

# Importing Your Patient List

A simple, step-by-step guide for your dental office. You have two ways to import patients into PractCom: **copy & paste** (fastest for small lists) or **file upload** (best for hundreds or thousands of patients).

## Before you start — what you'll need

Open your practice management software (Dentrix, Eaglesoft, Open Dental, Curve, etc.) and export your patient list. You'll need **at minimum**:

- **First Name** (required)
- **Last Name** (required)
- **Email Address** (required)
- **Cell Phone** (*optional* — add it if you have it; leave blank for patients who don't)

**Good news:** the column headers don't have to match exactly. We automatically recognize *First Name*, *firstName*, *FNAME*, *Email Address*, *Cell Phone*, *Mobile*, and most common variations. Just export what you have and we'll sort it out.

## Supported file formats

Format	Extension	Notes
CSV (Comma-Separated Values)	.csv	Most common — almost every PMS can export this
Excel Workbook	.xlsx	Standard modern Excel file
Older Excel	.xls	Will work, but please save as .xlsx if possible

### Limits to know:

- Paste method: up to **1,000** patients at a time
- File upload: up to **10,000** patients per file
- Maximum file size: **5 MB**

## Method A — Copy & Paste (fastest for small lists)

Use this method if you have anywhere from a handful up to a thousand patients, and you already have the list open in Excel or a spreadsheet.

### Step-by-step

- 1 Log into PractCom at [app.practcom.com](https://app.practcom.com).
- 2 From the dashboard, click **Patients** → **Import Patients**.
- 3 In the import window, click the **Paste Data** tab (it's the first one).
- 4 Open your spreadsheet (Excel, Google Sheets, etc.) and select the patient rows. Include the four columns in this order: **First Name, Last Name, Email, Cell Phone**. If you only have three columns, that's perfectly fine — just leave the phone out.
- 5 Copy the selected rows (**Ctrl+C** on Windows, **⌘+C** on Mac).
- 6 Click into the big text box in the Paste Data tab and paste (**Ctrl+V** or **⌘+V**).
- 7 Click the green **Import Patients** button at the bottom right.
- 8 A summary will appear telling you how many patients were imported, how many were updated (already existed), and any rows we couldn't process. You're done.

### Example of what your paste should look like

```
First Name  Last Name  Email      Cell Phone
John   Doe    john.doe@email.com    555-123-4567
Jane   Smith   jane.smith@email.com  (blank - Jane doesn't have a cell on file)
Robert Brown  robert.b@email.com    555-987-6543
```

**Tip:** You don't need to include a header row when pasting — but if you do, we'll detect it and skip it automatically.

## Method B — File Upload (best for big lists)

Use this method when your PMS produces a CSV or Excel file you can save to your computer — ideal for hundreds or thousands of patients.

### Step-by-step

- 1 In your PMS, run a patient-list export. Save the file as **.csv** or **.xlsx** to your Desktop or Downloads folder.
- 2 Log into PractCom at **app.practcom.com**.
- 3 From the dashboard, click **Patients** → **Import Patients**.
- 4 Click the **File Upload** tab.
- 5 Either drag your file into the dashed-box area, or click **Select File** and pick the file from your computer. You'll see the file name appear once it's loaded.
- 6 Click the green **Import Patients** button at the bottom right.
- 7 Wait a few seconds while PractCom processes the file. For 10,000 patients this typically takes 5–15 seconds.
- 8 Review the summary screen. Any rows that couldn't be imported will be listed with a reason (e.g., "Missing email") so you can fix them in your source file and re-upload only those rows.

### Don't have a template? Use ours.

Inside the Import window, click **Download Template**. You'll get a sample CSV with the right columns already set up. Fill in your data, save, and upload it back.

**If the upload fails:** the most common cause is the email column is missing or named something we don't recognize. Open the file in Excel, rename the column header to **Email** (or **Email Address**), save, and try again.

## Frequently asked questions

**Q:** What happens if a patient is already in PractCom?

**A:** We **update** their record (name and phone refreshed) instead of creating a duplicate. Email is the unique identifier.

**Q:** Do I need to include cell phone for every patient?

**A:** No. Phone is optional. Patients without a cell on file will still import successfully — just leave the cell-phone cell blank for that row.

**Q:** My PMS exports columns called "Pat Email" and "Cell". Will those work?

**A:** Yes. We accept a wide range of common header names: *Email, Email Address, e-mail, Patient Email, Cell, Cell Phone, Mobile, Mobile Number, Phone, Phone Number, Tel*, and more.

**Q:** My file has more than 10,000 patients. What do I do?

**A:** Split the file into smaller chunks (8,000 patients each is a safe size) and upload them one at a time. Each upload is independent.

**Q:** Will my patients be notified after they're imported?

**A:** Not automatically. Importing a patient just adds them to your database. You control if and when patients receive communications, through the rest of the PractCom dashboard.

**Q:** Can I undo an import?

**A:** Each successful row creates or updates a patient record. To remove patients you can delete them individually in the Patients tab, or contact **admin@practcom.com** if you need a bulk reversal.

Still stuck? We're here to help — email **admin@practcom.com** and we'll get back to you the same business day.

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