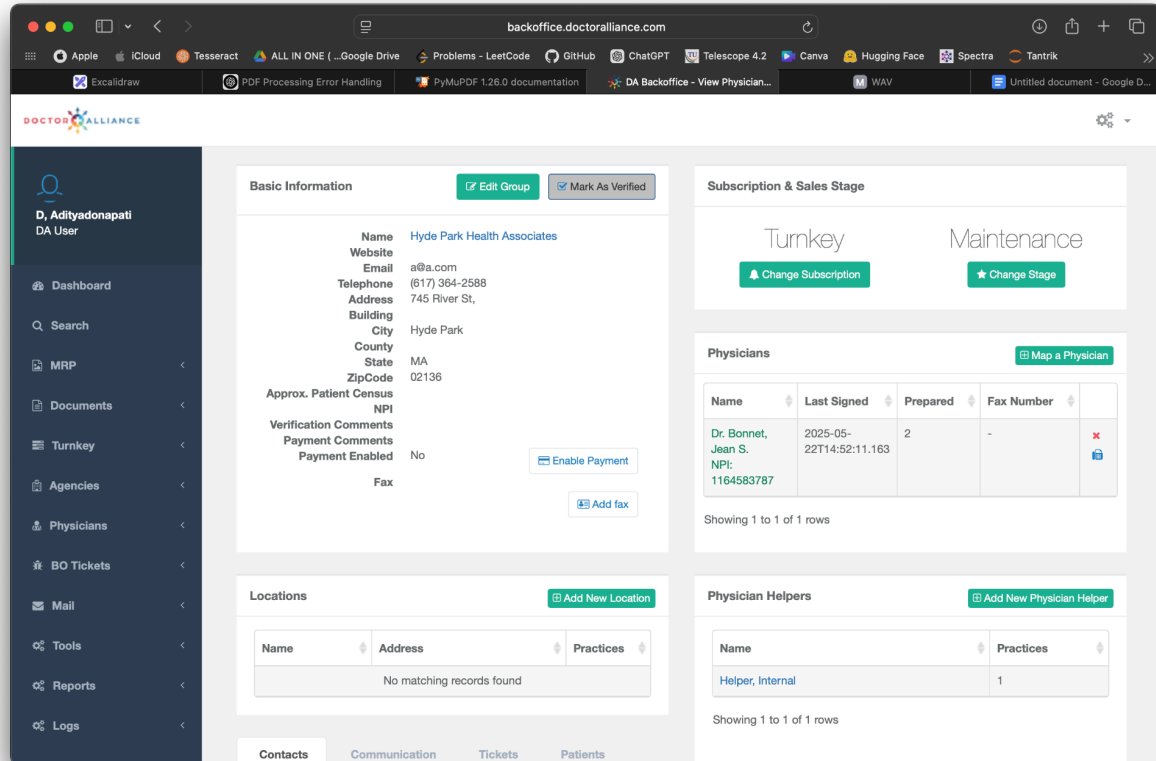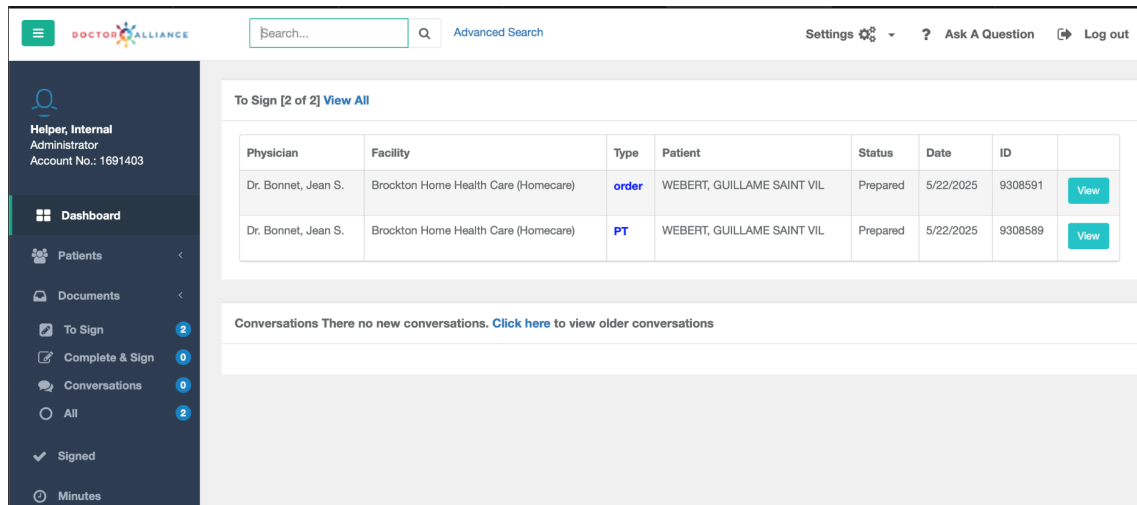Step 1: Go to backoffice -> search -> search for your PG -> select -> click on the PG

Step 2: Go to physician helpers -> select someone -> click on "Impersonate"

Step 3: Download "**All**" and "**Signed**" documents as a CSV.

Step 4: In an excel file, create two sheets. In the signed sheet, delete the "DOB" column. Copy the signed sheet and paste in the "**all**" section. Create a filter **for all columns**.

Step 5: Sort the **"Received On"** column from Z to A, and remove the rest of the documents that surpass the required received date. For example, i am downloading docs from march, so i will remove all documents from feb and before.

Step 6: Sort the "**Patient**" column from A to Z.

Step 7: Download the sheet as a CSV and import into your code folder.

* Step 7.5: before you move onto step 8, make sure you have a "**.env**" file with the required gemini api. Create a **gemini api key**(https://aistudio.google.com/apikey) and paste it into your **.env** file.

Step 8: Go to "**final.py**," replace the **PG_ID, physicianGroupNPI, and physicianGroup.** Pg id and physician group will be found in the "**entities**" sheet. To get the NPI, go into the WAV platform (https://www.mydaplatform.com), go to Market Analysis -> Practice -> search for PG. It will display an NPI number.

Step 9: Select the number of rows to push at once. I recommend not more than 70 or 80 as it may exhaust your Gemini API too soon. The number of rows can be selected by replacing this part in the code:

```
if i > 0:
    break
```

Here, you should replace the number with i-1 number of rows you want to execute. For example, to execute 10 rows, you must write **i > 9.**

Step 10: Run the code. A .json file will be created for the created patients, for orders and patients that ran an error, an audit file will be created with the document ID, and the reason.

Double check the patients and orders created as sometimes duplicates or errors may also be pushed. Let us know in that case. Make sure all patients are displayed correctly in the **wav** platform before proceeding.

Step 11: after the code evaluates completely, you should remove the documents from the orders csv that you downloaded so that the next batch of documents are pushed.