



Importing Caregiver Databases

IMPORT DOCTORS FUNCTION

Importing caregiver databases should be performed by an Information Services professional, or other experienced computer user.

You may use an existing database of primary attending or follow up caregiver names (and other contact information) provided the database or spreadsheet is supported by ExitCare. File upload compatibility can be confirmed by viewing the built in file extension types returned to the user at time of upload. The wizard allows for the proper supported file extension type to be selected and walks the user through the upload process. Please ensure to define the column names after uploading the caregiver file.

Follow-up Caregiver List

The ExitCare Import Wizard will look for the following information. Not all information is required to be imported.

1. First Name
2. Last Name
3. Title (such as MD, RN, PA, etc.)
4. Specialty (e.g., emergency medicine, EENT, OB, etc.)
5. Clinic Name (or Practice Name)
6. Address Line 1
7. Address Line 2
8. City
9. State
10. Zip code
11. Phone (with area codes if appropriate)
12. Fax
13. Email
14. DEA Number
15. State ID or License Number
16. NPI
17. Miscellaneous
18. Oversight Required
19. Applies To: (which or all facilities)
20. Details (which or all departments)

Attending Caregiver List

For attending caregivers, the only data printed on the Instruction is the complete name (with title); so entering the remaining fields is optional for attending caregivers. If you have Prescription Writing capabilities, having the DEA number, State ID Number and NPI number will facilitate the writing of prescriptions.

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Clicking the Import Doctors button on the Attending Caregivers screen will open the screen shown in Figure 1.

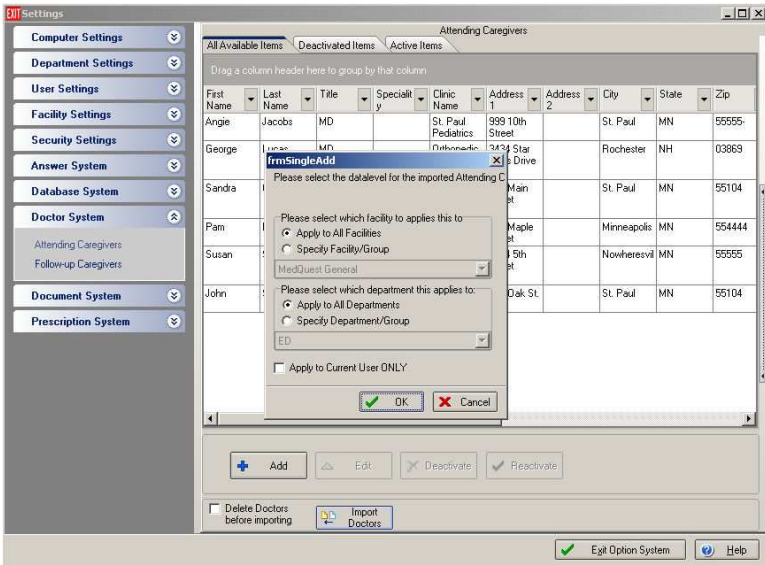


Figure 1, Selecting a facility and department to apply the import to

Select a facility level and department level, or click the Apply to Current User Only, and then click OK. You will next see the screen in Figure 2. **NOTE: If you will want to delete the current list of caregivers before importing the new list, check that box (lower left).**

