

Import Settings

Purpose	Set matching, updating, value handling, service options, ADAP options, and automation behavior before importing data.
Who should do this	CAREWare administrators and data managers who configure provider import sources.
Use Import Settings when you need to	Create or edit the rules that CAREWare uses when validating and processing PDI records.
Main warning	Import Settings directly affect whether clients are added, matched, updated, skipped, or processed automatically.

Quick path

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

Before you begin

- Know the provider, Source Name, and Source Type for the import.
- The Source Name should match the data source name in the exp_provider table of the import file.
- Review the settings before running a production import or enabling automation.

Important

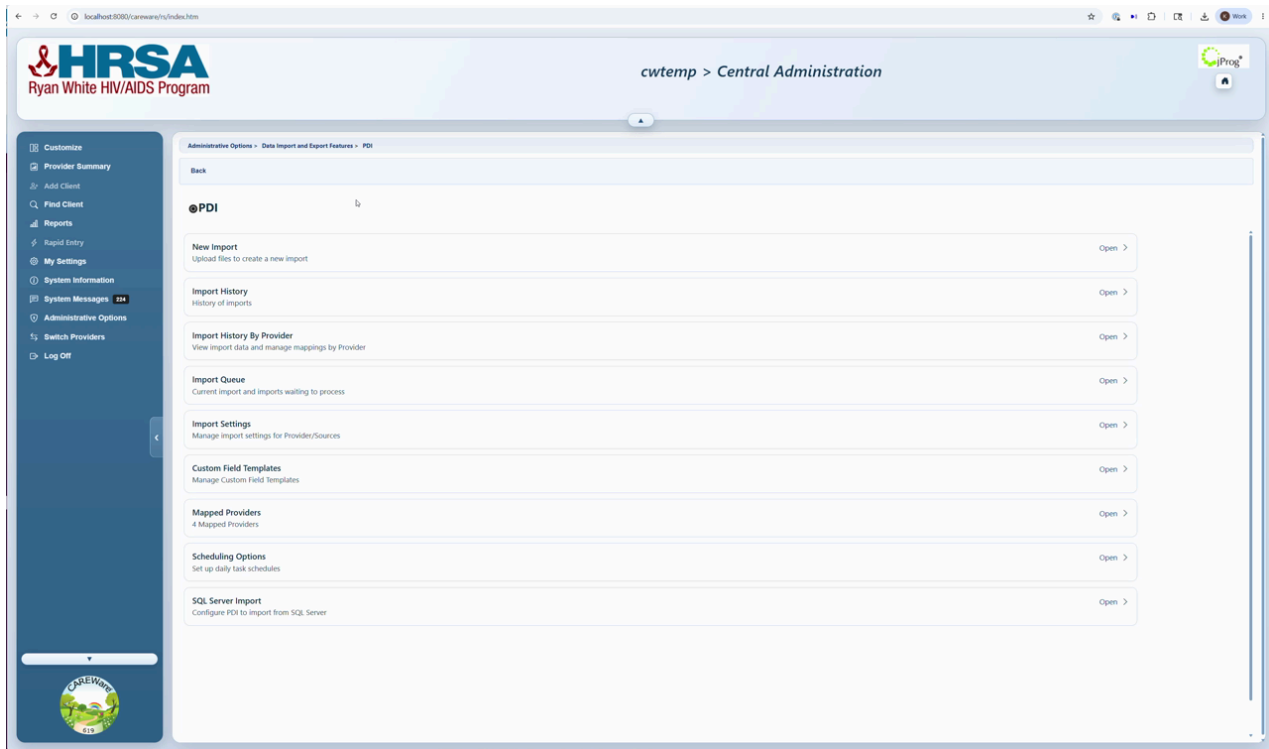
The provider name and source name under import settings must match the prv_name and prv_source value in the exp_provider.csv file included in the zipped folder of imports in order for these import settings to be used for that import.

