

Data Translation Module

Purpose	Understand the DTM workflow for importing flat CSV or delimited reports into CAREWare through Provider Data Import .
Who should do this	CAREWare administrators, data managers, and staff who prepare EMR, lab, spreadsheet, or custom report imports.
Use this guide when	You need the short end-to-end workflow before using Data Translation Module Import Settings , Configure DTM Specs , Edit Field Mappings , and Importing DTM Files .
Main warning	Once mappings are built, future imports must keep the same column headers and column order. If the source file changes, remap the sample file before importing again.

Quick path

Create a DTM Import Setting > [Configure DTM Specs](#) > [Edit Field Mappings](#) > Import the DTM files > Monitor [Import History](#).

[Video Walk Through](#)

Before you begin

- Confirm the source data is a flat CSV or delimited report from an EMR, CAREWare custom report, lab system, or spreadsheet.
- Decide whether the source should have its own DTM import setting. Use a separate setting when matching rules, update rules, data source, or automation folder differs.
- Identify which CAREWare CSV fields the incoming columns should become. The [CAREWare CSV Specifications](#) guide is the reference for target field names.

Tip: The current DTM is built into CAREWare. It can upload CSV files directly into CAREWare without converting files outside CAREWare first.

Import DTM data

1. Create a [Data Translation Module Import Setting](#) for the provider and source.
2. [Configure DTM Specs](#) for each file type or data type that uses the setting.
3. [Edit Field Mappings](#) so each incoming source column maps to the correct CAREWare CSV template field.
4. Import the DTM files manually through [New Import](#), or place matching files in the DTM source folder when automated folder processing is configured.
5. Open [Import History](#) to confirm the file reached the holding tanks, then resolve client matching, value mapping, or field mapping errors as needed.

Warning: Do not use one catch-all setup when sources need different client matching or update rules. Separate DTM import settings are safer than changing settings manually before each import, especially for automated imports.

Helpful mapping example

A source file may have friendly headers such as Service Name, Lab Date, or Insurance Name. In DTM, map only the fields CAREWare should import. Unmapped columns are skipped.

- Service Name -> srv_cs_1_def_code
- Service Date -> srv_date
- Lab Name -> tst_cs_1_def_code
- Lab Date -> tst_date
- Insurance Name -> ins_as_cs_1_def_code

- Insurance Start Date -> ins_as_date

Tip: Only required fields need to be mapped in the DTM. Columns with fields that are not required can remain unmapped.

How to confirm it worked

1. Review [Import History](#) for the imported file and status counts.
2. Open Import Details for records with errors or missing mappings.
3. Resolve errors and process ready records.
4. Spot-check the client record to confirm the expected demographics, services, labs, insurance, or other data were added or updated.

Related CAREWare guides

[Data Translation Module Import Settings](#) | [Configure DTM Specs](#) | [Edit Field Mappings](#) | [Importing DTM Files](#) | [CAREWare CSV Specifications](#) | [Provider Data Import](#) | [Import History](#)