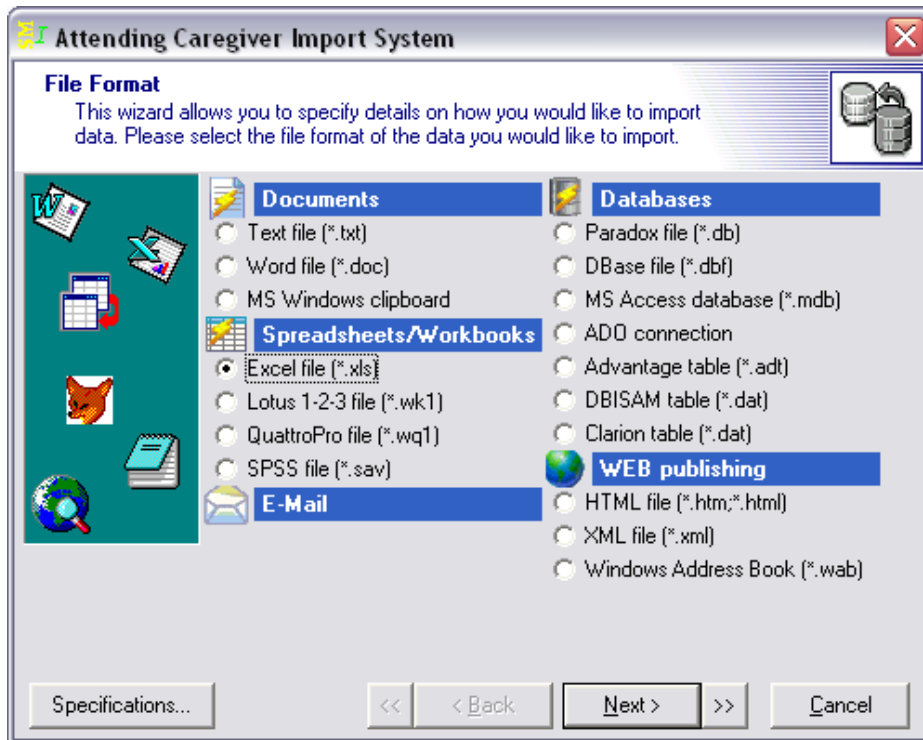


Figure 2, The first step in the Doctor Import System Wizard

Note the many file formats that can be used to import data into ExitCare. Select the format you are using to import from.

Click the Next button, and you will be taken to the screen in Figure 3.

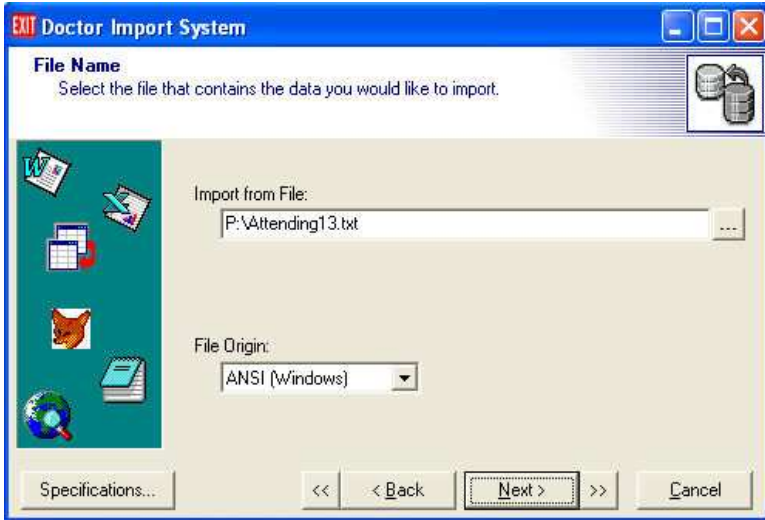


Figure 3, Importing a File - the second step in the Doctor Import System Wizard

Select the appropriate file from the Import from File by clicking on the button with the three dots to browse for the file. The import file can contain many fields of data, including: First Name, Last Name, Title, Clinic, Address Line 1, Address Line 2, City, State, Zip, Phone, Fax Number, Specialty, Misc., E-mail, DEA #, NPI, and State ID #.

