Importing

It is possible to import the basic demographics, and some details of previous treatment or surgery of patients from your practice or hospital software. You can do this as a one off when you first get started, or as an ongoing function – it's smart enough to see if a patient with the same details is already there and ignore these entries in subsequent imports. When you run the import you have the option of choosing if you want only new records added, or existing ones updated.

If you do import from a list of patients from your practice software, make sure that the list includes only those who you want to appear in Socrates, you don't want thousands of patients in Socrates that you don't plan to follow. You may have to find a way of identifying them when they are exported from your other software so you only get the ones you want on the file to import into Socrates.

> *Please… do a trial run on a few records only before you import thousands of them to make sure that you have the correct fields in the correct columns.*

CUSTOM IMPORT

We can also create a custom import for you if you want to import more details than are available on the standard import. These include diagnosis and procedure codes, and any fields that we can match to a field in Socrates. Even if you have fields that we don't have on the standard screens we can create a custom field. As long as your electronic medical record can export the fields you want to an Excel or text file, (which they should all be able to do) we can set up a custom import to enable you to regularly import these fields.

The Import function is found on the Home screen.
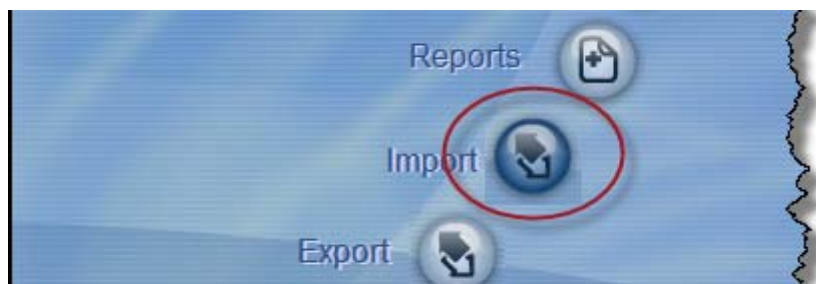
What fields can be imported

The list of fields that can be imported using the standard import are in the middle column as below.

It looks busy and complicated but it's really simple. If you put the right fields in the right columns in the spreadsheet file, Socrates does the rest.

Format needed to import

In order to import these fields they should first be set up in an excel spread sheet in the EXACT order they are on the list. If you are planning to use your existing EMR to obtain these data you may have to ask your IT department, or the company who supplies your EMR to create a file with the fields in the correct order. If you don't have details for a column, e.g, patient has no email address leave that column blank. Do not delete the column, or put the data from the next column in it. If you did that, you would end up with the Notes, from the next column, in the email address field. The first row should be blank or have the field titles on it.

Once you are sure that your spreadsheet is in the correct order, and any missing columns are left blank, you need to save it as a text delimited file (* .txt) file. To do this, click Save As and change the "Save as type" (as below).
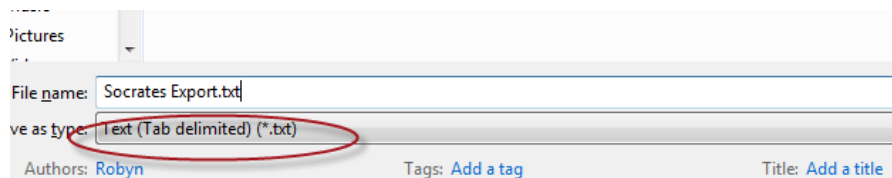
If you viewed the saved txt file, it will look a bit ugly and disorganised like the example below, but this is exactly what Socrates wants to see.

Note: It's important to leave the first row with no patient details - just a heading, (name address etc) or blank as the program will not import anything recorded on the first row. If the first row includes a patient's details instead of a heading, the details for that patient will not be imported.

See row 1 below as an example, which has named all the columns, Last name, First name etc. You don't have to do this, **as long as there is something in one column** on the first row, the import will work correctly.

Male and Female: The export will look for either the word Male, Female, or M or F, or 1 or 2 (where 1 = Male, 2 = Female) in the Gender column and convert that to Male or Female in Socrates.

So, as long as you have either:

Male, M or 1 in the column, males will be correctly imported.

