Dr.Bill spreadsheet formatting guide

To successfully upload your panel list to Dr.Bill, it is important to ensure that the columns in your spreadsheet meet specific formatting requirements. Some EMRs may export patient data with combined first and last names combined (see image below) and date formats that might not be acceptable to Dr.Bill. This guide will walk you through splitting first and last names into separate columns and adjusting the date format to meet Dr.Bill's requirement. If you require further assistance, please contact psp@doctorsofbc.ca

Formatting your Data

In some cases, EMRs may export patient data like the example below:

Dr.Bill requires that patient names are split into two columns, one for the first name and one for the last name. Additionally, it's recommended to format dates as YYYY-MM-DD or YYYY/MM/DD.

Follow these steps to format your data:

Step 1 – Insert two new columns where you want to place the first name and last name.

- Select the column to the right or left of your desired location.
- Click 'Insert,' as shown in the image below.
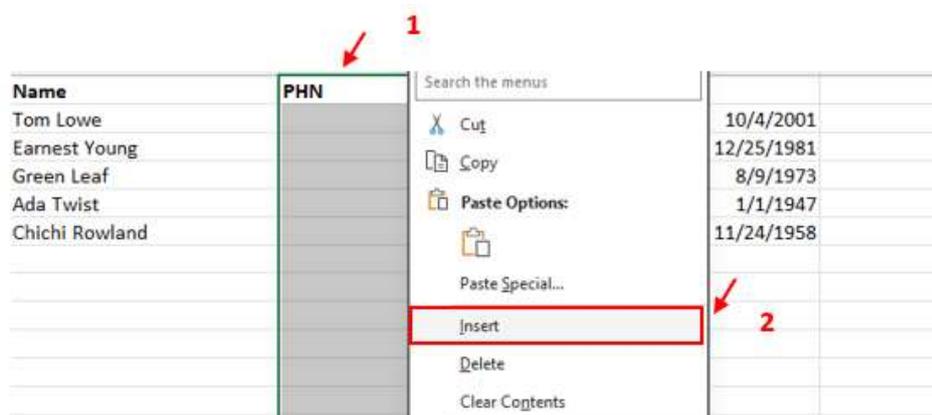
- Repeat the same action to creat the second column.
- Once you have created two additonal columns, include headings (First name, Last name) as shown in the image below.

Name	First Name	Last Name	PHN	Date of Birth
Tom Lowe			9876543210	10/4/2001
Earnest Young			9876543211	12/25/1981
Green Leaf			9876543212	8/9/1973
Ada Twist			9876543213	1/1/1947
Chichi Rowland			9876543214	11/24/1958

Step 2 – Enter the first and last name of the first patient on your list into the new cells.

	Name	First Name	Last Name	PHN	Date of Birth
1	Name	First Name	Last Name	PHN	Date of Birth
2	Tom Lowe	Tom	Lowe	9876543210	10/4/2001
3	Earnest Young			9876543211	12/25/1981
4	Green Leaf			9876543212	8/9/1973
5	Ada Twist			9876543213	1/1/1947
6	Chichi Rowland			9876543214	11/24/1958
7					
8					

Step 3 – Auto fill the first and last names for the remining patients.

- Click on the empty cell below the first name (e.g., below 'Tom') and press 'CTRL + E.'
- This will automatically populate the other first names.

Name	First Name	Last Name	PHN	Date of Birth
Tom Lowe	Tom	Lowe	9876543210	10/4/2001
Earnest Young			9876543211	12/25/1981
Green Leaf			9876543212	8/9/1973
Ada Twist			9876543213	1/1/1947
Chichi Rowland			9876543214	11/24/1958

Name	First Name	Last Name	PHN	Date of Birth
Tom Lowe	Tom	Lowe	9876543210	10/4/2001
Earnest Young	Earnest		9876543211	12/25/1981
Green Leaf	Green		9876543212	8/9/1973
Ada Twist	Ada		9876543213	1/1/1947
Chichi Rowland	Chichi		9876543214	11/24/1958

Repeat the same action for the last names by clicking on the empty cell below the last name (e.g., below 'Lowe') and pressing 'CTRL + E.'

