

Importing Data into CAREWare

Purpose	Summarize the main import options
Who should do this	CAREWare administrators, data managers, and interface staff planning an import process.
Use this guide when you need to	Decide whether to use PDI, SQL PDI, DTM, FHIR, or HL7 for incoming data.
Main warning	Do not continue legacy MDB import/export workflows; rebuild them with current CSV, SQL PDI/PDE, DTM, FHIR, or HL7 Interface options

Quick path

Administrative Options > Data Import and Export Features > Provider Data Import

Before you begin

- Identify the data source, file format, schedule, client matching field, and if the process should be automated.
- Confirm the user has the permissions required for the selected import method.
- Configure Import Settings before uploading or automating files.

Important

The CAREWare FHIR Interface involves complex setup, which requires a [support](#) contract with jProg.

Open the import features menu

1. Click Administrative Options.
2. Click Data Import and Export Features.
3. Click Provider Data Import.

Administrative Options > Data Import and Export Features > PDI

Back

PDI

- New Import**
Upload files to create a new import Open >
- Import History**
History of imports Open >
- Import History By Provider**
View import data and manage mappings by Provider Open >
- Import Queue**
Current import and imports waiting to process Open >
- Import Settings**
Manage import settings for Provider/Sources Open >
- Custom Field Templates**
Manage Custom Field Templates Open >
- Mapped Providers**
4 Mapped Providers Open >
- Scheduling Options**
Set up daily task schedules Open >
- SQL Server Import**
Configure PDI to import from SQL Server Open >

Choose an import method

Method	Best use	User Guide	Specifications
CAREWae CSV	Clinical data from other CAREWare systems or EHR's.	New Import	CAREWare CSV
SQL PDI	Scheduled import/export using the cw_pdi SQL Server database.	SQL Server Import	SQL Template
Data Translation Module (DTM)	Flat CSV or delimited files exported from non-CAREWare systems like EHR's.	Data Translation Module	CAREWare CSV
FHIR Interface	Server-to-server API data retrieval from supported EHR/EMR/lab systems.	CAREWare FHIR	
HL7 Interface	HL7 messages such as hospital admissions, diagnoses, tests, and appointments.	HL7 Socket Interface	HL7 Import Specifications

Recommended starting point

1. Select the method and review the import specifications for that method.
2. Create [Import Settings](#) for that method based on the expected incoming data.
3. Upload a small test file with [New Import](#).
4. Review the [Import History](#).
5. Resolve mappings and matching issues before processing the files to add the records..

How to confirm it worked

1. You know which import method applies to the source data.

2. The provider has a matching [Import Settings](#) or interface configuration.
3. The first test import reaches [Import History](#) and can be reviewed.

Troubleshooting and common questions

Which method should I use for a spreadsheet?

Use DTM when the spreadsheet or flat file needs fields mapped to the CAREWare CSV template. Use CAREWare CSV when the file already matches the CAREWare template.

Where do I find PDI field details?

Use the [CAREWare CSV Specifications](#) and related field maps for specific elements.

Why is the file I imported missing from Import History?

There may be an error, check the [Import History](#) from Central Administration and check the [System Log](#) for import errors.

Related guides

[Provider Data Import](#) | [Import Settings](#) | [New Import](#) | [Import History](#) | [SQL Server Import](#) | [CAREWare CSV Specifications](#) | [Data Translation Module](#)