

Provider Data Import (PDI)

User manual

Revision 1

January 2010

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PDI Overview

The PDI (Provider Data Import) is the primary mechanism used to import data to providers. It is designed to provide a flexible, robust interface within CAREWare that allows Central Admins to easily import data from various outside sources, including other instances of CAREWare, into their existing database.

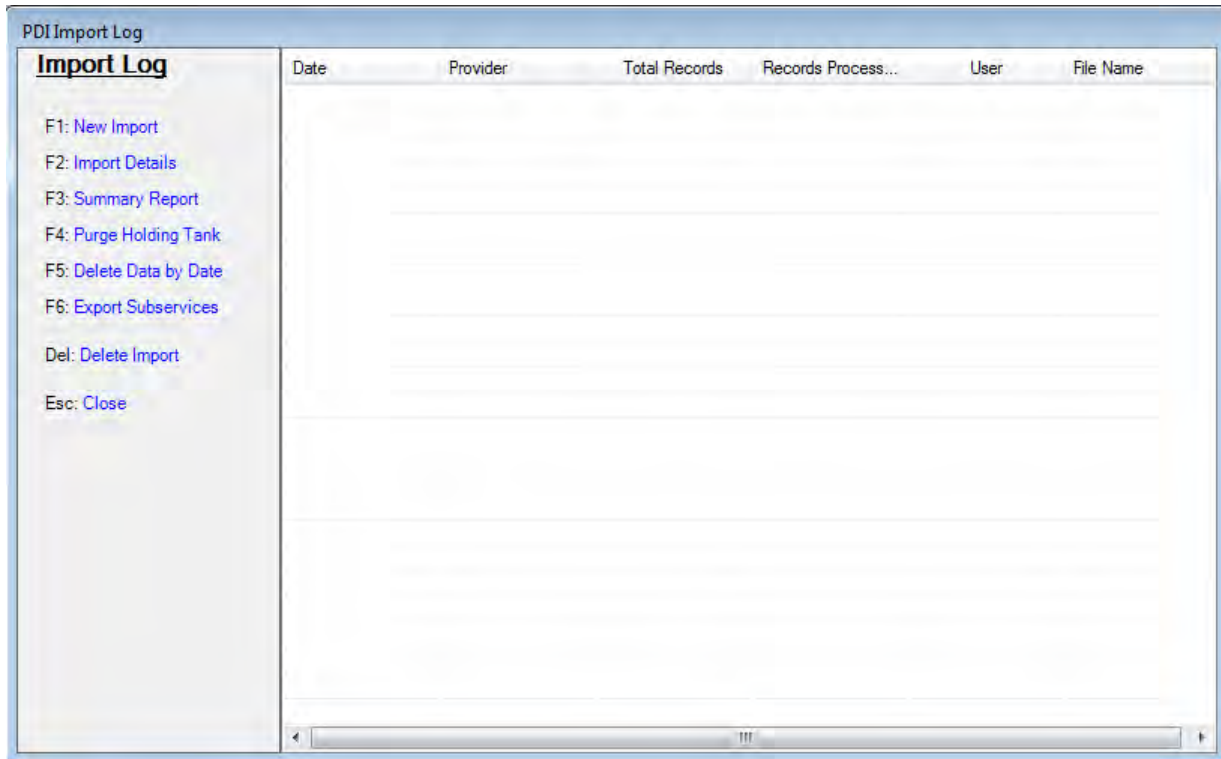
When a new import is created, the PDI reads data from a specifically formatted Access database called the PDI Template. It stores this data in temporary “holding tanks” within CAREWare, which allows a user to review the incoming data before actually changing the data in CAREWare.

Once everything is correct, the user will process the import which will enter all data into the data tables of CAREWare. Feedback is provided on the process and the success or failure of all incoming records. There is also a reporting mechanism to give the user more information about any errors that may have occurred.

The PDI is robust and designed to process what data it can from an import, and simply flag individual records as errors if there is a problem with that record. The PDI can also distinguish existing records from new ones, so users don't have to worry about duplicate data being entered, even if the same template file is imported multiple times.

