



Transferring Patient Demographics to Med-Center

Introduction

This technical note discusses transferring patient demographic information from other systems to Med-Center. The technique for transfer involves organizing the data fields and content for import using common office applications such as Microsoft Word and Excel. Med-Center's built-in import feature is then used to import the demographics to avoid re-keying the data. The goal of these instructions is to enable computer savvy individuals to control and migrate their patient demographic data to Med-Center without the need for costly technical support.

Discussion

Most practice management systems have the ability to export patient demographics, either for use in preparing reports, or for transferring to another information system. Since the many systems available have their own techniques for export, this subject will not be discussed here.

What is of importance is that the complete set of demographic information be exported then organized into a format called "Tab Delimited" format. In this format, each piece of information is separated by the "Tab" character within a paragraph for each record of data. For example, within Microsoft Word, the use of the tab key essentially places the "Tab" separator within the document between the words you want separated.

So, for a tab-delimited record, the data may look like the following table when viewed within a text editor. Note that the "Tab" character and "Carriage Return" character are shown as → and ¶ . This is the way Microsoft Word represents them when the "Show/Hide ¶" option is turned on. Other text editors may represent these separators differently.

Name	→	Address	→	City	→	State	→	Zip
Smith	→	3454 Elm St	→	Bellevue	→	WA	→	54666
Jones	→	987 Willow Ave	→	Seattle	→	WA	→	65454

Med-Center's Demographic Fields (Part 1 "People Table")

Let's go straight to the part of this discussion that deals with the fields Med-Center uses for demographics. The first set of demographic information is the fields that define the "People" table (see People Table definition below). Most of the fields are text so that normal text or numbers are accepted. The birth date is a date field (represented by "mm/dd/yyyy"), and field "ID in Name" is Boolean (i.e., it is either "True" or "False"). Fields that are required are shown with a "Yes" in the column. The field "Unique Name" is the primary key used throughout the Med-Center application for linkage to other database records.

Note: The "Unique Name" is unique and is automatically constructed by Med-Center when imported into the database. The format of "Unique Name" is "LastName, FirstName MiddleName" or "LastName, FirstName MiddleName [IDNumber]" if the ID Number is used and if "ID in Name" is set to "True".

The choice list name shown for a few of the fields (such as States) relates to a Med-Center list of text inputs to choose from (i.e., during normal use input of people information). So,

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The values used for States would be WA, OR, CA, etc to represent the various states. Similarly, Gender choice list would be M for Male, F for Female, and U for Unknown.

Field #	Field Name	Type	Length	Required	Choice List
1	Unique Name	Text	40	No.. Determined from field 2-4, 11&16	
2	First Name	Text	20	Yes	
3	Last Name	Text	20	Yes	
4	Middle Name	Text	20	Yes (if used)	
5	Salutation	Text	20		Salutation
6	Address1	Text	40		
7	Address2	Text	40		
8	City	Text	30		
9	State	Text	2		States
10	Zip	Text	20		
11	ID Number	Text	20	Yes (if field 16 is True)	
12	Maiden Name	Text	20		
13	Nick Name	Text	40		
14	Gender	Text	2		Gender
15	Birth date	Date			
16	ID in Name	Boolean		Yes (if used)	
17	Home Phone	Text	20		
18	Work Phone	Text	20		
19	Country	Text	2		Country Code

Now, let’s look at what “real” demographic data would look like in the tab delimited format discussed earlier. A good way to see the format is to export some example people demographics from Med-Center using the export feature (when called from the administrator module). The export dialog shown in Figure 1, illustrates selection of 24 records from the People table and selection of all of the fields to export.



Figure 1 “Export of People Table to a File”

Pressing the “Export...” button prompts for a filename and location on the hard drive to save the exported file. After the file has been saved, the file may be opened with Microsoft

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Word (or equivalent) to see the contents of the exported People table. Figure 2 shows the file opened in Microsoft Word with tabs set so the field separation is easily seen. Only the first eleven fields are shown.

