

# Instructions for Data Bridge Using PDI PDE

<b>Purpose</b>	Create a repeatable bridge workflow that moves data from a sending provider to a receiving CAREWare provider.
<b>Who should do this</b>	CAREWare administrators, state/provider data managers, or interface staff responsible for data exchange.
<b>Use this guide when you need to</b>	Send a zipped Provider Data Export to another CAREWare server and import it with Provider Data Import.
<b>Main warning</b>	The receiving CAREWare server must already have the sending provider set up, and import settings should be reviewed before importing the ZIP file.

## Quick path

**Path:** Sending provider: Administrative Options > Data Import and Export Features > Provider Data Export > [New Export](#).  
Receiving provider: Administrative Options > Data Import and Export Features > Provider Data Import > [New Import](#).

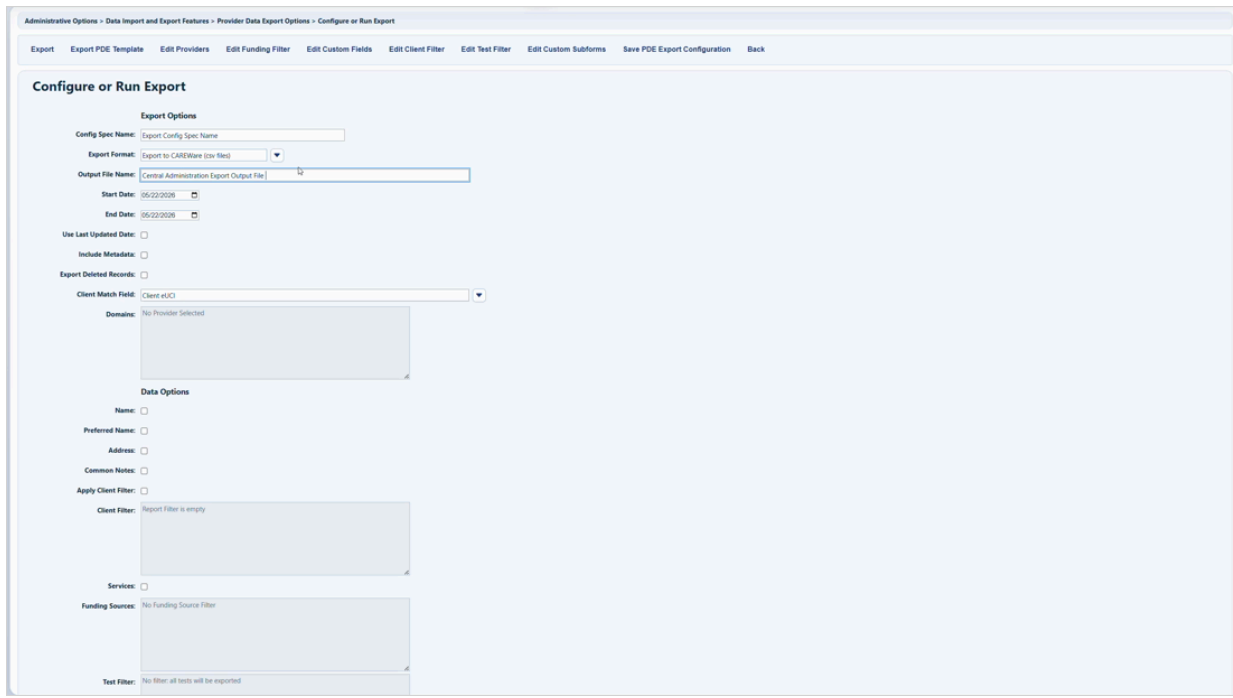
## Before you begin

Confirm the receiving server has a provider for the provider sending the data. Review [Import Settings](#) in the receiving provider before importing the ZIP file.

**Important:** For bridge imports, set the receiving provider import settings to Match CAREWare Values and Automatically Import Setup Data. If the data quality is trusted, enable Automatically Process Imports.

## Export from the sending provider

1. **Log into** the sending provider.
2. **Click** Administrative Options.
3. **Click** Data Import and Export Features.
4. **Click** Provider Data Export.
5. **Click** New Export.
6. **Select** the export settings and tables needed for the reporting year or bridge workflow.
7. **Click** Export.
8. **Click** Download Export File to save the zipped CSV export.



Provider Data Export configuration screen from the New Export source video.

## Import into the receiving provider

1. **Log into** the provider in the receiving or state server.
2. **Confirm** Import Settings are set for the bridge workflow.
3. **Click** Administrative Options.
4. **Click** Data Import and Export Features.
5. **Click** Provider Data Import.
6. **Click** New Import.
7. **Click** Choose File.
8. **Select** the zipped CSV file exported from the sending provider.
9. **Click** Open.
10. **Click** Import File.

**Tip:** When reviewing the files, prior to importing them, make sure to correct any [leading zeros](#) dropped by Excel before zipping the files again and importing them.

## After the file uploads

1. **Validate** the imported records.
2. **Resolve** errors and complete mappings as needed.
3. **Process** the validated file according to your organization's import procedure.
4. **Review** import results and compare expected counts to the sending export.

## Troubleshooting and common questions

- **Why can't I import the file?** Confirm the receiving provider exists and that you selected the original zipped export file.
- **Why are setup values not mapping?** Review Import Settings and confirm Match CAREWare Values and Automatically Import Setup Data are set as needed.

- **Why did clients not match?** Compare the exported Client Match Field to the receiving provider client matching settings.

## Related guides

[New Export](#) | [Provider Data Import](#) | [Import Settings](#) | [CAREWare CSV Specifications](#)