

# New Import

<b>Purpose</b>	Create a new import from a PDI file after the provider Import Settings are configured.
<b>Who should do this</b>	CAREWare administrators and data managers responsible for uploading import files.
<b>Use New Import when you need to</b>	Upload a ZIP or supported import file, monitor validation, and route the file to Import History.
<b>Main warning</b>	If the incoming provider name does not match a CAREWare provider, complete provider mapping before the import can continue.

## Quick path

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

## Before you begin

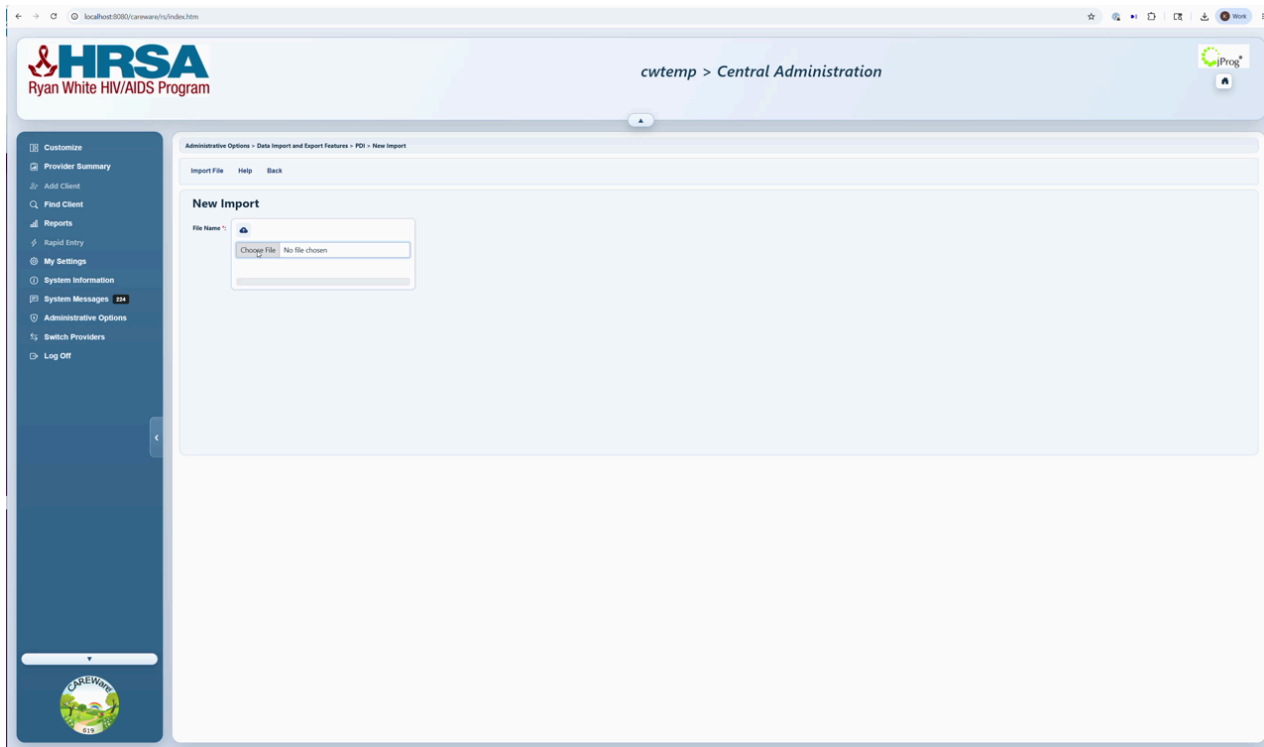
- Configure [Import Settings](#) for the provider and Source Name before uploading the file.
- Confirm the file is complete and includes required tables, such as exp\_provider for most imports.
- Use a small test file before processing a large production import.