1	2	3	4	5	6	7	8	9	10	
Able, Steven M	→	Steven	→	M	→	1954 Stoneway	→	Renton	→	WA → 98055 →
Alexander, Nora	→	Nora	→	Alexander	→	Mrs. → 18658 Crystal Dr.	→	Renton	→	WA → 98055 → 324-66-8
Zimmerman, Tim	→	Tim	→	Zimmerman	→	→	→	4610 104th St	→	Renton → WA → 78118 →
Aarab, Jose Antonio	→	Jose	→	Aarab	→	A	→	Dr. → 456 Roscow ave	→	Whittier → CA → 49484 →
Ashmore, Linda	→	Linda	→	Ashmore	→	→	→	27191 South Skyline	→	Renton → WA → 98055 →
Sanders, Jeff	→	Jeff	→	Sanders	→	→	→	26572 McGregor Ave	→	Bellevue → WA → 59836 →
Ullery, Dixey	→	Dixey	→	Ullery	→	Mrs. → 2139 Gallows Road	→	Kent	→	WA → 42123 →
Berman, Jeff	→	Jeff	→	Berman	→	→	→	15551 Youree Drive	→	Renton → WA → 98055 →
Johnson, Mike	→	Mike	→	Johnson	→	Mr. → 576 E. Vertical St	→	Redmond	→	WA → 87676 →
Upton, Jerry	→	Jerry	→	Upton	→	→	→	14715 East 61st St	→	Seattle → WA → 85201 →
Simenson, Fred	→	Fred	→	Simenson	→	→	→	26736 Copley Rd	→	Everett → WA → 96792 →
Jones, Sue	→	Sue	→	Jones	→	→	→	987 West Palm	→	Seattle → WA → 43536 →
Smart, Karla	→	Karla	→	Smart	→	→	→	4618 Butternut	→	Seattle → WA → 79989 →
Snow, Andrew	→	Andrew	→	Snow	→	Dr. → 26083 Harbor Island	→	Kent	→	WA → 43533 →
Alexander, Mark J	→	Mark	→	Alexander	→	J	→	Mr. → 18658 Crystal Dr.	→	Renton → WA → 98055 → 543-37-1
Belfry, Ance	→	Ance	→	Belfry	→	Dr. → 15229 Yvon Dr	→	Renton	→	WA → 98055 → 32425873
Berman, Jill	→	Jill	→	Berman	→	→	→	15551 Youree Drive	→	Seattle → WA → 98702 →
Osterman, Vernon	→	Vernon	→	Osterman	→	→	→	25832 State Street	→	Seattle → WA → 41203 →
Stoneman, John	→	John	→	Stoneman	→	→	→	2053 Ventura Blvd	→	Bothel → WA → 56393 →
Willcox, Steve	→	Steve	→	Willcox	→	→	→	25668 Atlanta Hwy	→	Renton → WA → 51450 →
Peterson, Sue	→	Sue	→	Peterson	→	Dr. → 12754 Alexander St	→	Hope	→	WA → 12222 →
Walker, Jimmey Lee	→	Jimmey	→	Walker	→	Lee → Dr. → 1374 Eastgate way	→	Seattle	→	WA → 86756 → 234-87-8
Green, Sydney	→	Sydney	→	Green	→	→	→	Dr. → 714 E. Cedar lane	→	Seattle → WA → 98373 →
Smith, John	→	John	→	Smith	→	→	→	425 E. Anderson	→	Ballard → WA → 98432 →

Figure 2 “Fields as Exported from the People Table”

It follows that the same file could be used for importing these demographics back into Med-Center. And, as long as the tab-delimited format is followed, new demographics (from another system) could be imported as well (provided that the field positions are known).

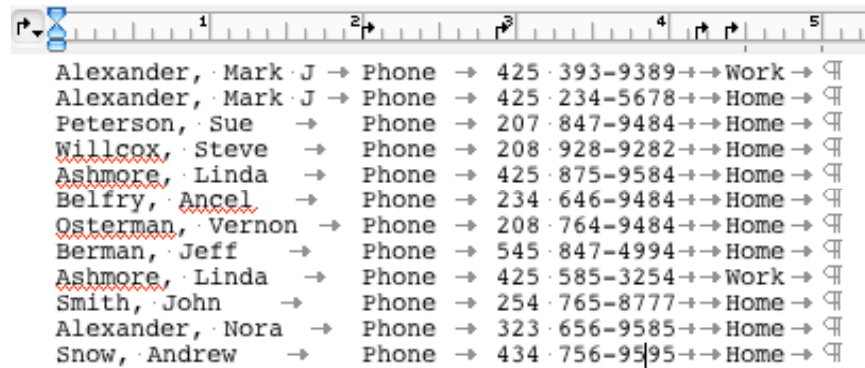
Med-Center’s Demographic Fields (Part 2 “Phone Extensions Table”)

The second part of the demographics is the Phone Extensions information. This set of information is optional in the cases where several phone extensions need to be transferred for each person. The part 1 demographics set already has home and work phone numbers fields available for import.