Female, F or 2 in the column, females will be correctly imported.

Once you have your Excel file saved as a .txt file, you are sure that all the columns are in the correct order, and it's located somewhere where you can find it again, you are ready to import your data into Socrates.

DEMOGRAPHICS

First, middle and last name, ID, DOB, Gender, Address details, Phone number, email address, and notes - as below. These are in Columns A to R.

Your file must have the fields, **in the same order** as on the import window of the Socrates screen (see above). Leave the column blank if you have no data for that column. If you muddle them up ,e.g if the Gender is in the last name column, you will have all your patients with the Last name = Male or Female.

> *If you don't have all the fields – maybe you only have 2 address lines you*
> *MUST leave the column for the Address line 3 empty, rather than deleting*
> *that column.*

Importing when you have existing records – matching the fields

You need to be very careful if you are importing and the same patients are in Socrates already. You get the choice between matching on Patient first and last name and DOB, or Patient first and last name and DOB and the ID. It will check the Socrates records for matching fields for whichever you have selected, and if it finds something different it will import that record. If you have the same patient but with a different ID in Socrates to what is on your import file, and you have selected to match the ID it will think that this is a different patient and they will be in Socrates twice. The same if the DOB or name is slightly different

Assigning default protocols and email addresses

Default protocols – some users have only one protocol per module and have it assigned as the default on their protocol set up. If so, and you want this to be added at the time of import check the *Assign default protocols* box.

If you are using the web scores and want to have the patient's email address selected as the notification method, select this check box also.

PREVIOUS PROCEDURE DETAILS

In addition, some details of previous history or surgery can also be imported and a surgery record set up, as well as the demographics needed to create a patient record.
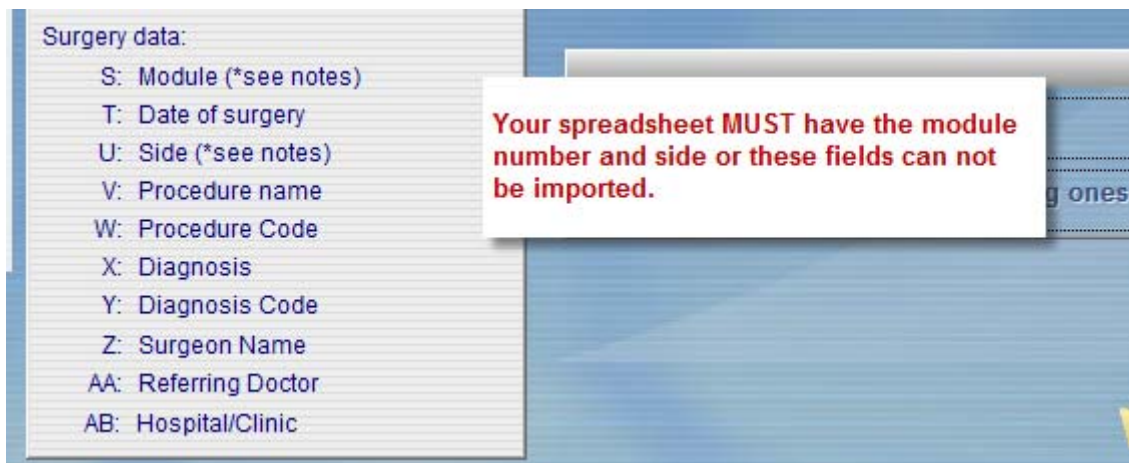
There are some rules that you must understand if you want Socrates to set up a surgery. Every record in Socrates has to have a **side** (apart from Spine, which doesn't have sides) **and a module** assigned to it. If you want to create a surgery record, the ***side and module*** for the surgery record must be defined on your spread sheet. If not, none of other fields from Column T down can be imported.

Module Number

Column S needs to contain a module number. These are 1-9, based on the order they are in Socrates, see below. If you leave the column blank, it will not create a surgery record at all.

Side

There are a two ways you can identify the side. Column U will look for either R or L, r or l, or Right or Left. If it finds one of these, it will create a record for that side in the module you have selected.

*Note that the Spine module does NOT require a side, leave it blank.

