Veradigm ePrescribe Patient Upload Guidance

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Purpose:
To provide guidance for the file upload of patient demographic data into the Patient demographics database in Veradigm ePrescribe. The file to be uploaded will be created by the ePrescribe user following the guidelines and requirements outlined here.

Prerequisites:
To create the file containing the patient demographics, the user must be able to download the data from the user's database, typically by running a SELECT statement in a SQL Server database. The data will be then saved in a text file with tab-delimited field separation. The file will be organized by rows and columns just as created by the SELECT query. The first row or line in the file will be a header line containing the required column header names, also tab-delimited. All subsequent rows will contain the patient data values.

Process steps:

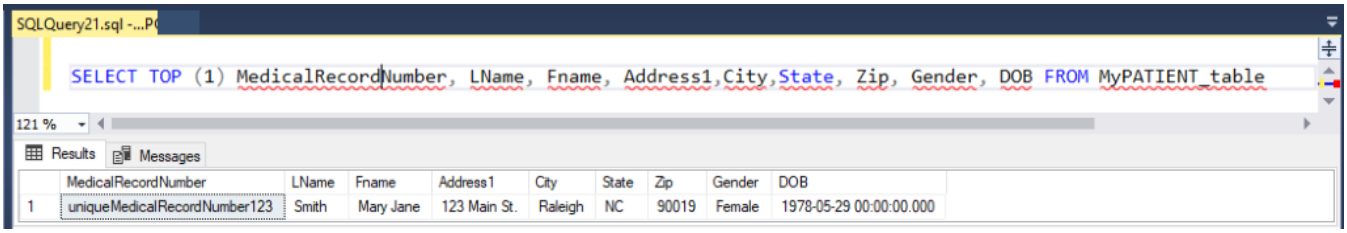
Step 1
In the user (your practice) database, identify the database table(s) which contain basic Patient demographic data, e.g. "MyPATIENT_table" in the examples provided. At a minimum, data must include the fields listed below with the required column header names in bold. Other optional fields are discussed later in this document.

1. Patient unique identifier,
e.g. MedicalRecordNumber, Patid (**Chartid**)
2. Patient Last Name (**LastName**)
3. Patient First name (**FirstName**)
4. Patient Address line 1 (**Address1**)
5. Patient City (**City**)
6. Patient State (**State**)
7. Patient Zip (**Zip**)
8. Patient Gender (**Sex**)
9. Patient Date of Birth (**DOB**)

Step 2
Craft a SELECT statement which produces 1 ROW of patient data from your database. You may want to create a specific patient for this purpose, e.g. Mary Jane Smith in the examples provided. Verify that the results provided satisfy at least the data listed in Step 1 above. Note the column names may be a bit different (Lname vs. LastName) but hopefully the concepts are intuitive. You will build upon this SQL, so you may want to save versions of the SQL files along the way for future reference and refinement. As an example SELECT statement:

```
SELECT TOP (1) MedicalRecordNumber, LName, Fname, Address1, City, State, Zip,
 Gender, DOB FROM MyPATIENT_table
```

Results should look something like:



If desired, you can craft the SQL query to find a specific patient by using a WHERE clause, for example:

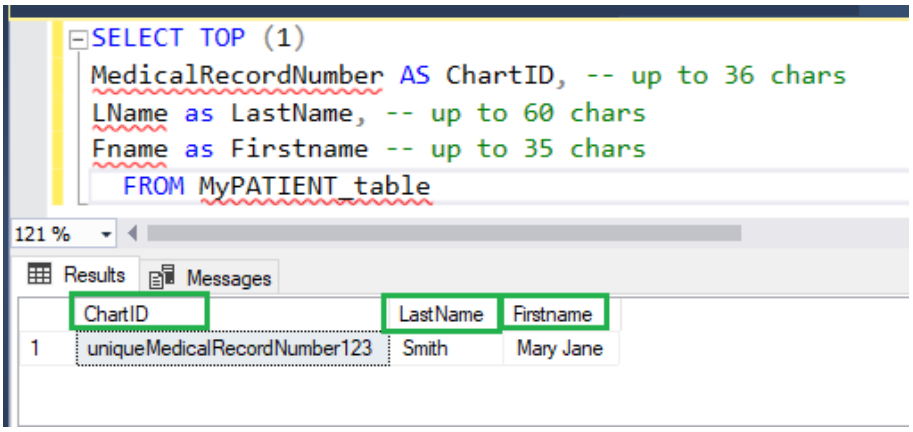
```
SELECT TOP (1) MedicalRecordNumber, LName, Fname, Address1, City, State, Zip, Gender, DOB
 FROM MyPATIENT_table
WHERE MedicalRecordNumber = 'uniqueMedicalRecordNumber123'
```

