

Exporting Data Out of CAREWare

Purpose	Export data from CAREWare for reporting, data exchange, reconciliation, or system synchronization.
Who should do this	CAREWare administrators, data managers, or staff responsible for reporting and data exchange.
Use this guide when you need to	Create a one-time Provider Data Export, review export history, export a list or report, or set up a recurring export.
Main warning	Coordinate the Client Match Field with the receiving import settings. Use current CSV or SQL options for new workflows.

Before you begin

Decide what kind of export you need, what date span to use, which client match field to include, and which tables or filters belong in the export.

- For a one-time clinical or setup export, use Provider Data Export (PDE).
- For scheduled table exports, use Scheduled Exports under Provider Data Export.
- For a recurring custom report file, use Scheduled CSV Report Export.
- For a quick list export, use Print or Export on the list page and choose CSV.

Warning: Do not build new workflows around MDB exports. Use CAREWare CSV Template or SQL PDE/PDI options for current export workflows.

Export Options

Method	Use when	Output or note
Provider Data Export (PDE)	You need selected client-level tables, setup data, filters, or a file for another CAREWare instance.	CSV or SQL format
SQL export	A reporting database, bridge, or downstream system will read the exported tables directly.	Records are exported to the cw_pdi database.
Custom Reports	You need custom columns or report-specific headers.	Export from a custom report or schedule as a CSV report export.
Print or Export	You need a quick CSV from a CAREWare list.	Uses the list columns as CSV headers.

Important: Scheduled export files are written to the folder set in [Common Storage Values](#) for PDI_ExportDirectory. That folder is on the CAREWare Business Tier server, not necessarily on your workstation.

Troubleshooting and common questions

Issue	What to check
Records are missing	Check the date span, the table critical date, Use Last Updated Date, and whether the table checkbox was selected.
Service counts are lower than expected	Check the funding filter and confirm Services was checked after the filter was saved. Run financial report to compare.
Clients did not match in the receiving system	Compare the exported Client Match Field to the receiving provider Client Matching setting in Import Settings .
Custom fields are missing	Confirm Custom Fields was checked and the correct table/location was selected. Custom field columns export with a cst_ prefix.
Scheduled export file is not where expected	Check the PDI_ExportDirectory setting on the CAREWare Business Tier server.
CSV report schedule did not run on the expected day	Check the Repeat Type and selected days. Daily with no checked days runs every day.

Related User Guides

[New Export](#) [Export History](#) [Scheduled Exports](#) [Scheduled CSV Report Data Export](#)
[Instructions for Data Bridge Using PDI PDE](#) [Export PDE Template](#)
[Transitioning to current import and export options in CAREWare](#)