It can also find the side from the Diagnosis and Procedure name field. If you don't know the side, but have it recorded in either the diagnosis or procedure field, you can leave the side column (U) blank. If it can't find the side in column U, it will then look in column V (procedure name) and W (diagnosis name) to see if the side is included in the description. So, if you have a diagnosis ***Right ACL tear***, or ***ACL tear Right***, or a procedure name or ***Right ACL reconstruction or ACL reconstruction right*** it will be able to create a record. It doesn't matter if you use upper or lower case or a mixture of both, the text for these fields is not case sensitive.

It won't look for just a R or L, or an r or l, as it will in the Side column, as too many of the diagnosis and procedures names include these letters as part of their name. See below – it will not recognise R ACL reconstruction as being a RIGHT ACL reconstruction. It would need to read Right ACL Reconstruction for this to be recognised.

> *Bottom line is, if there is no side in Column U, nor anything in the diagnosis or procedure column it can recognise as a right or left, no surgery record will be created.*

If it can't find a side, it will ignore anything from there on. You will still have the patient record with the demographics, but no surgery record will be added.

Type

Column AC: This refers to whether it is a primary or revision. If the import file has either Primary, Revision, or the first letter is any of P, p, R, r it will import it into the Type field. Note, most import files don't record if the revision was own or elsewhere so they will all be imported into Revision Own.

Referring Dr, hospital/clinic name

These fields can also be imported. Note that he name of the surgeon and referring Dr will be imported into the last name column only. So, if it says Mary Smith brown, that's what will come into the last name field. You can always edit it later and add the first name to the first name field. In most cases it won't matter but if you are generating a report that has the first name on it, i.e Dear Mary, unless you edit it and put the first name in the first name field it would be blank in the report.

See below... What's on the import file.

Z	AA
Surgeon	Referring Dr
dr fred brown	Mary smith

... How it looks it the Set Up section
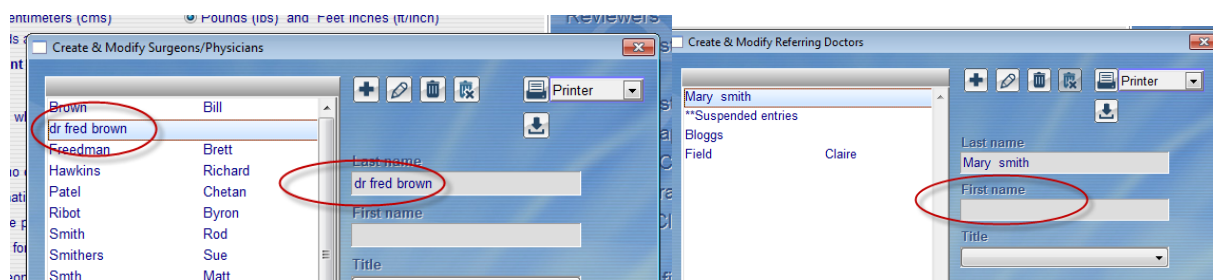
Diagnosis and Procedure Names, and Codes

If it has found a side in either column U, or in one of the Diagnosis or Procedure Name columns (V and X), it will now add the codes or names into the relevant fields. If the Diagnosis, Diagnosis Code, Procedure name or Procedure Codes field name is not in the adaptable fields lists already, it will be added to the master list.

