

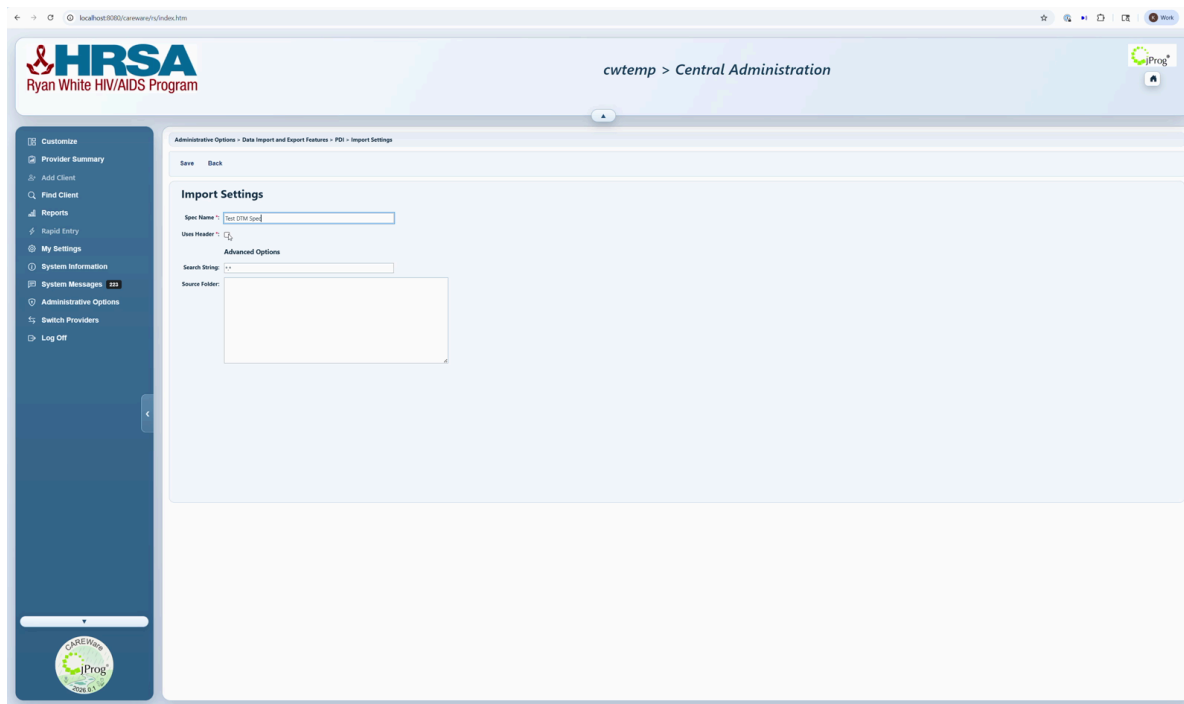
Importing DTM Files

Purpose	Import DTM files after the DTM import setting, DTM Spec, and field mappings are complete.
Who should do this	CAREWare users responsible for uploading or monitoring DTM imports.
Use this guide when	You are ready to import data manually through Provider Data Import or by dropping files in a monitored source folder.
Main warning	Manual imports require exp_provider.csv zipped with the DTM data file. Folder-drop imports exclude exp_provider.csv and use unzipped files.

Quick path

Manual import: [Provider Data Import](#) > [New Import](#) > upload ZIP > review [Import History](#).

Folder import: SFTP or drop unzipped files into the CAREWare server folder > review [Import History](#).



Before you begin

- Confirm the [DTM import setting](#) is saved.
- Confirm the [DTM Spec](#) exists and the file format is mapped.
- For manual imports, know the provider name and Source Name to set exp_provider.csv to point CAREWare to the correct import setting.
- For folder imports, confirm the Source Folder exists on the CAREWare server and the file name includes the Search String as a separate word.

Tip: Use a small test file first. Confirm it reaches [Import History](#) and maps correctly before sending large files or enabling automated processing.

Option 1: Import a zipped DTM file manually

1. Create exp_provider.csv with three columns: prv_pk, prv_name, and prv_source.
2. Enter a 1 under prv_pk.
3. Enter the provider name under prv_name.
4. Enter the exact DTM Source Name under prv_source.
5. Zip exp_provider.csv with the DTM data file or files. Include the search string in the file name.