Import Log

The PDI Import functionality begins on the PDI Import Log form. This shows the complete history of imports as shown here:



F1 – Starts the process of creating a new import. See [Creating a New Import](#).

F2 – Shows the details of an existing import. This can be used to review a completed import, or continue a previously started import. See [Processing Imports](#).

F3 – Shows a printable summary of the import history shown on this form.

F4 – Used to perform maintenance on the holding tanks that store incoming data. See [Purging Holding Tanks](#).

F5 – Deletes all data for a given provider based on a supplied date. See [Deleting Data](#).

F6 – Exports subservice information to the template file to assist the exporting location with specifying service data. Most users will not use this.

Del – Deletes the selected import log record. Note that this is not used to delete imported data, and this option will not be available for an import once any records have been processed.

Creating a new import

To create a new import, enter the path to the PDI template file that contains the data you are importing. You can also use the navigation button to search for the file.

The screenshot shows the 'PDI New Import' dialog box. The 'New Import' section contains an 'Import File Path (include file name *.mdb):' field with the path 'C:\Users\Roy\Desktop\GumboHousedata.mdb' and a 'Provider:' field. Below this is an 'Import Log:' area. At the bottom, there are two checkboxes: 'Manual Matching of Clients' and 'Update Provider information'. A large 'Import File' button and a 'Close' button are also present.

Checked: User must manually match incoming clients that have similar URNs.

Unchecked: Clients will be automatically matched to an existing client if the URNs match, and will be automatically entered if they are not an exact match.

Checked: Provider information will be imported from the PDI template.

Unchecked: Provider information will NOT be imported.

Once the file path is set, you will need to map this file to a particular provider:

The screenshot shows the 'PDI Mapping Item - Provider Mapper' dialog box. The 'Provider:' is set to 'Central'. The 'Provider Code:' is 'gumbo house' and the 'CW Code:' is 'House of Gumbo'. There are 'Save' and 'Cancel' buttons. Below this is a checkbox for 'Use CARE/Ware codes for all'. At the bottom, there is a 'Continue' button.

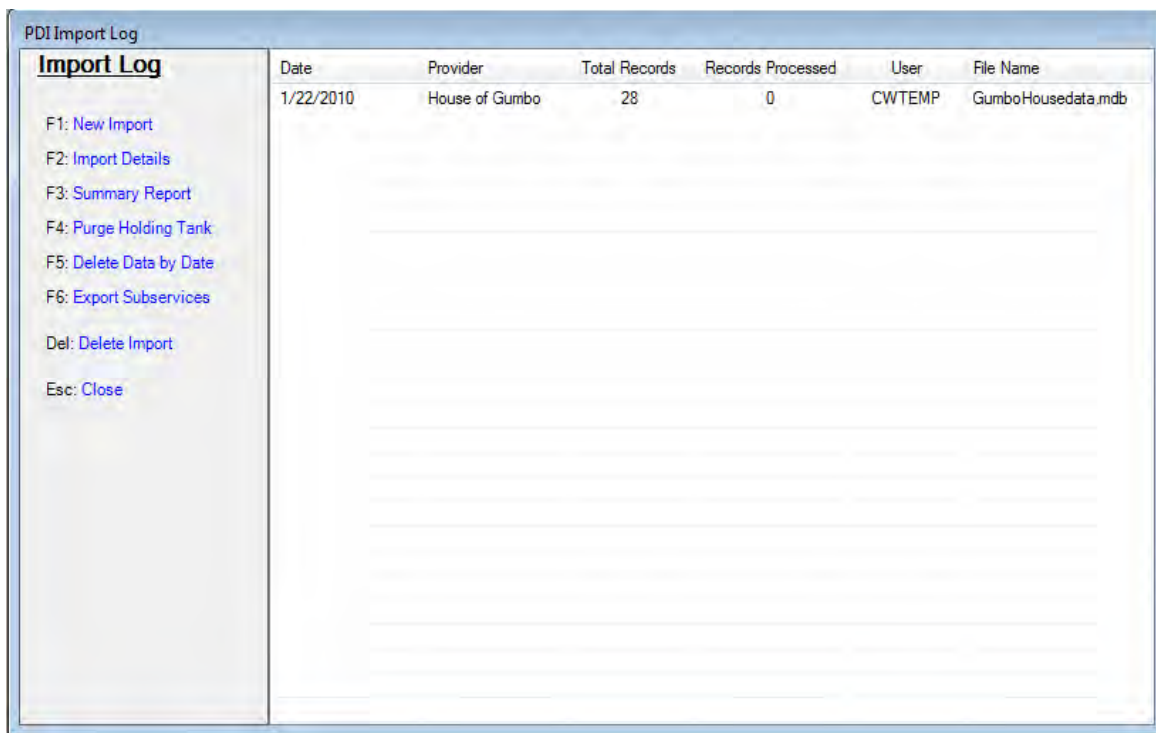
Provider Code	CW Code
gumbo house	House of Gumbo