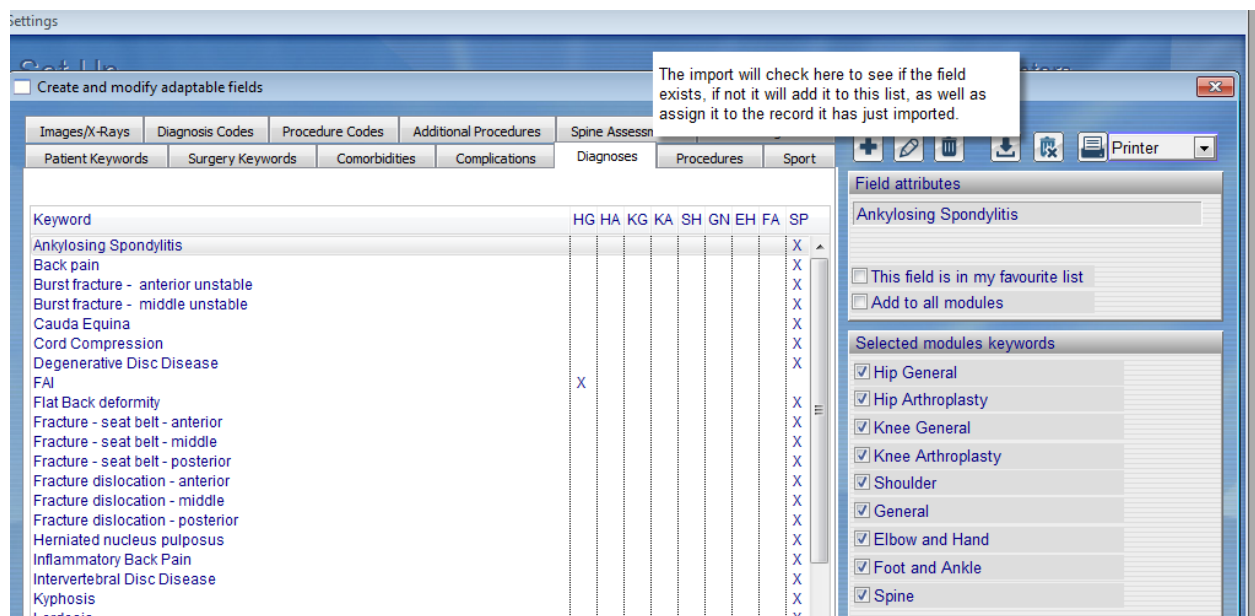If you have it in this list already, but your import has spelled it differently, it can't tell that it's really the same and you will have 2 entries. If this happens you can assign any records from one to the other, and then delete the one you don't want, but that's in another part of the manual....

Multiple procedure/names/codes

If you have a file to import with more than one procedure, diagnosis, or procedure or diagnosis code per patient/side unless these are separated by a vertical line | (this is above the back slash on your keyboard) they will all be imported as one.

See the example below.

1st option will import like this

The 2nd like this

Title

This can be imported providing the list is exactly the same as is in Socrates.

This is:

Mr	Master
Ms	Brother
Mrs	Sister
Miss	Father
Doctor	Mother
Professor	

Race

This can be imported providing the list is exactly the same as is in Socrates.

This is:

|	
African American	Other European
Asian	NZ Maori
Caucasian	Samoan
Filipino	Cook Island Maori
Hispanic	Tongan
Native American	Niuean
Native Hawaiian	Tokelauan
Aborigine	Fijian
African	Other Pacific
Indian	South East Asian
Pacific Islander	Chinese
Other	Middle Eastern
Undetermined	Eskimo USA Indian
NZ European/Pakeha	South African

SUMMARY

By now you have a spread sheet with everything nicely sorted into the correct columns, the first row has headings or is blank, and any columns you don't have data for are left blank. Don't rely on your IT department or EMR Company to sort the spread sheet properly, check up on them! We had one site which got their EMR Company to export the data. They gave them the instructions, didn't check and ran an import for 5000+ patients. The EMR Company had made a mistake, and put the time of the appointment into the Last name column so there were 5000 patients, Mr John 2.45 etc.....

We recommend that you save a copy of your master spread sheet and delete all but a few entries so you can do a dummy run. Note who they are, so you can check that it's all worked as expected. Once you're happy, off you go. You don't have to delete these patients, if it finds the same record again when you run the import proper, it will recognise that it's already there and ignore it.

Now you still have one more decision to make before you run the import.

