

Import Patient Data from CSV

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Genie

Clintel Systems can import or migrate your existing customer data.

Simple patient demographics - This is the easiest approach.

From Genie, export a CSV with the following structure.

```
Surname,FirstName,DOB,Sex,EmailAddress,AddressLine1,AddressLine2,Suburb,state,postcode,HomePhone,MobilePhone,HealthFundName,lastseendate,DvaNum,MedicareNum,ReferringDoctor
Redacted,Patient,22/03/72,M,xxxx@hotmail.com,Example St,,ADELAIDE,,5000,1234 3456,04xxxxxxxx,NIB,,,11111111,DR A Test
Redacted,Patient,07/06/67,F,xxxx@gmail.com,Example Ave,,DARWIN,,800,1234 3456,04xxxxxxxx,Uninsured,,,11111111,DR A Test
Redacted,Patient,21/04/51,M,example@xxxxxxx.com.au,Example Road,,BRISBANE,,4000,123456,04xxxxxxxx,GMHB A Limited,,,11111111,DR A Test
```

Clintel Systems will import this in your behalf.

Note:

- Gender must often be manually added or corrected
- Where a concept does not exist in CareRight in the exact same way as Genie, it will be mapped to an Alert/Notice.

Full Migration

Contact us to discuss your requirements.

Gentu

Clintel Systems can import or migrate your existing customer data.

Simple patient demographics - This is the easiest approach.

From Gentu, export a CSV with the following structure.

<https://help.geniesolutions.com.au/gentu/s/article/360040570552-Exporting-the-Patient-List>

```
Title,First Name,Last Name,Date of Birth,Aboriginal or Torres Strait Islander,Mobile Phone,Home Phone,Work Phone,E
mail Address,Residential Address 1,Residential Address 2,Residential Suburb,Residential Postal Code,Residential State
,Postal Address 1,Postal Address 2,Postal Suburb,Postal Postal Code,Postal State,Use Residential Address as Postal,Ina
ctive,Deceased,Next Appointment Date,Has Current Pregnancy
Mrs,Redacted,Patient,01/01/1947,,04011 801 905,111111,,xxxx@hotmail.com,32 Example Loop,,DARWIN,0800,NT,,,,
,TRUE,FALSE,,6/11/2023 11:15,FALSE
Ms,Redacted,Patient,01/09/2003,,01111 06 712,,xxxx@gmail.com,94 Example Road,,DARWIN,0800,NT,,,,,TRUE,FAL
SE,,16/10/2023 15:30,FALSE
Mr,Redacted,Patient,21/01/1998,,1111 531 140,111111,,example@xxxxxxx.com.au,5A Example St,,DARWIN,0800,NT,,
,,,TRUE,FALSE,,,FALSE
```

Clintel Systems will import this in your behalf.

Note:

- Gender must often be manually added or corrected
- Where a concept does not exist in CareRight in the exact same way as Gentu, it will be mapped to an Alert/Notice.

Full Migration

Contact us to discuss your requirements.

Semi assisted data entry

Where you have a spreadsheet of core demographics but not enough details to easily conduct an import; excel formulas can be used to pre-fill a new patient screen.

Prefill a patient search with a name from the column **A1**:

```
= "https://example.use.careright.com.au/patients/search?utf8=%E2%9C%93&provider_id=&include_merged=true&search=Search&term=" & A1
```

Prefill create a new patient:

```
= "https://example.use.careright.com.au/patients/new?patient[person_attributes][clinical_sms_consent]=1&patient[person_attributes][clinical_email_consent]=1&patient[person_attributes][email]=" & E2 & "&patient[person_attributes][mobile_phone]=0" & RIGHT(D2, 9) & "&patient[person_attributes][first_name]=" & B2 & "&patient[person_attributes][last_name]=" & C2 & "#Any extra info"
```

Other Systems

Clintel System has migration capabilities for a large number of other systems.

Contact us to discuss your requirements.

Third Party Datasource - Ongoing

CareRight has a custom import functionality. This may be used if you have a secondary / third party system which is not integrated with CareRight but you need to update the data occasionally. This process functionally allows a CSV file to be imported into CareRight and make changes/ updates to a patient record based on the data in that file.

