

# Provider Data Import

<b>Purpose</b>	Understand the Provider Data Import workflow and where the main PDI tools are located.
<b>Who should do this</b>	CAREWare administrators, data managers, and staff who import data from external systems or other CAREWare servers.
<b>Use Provider Data Import when you need to</b>	Upload PDI files, review holding tank records, complete mappings, and process imports.
<b>Main warning</b>	Do not process an import until errors, missing mappings, and client matching issues have been reviewed.

## Quick path

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

## Before you begin

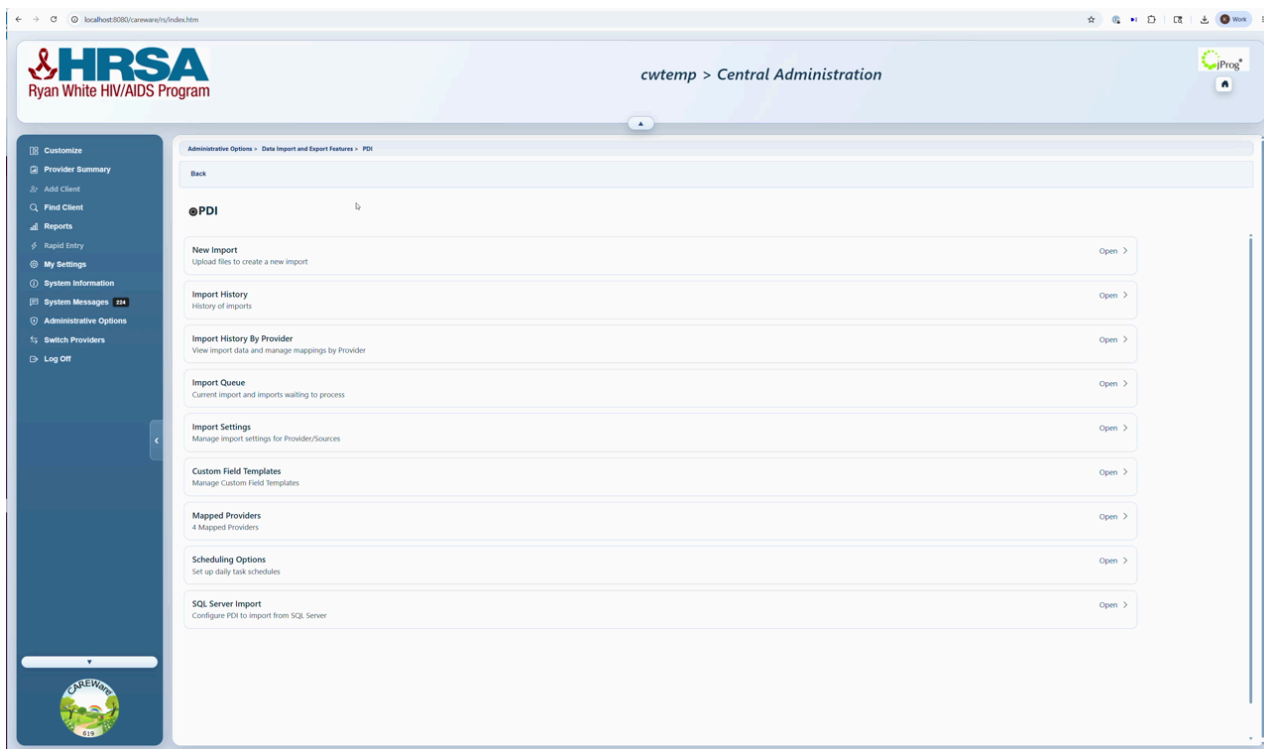
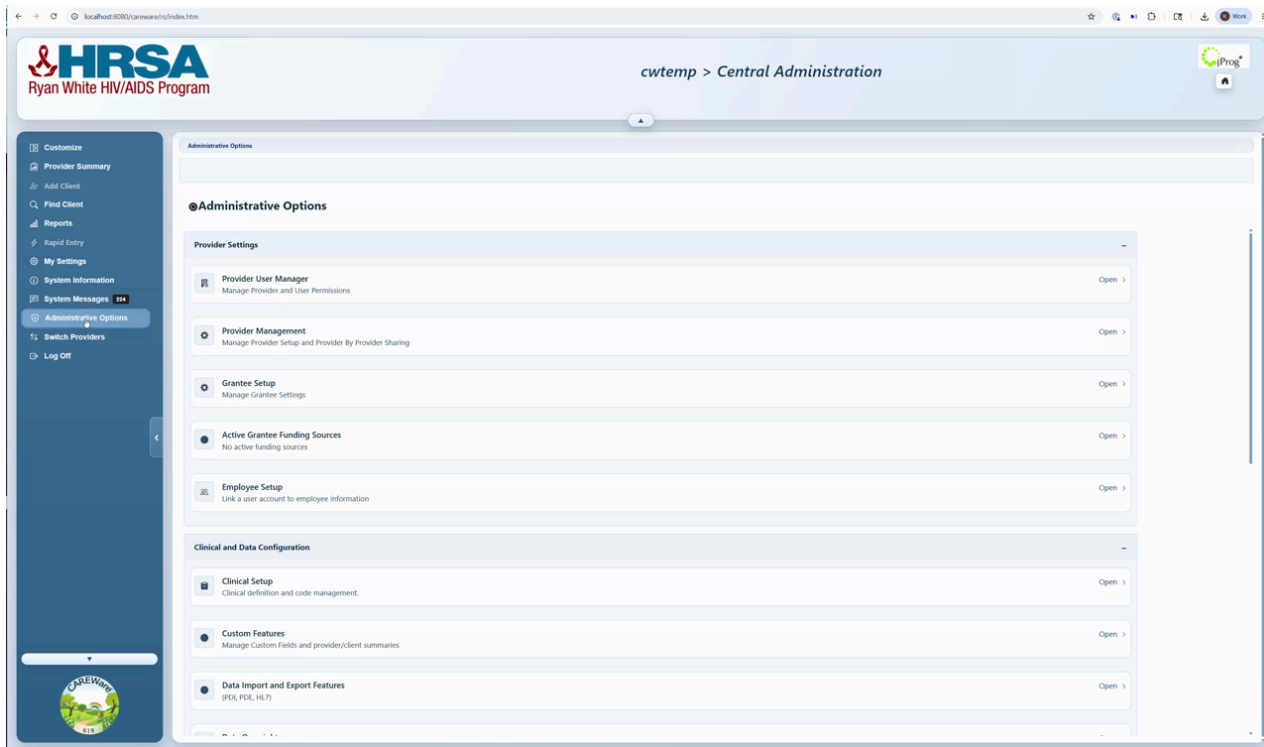
- You need [permission](#) to access Administrative Options and Data Import and Export Features.
- Confirm the import file is in a supported format and that the provider has the correct [Import Settings](#) for the Source Name in the exp\_provider table.
- Perform a quality check in the files intended to be imported to remove duplicate records, ensure dates are in the correct format DD/MM/YYYY, and that leading zeros are present for data elements that require them.