## Important

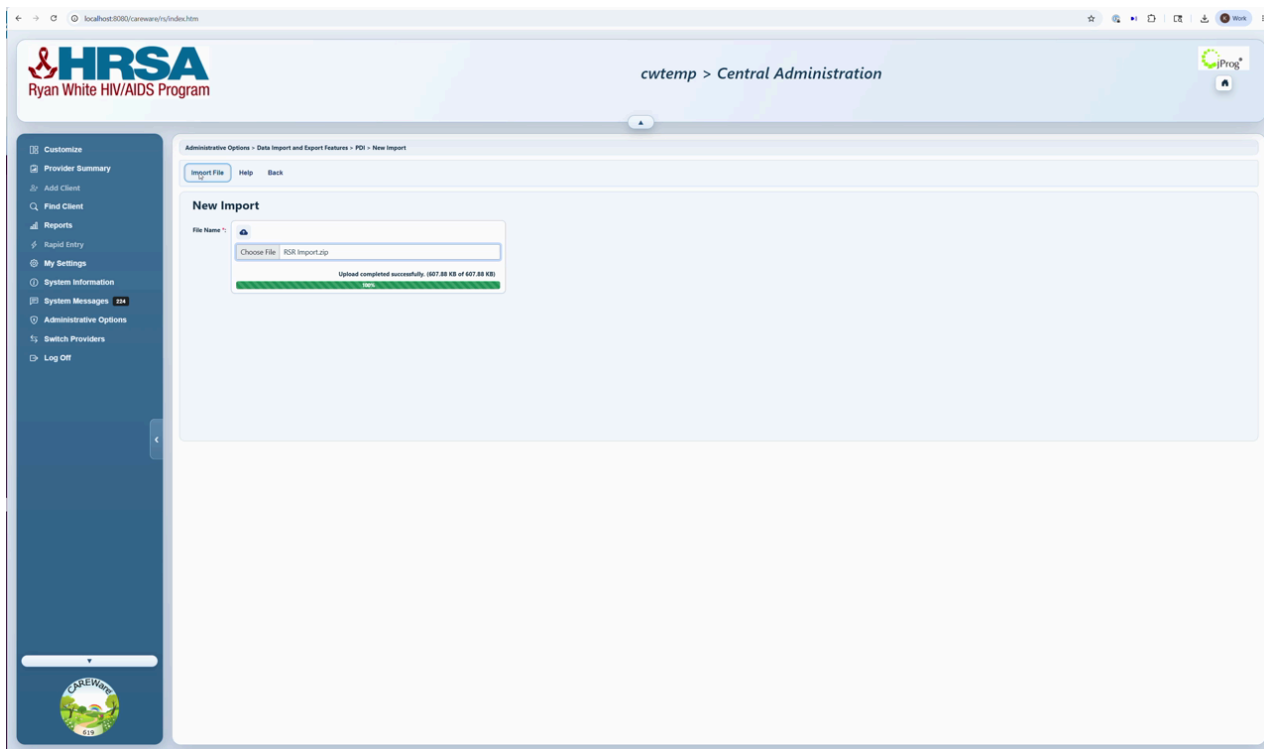
Cancel Import stops validation and removes the file from the import list. Back leaves the page while the import process continues.

## Upload an import file

1. Click Administrative Options.
2. Click Data Import and Export Features.
3. Click Provider Data Import.
4. Click New Import.
5. Click Choose File.
6. Select the import file.
7. Click Open.
8. Wait for the Upload Completed Successfully message.
9. Click Import File.
10. Click Refresh to update the status.
11. Click Back once the file is removed from the queue.



