

Switching from your old EHR

Most practices switch in about two weeks. The setup is done once; your client list comes over from a CSV file in minutes, with a preview before anything is saved.

1. Export from your old system

- Your **client list** as a CSV file (names, birth dates, contact details, insurance). Your old system's own help explains how.
- Each client's **latest treatment plan, intake and releases**, as PDFs.
- A **full export** of everything, to keep. You may need to keep old records for years.
- No export? Fill in the template from cimaehr.com/get-started, one client a row.

2. Bring it into Cima

- **Settings → Your data → Bring your clients over.**
- Cima matches the columns. Check them and the preview, then click **Import**.
- A client already in Cima (same last name and birth date) is skipped, so the same file twice is safe.
- Add the PDFs to each chart's **Files** tab as outside records.

What comes over, and what doesn't

Comes over	Stays behind
Names and birth dates	Past notes and documents (keep the export)
Phone, email and address	Past appointments
Insurance company, member ID, group number	Open claims and balances (finish them in the old system)
Diagnosis codes	Old chart numbers (Cima gives new ones)

3. The cutover week

1. **Two weeks out:** set up Cima (the quick start) and start electronic payment sign-up with each payer.
2. **The Friday before:** import your clients and book next week's visits in Cima.
3. **Cutover Monday:** see clients and write notes in Cima only.
4. **After:** work old claims to the end in the old system. Keep it read-only until they're paid.

Want a hand?

Write to hello@gocimahealth.com before you start and we'll look at your export with you. Please send the column names only, never a file with client details in it.