To map an item:

- Click on the item in the bottom list you want to map. This will show the Provider information in the top panel.
- Choose the correct value from the dropdown list and click Save.
- You can change any mapped value by following this same process and choosing a different value for CW Code.

Note: Once you have gone through this process, it will remember the location of the file and provider to which it is mapped.

Now the import you just started will be on the Import Log. Note that no records have been processed yet.



The screenshot shows a window titled "PDI Import Log" with a sidebar on the left and a table on the right. The sidebar contains the following options:

- Import Log**
- F1: New Import
- F2: Import Details
- F3: Summary Report
- F4: Purge Holding Tank
- F5: Delete Data by Date
- F6: Export Subservices
- Del: Delete Import
- Esc: Close

The table on the right has the following columns and data:

Date	Provider	Total Records	Records Processed	User	File Name
1/22/2010	House of Gumbo	28	0	CWTEMP	GumboHousedata.mdb

Now we go to F2: [Import Details](#) to setup mappings and process the import.

Processing Imports

This is the main processing form that holds all information about a specific import:

PDI Import Details

Provider: **House of Gumbo** Date Span: **1/2/2007 - 5/1/2007**
 Imported: **1/22/2010**

	Records in File	Ready to Process	Missing Mappings	Errors	Records Processed	
Clients:	5	0	9	5	0	Report
Annual Reviews:	3	3	2	0	0	Report
Services:	7	0	5	7	0	Report
Referrals:	1	0	3	1	0	Report
Diagnoses:	0	0	0	0	0	Report
Pregnancy Histories:	0	0	0	0	0	Report
Medications:	2	0	8	2	0	Report
Labs/Screenings:	9	0	3	9	0	Report
Immunizations:	1	0	3	1	0	Report
Custom Subforms:	0	0	0	0	0	Report