Tip

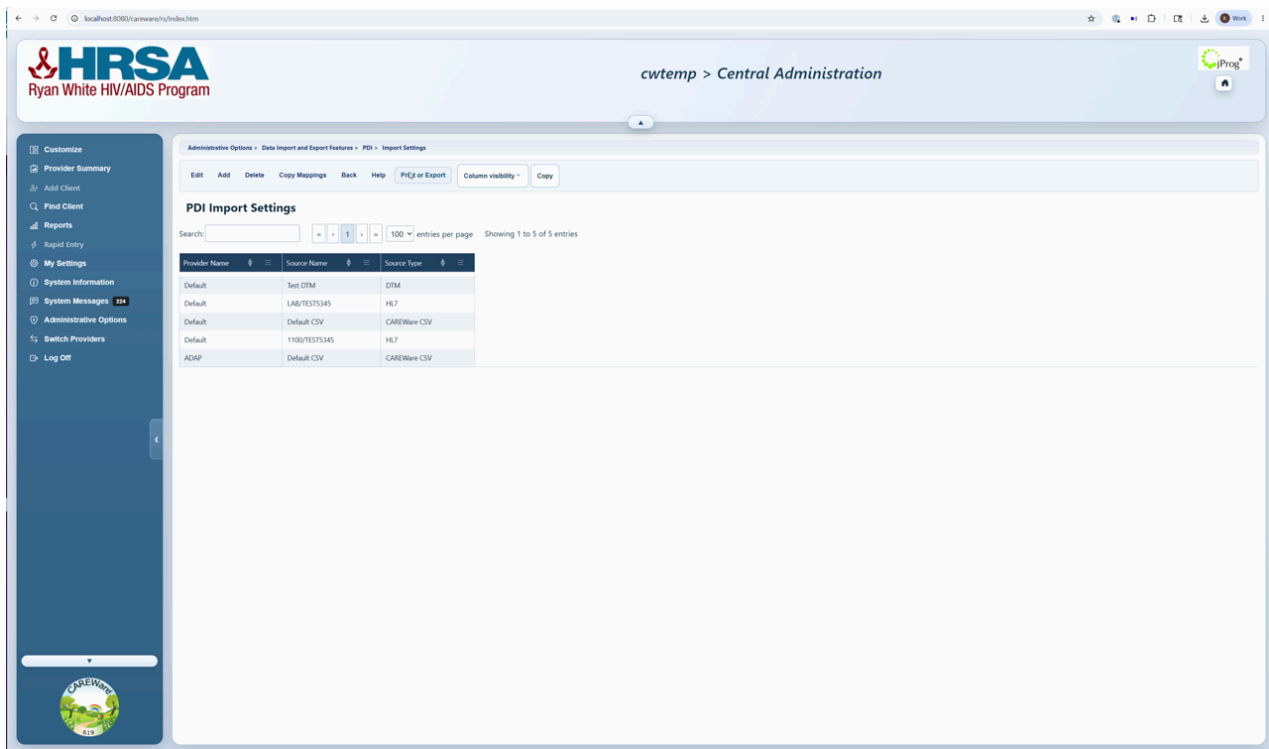
Use Copy Mappings when a similar source has already been mapped for another provider or import source.

Access PDI Import Settings

1. Click Administrative Options.
2. Click Data Import and Export Features.
3. Click Provider Data Import.
4. Click Import Settings.
5. Select the source.
6. Click Edit.



Provider Data Import menu



PDI Import Settings list

Settings Options

Setting group	What it controls	Helpful warning
Source Type	CAREWare CSV, DTM, FHIR, HL7, or SQL PDI.	Use the source type that matches the incoming file or interface.
Adding New Clients	Whether unmatched incoming clients are added automatically or manually.	Manual mode requires users to add or match new clients.
Client Matching	Whether matching uses eUCI, Client ID, custom field, State No, or legacy URN elements.	The matching value must be in the Match ID column when required.
Updating Demographics	Whether CAREWare updates existing demographics.	Blank incoming values do not delete existing values.
Service Matching	Standard, Always Add, Service PK, or custom field matching.	Always Add may create duplicate services.
Provider Data Options	Automatic processing, value matching, setup data import, and holding tank cleanup.	Delete Completed Records removes successful holding tank records after processing.

Add new Import Settings

1. Click Add.
2. Select the Provider Name.
3. Select the Source Type.
4. Enter a Source Name.
5. Click Next.
6. Review and save the new settings before importing.

Provider data options

- Automatically Process Imports processes records that are ready to process without a manual click.
- Match CAREWare Values assumes incoming referential values already match CAREWare values.
- Automatically Import Setup Data imports metadata tables such as contract, clinical, and custom setup information.
- Delete Completed Records after Process purges successfully imported holding tank records after processing.

How to confirm it worked

1. Return to Import Settings and confirm the source appears in the list.
2. Upload a small test import with the matching Source Name.
3. Open Import History and confirm the expected source type and provider were used.

Troubleshooting and common questions

A file did not use the settings I expected. What should I check?

Confirm the Source Name in exp_provider matches the Source Name in Import Settings.

Why did duplicate services appear?

Review Service Matching. Always Add imports all service rows and can create duplicates.

Related guides

Provider Data Import	A general guide to the Provider Data Import process.
New Import	Guide on initiating a new data import.
Import History	Details on viewing and checking past import results.
PDI Automatic Imports	Information on configuring and using automated import processes.
SQL Server Import	Guide for importing data specifically from a SQL Server source.
Custom Field Templates	Details on using and setting up templates for custom fields during import.