

# Data Translation Module Import Settings

<b>Purpose</b>	Create the provider-level DTM import setting that controls matching, updating, processing, and automation behavior.
<b>Who should do this</b>	CAREWare administrators or data managers who configure imports for a provider.
<b>Use this guide when</b>	You are setting up DTM for a new provider, source, data set, or automated import workflow.
<b>Main warning</b>	The Source Name must match the prv_source value in exp_provider.csv for manual imports. If it does not match, CAREWare cannot select the intended setting.

## Quick path

Administrative Options > Data Import and Export Features > [Provider Data Import](#) > [Import Settings](#) > Add > Source Type: DTM > Save > [Configure DTM Specs](#).

The screenshot shows the HRSA CAREWare administrative interface. The main content area is titled "PDI Import Settings" and displays a table with the following data:

Provider Name	Source Name	Source Type
Default	LAB/TESTS345	HL7
Default	Default CSV	CAREWare CSV
Default	1100/TESTS345	HL7
ADAP	Default CSV	CAREWare CSV

## Before you begin

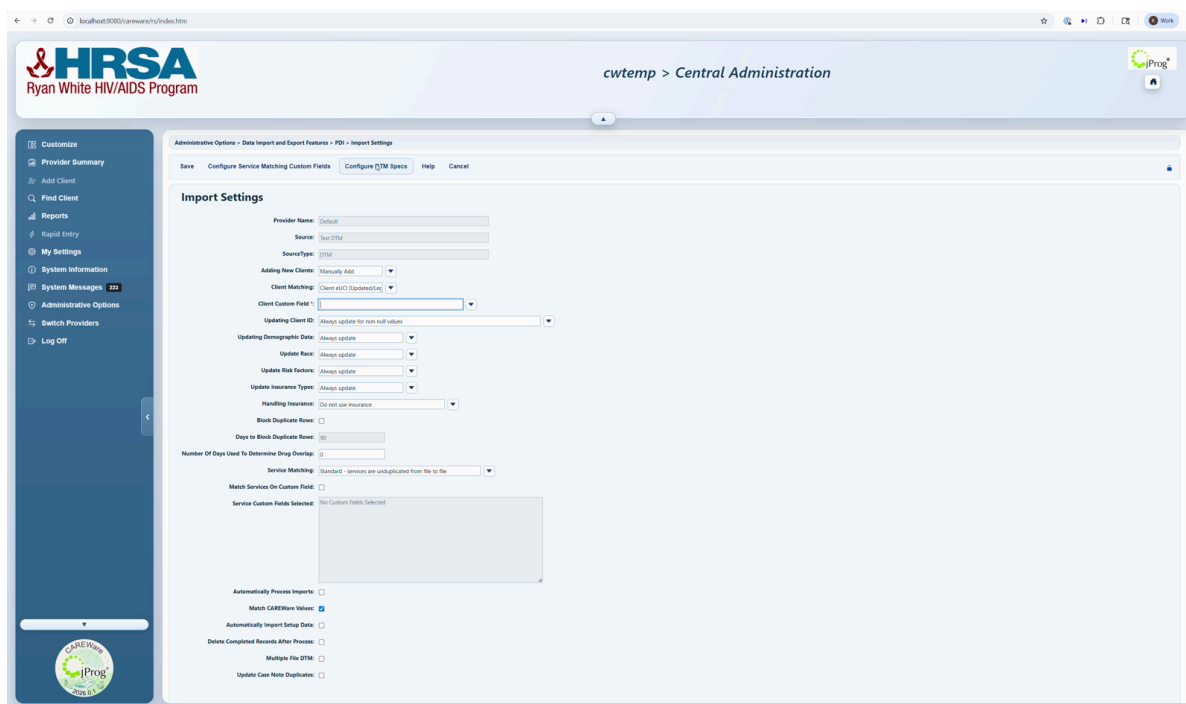
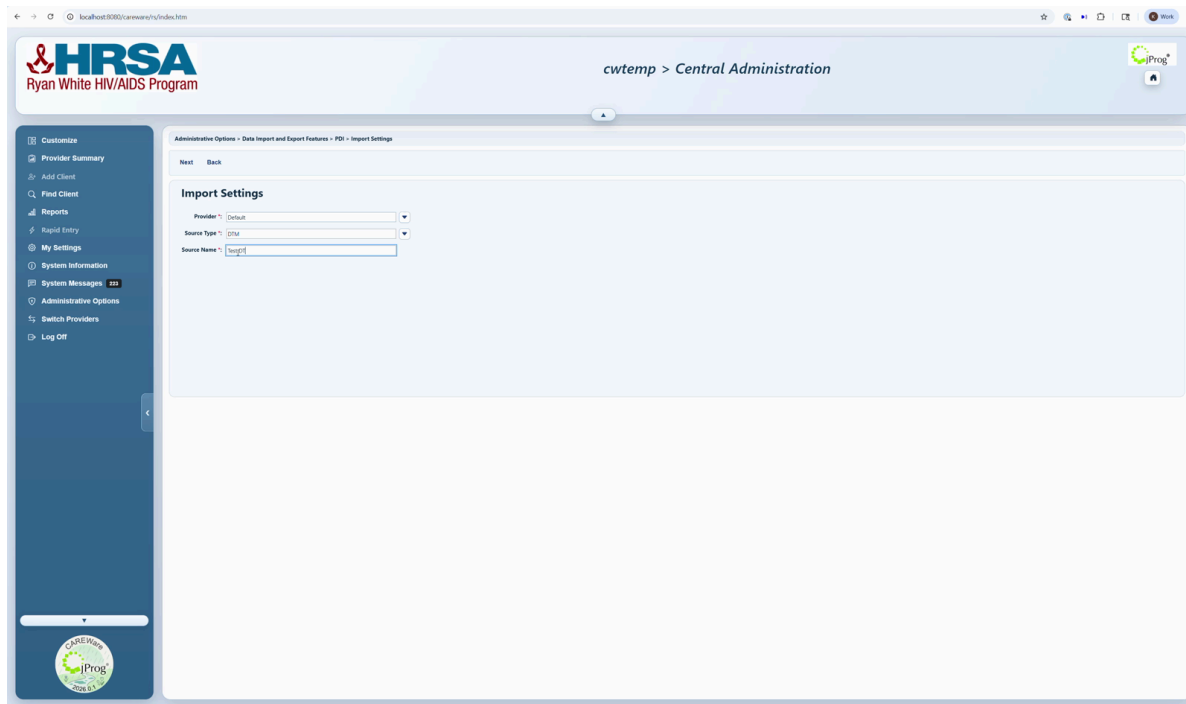
- Know the provider receiving the import.
- Choose a clear Source Name. Use a name that identifies the data source, such as Default DTM, Lab DTM, or EPIC Services.
- Decide whether this source needs unique client matching or update rules. If yes, create a separate DTM import setting for each unique set of import rules.

**Tip:** Each provider can have multiple DTM import settings. Use that flexibility to separate sources, data sets, reporting purposes, and automation folders.

## Create the DTM import setting

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.
7. Enter the Source Name.
8. Click Next.
9. Review the import settings and click Save.
10. Click [Configure DTM Specs](#) to create the file specifications for this setting.



## Helpful settings to review

- Client Matching: choose how CAREWare matches incoming client records, such as legacy URN elements, Client ID, custom field, or State No where applicable.
- Adding New Clients: choose whether new clients are added automatically or handled manually.