Demographic and Annual Data

Import all (default)
 Import only for NEW clients
 Do not import

Process Records

Refresh Counts

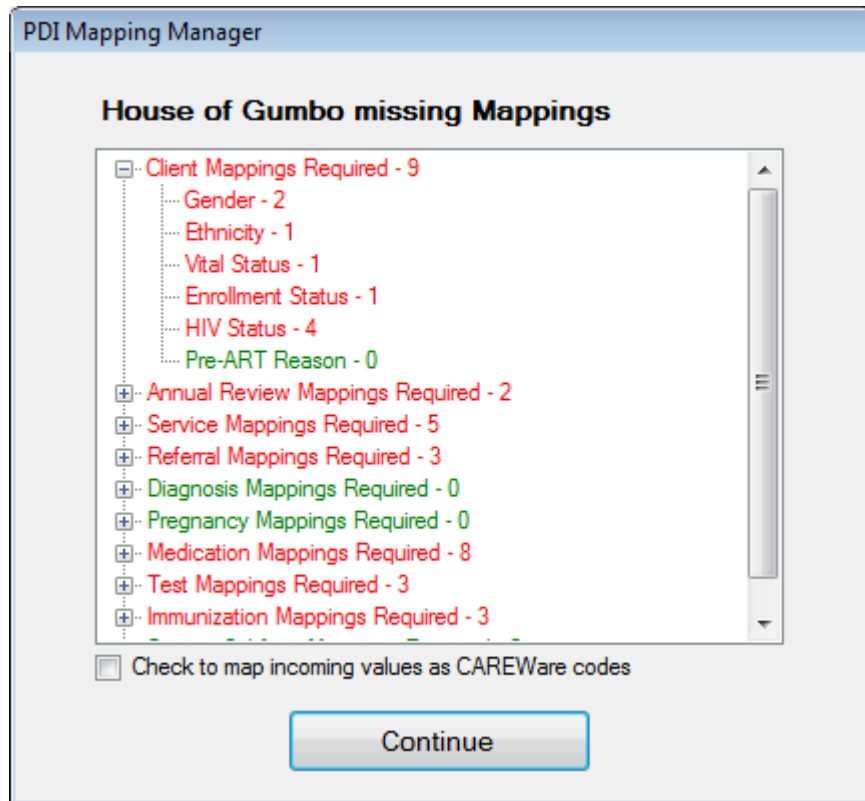
Close

This form shows how many records of each type there are in the file and shows the status of each. The goal here is to have everything green and have all the records in the Ready to Process column.

Hint: Any time there are Errors, you can click the Report button for that record type to get detailed information about each record that has an error.

The first step here will be to configure all the mappings. This is the part of the import process that will take the most work. The good news is that this is a one-time process; once you set a mapping for a particular value, then CAREWare will remember that value for future files that you import.

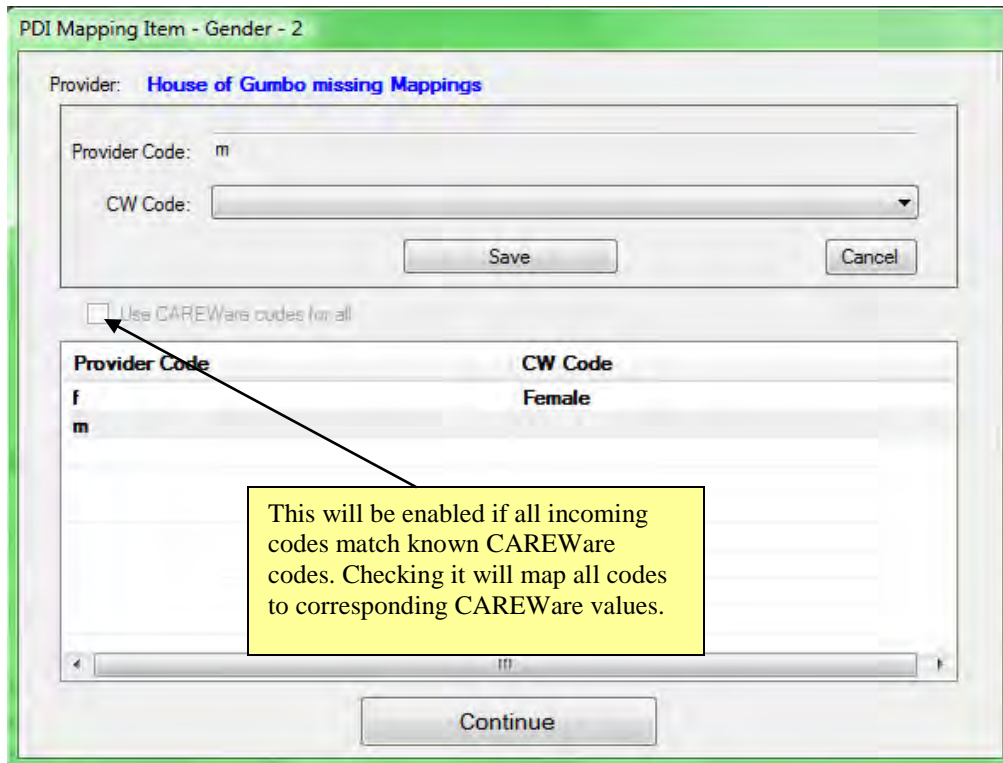
To begin the mapping, click on any number in the Missing Mappings column. This will open the mapping form.



