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Processing HL7 Messages in the PDI

Several changes were made to the import processing of HL7 data to make it more like other data source types in the Provider Data Import (PDI). This guide covers two methods of processing HL7 data imports: Import by Provider in Central Administration and imports within the provider.

Imports from Central Administration using Import by Provider

Users can rapidly import all data received from an import source type per provider using Import by Provider. The general process is to:

1. Review and resolve any errors or mappings with clients first.
2. Refresh counts.
3. Review each row of record types for errors and mapping.
4. Refresh the counts.
5. Repeat steps 3-4 until all errors and mappings are resolved in a row of record type.
6. After all issues are resolved to your satisfaction, click the process import link, and the data is then added to client records.

Resolving client records

Follow these instructions to resolve client records:

1. Log into Central Administration.
2. Click *Administrative Options*.
3. Click *Data Import and Export Features*.
4. Click *Provider Import*.
5. Click *Import History By Provider*.

Administrative Options > Data Import and Export Features > PDI					
Provider Details New Import Refresh Help Back Print or Export Hide/Show Columns					
PDI Provider Summary					
Search: <input type="text" value="steve"/>					
Provider Name	Source	Last Import Date	Ready To Process	Missing Mappings	Errors
Steve's Test Agency	Default CSV	01/26/2023	1363	5	4261
Steve's Test Agency	Test for CSV	01/06/2023	22	0	0
Steve's Test Agency	LAB/22108468	01/06/2023			
Steve's Test Agency	Default MDB	01/05/2023	8	0	0
Steve's Test Agency	SQL PDI Source	12/19/2022	2	2	0
Steve's Test Agency	Test Custom	11/30/2022	0	1	0

Depending on your import requirements, there may be several different types of imports to process. Look at the Source column to determine which import to process. The source name is based on the initial file that is received for the HL7 import.

If unsure which sources are HL7, check this in Administrative Options by following these instructions:

1. Click *Administrative Options*.
2. Click *Data Import and Export Features*.
3. Click *Provider Import*.
4. Click *Import Settings*.

In this example, the provider has three HL7 import sources that have been configured:

[Administrative Options](#) > [Data Import and Export Features](#) > [PDI](#) > [Import Settings](#)

[Edit](#) [Add](#) [Delete](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

PDI Import Settings

Search:

Provider Name	Source Name	Source Type	
Steve's Test Agency	SQL PDI Source	SQL PDI	
Steve's Test Agency	Test Custom	DTM	
Steve's Test Agency	Test for CSV	CAREWare CSV	
Steve's Test Agency	Annual Custom Update	DTM	
Steve's Test Agency	Default MDB	MDB	
Steve's Test Agency	Default CSV	CAREWare CSV	
Steve's Test Agency	LAB/19107475	HL7	
Steve's Test Agency	LAB/22108468	HL7	
Steve's Test Agency	LAB/73915240	HL7	

To process HL7 files using Import by Provider, follow these instructions:

1. Click *Administrative Options*.
2. Click *Data Import and Export Features*.
3. Click *Provider Import*.
4. Click *Import by Provider*.
5. Click the HL7 row.
6. Click *Import Details*.

Provider Import Details

Search:

Record Type	Total Records	Ready to Process	Errors	Missing Mappings	Records Processe	
Clients	6	1	5	0	0	
ADAP Enrl. History	0	0	0	0	0	
Appointments	0	0	0	0	0	
Annual Reviews	0	0	0	0	0	
Attachments	0	0	0	0	0	
Case Notes	0	0	0	0	0	
Counseling Testing	0	0	0	0	0	
Custom Subforms	0	0	0	0	0	
Diagnoses	0	0	0	0	0	
Drug Payments	0	0	0	0	0	
Eligibility Records	0	0	0	0	0	
Form Design Data	0	0	0	0	0	
Immunizations	0	0	0	0	0	
Insurance Assessm	0	0	0	0	0	
Labs/Screenings	606	96	324	324	186	
Medications	0	0	0	0	0	
Messages	0	0	0	0	0	
Out of Pocket Expe	0	0	0	0	0	
Poverty Levels	0	0	0	0	0	

Total Records –The total number of records in the file in all dispositions: processed, ready to process, and errors.

