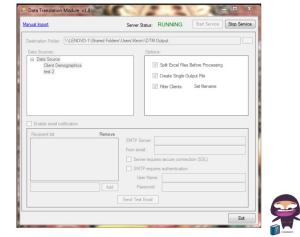


## CareWare

CSV and Data Translation  
Module



# CareWare CSV and Data Translation Module User Guide

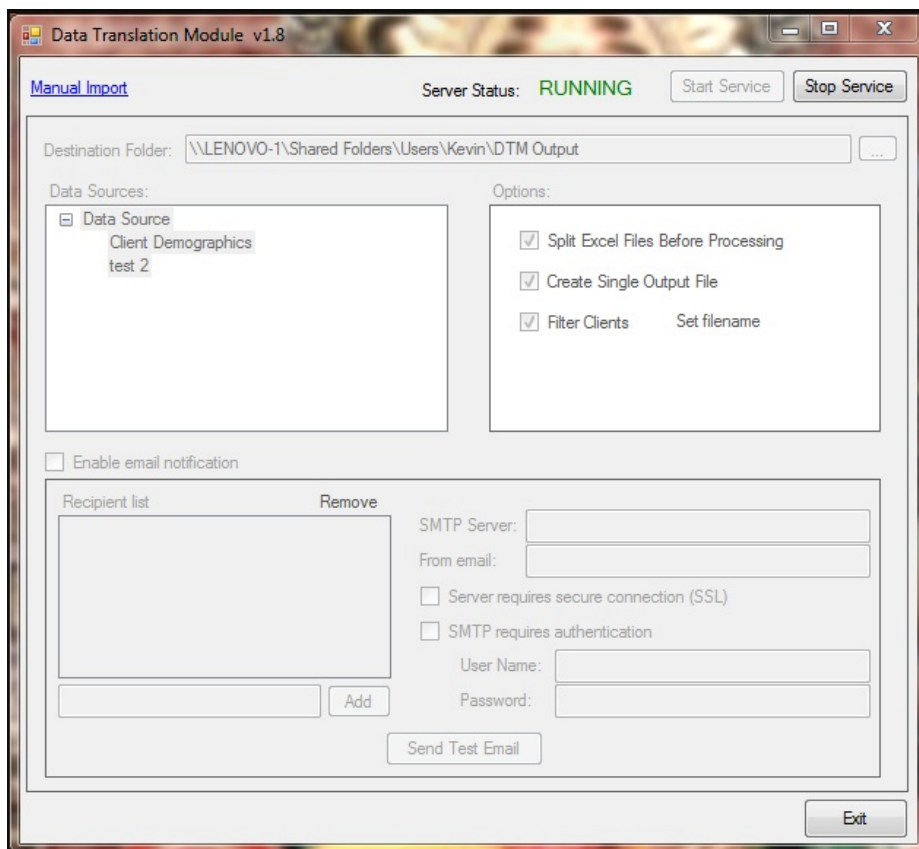
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# CareWare

**CareWare CSV and Data Translation Module**



## Product Information

### Specifications

- Product Name: JPROG
- Date: 4/19/2024

## Product Usage Instructions

### Access Import History:

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

### Process an Import File:

1. Click the file to select it.
2. Click Import Details.

### Review Error Details:

1. Click the Record Type row.
2. Click Error Details.

### **Manual Client Matching:**

1. Click Back.
2. Click Clients.
3. Click Manual Client Mapping.
4. Click a client.
5. Click Potential Matches.

### **Compare Potential Matches:**

1. Click the potential match.
2. Click Compare.

### **Edit Mappings:**

1. Click a Record Type row.
2. Click Edit Mappings.
3. Click a row where CAREWare Value is blank.
4. Click Edit Mapping.
5. Click Edit.
6. Click CAREWare Value.
7. Select the CAREWare Value that matches the incoming value.
8. Click Save.

Once the clients are matched, mappings are completed, and errors are resolved, users can click Re-check Import to remove the error counts and move the records to the Ready to Process column.

**Note:** If Skip Import is checked, CAREWare always excludes client records with that value from the import process even if that value is mapped to a CAREWare Value. Any records with errors and/or missing mappings are skipped during the process. If a user intends to leave records unmapped, they can also clean up the import history by removing the records associated with the missing mappings by using the Purge Unmapped Values option.