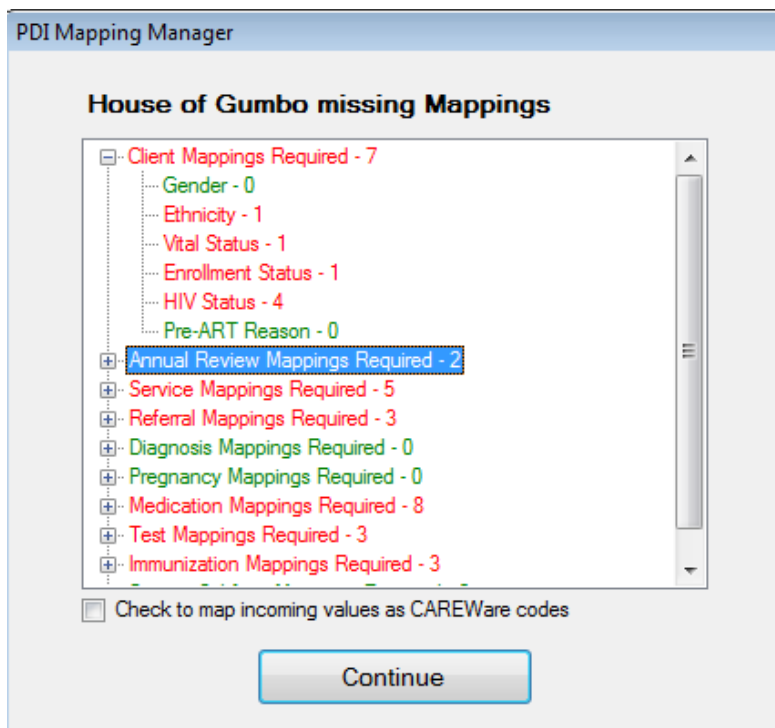
Items that are red require mappings. Click on the + next to an item to expand that item to get each field that needs to be mapped. The numbers next to each item are the number of values that are not mapped. Keep in mind this is not the number of records, but the number of values. So doing a single mapping will handle many records. For example, you may have only 2 values for gender – ‘F’ and ‘M’. You will need to map two values, but those two mappings will be applied to every client record in the file.

Hint: Depending on how the data was exported, checking the checkbox here can save a lot of work. This will cause CAREWare to assume that any codes in the incoming file that match to CAREWare codes should automatically be mapped. For example, CAREWare uses a code of ‘1’ to represent Male and ‘2’ to represent Female. If the codes in the incoming file use ‘1’ and ‘2’ for gender, then all those mappings will be done automatically. If the export was done from another CAREWare database, then checking this box will do almost all of the mappings for you, since CAREWare uses the same codes to represent each value in every installation.

Clicking on any sub-item will open the mapping form.



Choose a value for each Provider Code and then Continue.



Now all the Gender codes are mapped. Do this for all records.

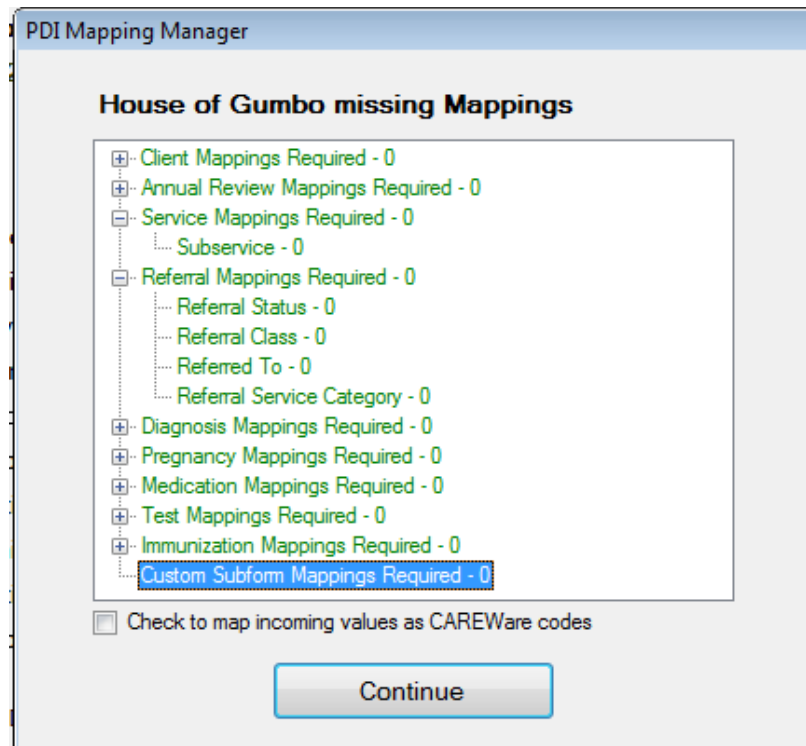
Service Mapping: Mapping Services is a special case, since services are all tied to a contract in CAREWare. Before you can map services, you must have the subservices to which you are mapping and their respective contracts all set up. However, there are special rules that must be followed for services.