Ready to Process – Records that are mapped and lack any data errors.

Errors – Records that require a resolution, which could be missing mappings or other data issues.

Missing Mappings – Records that CAREWare has not mapped to CAREWare values. If these mappings are resolved, those records can be imported.

Records Processed – Records that CAREWare has successfully imported.

Note: Client records must be resolved first. All other record types (labs, medications, etc.) depend on having the client record referenced. Otherwise the error remains until the client record matching is complete.

Resolving Client record errors

Client errors are most commonly resolved by adding the records or matching them to existing clients. If clients cannot be added and are not available for mapping, this indicates that there is an underlying data problem that needs to be resolved outside of the Provider Data Import interface. The incoming record can also be deleted.

To resolve an unmatched client record, follow these instructions:

1. Select the Client row in Import Details.
2. Click *Manual Client Matching*.

Unmapped Clients

Search:

First Name	Middle Name	Last Name	DOB	Gender	Client ID
TC1		TEST	10/10/1952	Female	
TC1		TEST	10/10/1952	Female	
TC1		TEST	10/10/1952	Female	
TC1		TEST	10/10/1952	Female	
TC1		TEST	10/10/1952	Female	
TC1		TEST	10/10/1952	Female	

Adding as New Client

Follow these instructions to add the client as a new client:

1. Select the client row.
2. Click *Potential Matches*.

In the case shown below, CAREWare is unable to identify a potential match to the client. To include this client in the import, the client needs to be added as new client.

3. Click *Add as New Client*.

Administrative Options > Data Import and Export Features > PDI > Import Details > Manual Client Matching > Incoming Record > TEST, TC1, , 10/10/1952, Female

[Compare](#)
[Match To Client](#)
[Add as New Client](#)
[Match and Update Existing Client](#)
[Back](#)
[Print or Export](#)
[Hide/Show Columns](#)

Incoming Record > TEST, TC1, , 10/10/1952, Female

Search:

Score	Client ID	Name	DOB	Gender	URN	Zip Code	Phone	Provider

If CAREWare finds the client in the system, the client appears as a potential match. There are a couple of options for matching the incoming client to an existing record.

Match to Client – This option only updates the Client ID to whatever the incoming record has.

Match and Update Existing Client – This option updates all the CAREWare data (address, name changes, etc.) to match the incoming HL7 record.

[Administrative Options](#) > [Data Import and Export Features](#) > [PDI](#) > [Import Details](#) > [Manual Client Matching](#) > [Incoming Record](#) > TEST, TC1, , 10/10/1952, Female

[Compare](#) [Match To Client](#) [Add as New Client](#) [Match and Update Existing Client](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Incoming Record > TEST, TC1, , 10/10/1952, Female

Search:

Score	Client ID	Name	DOB	Gender	URN	Zip Code	Phone	Provider
100		TEST, TC1	10/10/1952	Female	T9TS1010522U			Steve's Test Agency

NOTE: When a client's record is matched (automatically or manually) and the client's data is imported, the client's Client ID is always updated.

[Administrative Options](#) > [Data Import and Export Features](#) > [PDI](#) > [Import Details](#) > [Manual Client Matching](#)

[Potential Matches](#) [Delete Client](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Unmapped Clients

Search:

First Name	Middle Name	Last Name	DOB	Gender	Client ID
TC1		TEST	10/10/1952	Female	

Delete Client – If the client in the import is not needed, should not be added, or matched an existing client, that client's record can be deleted or simply left alone. Deleting a client deletes all associated records from the holding tanks for the unmapped client.

After all records have been resolved (or do not need to be resolved), click Refresh Counts and allow CAREWare to reprocess the import.

NOTE: This step is critical after a data type is resolved before proceeding to the next steps.

Other Import Record Types

Other record types have similar procedures as with clients. Look through the different record types and decide to resolve or ignore any errors or missing mappings. Screening results, for example, might need to be mapped to values already set up in CAREWare. After the records are resolved, click Refresh Counts.

Imports within the provider

Users without Central Administration access can do their HL7 imports within the provider. Managing import history in the provider is more granular in the import process because each row in CAREWare's import history is relevant to only one HL7 message. Processing HL7 messages in this way is typically more time consuming since most providers receive multiple HL7 messages daily.