The Phone Extensions Table as shown below, lists the fields that can be used to define each phone number for the person. Only the Unique Name is required. The “Phone Type” could be: Phone, cell, pager, or fax. From the example database provided with Med-Center, the exported phone extensions file (as viewed in Microsoft Word) is shown in Figure 3. Note that having multiple records and repeating the person’s unique name will define multiple phone numbers.

Phone Extensions Table					
Field #	Field Name	Type	Length	Required	Choice List
1	Unique Name	Text	40	Yes	
2	Type	Text	20		Phone Type
3	Number	Text	30		
4	PIN	Text	20		
5	Location	Text	20		Phone Location

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Alexander, Mark J	Phone	425-393-9389	Work
Alexander, Mark J	Phone	425-234-5678	Home
Peterson, Sue	Phone	207-847-9484	Home
Willcox, Steve	Phone	208-928-9282	Home
Ashmore, Linda	Phone	425-875-9584	Home
Belfry, Ancel	Phone	234-646-9484	Home
Osterman, Vernon	Phone	208-764-9484	Home
Berman, Jeff	Phone	545-847-4994	Home
Ashmore, Linda	Phone	425-585-3254	Work
Smith, John	Phone	254-765-8777	Home
Alexander, Nora	Phone	323-656-9585	Home
Snow, Andrew	Phone	434-756-9595	Home

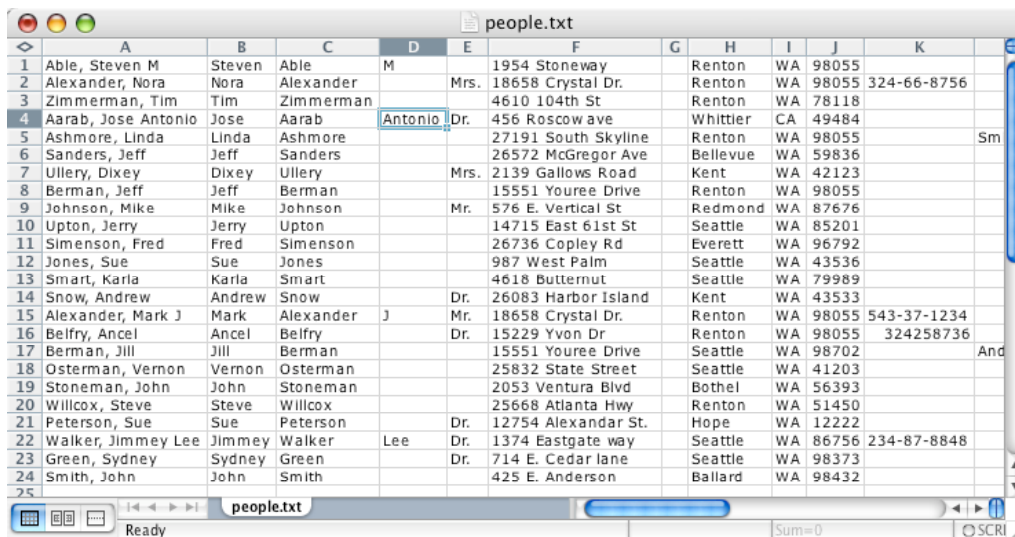
Figure 3 “Fields as Exported from the Phone Extensions Table”

Using Microsoft Excel to Format Import Files

Microsoft Word may be a great way to view the content of the exported files, but Microsoft Excel is the better tool to prepare demographic information for import when a significant amount of field manipulation is needed. Excel allows an easier way to move or insert columns, merge rows (records) of data, and enter additional demographic information. The following steps and guidelines cover this approach.