Matching names/ID/DOB

You have two choices of how you want to look for a match in Socrates with the data from your import. If you have a patient ID on your spread sheet and in Socrates and want the program to look for that as well as a name and DOB before it "decides" if the patient already exists, select to include the ID. If there is not an ID, select the next one (name and DOB only). What this means is if you had two John Brown's, born 11.11.55 and didn't select to match by ID (which should be different) it would assume that they were the same patient and ignore the second John Brown.
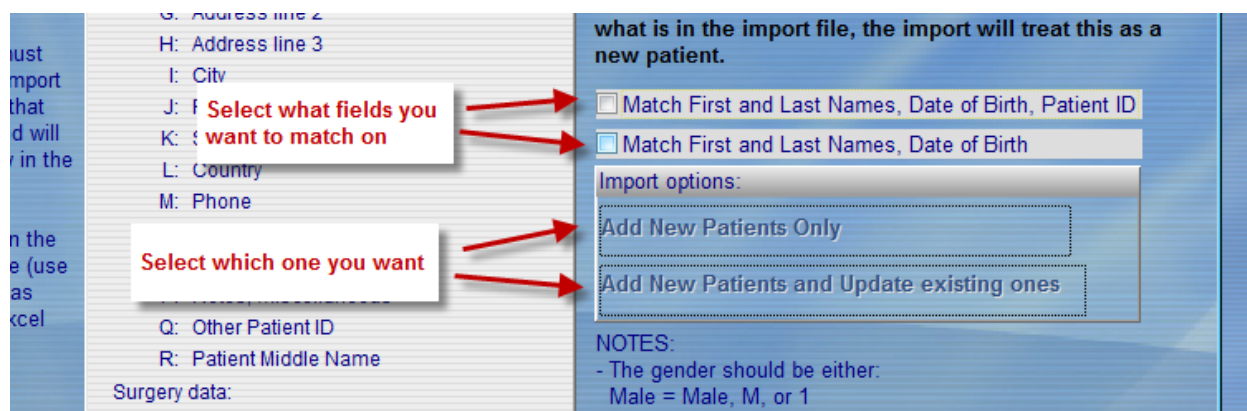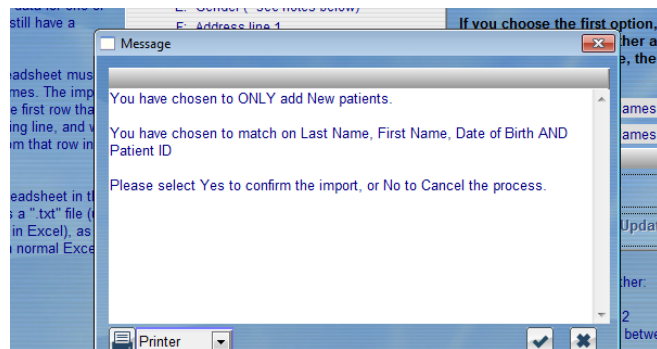

Add New, or Update existing patients

Only one more thing to think about. Do you want to import only new patients, or update the existing ones as well as importing new ones? If you select Update, it will look at each record in the spread sheet, and update anything that's different - change of address, email etc. This will only update any changes in the patient demographics screen.

IMPORTANT: This 'update existing patients' feature will **only import changes in the demographics** – if you have previously imported surgery names, referring Drs, hospitals etc, and added more or changed these on the import spread sheet for some existing records in Socrates these new details will NOT be updated.

However, if your previous import had the columns from the surgery details (Columns S to AC) blank and they have been added since, when it does the import again to update existing patients, if it finds something in those columns and **there is nothing in that field** Socrates it will add it. It will NOT change it if there is already something in that field in Socrates.

An example. When you ran the first import there was no date of surgery or diagnosis. The date of surgery was added manually in Socrates since the import but no diagnosis has been added. You are running a new import and you have selected to update existing records. The surgery date has changed and there is now a diagnosis in those columns. It will find the diagnosis on the import file and add that, but it will not change the date of surgery in Socrates even if it is a different one. Updating existing records will take quite a bit longer than just adding new ones so if your database is very big, run this at the end of the day and leave it running.
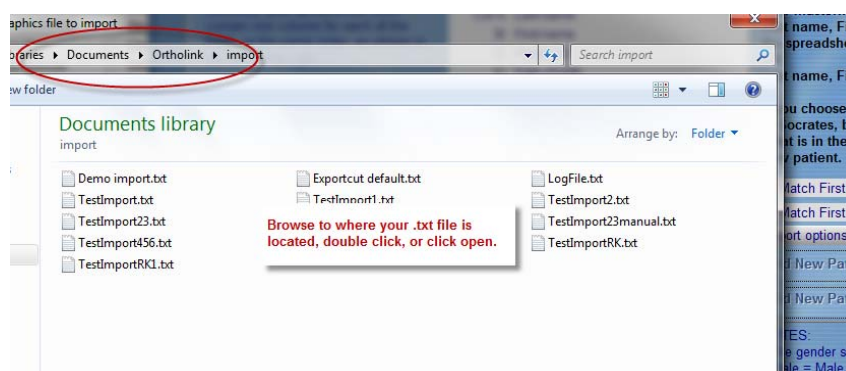
That's all you have to do. Now - to actually do it.