Name	First Name	Last Name	PHN	Date of Birth
Tom Lowe	Tom	Lowe	9876543210	10/4/2001
Earnest Young	Earnest	Young	9876543211	12/25/1981
Green Leaf	Green	Leaf	9876543212	8/9/1973
Ada Twist	Ada	Twist	9876543213	1/1/1947
Chichi Rowland	Chichi	Rowland	9876543214	11/24/1958

Step 4 – Remove the column containing merged first and last names.
    a. **Highlight the column.**
    b. **Right click.**
    c. **Select delete.**
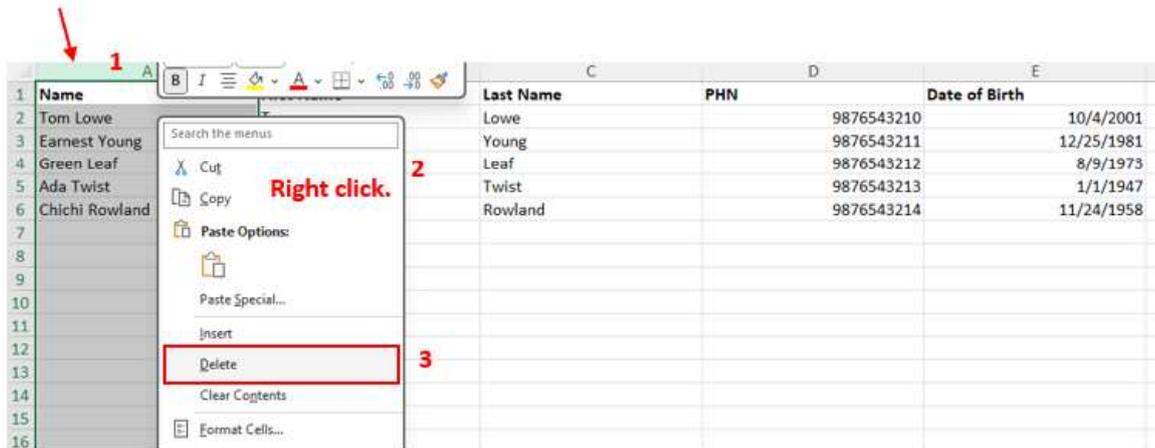
This will make your sheet look like the image below:

First Name	Last Name	PHN	Date of Birth
Tom	Lowe	9876543210	10/4/2001
Earnest	Young	9876543211	12/25/1981
Green	Leaf	9876543212	8/9/1973
Ada	Twist	9876543213	1/1/1947
Chichi	Rowland	9876543214	11/24/1958

Step 5 – Adjust the date of birth format to the recommended style (YYYY-MM-DD or YYYY/MM/DD).

- Highlight the cell containing the patient's date of birth.
- Select 'Format Cell' and follow the steps in the wizard that appears, as shown below:

Highlight the cell and then right click.