## Important

PDI can process valid records and flag individual records with errors. Always review [Import History](#) and Import Details before deciding that an import is complete.

## Open Provider Data Import

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



## Understand the workflow

1. Configure [Import Settings](#) for the provider and Source Name.
2. Create a [New Import](#) or use an [automated](#) import folder.
3. CAREWare validates the file and places records in holding tanks.

- Review [Import History](#) and Import Details for errors, missing mappings, and client matching.
- Recheck the import after corrections, then process records that are Ready to Process.

## Common PDI tools

Tool	What it does	Use it when
<a href="#">New Import</a>	Uploads a PDI file and starts validation.	You have a ZIP or supported import file ready.
<a href="#">Import History</a>	Lists imports and opens Import Details.	You need to review, process, undo, or troubleshoot an import.
<a href="#">Import Settings</a>	Defines source type, matching, updating, automation, and setup data behavior.	You are preparing a provider/source for imports.
<a href="#">Custom Field Templates</a>	Controls which custom fields appear in import/export templates.	You need custom field columns in PDI templates.
<a href="#">Mapped Providers</a>	Maps incoming provider names to CAREWare providers.	A file cannot continue because the provider is unmapped.
<a href="#">Scheduling Options</a>	Sets automated PDI processing windows.	Files will be dropped into the automatic import folder.
<a href="#">SQL Server Import</a>	Enables SQL PDI using the cw_pdi database.	Data will be imported or exported through SQL.

## How to confirm it worked

- Open Provider Data Import and confirm the expected PDI options appear.
- Open Import History and verify imported files appear after upload or automation.
- Open Import Details and confirm records are Ready to Process or that errors are listed for correction.

## Troubleshooting and common questions

### Why are there errors if some records processed?

PDI is designed to process what it can and flag individual records that need review.

### Where should I look for errors?

Start with Import Details, then review Error Details, Status Log, and the [System Log](#) when needed.

### The instructions were following, however nothing appeared in the Import History

Check the [Import History](#) in Central Administration, look for unmapped providers. Make sure the exp\_provider file was included in the zipped folder with the client level data. Make sure the correct provider name and [import setting](#) source name was listed in the exp\_provider.csv file.

## Related guides

[Import Settings](#) | [New Import](#) | [Import History](#) | [PDI Automatic Imports](#) | [SQL Server Import](#) | [System Log](#)