In the PDI template file you are importing, on the exp_service table (this is the table that holds service information) there is a column called srv_contract_name. This column holds the name of the contract under which a service was provided. There are two options for setting up the service contracts in CAREWare, according to how that column is populated:

- 1) The column in the import file is left blank. In this case, the subservice must be mapped to only one contract in the contract setup. If it is active for more than one contract, any service of that type will be flagged as an error.
- 2) The column can specify the name of the contract under which this particular subservice should be entered. Note that for this to work, the contract name must match *exactly*, or it will flag the records with an error since it will not be able to find the correct contract.

Once all mappings are complete the mapping form will be all green.

Hint: You do not need to do all mappings at one time. You can come back to this form any time you want to complete the mappings or even change existing ones.



Now click Continue and the import will be re-validated to ensure all mappings are valid.

The main form will look like this once everything is ready to be processed:

PDI Import Details

Provider: **House of Gumbo** Date Span: **1/2/2007 - 5/1/2007**
 Imported: **1/22/2010**

	Records in File	Ready to Process	Missing Mappings	Errors	Records Processed	
Clients:	5	5	0	0	0	Report
Annual Reviews:	3	3	0	0	0	Report
Services:	7	7	0	0	0	Report
Referrals:	1	1	0	0	0	Report
Diagnoses:	0	0	0	0	0	Report
Pregnancy Histories:	0	0	0	0	0	Report
Medications:	2	2	0	0	0	Report
Labs/Screenings:	9	9	0	0	0	Report
Immunizations:	1	1	0	0	0	Report
Custom Subforms:	0	0	0	0	0	Report

Demographic and Annual Data

Import all (default)
 Import only for NEW clients
 Do not import

Process Records

Refresh Counts

Close

Click Process Records to complete the import. You should see all the counts in the Processed column once this is done:

PDI Import Details

Provider: **House of Gumbo** Date Span: **1/2/2007 - 5/1/2007**
 Imported: **1/22/2010**

	Records in File	Ready to Process	Missing Mappings	Errors	Records Processed	
Clients:	5	0	0	0	5	Report
Annual Reviews:	3	0	0	0	3	Report
Services:	7	0	0	0	7	Report
Referrals:	1	0	0	0	1	Report
Diagnoses:	0	0	0	0	0	Report
Pregnancy Histories:	0	0	0	0	0	Report
Medications:	2	0	0	0	2	Report
Labs/Screenings:	9	0	0	0	9	Report
Immunizations:	1	0	0	0	1	Report
Custom Subforms:	0	0	0	0	0	Report

Demographic and Annual Data

Import all (default)
 Import only for NEW clients
 Do not import

Process Records

Refresh Counts

Close

Purging Holding Tank

From the Import Log form, F4 will take you to the Purge Holding Tank form. This is used to remove unnecessary records from the temporary holding tanks and thus keep the database from growing unnecessarily.