### **Frequently Asked Questions (FAQ)**

#### **1. Q: What should I do if I encounter an error during the import process?**

A: If you encounter an error during the import process, refer to the Error Details section to identify and resolve the specific issues with the records causing errors. Follow the provided instructions to address each error and ensure successful processing of the imported data.

#### **2. Q: How can I ensure accurate client matching?**

A: To ensure accurate client matching, carefully review the Potential Matches and compare them side by side with the imported record. Follow the instructions provided to select the best match based on the Demographics data listed for each client in CAREWare.

Make sure to complete manual client mapping if necessary to achieve accurate matching results.

Once the import file has been uploaded and mapped to a provider, the file is added to the Import History list.

### **Follow these instructions to access Import History:**

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

| Administrative Options > Data Import and Export Features > PDI > Import History   |              |           |            |             |                 |       |  |
|---|--------------|-----------|------------|-------------|-----------------|-------|--|
| <a href="#">Import Details</a> <a href="#">New Import</a> <a href="#">Delete Import</a> <a href="#">Undo Import</a> <a href="#">Refresh</a> <a href="#">Help</a> <a href="#">Back</a> <a href="#">Print or Export</a> <a href="#">Hide/Show Columns</a> |              |           |            |             |                 |       |  |
| PDI Import History  |              |           |            |             |                 |       |  |
| Search: <input type="text"/>  |              |           |            |             |                 |       |  |
| Import Date   | Record Count | Status    | Provider   | Source      | File Name       | User  |  |
| 9/23/2022   | 8/8          | Processed | Kevin's Cl | Default CSV | Sharing Test.zi | KEVIN |  |
| 9/23/2022   | 8/8          | Processed | Kevin's Cl | Default CSV | Sharing Test.zi | KEVIN |  |
| 9/22/2022   | 2/2          | Processed | Default    | Default CSV | Default Export2 | KEVIN |  |

## Import History Options

- Import Details – Click to review the import file, identify errors, complete mappings, and process the records.
- New Import – Click to upload a new import file.
- Delete Import – Click to delete the import file from the history. This only deleted temporary records for the import process—no processed client records are deleted.
- Undo Import – Deletes records processed from that import file.
- Refresh – Sets list to the current Status.
- Help – Opens user guide for this feature.
- Back – Click to go back to the Provider Data Import menu.
- Print or Export – Click to print or export the list of import files in the Import History.
- Hide/Show Columns – Opens list of column headers, which can be activated to show or deactivated to hide from view.

## Import History List Column Headers

- Import Date – Date the import file was uploaded.
- Record Count – Total records processed (entered into CAREWare)/Total records in the import file.
- Status – An indicator of the status of this import.
- Domain mapping and re-upload required – The provider name in the table exp\_provider of the import file is different from the provider name in CAREWare. The domain mapping needs to be completed in Central Administration. The import needs to be started over again by uploading the file after the provider mapping is complete.
- Error adding import – Must check the cw\_events or system log for error information.
- Error in DTM process – Verify the source type in the exp\_provider table matches the correct import settings for the DTM Specs the format of this file.
- Exp\_provider files is missing from the import – This files is required for most imports. The exp\_provider table includes the provider name and the import setting data source name.
- Ready to Process – There are records in this import that are Ready to Process. During processing, the system

will attempt to enter all Ready to Process records into CAREWare. Once this pass is complete, the import status will be set to Processed.

- **Processed** – the PDI has processed this import and entered all records possible into CAREWare. The PDI system considers this import complete unless changes are made to the records in the import. In the first example above, 79 records were processed with 2 records yet to be processed.
- **Undone** – The processed records have been deleted from the client as well as from the import holding tanks. To process these records again, the file needs to be uploaded again.
- **Provider** – This is the provider to which the data is being imported.
- **Source** – The source is the data source in the exp\_provider table under column prv\_source. That value is matched to the source type under import settings for that provider.
- **File Name** – This is the name of the import file being imported.
- **User** – The CAREWare user that uploaded the file. If System is the user, the file was likely uploaded by the CAREWare Business Tier importing scheduled PDI, Scheduled SQL, DTM, HL7, or FHIR files.

