

Data Translation Module Import Settings

Configuring the import settings is the first step for using Data Translation Module (DTM) imports. The settings are unique to each provider and define the set of rules CAREWare uses for translating the source data, including client matching, field mappings, and other data processing tasks. DTM import settings include:

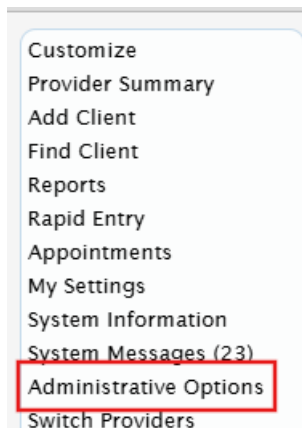
- Configuration of the import template
- Keywords for matching files to import settings
- Folders for automatic imports
- Default values that can be automatically added to imported files

Provider DTM Import Settings

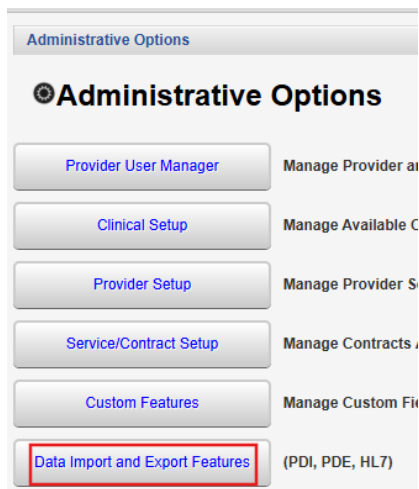
Each provider can have multiple DTM imports, which is beneficial should the settings need to be tailored to specific data sets (i.e., labs), a specific reporting purpose (i.e., RSR), or a specific data file source (i.e., EPIC). The DTM import settings can be configured to allow multiple import files in a single ZIP file. Additionally, the DTM import can be configured to automatically process records when a new file is added to a folder on the server. The import settings can be further tailored to delete temporary records that have been processed and added to client records. These tools automate much of the DTM import process, and users typically only need to address errors related to client matching or field mapping.

How to Create DTM Import Settings

1. Click *Administrative Options*.



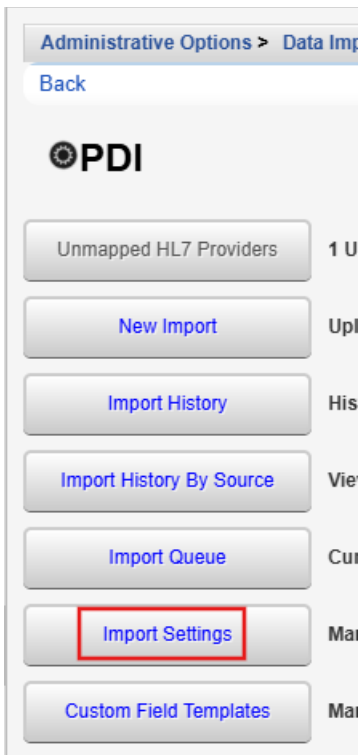
2. Click *Data Import and Export Features*.



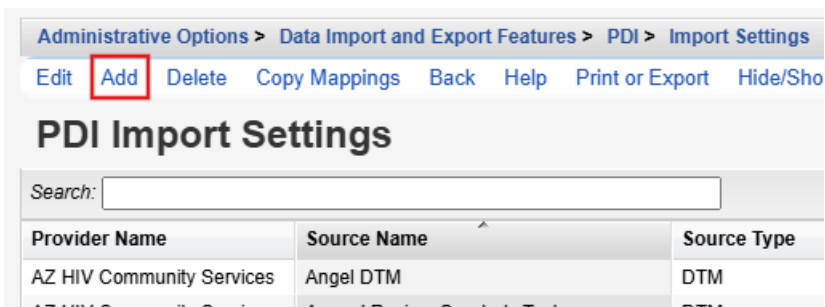
3. Click *Provider Data Import*.



4. Click *Import Settings*.



5. Click *Add*.



6. Select DTM as the Source Type.

[Next](#) [Back](#)

Import Settings

Provider:

Source Type: 

Source Name:

7. Enter the Source Name.

[Next](#) [Back](#)

Import Settings

Provider:

Source Type: 

Source Name:

8. Click *Next*.

[Next](#) [Back](#)

Import Settings

Provider:

Source Type: 

Source Name:

9. Verify the [import settings](#) and click *Save*.

[Save](#) [Configure Service Matching Custom Fields](#) [Configure DTM Specs](#) [Help](#) [Cancel](#)

Import Settings

Provider Name:

Source:

SourceType:

Adding New Clients: 

Client Matching: 

Client Custom Field: 

Updating Client ID:

Updating Demographic Data: 

Update Race: 

Update Risk Factors: 

Update Insurance Types: 

Handling Insurance: 

Block Duplicate Rows: ☐

Days to Block Duplicate Rows:

Number Of Days Used To Determine Drug Overlap:

Service Matching: 

Match Services On Custom Field: ☐

Service Custom Fields Selected:

Configure DTM Specs

The DTM includes a [Configure DTM Specs](#) option that is unique from other import source types.

The screenshot shows a software window titled "Administrative Options > Data Import and Export Features > PDI > Edit". The window has a menu bar with "Save", "Configure Service Matching Custom Fields", "Configure DTM Specs" (highlighted in yellow), "Help", and "Cancel". Below the menu bar, the word "Edit" is displayed in a large, bold font. The main area of the window contains several configuration fields:

- Provider Name:** A text box containing the value "Default".
- Source:** A text box containing the value "Default DTM".
- SourceType:** A text box containing the value "DTM".
- Adding New Clients:** A dropdown menu showing "Automatically Add" with a blue downward arrow icon to its right.
- Client Matching:** A dropdown menu showing "Client ID" with a blue downward arrow icon to its right.
- Client Custom Field:** A text box that is currently empty, with a blue icon to its right.
- Updating Client ID:** A text box containing the value "Always update for non null values".
- Updating Demographic Data:** A dropdown menu showing "Always update" with a blue downward arrow icon to its right.