The data in the CSV file must have a unique identifier which can anchor it to a record in CareRight. For example: CRN - this could be the external system unique patient identifier.

Example file structure:

CRN | MRN | Patient Last Name | Patient First Name | Date of Birth | Gender |

CareRight takes the data in the CSV file and completes the following:

1. Matches it to any existing patient records and provides you with a summary.
2. If there is not a patient record in CareRight, this process will create a new Patient record (anchored by the CRN).

Important Note: This process does based the matching process on the patient name.

Setting up an Import is a multiple set process:

1. Create the Import.
2. Add the import elements.
3. Create any default searches or trigger scripts.
4. Publish the Import process.

Setting up a Import process

Via CareRight Administration:

1. Select **Workflow** from menu.
2. Select **Imports**.
3. Select **New**.
4. Fill in the following fields:
 - a. Name - This is the name of the import process.
 - b. Facility - This is important, this will be the location where new patients are updated.
 - c. Description - Detailed description of the process.
5. Select the **Create Custom Import** button.
6. The import will be created and the following buttons will display:
 - a. Show
 - b. Edit
 - c. Publish
 - d. Delete

Update / Enter the Import Elements

1. Select the **Show** button, next to the relevant Import process.
 - a. The Imports elements screen will display
2. Select the **New** button.
3. The add elements screen will display, fill in the following fields
 - a. **Name** - This name needs to match the column name in the CSV file.
 - b. **Column Type** - This can be a generic type or can be a Patient field in CareRight i.e. String or family_name

c. **Description** - This is the description of the column / data values.

4. Select **Create import element**

5. Complete this process for each data element (columns in the CSV file)

The following standard patient elements are available:

- account_type
- australian_south_sea_islander_status
- bank_account_bsb
- bank_account_name
- bank_account_number
- benefit_expiry
- benefit_number
- benefit_type
- clinical_email_consent
- clinical_sms_consent
- country_of_birth
- crn
- date_of_birth
- date_of_birth_accuracy_flag
- date_of_death
- deceased
- dob
- dva_card_type
- dva_file_number
- dva_number
- email
- employment_status
- ern
- ethnicity
- family_name
- first_name_alias
- gender
- given_name
- healthcare_fund_commenced
- healthcare_fund_cover
- healthcare_fund_id
- healthcare_fund_irn
- healthcare_fund_member_number
- healthcare_fund_notes

- home_phone
- hsp_last_review
- hsp_lost_eligibility
- hsp_maintenance
- hsp_maintenance_due
- hsp_transfer_in
- hsp_transfer_out
- indigenous_status
- last_name_alias
- location
- marital_status
- marketing_email_consent
- marketing_sms_consent
- medicare_concession_entitlement
- medicare_expiry
- medicare_irn
- medicare_number
- medicare_suffix
- middle_name
- mobile_phone
- mrn
- nationality
- nz_ethnicity_1
- nz_ethnicity_2
- nz_ethnicity_3
- nz_ethnicity_4
- nz_ethnicity_5
- nz_ethnicity_6
- occupation
- patient_number
- patient_title
- pension_expiry
- pension_number
- pension_status
- person_id
- place_of_death
- preferred_language
- primary_provider_id
- religion

- religious_visits
- requires_interpreter
- second_language
- single_line_active_allergies
- state_of_birth
- title
- work_phone

Any custom patient fields defined are also available to be used.

The import system is capable of importing data to other areas of the patient record, but will require consultation with Clintel as the configuration to achieve this is advanced. (E.g. populating home and/or postal addresses)

Once all the elements are added, you can add additional criteria:

- Config Default Search - this will help to refine the data before it is imported to CareRight based on specific criteria
- Any Triggerable Classes - this will allow for other actions/ changes to occur in CareRight during the import. For example; such as Assessment created or alerts to be added / data to be manipulated

From the Imports Screen:

1. Select the **Edit** button, next to the relevant Import process.
 - a. The Imports elements screen will display.
2. Select the relevant Triggerable Class from the drop down list.
 - a. **Note:** The Trigger class must be set up prior - see Trigger Classes.

Publish the Import Process

From the Imports Screen:

1. Select the **Publish** button, next to the relevant Import process.
 - a. The Imports will be published and can now be executed.
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