The POLAR Patient List may be uploaded to your 'online appointment' software for sending of customised broadcast SMS messages to your patients. You will need to save your Patient List file as a **.csv** file extension (instead of **.xlsx**) using Excel (i.e. Patient List**.xlsx** to Patient List**.csv**).

The POLAR Patient List includes patient ID and mobile number from your practice software. The patient ID number allows you to customise the message with the patient's name, and may automatically respect the patient's SMS opt-out preference.

Hot Doc Instructions

The following instructions will step you through uploading your Patient List**.csv** file to send patient SMS using Hot Doc:

1. In POLAR, under Patient List menu, click 'Export to Excel' button to create your **patient.xlsx** file

2. In Excel, open your file **patients.xlsx** and save as **patients.csv**

3. Highlight and copy the **BOLDED** heading (below) according to your clinical software (without spaces)

    o Best Practice = **INTERNALID**

    o Medical Director = **PATIENT_ID**

4. In Excel, open your **patients.csv** file, edit Cell A1, delete **ID** heading and paste the **BOLDED** heading (e.g. for Medical Director copy and paste **PATIENT_ID**) - save and close the file. NOTE: DO NOT PASTE THE BOLDED HEADING OVER THE ID HEADING AS THE DATA MAY NOT IMPORT INTO HOT DOC

5. Click and follow the **Hot Doc: How to upload a CSV file** instructions

HealthEngine Instructions

The following instructions will step you through uploading you Patient List**.csv** file to send patient SMS using HealthEngine:

1. In POLAR, under Patient List menu, click 'Export to Excel' button to create your patient.xlsx file

2. In Excel, open your file patients.xlsx, delete all the columns except mobile number and save as patients.csv

3. Go to HealthEngine and follow the **How to upload a CSV file** instructions