PDI Purge Records

Choose record type(s) to purge from holding

Invalid Record Format:	0	<input checked="" type="checkbox"/>
Missing mappings:	0	<input checked="" type="checkbox"/>
Invalid Values:	0	<input checked="" type="checkbox"/>
Missing Clients:	0	<input checked="" type="checkbox"/>
Duplicate Clients:	0	<input checked="" type="checkbox"/>
Unmatched Clients:	0	<input checked="" type="checkbox"/>
Malformed EURNs:	0	<input checked="" type="checkbox"/>
Unknown Errors:	0	<input checked="" type="checkbox"/>
Records Ready to be Added:	0	<input checked="" type="checkbox"/>
Completed Records:	0	<input checked="" type="checkbox"/>

Purge all:

Purge records older than: 90 days

Purge Records

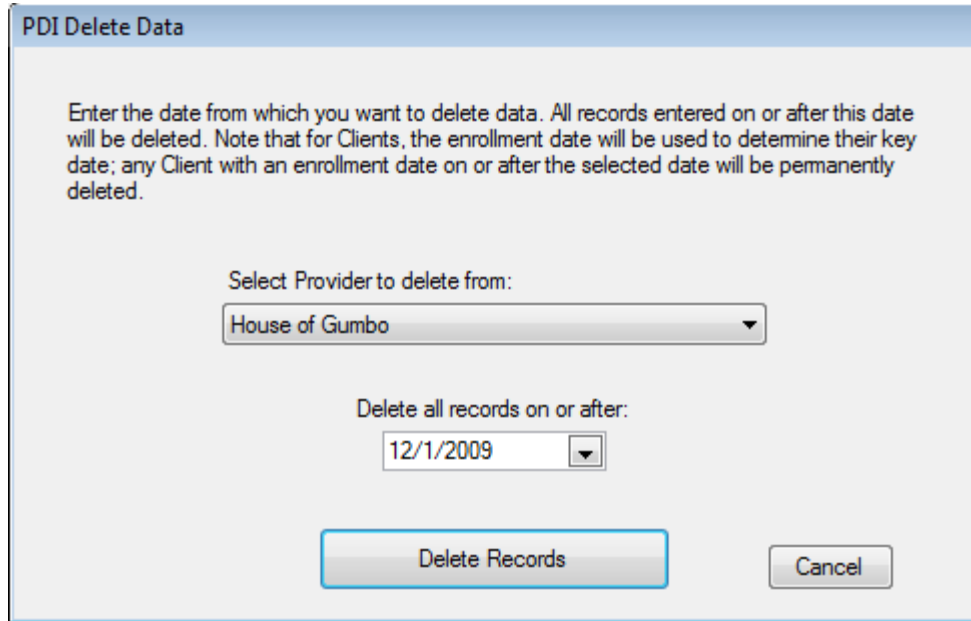
Close

Each record type represent a status that a record can have over the process of importing. The number next to each shows how many records of that type are in the holding tanks. Check the record types that you want to delete and how old a record should be before it is deleted and click Purge Records to remove them.

Hint: During the normal import process, records that are successfully imported will automatically be removed. Therefore you should usually expect to have 0 for Completed Records.

Deleting Data

From the Import Log form, F5 will take you to the Delete Data by Date form. This is used to delete data for a specified provider based on a given key date.



The screenshot shows a window titled "PDI Delete Data". Inside the window, there is a text instruction: "Enter the date from which you want to delete data. All records entered on or after this date will be deleted. Note that for Clients, the enrollment date will be used to determine their key date; any Client with an enrollment date on or after the selected date will be permanently deleted." Below this text, there is a dropdown menu labeled "Select Provider to delete from:" with "House of Gumbo" selected. Below the dropdown menu, there is a date field labeled "Delete all records on or after:" with "12/1/2009" entered. At the bottom of the window, there are two buttons: "Delete Records" and "Cancel".

Select the provider whose data should be deleted and the date to delete from. All records on or after that date will be deleted from the provider. Note that this does not use the date the record was added, but rather the date attached to the record. For example, for service records, a particular record would be deleted if the date of service is on or after the specified date.

CAUTION: This delete form deletes ALL data for the provider (based on the key date), not just data that was imported through the PDI. If all the data at the provider was imported through the PDI, then this will be fine. If you have data entry at the provider in addition to imported data, then be sure you know exactly what is being deleted. Once deleted, there is no way to recover the data.