New Export

Purpose	Create a one-time Provider Data Export using selected tables, dates, providers, filters, and export format.
Who should do this	CAREWare administrators, data managers, or staff responsible for reporting and data exchange.
Use this guide when you need to	Export clinical or setup data as CSV files or to SQL PDE/PDI for reporting, reconciliation, or system synchronization.
Main warning	Coordinate the Client Match Field with the receiving import settings. Use current CSV or SQL options for new workflows

Quick path

Path: Administrative Options > Data Import and Export Features > Provider Data Export > New Export

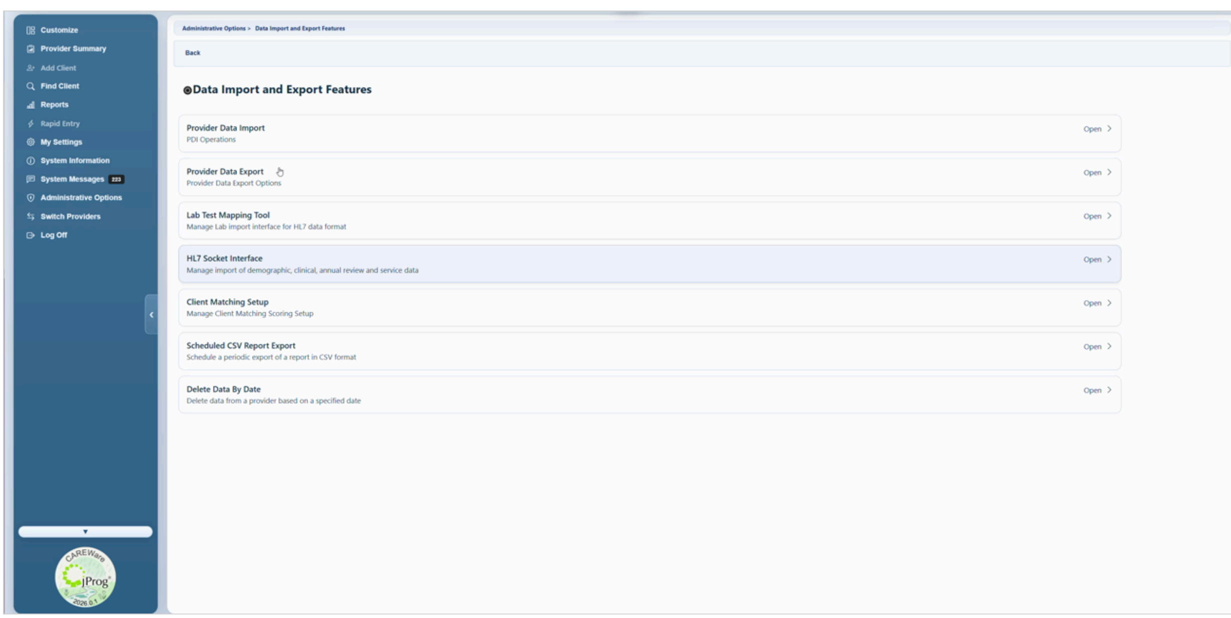
Video walkthrough: New Export

Before you begin

Decide the export format, output file name, date span, client match field, and the client-level tables to include. If the export is to be imported into another CAREWare instance, confirm the receiving system import settings first.

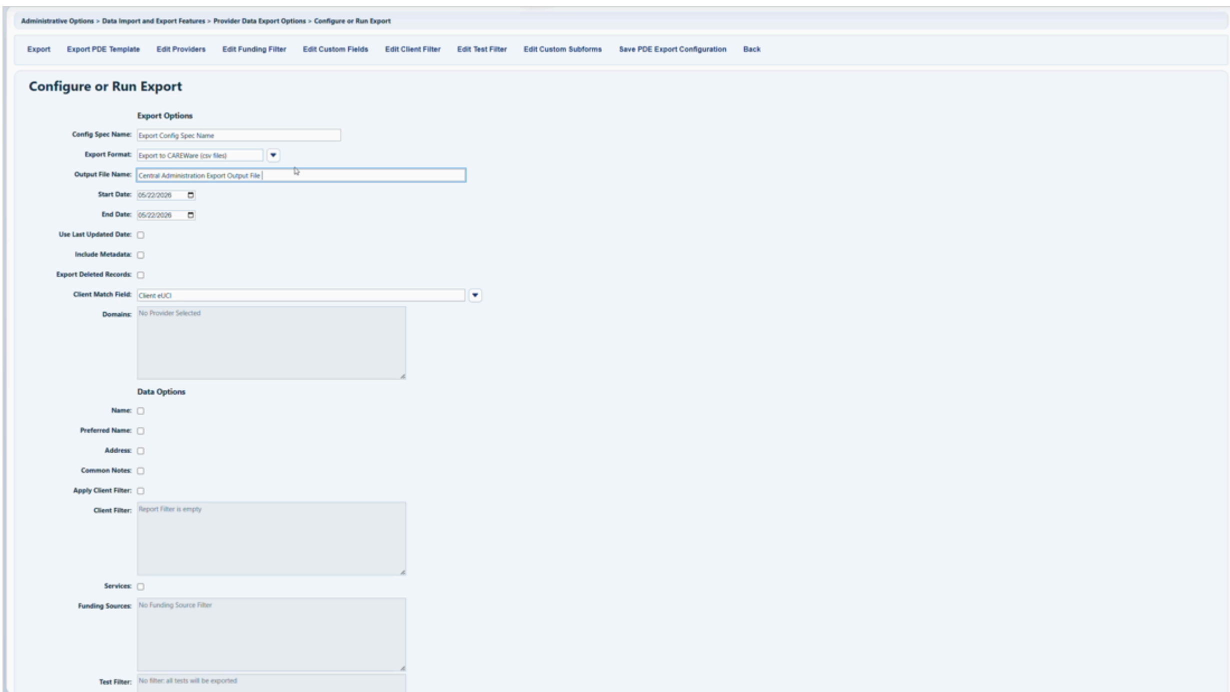
Important

If Use Last Updated Date is checked, CAREWare includes records edited during the date span, not necessarily records dated during the date span. This can change counts in the export.