### Follow these instructions to process an import file:

1. Click the file to select it.
2. Click Import Details.

| Administrative Options > Data Import and Export Features > PDI > Import History > Import Details   |                 |                  |        |                  |                   |  |
|--|-----------------|------------------|--------|------------------|-------------------|--|
| Error Details   Status Log   Edit Mappings   Process Import   Recheck Import   Manual Client Matching   Purge Unmapped Values   Back   Print or Export   Hide/Show Columns |                 |                  |        |                  |                   |  |
| <b>PDI Import Details</b>  |                 |                  |        |                  |                   |  |
| Search: <input type="text"/>   |                 |                  |        |                  |                   |  |
| Record Type  | Records in File | Ready to Process | Errors | Missing Mappings | Records Processed |  |
| ADAP Enrl. History   | 0               | 0                | 0      | 0                | 0                 |  |
| Annual Reviews   | 0               | 0                | 0      | 0                | 0                 |  |
| Appointments   | 0               | 0                | 0      | 0                | 0                 |  |
| Attachments  | 0               | 0                | 0      | 0                | 0                 |  |
| Case Notes   | 0               | 0                | 0      | 0                | 0                 |  |
| Clients  | 83504           | 83242            | 262    | 0                | 0                 |  |

### Import Details Options

- **Error Details** – Provides error details as well as record keys. A Record PK can be used to look up the record in the import file.
- **Status Log** – Lists each individual imported client record for the table selected as well as the status or the record and any errors.
- **Edit Mappings** – Set or change mapped incoming values to CAREWare values.
- **Process Import** – Click to add records that are in the Ready to Process column.
- **Recheck Import** – Triggers CAREWare to validate all records in the import that have not yet been added to CAREWare (record status is Complete).
- **Manual Client Matching** – Handles incoming client records that need to be either added as a New Client or matched to an existing one.
- **Purge Unmapped Values** – Deletes any records with unmapped values.
- **Back** – Click to go back to the Import History menu.
- **Print or Export** – Print or Export the Import Details list.
- **Hide/Show Columns** – Opens list of column headers, which can be activated to show or deactivated to hide

from view.

## Import Details List Column Headers

- Record Type – The table the records are saved in for the import file. For example, “Clients” refers to records imported from the exp\_client table in the PDI file.
- Records in File – Total records in the import file for each table.
- Ready to Process – The count of records ready to enter into CAREWare (free of errors, and for which all mappings and client matching are complete).
- Errors – Number of records that have some error to be resolved before they are Ready to Process.
- Missing Mappings – Records where an incoming value does not match a CAREWare value or the incoming value needs to be manually mapped to a CAREWare value because of import settings.
- Records Processed – Records have been added as client data in the CAREWare database.

## Error Details

Error details list each record for the table selected with the error message for that record. If the clients table has a count of 262 errors, that means that 262 clients have an issue that needs to be resolved before the records and their associated client level data records can be processed. The Error Details provides insight on how to resolve those issues and complete the process of adding the records to CAREWare.

**Note:** For CAREWare CSV and DTM imports, the primary key for each client record is different from the Record PK listed in the Error Details menu. CAREWare generates a random unique key for each record when the records are added to the holding tanks awaiting review before they are processed and added to CAREWare client records. The Record PK exists only in the CAREWare database in the holding tank tables as a temporary ID for that one import event. To see the specific record imported experiencing that error, it is best to review the record in the Status Log for greater detail and specificity.

**To review error details, follow these instructions:**

1. Click the Record Type row.
2. Click Error Details.

| Administrative Options > Data Import and Export Features > PDI > Import History > Error Details |                   |                                     |
|---|-------------------|-------------------------------------|
| <a href="#">Back</a> <a href="#">Print or Export</a> <a href="#">Hide/Show Columns</a>          |                   |                                     |
| PDI Error Details   |                   |                                     |
| Search: <input type="text"/>  |                   |                                     |
| Record Type   | Record PK         | Error Text                          |
| Client  | 8a6c76d2-7378-4e1 | Client Needs to be manually matched |
| Client  | 99db0ede-6624-4d7 | Client Needs to be manually matched |
| Client  | e35253eb-9129-44b | Client Needs to be manually matched |

In this case, the client needs to be manually matched to allow the records to process.

## Status Log

The Status Log provides links to each individual record for the table selected as that record exists in the CAREWare Holding tanks awaiting review. The records in the Status Log show the values for each column included in the CAREWare CSV template regardless of whether or not those columns were included in the imported file. For instance, if a DTM file was imported for clients, that file may only include the clients URN field values, enrollment, and race information. The Status Log has those imported values as well as a primary key for that record in the holding tank, a reference foreign key to the import history record of the file uploaded, the error code, error message, and a csv\_row number showing which record in the CSV file triggered the error. This is valuable information for tracking down a record with data quality issues.