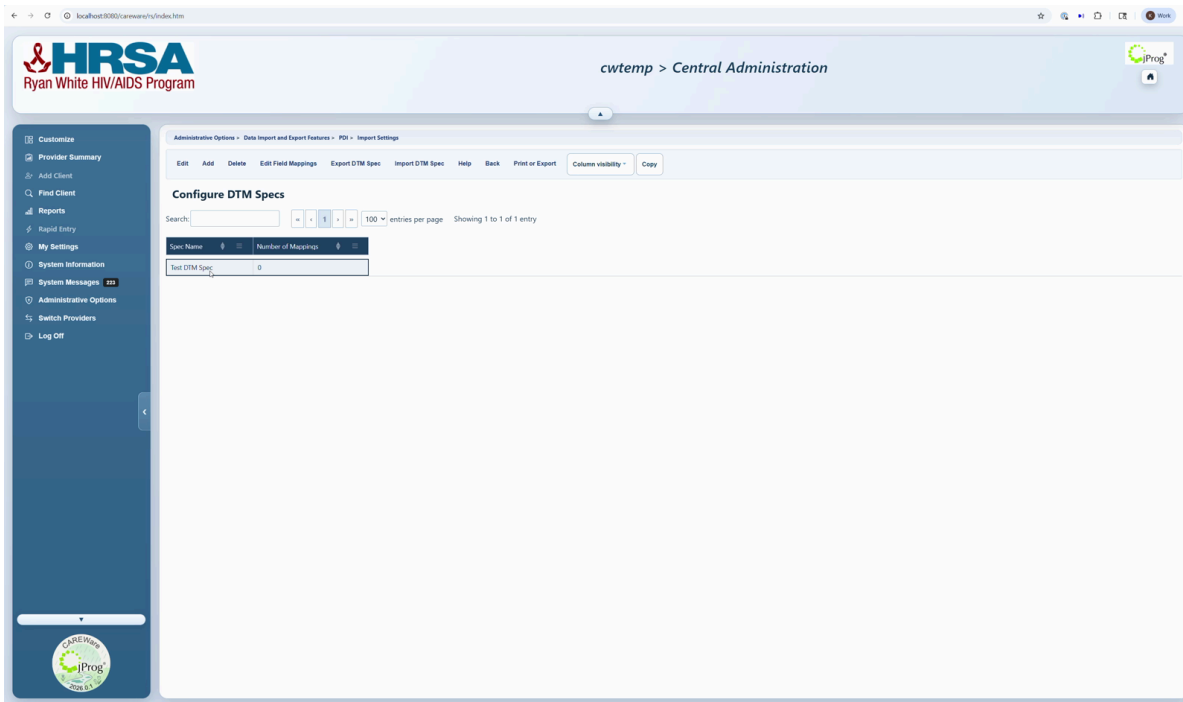
- Automatically Process Imports: use only after mappings and matching rules have been tested.
- Delete Completed Records after Process: use when you want completed temporary holding-tank records purged after successful processing.
- Block Duplicate Rows: consider this if duplicate file names or records are a recurring issue.
- Multiple File DTM: Allows multiple files using the same DTM Specifications to be imported using a single zipped file.

**Warning:** For demographic updates, incoming blank values do not delete existing CAREWare values. Review update rules so staff know which source is allowed to change existing data.

**Warning:** Block Duplicate Rows can remove imported files from the list without a prompt. Test this option before using it in production automation.

## After saving

1. Confirm the setting appears in the Import Settings list.
2. Open [Configure DTM Specs](#) from the DTM setting.
3. Create at least one DTM Spec for the source file format.
4. [Edit Field Mappings](#) for the sample file.



## How to confirm it worked

1. For a manual import, confirm exp\_provider.csv contains the provider name and the exact Source Name in prv\_source.
2. For folder imports, confirm the DTM Spec has the correct Source Folder and Search String.
3. Run a small test file and review [Import History](#) for status, errors, and mapping results.

## Related CAREWare guides

[Import Settings](#) | [Configure DTM Specs](#) | [Edit Field Mappings](#) | [Importing DTM Files](#) | [Provider Data Import](#) | [Import History](#)