Upload CSV File

Last Modified on 11/07/2022 3:38 pm EST

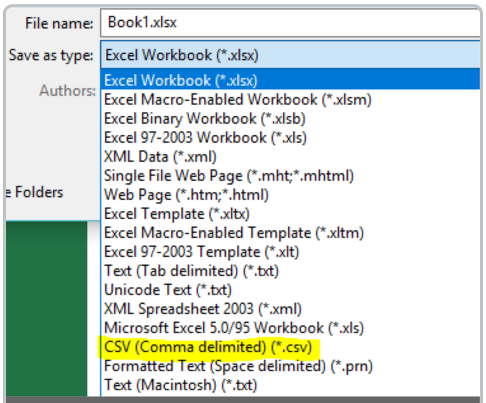
Summary

It's easy to message patients from contact lists that you create from fields within your practice management system (PMS).   These lists may include those generated by treatment plan, insurance provider, last visit by diagnosis, etc. Once the list is generated, save to Excel as a CSV file. Go to **Communication Center>Upload CSV**.

Create an Excel Sheet in CSV format

After exporting data from your PMS to Excel, you must save the sheet.

Two lines will appear. The upper line is where you will name your document, the lower line will be the format to save as. Choose **CSV (Comma Delimited) (*csv)**

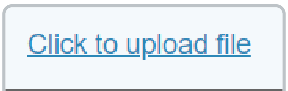


CSV Format Selection

Your file is now ready to upload to Patient Communicator.

Message your patients

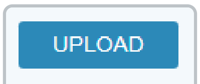
1. From the *Upload CSV* tab, click **Click to upload file** hyperlink



Choose File Hyperlink

2. Select the desired CSV file saved to your computer then click **Open**

3. Click the blue **UPLOAD** button

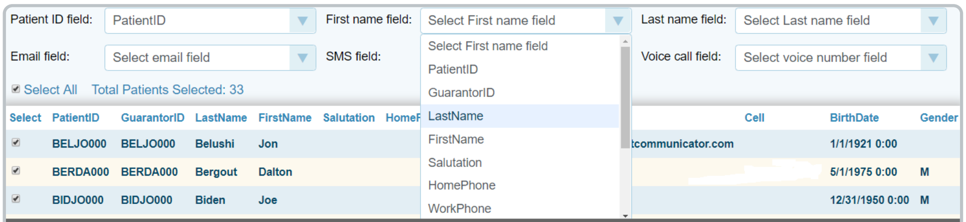


Upload CSV

4. You may now populate the fields you will need to send your message using the column header on your

Excel sheet.

> **Note:** You must populate at least one *message delivery* type field (Email, SMS, Voice). All others are optional.



Populate Fields From Column Headers

- **Patient ID field:** Populating this field allows the outbound message to be saved in the patient's Patient Details.
- **First name field:** Allows the auto-fill of the *%FirstName%* keyword within your message. This name will be seen in the History screen after the message is sent.
- **Last name field:** Allows the auto-fill of the *%LastName%* keyword within your message. This name will be seen in the History screen after the message is sent.
- **Email field:** If sending emails, this field must be populated
- **SMS field:** If sending text messages, this field must be populated
- **Voice call field:** If sending a voice call, this field must be populated

5. Check **Select All** to message all patients

6. Click **CONTINUE** to load templates and send messages

Load and Send Messages

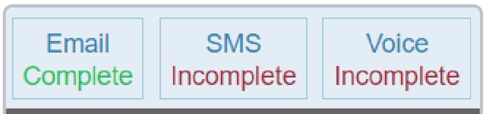
> **Please remember that sms messages are limited to 160 characters.**
>
> **A character counter is provided on the sms edit screen.**

After selecting the patients to message, you'll be able to select the method of messaging, set up the templates, and message your selected patients by following the steps below.

1. Select Delivery Method: Methods available were determined by the message fields enabled in Step 4 above.

Delivery Method Toggles

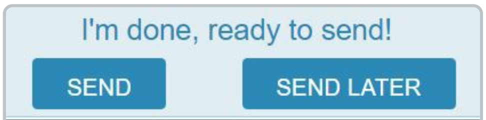
2. Incomplete notification: A template must be loaded for each selected delivery method in order to send to your selected patients. Once a template has been loaded, the notification changes to *Complete*.



Loaded Template Notification

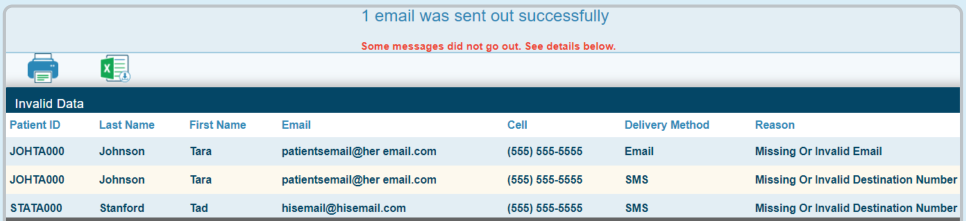
3. Select Template: Clicking on any of the notifications in *step 2* will allow you to load a preloaded template. All text fields within the template may be edited. Any changes apply to this sending only.

4. I'm done, ready to send!: Click SEND to message your patients now or click SEND LATER and select a time to message your patients.



Ready to Send

Once sent, a screen will appear showing how many messages were sent and list any patient who didn't receive an enabled message.


1 email was sent out successfully

Some messages did not go out. See details below.

Invalid Data

Patient ID	Last Name	First Name	Email	Cell	Delivery Method	Reason
JOHTA000	Johnson	Tara	patientsemail@her email.com	(555) 555-5555	Email	Missing Or Invalid Email
JOHTA000	Johnson	Tara	patientsemail@her email.com	(555) 555-5555	SMS	Missing Or Invalid Destination Number
STATA000	Stanford	Tad	hisemail@hisemail.com	(555) 555-5555	SMS	Missing Or Invalid Destination Number

Message Results Screen

<End of Article>