Step 3
Rename the result columns from your SQL query to have the column names required by the ePrescribe Patient Upload process. Notice in step 2 that the results from MyPATIENT_table have a column named "Fname". The expected column names are:
(**Chartid**)
(**LastName**) (**FirstName**) (**Address1**) (**City**) (**State**) (**Zip**) (**Sex**) (**DOB**)

Ensure that all column names in the resulting file to be uploaded match <u>all</u> these required fields.

In this example, the column "Fname" will be renamed to "Firstname". This is accomplished by using the "AS" keyword:

```
SELECT TOP (1)
MedicalRecordNumber AS ChartID,
LName AS LastName,
Fname AS Firstname
  FROM MyPATIENT_table
```



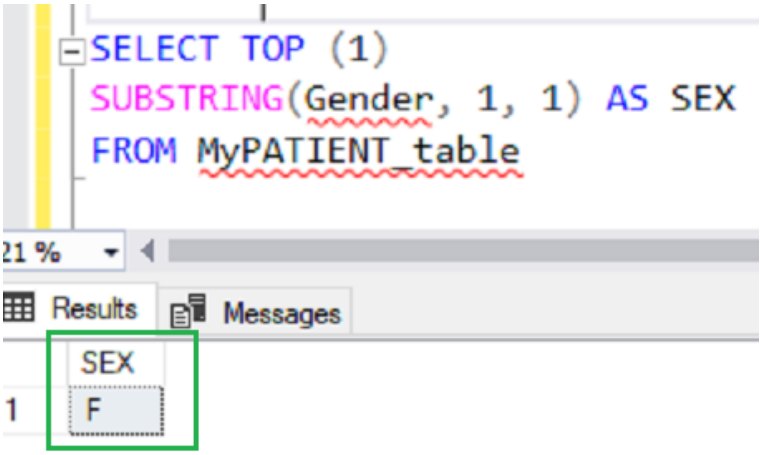
Step 4
Validate that all fields fit within the size limits (except dates which are a special case):

Column	Max length
ChartID	36 chars
LastName	60 chars
Firstname	35 chars
Address1	55 chars
City	35 chars
State	2 chars
Zip	10 chars
Sex	1 char
DOB	(see step 5 for format requirements)

If necessary, a field can be trimmed down to size by using the SUBSTRING function. For example, if your data has Gender value "FEMALE", the required value is the first letter "F", so use

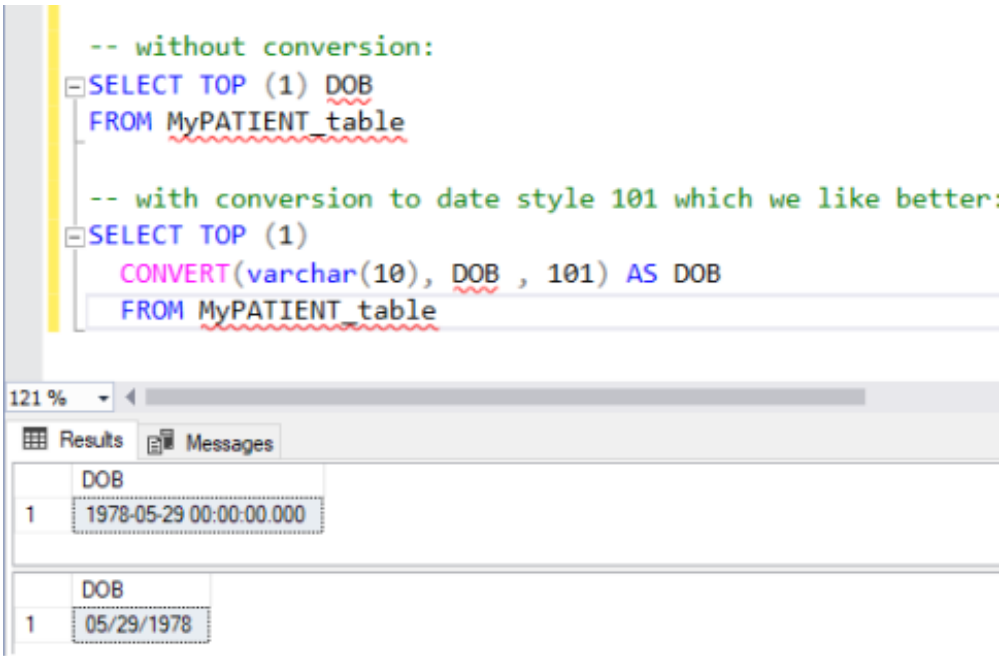
```
SUBSTRING(<yourcolumn name>, <starting point>, <how long you want the result to be>)
SELECT TOP (1)
SUBSTRING(Gender, 1, 1) AS SEX -- M for Male,  F for Female, U for Unknown
FROM MyPATIENT_table
```