Create the export

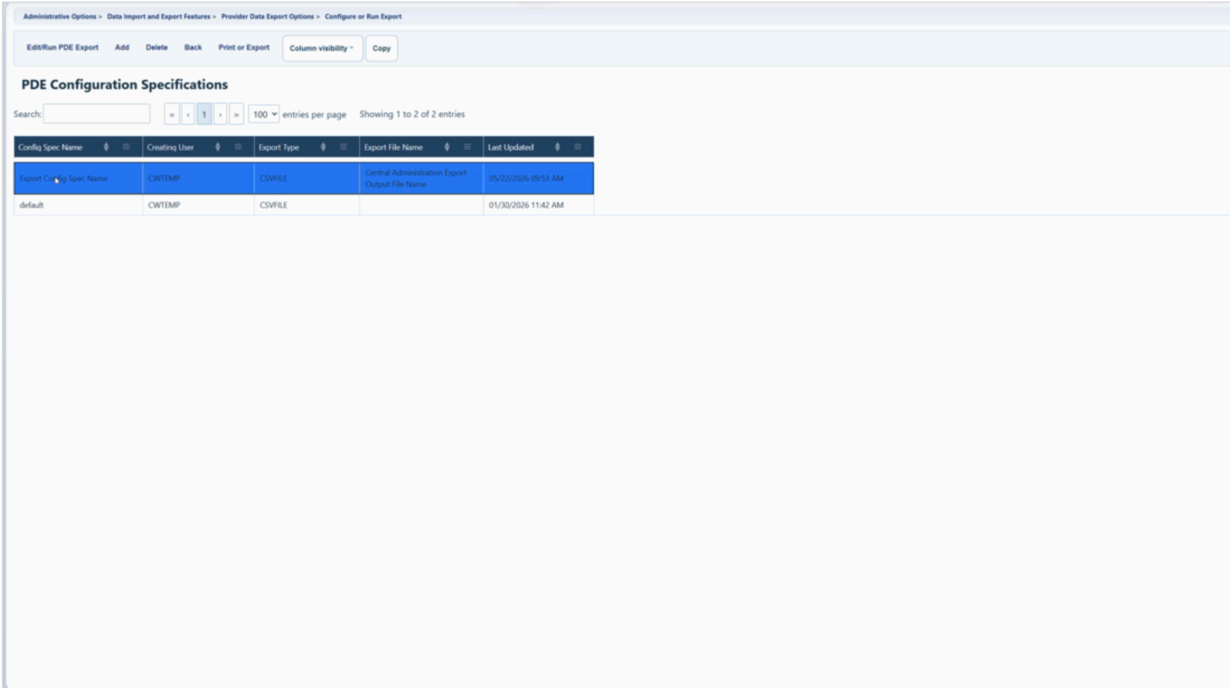
1. **Click** Administrative Options.
2. **Click** Data Import and Export Features.
3. **Click** Provider Data Export.
4. **Click** New Export.
5. **Select** the Export Format. Use CSV files for a zipped export or SQL PDE/PDI for database-based workflows.
6. **Enter** an Output File Name. This becomes the downloaded file or export label.
7. **Select** the Start Date and End Date. If only Name is selected and you need a full client list, leave the date span blank.
8. **Choose** optional settings such as Use Last Updated Date, Include Metadata, or Export Deleted Records. Export Deleted Records applies to SQL exports only.
9. **Select** the Client Match Field, such as Client eUCI, Client ID, or an active custom client field.
10. **Check** each data option to include in the export.
11. **Click** Export.
12. **Click** Download Export File when the export is ready.



Optional filters and customization

- **Multiple providers:** In Central Administration, click Edit Providers, check each provider, and click Save. CAREWare creates a separate zipped folder for each selected provider.
- **Client filter:** Click Edit Client Filter, add the demographic filter, save it, return to the export page, and check Apply Client Filter.
- **Funding filter:** Click Edit Funding Filter, check the funding sources, click Save, and check Services on the export page.
- **Test filter:** Click Edit Test Filter, check the tests, click Save, and check Labs/Screenings/Screening Labs.
- **Custom fields:** Click Edit Custom Fields, select fields from the correct location, click Save, and check Custom Fields.
- **Custom subforms:** Click Edit Custom Subforms, select the subforms, click Save, and check Custom Subforms.

Tip: Use Export History after the export runs to confirm the provider, date span, user, and table counts.



How to confirm it worked

1. **Open** the downloaded ZIP file and confirm the data is populated in the CSV tables or confirm the SQL export tables were updated in the cw_pdi database.
2. **Review** the exported table files or SQL tables for the expected data elements.
3. **Open** Export History and compare the table counts to the date span and filters you selected.

Troubleshooting and common questions

- **Why are records missing?** Check the date span, the table critical date, Use Last Updated Date, and whether the table checkbox was selected.
- **Why are service counts lower than expected?** Check the funding filter and whether Services was checked after the filter was saved. Run a financial report for the same date span to compare the counts.
- **Why did the receiving system not match clients?** Confirm that the exported Client Match Field matches the client matching option in Import Settings.

Related guides

Export History | Scheduled Exports | Export PDE Template | Import Settings | CAREWare CSV Specifications | Exporting Data Out of CAREWare