RUNNING THE IMPORT FUNCTION

Select what basis you want to match on, and then select either the 'Add New Patients Only' or 'Add New Patients and Update Existing ones'. You will then be prompted to select the file to import.
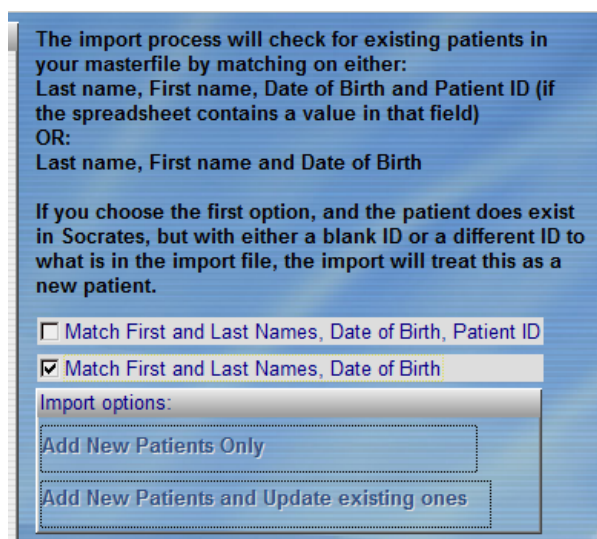
Then browse to where your .txt file is located.

The following messages will appear (note that the first 2 lines of this first message, will differ, depending on what options you selected.)
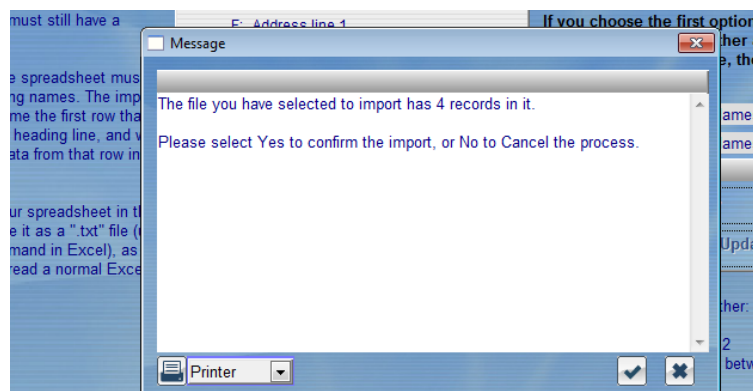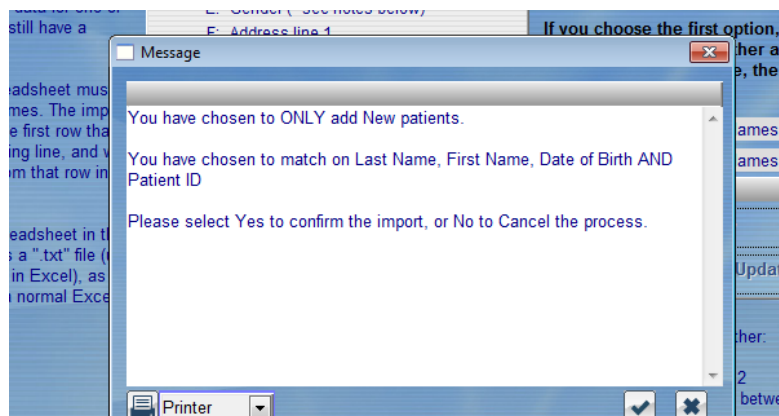
At the end of the import, a log will appear showing you any errors, and what the net effect of the import was. The errors will be where surgery data exists but no module or side was selected and the message will identify the line number in the .txt file these errors were on.

