

Creating PDI Files with Attachments

Purpose	Prepare PDI files that import attachment records and upload the associated documents.
Who should do this	CAREWare administrators, data managers, and interface staff who build PDI import files.
Use this guide when you need to	Include attached documents in a PDI import.
Main warning	Attachment file names must match the primary key of the associated exp_attachments record.

Quick path

Create CSV tables and an attachments folder at the ZIP root, then upload the ZIP using Provider Data Import > New Import.

Before you begin

Confirm the receiving custom field is an active attachment type field when importing to a custom field.

Prepare the client or record data tables that the attachments reference.

Use unique attachment primary keys and matching file names.

Important

att_record_fk can reference records in different tables. att_field_location_rfk determines which table or custom field location the attachment is associated with.

Build the ZIP file

1. Create the PDI CSV files needed for the import.
2. Add exp_attachments.csv with one row for each attachment.
3. Create a folder named attachments at the root of the ZIP structure.
4. Place each attachment file in the attachments folder.
5. Name each attachment file to match the att_pk value for its exp_attachments row.
6. Zip the CSV files and the attachments folder together.

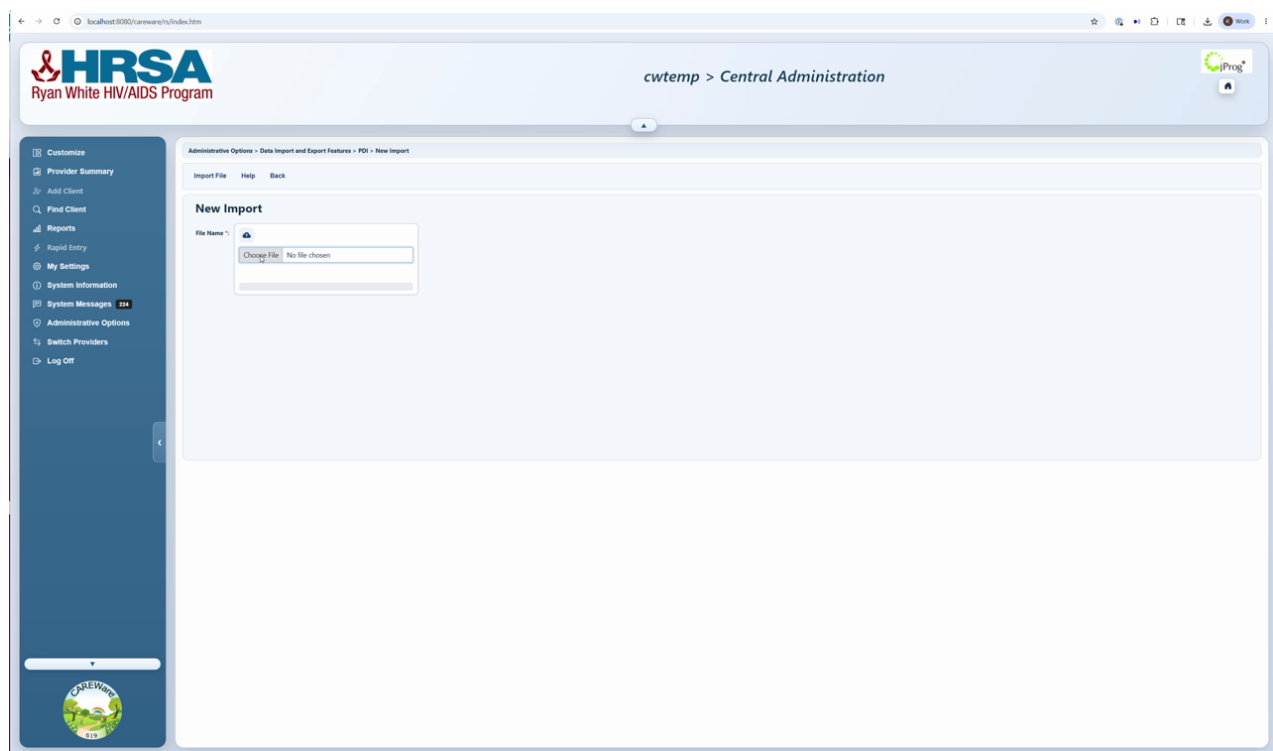
Required attachment concepts

Field or folder	Purpose	Helpful warning
attachments folder	Stores the physical files.	Folder name should be exactly attachments.
exp_attachments.csv	Stores attachment records.	Each file needs a matching row.
att_pk	Primary key for the attachment row.	The file name must match this value.
att_file_name	Name or label of the attached document.	Use a clear document name for users.

att_record_fk	Foreign key to the record that owns the attachment.	Must point to the correct client, service, or other record.
att_field_location_rfk	Identifies the referenced table/location.	Use the correct location code for the target record.
att_custom_field_name	Custom field name when imported to a custom attachment field.	Must match the active attachment custom field.

Upload and review

1. Open Provider Data Import.
2. Click New Import.
3. Choose the ZIP file.
4. Click Import File.
5. Open Import History.
6. Review Import Details for errors or missing mappings.
7. Process the import when records are Ready to Process.



Choose File step from the source video.

How to confirm it worked

1. The ZIP contains CSV files and an attachments folder at the root level.
2. Every attachment file name matches an att_pk value.
3. After processing, the attachment appears on the expected client record or custom field location.

Troubleshooting and common questions

The attachment did not appear. What should I check?

Verify att_pk, file name, att_record_fk, att_field_location_rfk, and custom field activation.

Can attachments reference different tables?

Yes. Use att_record_fk and att_field_location_rfk to point to the correct table/location.

Related guides

Related Guide	Description
New Import	Steps for uploading the prepared PDI file (ZIP) to start a new import
Import History	Guide to reviewing past imports, resolving errors, and processing data
Importing Custom Data Using the Provider Data Import	Import data into active custom fields using the CAREWare PDI template
Provider Data Import	A general guide to the Provider Data Import process