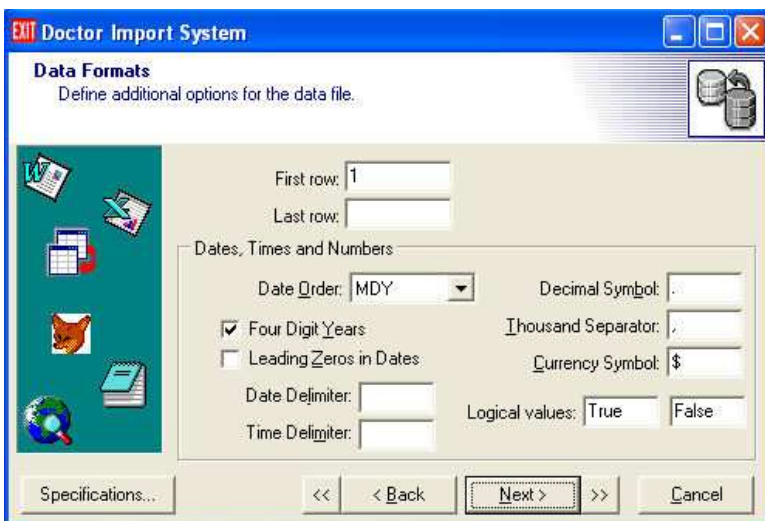


Figure 4, The third step to import a caregiver's list: Data Formats

This fourth step allows you to define/specify additional options for the data file you are using to import. Note that if you have a first row that contains column labels/headers, you can key in a value of 2 in the First Row field, so that the column labels aren't made part of the data set. After making the appropriate entries (may be no changes), click the Next button to go to the screen in Figure 6.



Figure 5, the fourth step to import a caregivers list: File Preview

This fifth step to import a caregiver database requires you to adjust the imported data to correlate with the correct field headings. To assign field names, click on the drop down arrow of each column heading (Field1, Field2, etc.), and select the corresponding field heading from the drop down list (FirstName, LastName, etc.). When done, click the Next button to go to the next step, shown in Figure 6.

Click next when ready to move to the next step, Data Preview (Figure 6).

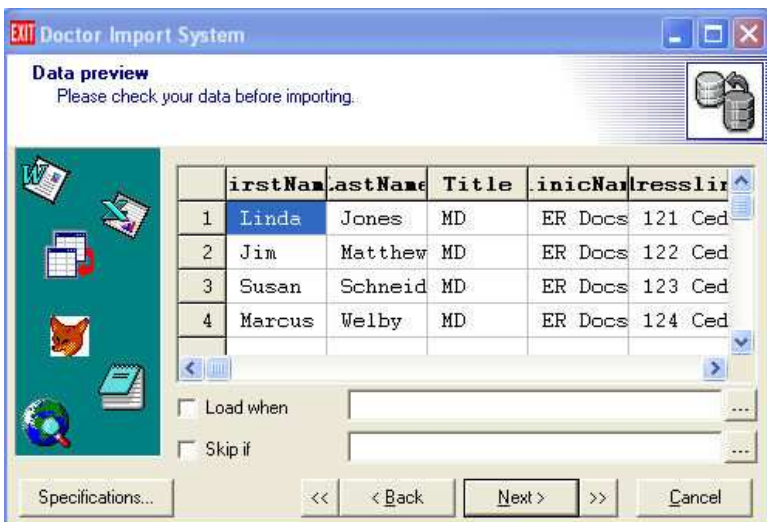


Figure 6, the fifth step to import a caregivers list: Data Preview

This step (Figure 6) allows you to check your data before importing. If necessary you may click on the Back button to make adjustments on previous screens.

You may **save the import specifications** you have set up thus far by clicking on the Specifications... button, clicking the Save button, and giving the setup a name. In the future, you can reload that specification setup for more importing. When ready, click the Next button to go to the last screen, the Import Mode. (Figure 7).



Figure 7, the sixth and final step to import a caregivers list: Import Mode

In this final step, make the one available radio button selection: *Append: add records to the destination table*. The last radio button choice showing is not to be used. When ready, click the Execute button to import the records into ExitCare.

If you require Customer Service Support for additional training or support on this process, please call ExitCare, LLC at 1-800-694-6669, extension 3.

If you require Technical Support, please call ExitCare, LLC at 1-800-694-6669, extension 2.