In this import there are 4 records read, the option to only add new patients was selected, and one was a duplicated record, so it has ignored it.

If you select the option to add new patients and update existing ones, it will tell you how many new patients it has added, and how many it has updated.
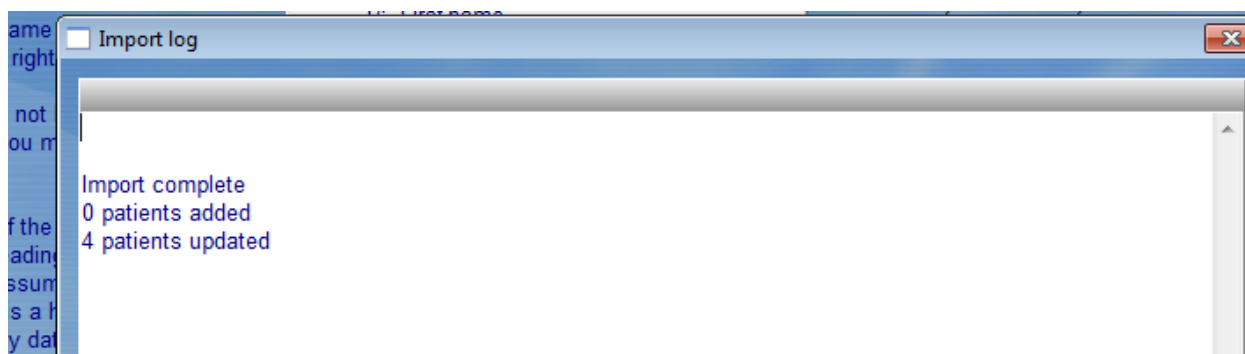
If it has added both a patient record, and a surgery (that's when you had added the module and side, and maybe a diagnosis) it tells you it has added both.

Import log

Import complete
1 patients added
4 patients updated
1 surgeries added
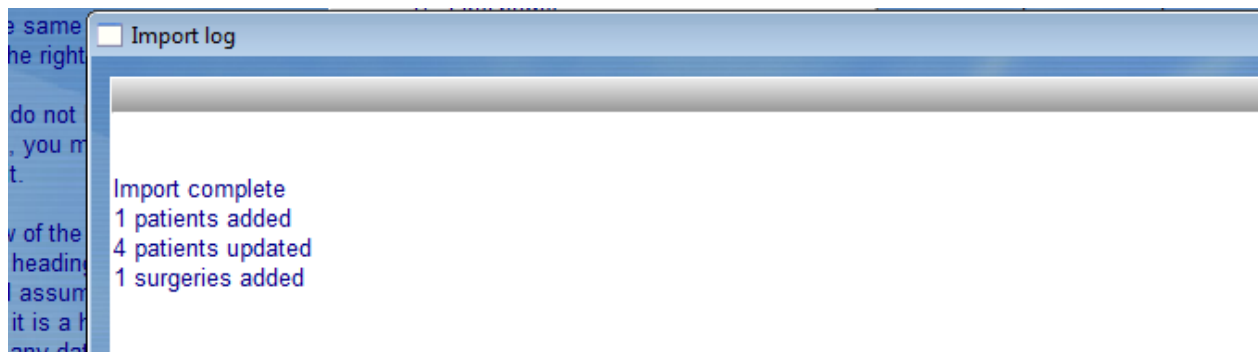
Not to sound like a broken record, but please have a practice run first, especially if you are doing this for the first time. Also, always make sure you have a back up of your current Socrates database file. If you do muck it up, you can replace the database and start again. Starting with just importing a test patient is a good idea. If it's wrong you only have to delete this one.

Once you have the format of the spreadsheet correct, subsequent imports are easy. And you can do this on a recurring basis if you can get your IT or practice management software to provide you a regular list of the patients whose details you want to import with no changes to the columns.   Make sure that they don't make any changes to the spread sheet.