The record with the error can be reviewed in greater detail in the Status Log, by following these instructions:

- 1. Click the table with errors.
- 2. Click Status Log.

Administrative Options > Data Import and Export Features > PDI > Import History > Import Details > Status Log: Clients

[View Holding Tank Record](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Status Log: Clients

Search:

| Import Status                       | Client ID | First Name | Last Name         | DOB        | Gender | File Name         | Last Updated      |
|-------------------------------------|-----------|------------|-------------------|------------|--------|-------------------|-------------------|
| No Error                            |           | Brendan    | Nartanryl         | 01/01/2000 | 1      | DefaultDTMService | 4/15/2024 8:58 AM |
| No Error                            |           | Housing    | Experiment        | 01/01/1950 | 1      | DefaultDTMService | 4/15/2024 8:58 AM |
| No Error                            |           | Lartholsel | TestTest          | 01/01/1990 | 2      | DefaultDTMService | 4/15/2024 8:58 AM |
| No Error                            |           | Colin      | Experimentexperim | 04/14/1988 | 2      | DefaultDTMService | 4/15/2024 8:58 AM |
| No Error                            |           | Chauncey   | Felix             | 01/01/1990 | 2      | DefaultDTMService | 4/15/2024 8:58 AM |
| No Error                            |           | Fiona      | Testing           | 01/01/1990 | 1      | DefaultDTMService | 4/15/2024 8:58 AM |
| Client Needs to be manually matched |           | Abbey      | Aadland           | 06/27/1975 | 2      | DefaultDTMService | 4/15/2024 8:58 AM |
| No Error                            |           | Theresa    | Lee               | 01/01/1990 | 2      | DefaultDTMService | 4/15/2024 8:58 AM |

- 3. Click the record with the error to highlight it.
- 4. Click View Holding Tank Record.

Administrative Options > Data Import and Export Features > PDI > Import History > Import Details > Status Log: Clients > Holding Tank: Clients

[Back](#)

Holding Tank: Clients

tdi\_cln\_hl\_pk:

tdi\_cln\_hl\_tdi\_imp\_lg\_fk:

tdi\_cln\_hl\_error\_code:

tdi\_cln\_hl\_error\_message:

tdi\_cln\_hl\_cln\_fk:

|                        |                                      |
|------------------------|--------------------------------------|
| tdi_cln_hl_client_pk:  | d58be287-6fed-4694-beaa-fd7c3b57ed57 |
| tdi_cln_hl_urn_suffix: | U                                    |
| tdi_cln_hl_eurn:       |                                      |

**Note:** The holding tank temporarily holds records waiting to be processed during an import. Until those records' errors are resolved and they are processed, the records haven't been added to the clients' tables yet. While in the holding tanks, the records can be reviewed and issues can be resolved. Some values like the holding tank primary key, tdi\_cln\_hl\_pk, for example are created by CAREWare during the import process as a way to distinguish each imported record with a unique value in the table.

## Manual Client Matching

In this case, the clients need to be matched to CAREWare client records.

1. Click Back.
2. Click Clients.
3. Click Manual Client Mapping.

Administrative Options > Data Import and Export Features > PDI > Import History > Import Details > Manual Client Matching

Potential Matches Exclude Client Back Print or Export Hide/Show Columns

### Unmapped Clients

Search:

| First Name | Middle Name | Last Name | DOB      | Gender | Client ID |
|------------|-------------|-----------|----------|--------|-----------|
| Aaron      |             | Test      | 4/5/1989 | Male   |           |
| Aaron      |             | Test      | 4/5/1989 | Male   |           |
| Aaron      |             | Test      | 4/5/1989 | Male   |           |
| Aaron      |             | Test      | 4/5/1989 | Male   |           |

4. Click a client.
5. Click Potential Matches.

## Unmapped Clients Options

- Potential Matches – Displays a list of clients with similar URN field values based settings in Client Matching Setup.
- Exclude Client – Removes the clients and associated client level data records from the import process.
- Back – Click to go back to the Import History menu.
- Print or Export – Print or Export the Import Details list.
- Hide/Show Columns – Opens list of column headers, which can be activated to show or deactivated to hide from view.