As shown:



Step 5
Format the Patient Date of Birth in the form mm/dd/yyyy, e.g. 05/29/1978
This may require use of the SQL CONVERT function. In the example above the DOB is in the form: 1978-05-29 00:00:00.000
This SQL statement performs a conversion to date style 101 which provides the required format as shown below:

```
SELECT TOP (1)
CONVERT(varchar(10), DOB , 101) AS DOB
FROM MyPATIENT_table
```



Step 6

Put all of the above together into a single SQL query. Ensure that the results from SQL have:

- Required fields
- Correct column names
- Correct Lengths
- Correct Formats

In this example, we demonstrate the patient upload process using only the first matching patient record. As shown below, you may execute your SQL following this example and save the results to a file which can be used as a first pass test in the Veradigm ePrescribe Patient Upload.

Example:

```
SELECT TOP (1)
MedicalRecordNumber AS ChartID, -- MRN -- must be Unique -- up to 36 chars
LName as LastName, -- up to 60 chars
Fname as Firstname, -- up to 35 chars
Address1,-- up to 55 chars
City, -- up to 35 chars
State, -- 2 letters
Zip, -- 5 digit minimum
SUBSTRING(Gender, 1, 1) AS SEX, -- 1 character: M for Male, F for Female, U
for Unknown
CONVERT(varchar(10), DOB , 101) AS DOB -- format: 05/29/1978
FROM MyPATIENT_table
```

```
-- if your column names DON'T match ours, use "AS", e.g. select <your_columnName> as <our_columnName>
--if your data needs to be trimmed use "SUBSTRING", e.g. "Female" to "F"
--if your data needs to be reformatted use "CONVERT", e.g. "1978-05-29 00:00:00.000" to "05/29/1978"
select 'example of what data in your table may look like:'
SELECT TOP (1) MedicalRecordNumber, LName, Fname, Address1,City,State, Zip, Gender, DOB FROM MyPATIENT_table
select 'example of your data in the correct format with correct column names:'
SELECT TOP (1)
MedicalRecordNumber AS ChartID,  -- MRN -- must be Unique -- up to 36 chars
LName as LastName, -- up to 60 chars
Fname as Firstname, -- up to 35 chars
Address1,-- up to 55 chars
City,   -- up to 35 chars
State,  -- 2 letters
Zip,   -- 5 digit minimum
SUBSTRING(Gender, 1, 1) AS SEX,   -- 1 character:  M for Male,  F for Female, U for Unknown
CONVERT(varchar(10), DOB , 101) AS DOB   -- format: 05/29/1978
  FROM MyPATIENT_table
```

21 %

Results | Messages

	(No column name)
1	example of what data in your table may look like:

	MedicalRecordNumber	LName	Fname	Address1	City	State	Zip	Gender	DOB
1	uniqueMedicalRecordNumber123	Smith	Mary Jane	123 Main St.	Raleigh	NC	90019	Female	1978-05-29 00:00:00.000

	(No column name)
1	example of your data in the correct format with correct column names:

	ChartID	LastName	Firstname	Address1	City	State	Zip	SEX	DOB
1	uniqueMedicalRecordNumber123	Smith	Mary Jane	123 Main St.	Raleigh	NC	90019	F	05/29/1978

Note the previous line above shows the correctly formatted patient record as required for ePrescribe Patient Upload.

