

Importing Patients

You can import patients if you have a CSV file of the patients you wish to add.

To Import Patients From a CSV File

1. Go to the Patients > All Patients page using the menu on the left.
2. Click the "Import Patients" button found in the top right of the list.
3. Click "Browse Files" to and navigate to your CSV file.
4. Click Import.
5. The next screen will show you a summary of all the patients that will be imported.
6. If there are any problems it will highlight them. You will need to correct these errors and try again.
7. Click "Import" to finish.

Screenshots

Find the "Import Patients" button on the All Patients page.

Patients of Sunshine Acupuncture

Patients

Import Patients New Patient

PX	New	First	Last	Email	Birthdate	Appts	Tkns	Credit	CC	Intake
[80]		Miles J	Axelrod	milesa79637@artdudegraphics.com	June 1, 2006	10	2	(\$ 2.00)		—
[89]		Sleeping Pea	Beauty	sleeping@disney.com	June 28, 1908	24	2	\$ 24.50		
[32]		Tinker D	Bell	bouncetest@tribulant.com	August 25, 1978	87	...	\$ 0.00		

The import modal with an example of the columns required. [How to create a CSV from an Excel, Open Office or Google Sheet document.](#) [How to create a CSV file from an Apple Numbers document](#)

Import Patients

Browse files...

☐ Ignore First Row

Import

Passwords will be automatically added. Patients will need to reset their passwords to use the portal. Admins can also reset passwords.

First	MI	Last	Email (username)	Phone	DOB	Legal Name	Pronouns	tokens	admin note	private note
Jane	A	Doe	jan@mail.com	(615)555-1212	04/25/1962	Janice Alice Doe	She/her	12		Dizziness
Phil	T	Blank	phil@dblank.com	(615)555-1212	11/13/1984		He/Him		Asks for a blanket	

Once you've uploaded your CSV data Open ACU checks your file for any errors. You must correct these errors to complete the import.

Browse files...

fake_pats.csv

☒ Ignore First Row

Import

There were 12 errors found. Please correct them and try again

First	MI	Last	Email
Chef	Louis		Invalid Email
Drizella	Tremaine		Invalid Email
Elmer	D		Invalid Email
Effendi	Effendi		Invalid Email

Revision #3

Created Tue, Aug 3, 2021 4:10 PM by Joe

Updated Thu, Apr 3, 2025 4:51 PM by Alexa Hulsey