Administrative Options > Data Import and Export Features > PDI > Import History > Incoming Record > Endingtest, Julia, , 1/1/1990, Female

Compare Match To Client Add as New Client Match and Update Existing Client Back Print or Export Hide/Show Columns

## Incoming Record > Endingtest, Julia, , 1/1/1990, Female

Search:

| Score | Client ID | Name                | DOB        | Gender | URN          | Zip Code | Phone | Provider       |
|-------|-----------|---------------------|------------|--------|--------------|----------|-------|----------------|
| 85    |           | Endingtest, Jessica | 01/01/1990 | Male   | JSED0101901U | 74043    |       | Kevin's Clinic |

Potential Matches have a score based on settings in Client Matching Setup. In this case, the client is a 90% match to an existing client.

## Potential Matches Options

- Compare – Opens a side by side view showing additional demographics details about the imported client record and the potential match to further identify the records ensuring they are a match or not.
- Match To Client – Acknowledges the imported client is actually that specific existing client setting all client level data from the import file to be added to the selected existing client.
- Add as New Client – Adds the client as a new record. If the imported client and existing potential match have the same URN. Users are asked to change the URN suffix to a unique value preventing a duplicate unique ID from being added to the system.
- Match and Update Existing Client – Acknowledges the imported client is actually that specific existing client, however replacing URN field values and other demographics values with the imported values determining the imported values to be correct and the existing values to be in error.
- Back – Click to go back to the Import History menu.
- Print or Export – Print or Export the Import Details list.
- Hide/Show Columns – Opens list of column headers, which can be activated to show or deactivated to hide from view.

**The potential matches can be compared side by side by following these instructions:**

1. Click the potential match.
2. Click Compare.

The imported record and the potential match are listed side by side with the imported Demographics data listed to be compared to the data for the client currently in CAREWare.

Administrative Options > Data Import and Export Features > PDI > Import Details > Manual Client Matching > Incoming Record > Wilkins, Anderson, , 1/1/1990, Female > Compare

Match To Client   Add as New Client   Match and Update Existing Client   Hide Value   Hidden

Values   Back   Print or Export   Hide/Show Columns   Set Sorting

## Potential Match Detailed View

Search:

| Value          | Import Client | Potential Match |
|----------------|---------------|-----------------|
| Preferred Name |               |                 |
| Street Address |               | 199 Logan Way   |
| City           |               | Yeppers         |
| Zip            | 74043         | 74043           |
| Mailing State  |               |                 |
| MailingZipCode |               |                 |
| Race Unknown   | False         | False           |
| Hispanic       | No            | No              |
| Risk MSM       | False         | False           |

### Manual Client Matching Options

- Match To Client – Sets the records for the imported client to be added to the existing client based on the import settings for updating records.
- Add as New Client – Creates a new client record. If the URN fields are a 100% match, the suffix needs to be changed to set each URN as unique. So the U at the end needs to be changed to another letter in the alphabet.
- Match and Update Existing Client – Updates the demographics fields listed in the side by side list using the Import Client's records.
- Hide Value – Removes a value from the list.
- Hidden Values – Lists all values removed from the list. Hidden Values can be added back by clicking the value and then clicking Show Value.
- Back – Click to go back to the Provider Data Import menu.
- Print or Export – Click to print or export the list of values.
- Hide/Show Columns – Opens list of column headers, which can be activated to show or deactivated to hide from view.
- Set Sorting – Customizes sorting which can be set for multiple columns. It could be set as descending for one column and ascending for another.

### Manual Client Matching List Column Headers

- Value – Demographics fields which may provide additional insight in identifying who the client is in determining a match to an existing record or if the client is new.
- Import Client – These are the values for those demographics fields for the imported client record.
- Potential Match – These are the values for those demographics fields for an existing client record in CAREWare

selected as a potential match.