Date formats display date and time serial numbers as date values. Date formats that begin with an asterisk (*) respond to changes in regional date and time settings that are specified for the operating system. Formats without an asterisk are not affected by operating system settings.
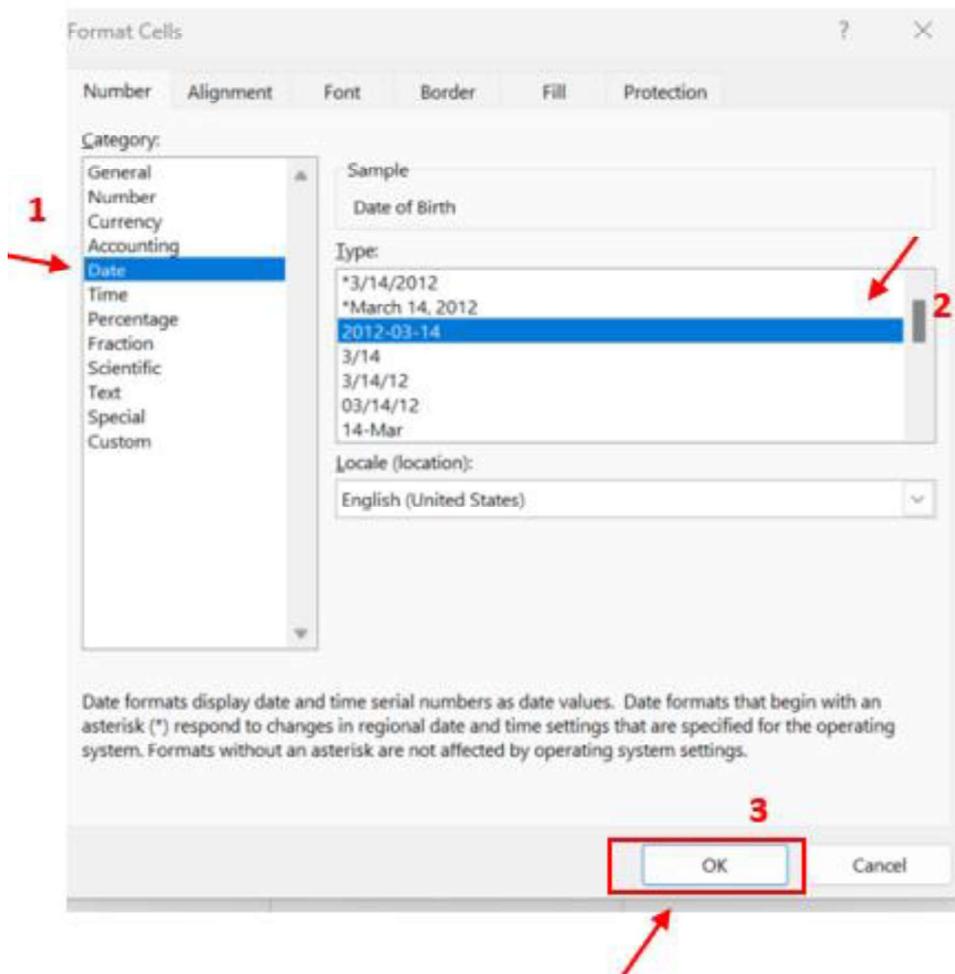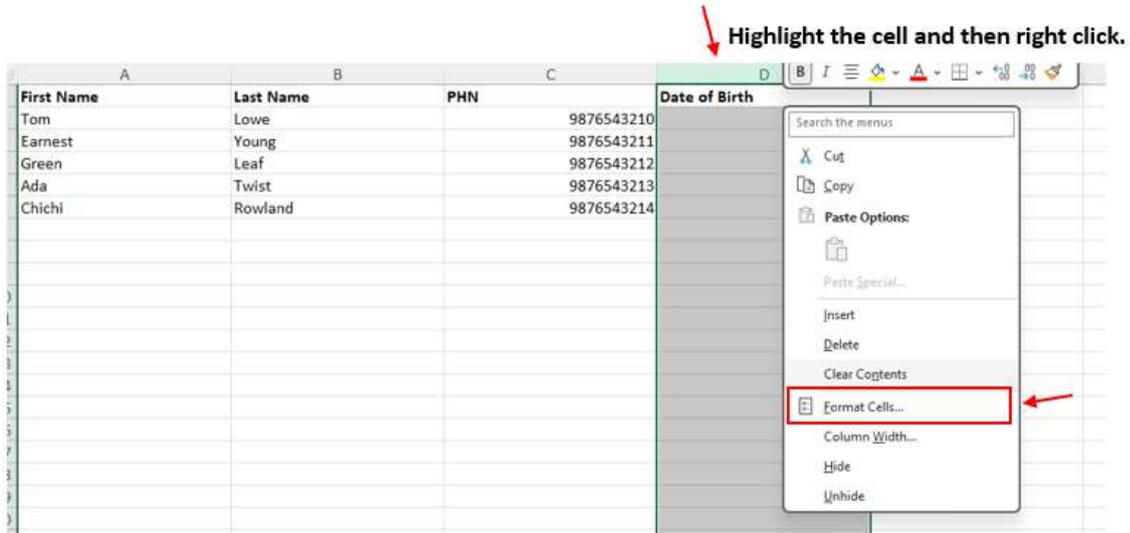
After completing these steps, your date format will match the recommended style, and your final table should resemble the example below:

First Name	Last Name	PHN	Date of Birth	
Tom	Lowe	9876543210	2001-10-04	
Earnest	Young	9876543211	1981-12-25	
Green	Leaf	9876543212	1973-08-09	
Ada	Twist	9876543213	1947-01-01	
Chichi	Rowland	9876543214	1958-11-24	

The final table with the updated formats will look something like the table below:

First Name	Last Name	PHN	Date of Birth	
Tom	Lowe	9876543210	2001-10-04	
Earnest	Young	9876543211	1981-12-25	
Green	Leaf	9876543212	1973-08-09	
Ada	Twist	9876543213	1947-01-01	
Chichi	Rowland	9876543214	1958-11-24	

These formatting changes will ensure your spreadsheet is ready for successful upload to Dr.Bill.