empty but if a value is provided then it must exist in Medisoft  
\*\* Required field and its value must exist in Medisoft