Demographics Preparation (Part 1 “People Table”)

1. Export the primary demographics from your current system. The order of the fields may be different as long as it is tab delimited.
2. Open the file using Excel. The program will parse the fields into columns and rows.
3. Refer to the People Table field definition discussed earlier.
4. Set up (organize) the required fields. For Med-Center, the only required fields are the fields that define the Unique Name (i.e., Last Name, First Name, and Middle Name (or initial)) are needed as a minimum.
5. If there are names that are not unique with just the name fields, field “ID Number” should be used with field “ID in Name” set to “True”.
6. Note the fields and the order of the fields (e.g., zip is field 10, address is field 6 etc.)
7. Save the document as a tab-delimited text file.
8. Import the file into an empty starter database to test the data content and import process. The order of the fields can be set using the import dialog.



	A	B	C	D	E	F	G	H	I	J	K
1	Able, Steven M	Steven	Able	M		1954 Stoneway		Renton	WA	98055	
2	Alexander, Nora	Nora	Alexander		Mrs.	18658 Crystal Dr.		Renton	WA	98055	324-66-8756
3	Zimmerman, Tim	Tim	Zimmerman			4610 104th St		Renton	WA	78118	
4	Aarab, Jose Antonio	Jose	Aarab	Antonio	Dr.	456 Roscow ave		Whittier	CA	49484	
5	Ashmore, Linda	Linda	Ashmore			27191 South Skyline		Renton	WA	98055	Sm
6	Sanders, Jeff	Jeff	Sanders			26572 McGregor Ave		Bellevue	WA	59836	
7	Ullery, Dixey	Dixey	Ullery		Mrs.	2139 Gallows Road		Kent	WA	42123	
8	Berman, Jeff	Jeff	Berman			15551 Youree Drive		Renton	WA	98055	
9	Johnson, Mike	Mike	Johnson		Mr.	576 E. Vertical St		Redmond	WA	87676	
10	Upton, Jerry	Jerry	Upton			14715 East 61st St		Seattle	WA	85201	
11	Simenson, Fred	Fred	Simenson			26736 Copley Rd		Everett	WA	96792	
12	Jones, Sue	Sue	Jones			987 West Palm		Seattle	WA	43536	
13	Smart, Karla	Karla	Smart			4618 Butternut		Seattle	WA	79989	
14	Snow, Andrew	Andrew	Snow		Dr.	26083 Harbor Island		Kent	WA	43533	
15	Alexander, Mark J	Mark	Alexander	J	Mr.	18658 Crystal Dr.		Renton	WA	98055	543-37-1234
16	Belfry, Ancel	Ancel	Belfry		Dr.	15229 Yvon Dr		Renton	WA	98055	324258736
17	Berman, Jill	Jill	Berman			15551 Youree Drive		Seattle	WA	98702	And
18	Osterman, Vernon	Vernon	Osterman			25832 State Street		Seattle	WA	41203	
19	Stoneman, John	John	Stoneman			2053 Ventura Blvd		Bothel	WA	56393	
20	Willcox, Steve	Steve	Willcox			25668 Atlanta Hwy		Renton	WA	51450	
21	Peterson, Sue	Sue	Peterson		Dr.	12254 Alexandar St.		Hope	WA	12222	
22	Walker, Jimmey Lee	Jimmey	Walker	Lee	Dr.	1374 Eastgate way		Seattle	WA	86756	234-87-8848
23	Green, Sydney	Sydney	Green		Dr.	714 E. Cedar lane		Seattle	WA	98373	
24	Smith, John	John	Smith			425 E. Anderson		Ballard	WA	98432	

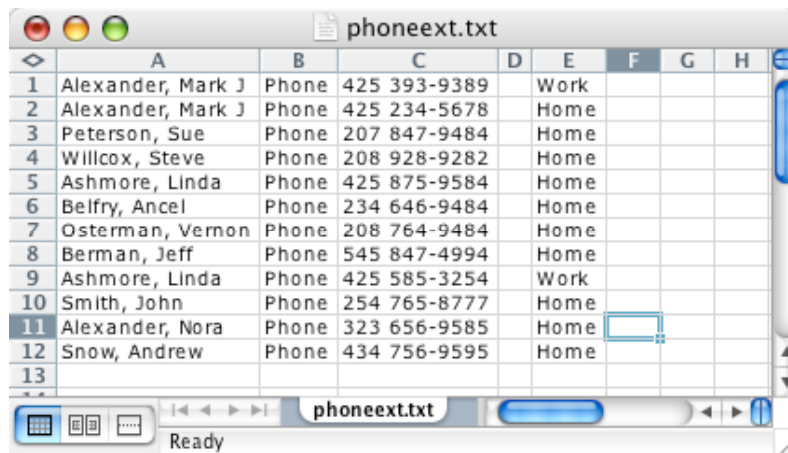
Figure 4 “Using Excel to Format People Demographics”