*New Import page to browse to import file*



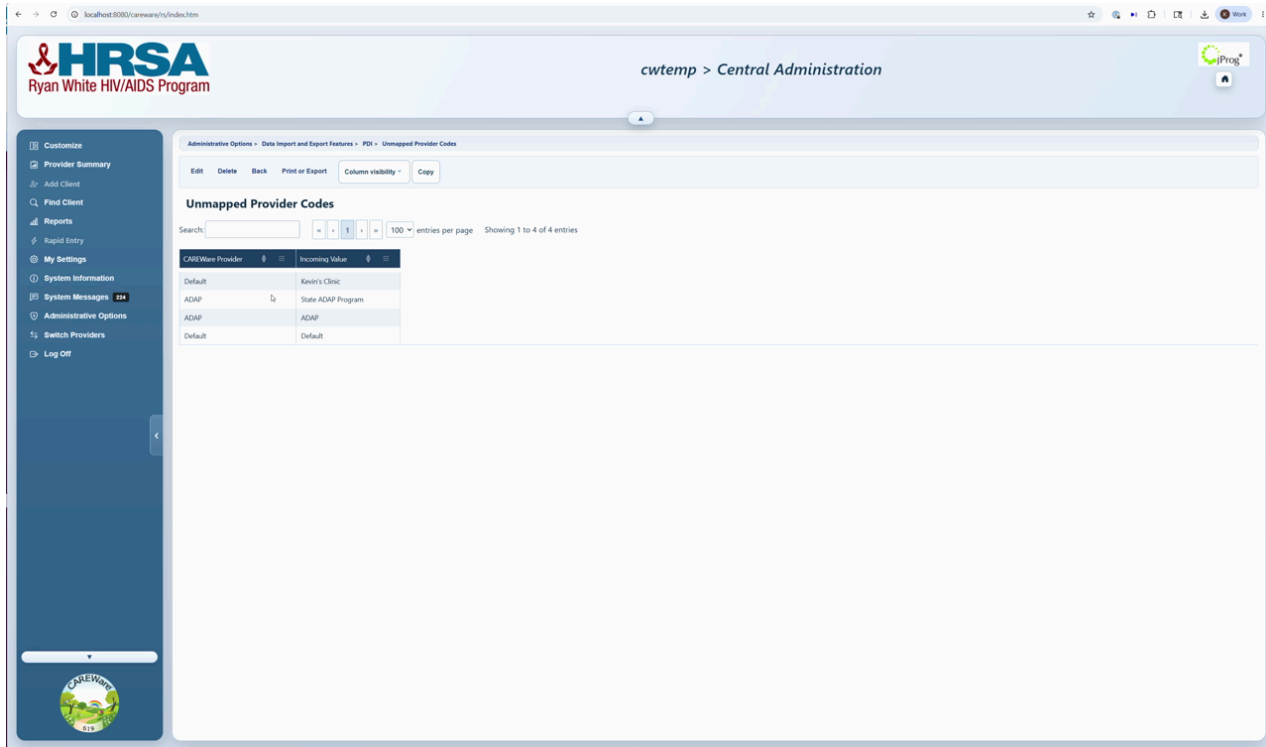
*New Import page success message for uploaded file*

## Map an unmapped provider

If the provider name in the import file does not match a CAREWare provider, an unmapped provider option appears in the PDI menu.

1. Click Unmapped Providers.

2. Click the Incoming Provider.
3. Click Edit.
4. Click CAREWare Provider.
5. Select the correct provider.
6. Click Save.



*Unmapped Provider Codes screen for mapping providers*

## Import Queue options

Option	What it does	When to use it
Refresh	Displays the current status.	Use while validation is running.
Cancel Import	Stops validation and removes the file from the list.	Use when the wrong file was uploaded.
Back	Returns to the previous menu while processing continues.	Use after confirming the file is queued.
Print or Export	Exports the queue list.	Use for documentation or troubleshooting.

## How to confirm it worked

1. Open [Import History](#).
2. Confirm the uploaded file appears with the expected provider, source, file name, and status.
3. Open [Import Details](#) to review errors, mappings, and records ready to process.

## Troubleshooting and common questions

**The file stays in the queue. What should I do?**

Click Refresh and review the status. Verify the count changes or the table changes. If not, restart the [CAREWare Business Tier](#) service.

**The provider is wrong. What should I check?**

Confirm the provider name in exp\_provider and the provider mapping in CAREWare.

**The file was imported, however it is missing from 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

Guide	Description
<a href="#">Import Settings</a>	Configures settings for the provider and Source Name before uploading a file.
<a href="#">Import History</a>	Allows confirmation of uploaded files (provider, source, status) and review of import details, errors, and mappings.
<a href="#">Provider Data Import</a>	The overall feature for managing provider data imports (PDI) and creating new imports.
<a href="#">Creating PDI files with Attachments</a>	Guidance on creating PDI files that include attachments.