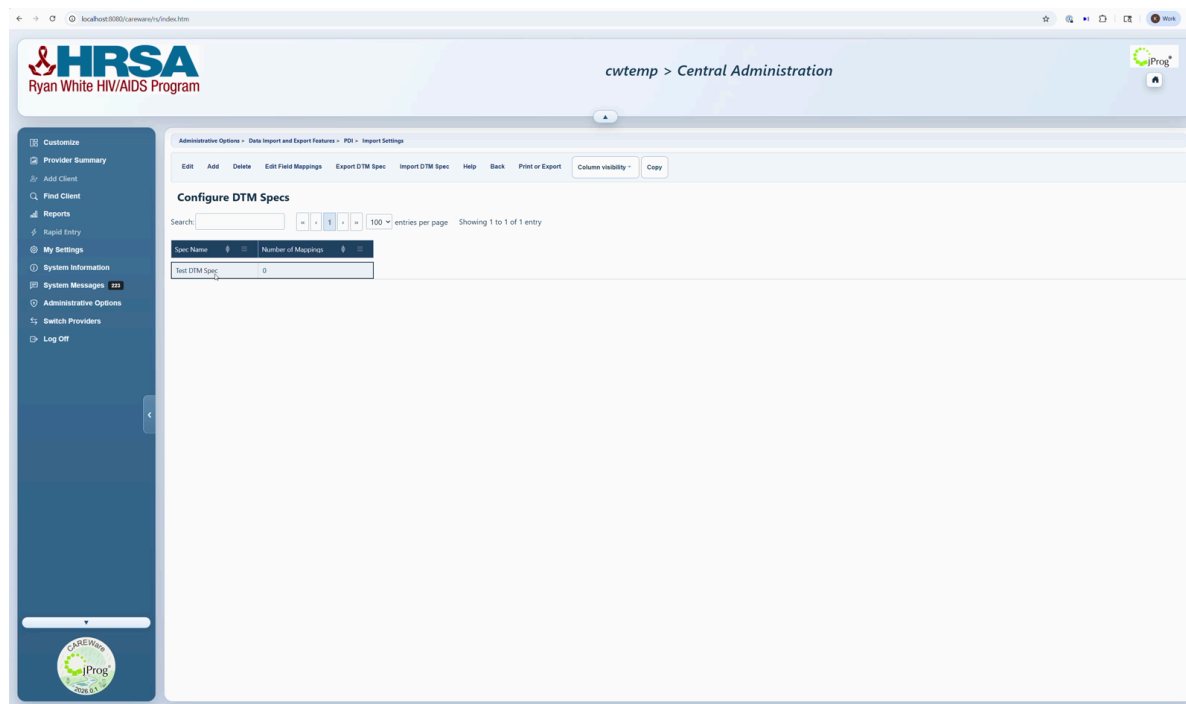
5. In CAREWare, open [Provider Data Import](#).
6. Click [New Import](#).
7. Choose the ZIP file and import it.
8. Open [Import History](#) to review progress, errors, and processing status.

Warning: If prv_source does not match the Source Name in the DTM import setting, CAREWare cannot use the intended DTM settings. If the search string matches more than one DTM Spec in the system, an error may occur.

Option 2: Import through a DTM source folder

1. Confirm the DTM Spec includes a valid Source Folder path on the CAREWare server.
2. Confirm the source file name includes the DTM Spec Search String.
3. Place the unzipped CSV file in the source folder, or send it to that folder by SFTP.
4. Open [Import History](#) to confirm CAREWare detected the file and placed records in the holding tanks.

Warning: Do not include exp_provider.csv for source folder DTM imports.



After the file imports

1. Review the file in [Import History](#).
2. Open Import Details for record counts, missing mappings, or errors.
3. Resolve client matching, value mapping, and field mapping issues.
4. Process records that are Ready to Process unless Automatically Process Imports is enabled and trusted for this setting.
5. Spot-check affected client records.

Related CAREWare guides

[Data Translation Module Import Settings](#) | [Configure DTM Specs](#) | [Edit Field Mappings](#) | [Import DTM Specs](#) | [New Import](#) | [Import History](#) | [Provider Data Import](#)