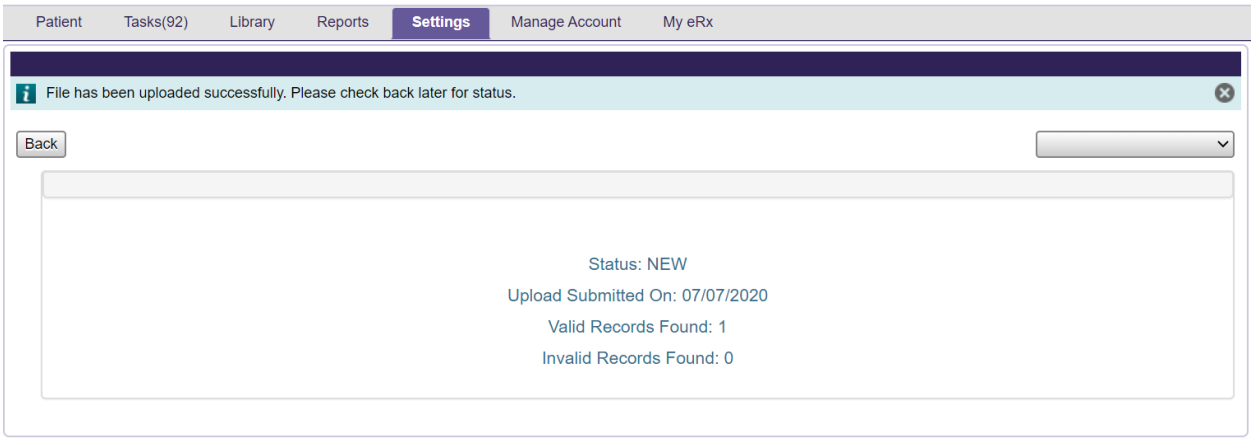
Step 7

Produce the Tab-delimited text file from the SQL results:

In SQL server, click on the line showing the example patient data in the Results. Click the mouse right button and select "Select All" in the pop-up menu. This will highlight all data field values in the row. Click the mouse right button again and select "Copy with Headers". Open a text editor program (i.e. Notepad), and paste the copied patient data along with the column headers into the text area. Click File, Save As… , navigate to a desired folder, enter a file name with the "Save as type:" selection set to "Text Documents (*.txt)" and click the Save button

To load the example file into ePrescribe, click the Choose File button on the Patient Upload page and navigate to the folder containing the example file. Note that the file will not be visible unless the file name extension is ".txt". After selecting the file, click Open in the file chooser dialog, then click the Upload button on the Patient Upload page.

A successful upload will result in a success message and Valid Records Found: 1 displayed as seen in this screen shot:

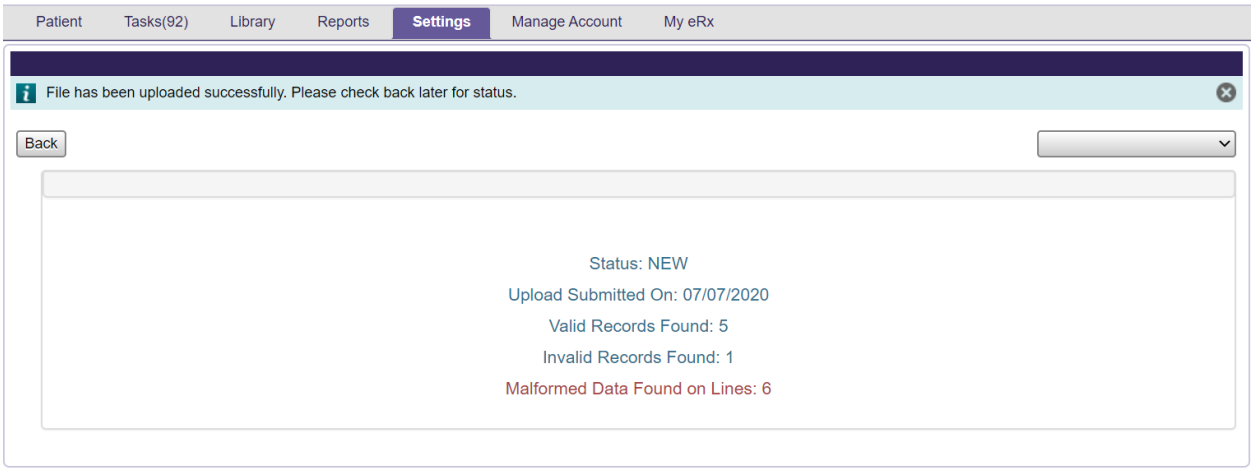


Step 8
After the sample patient is verified in the Veradigm ePrescribe application, proceed to include additional patients by using the same SQL query and changing the SELECT the SQL from "SELECT top (1) …." to "SELECT top 10…" or "SELECT top 100…" with maximum count of 5000.

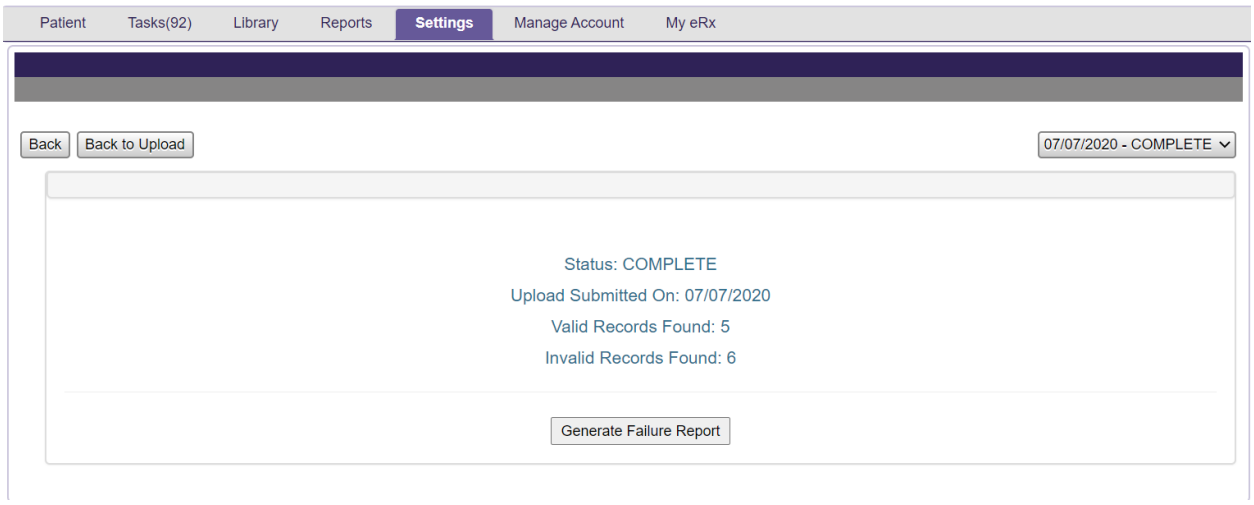
There are optional fields which can also be included in the patient upload file. The upload file may include some, all or none of these optional fields. As with the required fields, the optional field column header names must match expected values as shown in the table below. Maximum value lengths must also be noted. If optional fields are included, if a patient does not have a value for one of the optional fields, a tab separator character must still be present for the empty field. The following are the optional fields which can be uploaded in the Patient record if included:

Optional Fields	Max length	example
MiddleName	**35** (note: only 1st character is saved as middle initial)	**Alexander**
Address2	**55**	**Apartment 12 B**
Phone	**14**	**555-555-5555**
Email	**100**	**Email123@email.com**

Additional User Notes:
If the upload process encounters errors, the erroneous line will be reported to assist in making any necessary corrections before resubmitting. An example of this display:



Note that the upload process is asynchronous, so there may be a delay between clicking the Upload button and when the upload is complete. The Upload Status will initially show as NEW. To check on the status, click the Back button and then returning to the Patient Upload page. The Status will show as COMPLETE when processing is complete.



Click the Past Import Job dropdown in the upper right corner of the page to check the status of any past uploads.