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Demographics Preparation (Part 2 “Phone Extensions Table”)

Assuming that the part 1 demographics import was successful, you will note that the home and work phone numbers entered with this set will automatically create Phone Extension entries. So, if that is all of the phone extensions that need to be created, then you are finished. If there are additional phone extensions, then the following steps can be followed.

1. From Med-Center, select the People that have additional Phone Extensions to be entered. Use the export dialog to select the field “Unique Name” and export to a file.
2. Open this file in Excel. The Unique Name field will give you a starting place for adding the Phone Extension information. Use the Unique Name for as many records (entries) as needed to define the multiple Phone Extension for each person.
3. The file format should look similar to figure 4 when complete.
4. Save the file as a tab-delimited text file.
5. From within Med-Center, import the file to the Phone Extension table



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H
1	Alexander, Mark J	Phone	425 393-9389		Work			
2	Alexander, Mark J	Phone	425 234-5678		Home			
3	Peterson, Sue	Phone	207 847-9484		Home			
4	Willcox, Steve	Phone	208 928-9282		Home			
5	Ashmore, Linda	Phone	425 875-9584		Home			
6	Belfry, AnceI	Phone	234 646-9484		Home			
7	Osterman, Vernon	Phone	208 764-9484		Home			
8	Berman, Jeff	Phone	545 847-4994		Home			
9	Ashmore, Linda	Phone	425 585-3254		Work			
10	Smith, John	Phone	254 765-8777		Home			
11	Alexander, Nora	Phone	323 656-9585		Home			
12	Snow, Andrew	Phone	434 756-9595		Home			
13								

Figure 4 “Using Excel to Format Phone Extensions Details”

Summary

Importing demographics from another system saves time and effort by not having to reenter the information again. Using common editing programs such as Microsoft Word and Excel, demographics information can be edited and organized for import into Med-Center.

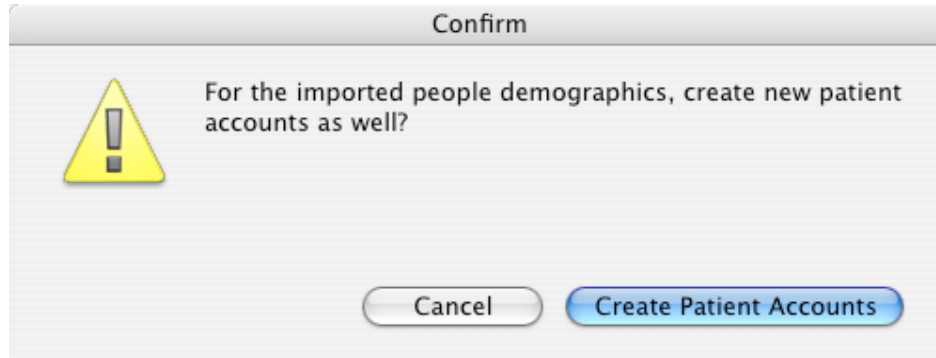
Note: By using an empty starter database (such as the one that can be downloaded from the Database Constructs web site), you can import and test the transition process for your own demographic data to Med-Center.

Addendum

(Applicable for Med-Center release 4.2)

Automatic Creation of Patient Accounts

For newly imported people, an option to also create corresponding patient accounts has been added for Med-Center version 4.2. This option further simplifies the transition of patient data from a prior practice management system to Med-Center. For each person's demographic information imported, a new patient account can then automatically be created.



One final time saver worth mentioning is the use of the field named "Prior MRN" that can be used when importing people demographics. This field can be populated with the Medical Record Number from the prior practice management system such that the same number can be carried over and used within Med-Center. Simply use another column in the tab-delimited file (field # 20) and import the MRN into the "Prior MRN" field. The field should be no longer than 15 characters for compatibility with Med-Center's MRN field.