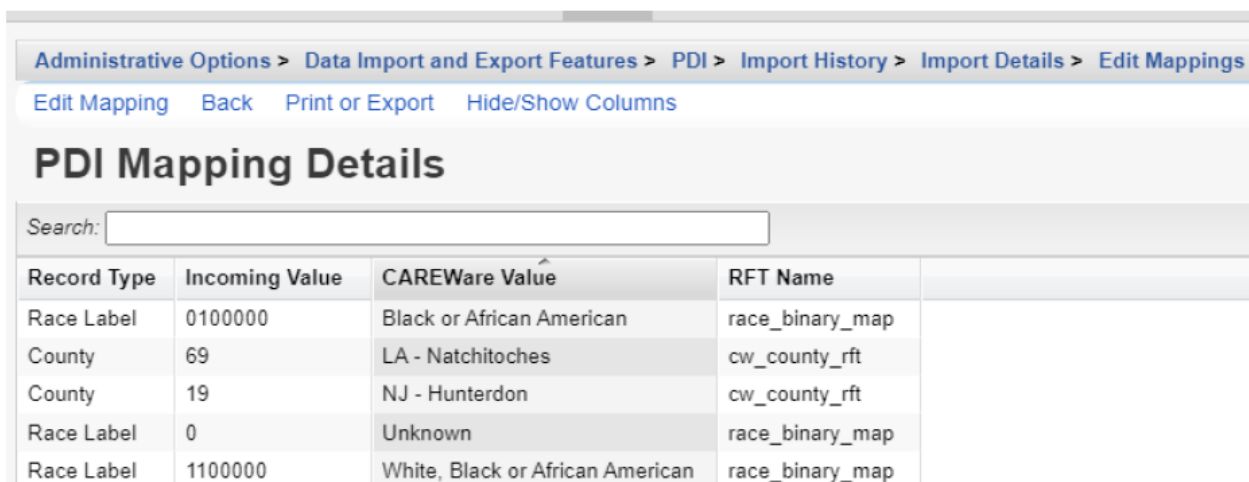
Completing the client matching typically substantially reduces the errors for other record types because unmatched client errors are recorded there. For example, a service record cannot be imported if it has not been associated with an existing client record in the import or in CAREWare and matching the incoming client linked to that service record solves that problem.

## Edit Mappings

When importing client level data, users can often use any term that is appropriate for that field even if CAREWare uses a different term. For instance the concept of a definition code is included in the CAREWare CSV guide for setting up imported records like the column for the service definition code `srv_cs_1_def_code`. That doesn't necessarily mean an actual code needs to be used for CAREWare to recognize the service. That is just a term used for that column acknowledging that the imported record is coded to whatever value is set for that service and when exporting CAREWare may insert any codes used for that service in the stored definition table. For the purpose of importing a service, however users can use any name that is appropriate to recognize that service. An EMR may have a service listed as Case Management Phone Call. In CAREWare, the grantee may have that same service listed as Phone Call. If users import the EMR's definition of that service as Case Management Phone Call, CAREWare doesn't recognize the name of that service and asks users to verify which service is meant by that name. To do that, the service names are mapped to an existing equivalent service in CAREWare under Edit Mappings.

To review missing mappings, follow these instructions:

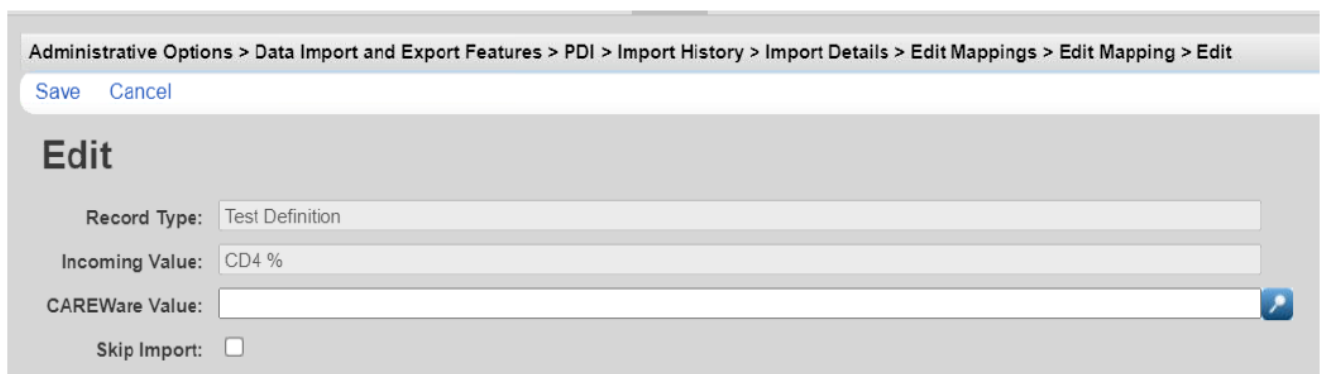
1. Click a Record Type row.
2. Click Edit Mappings.
- 3.



| Record Type | Incoming Value | CAREWare Value                   | RFT Name        |
|-------------|----------------|----------------------------------|-----------------|
| Race Label  | 0100000        | Black or African American        | race_binary_map |
| County      | 69             | LA - Natchitoches                | cw_county_rft   |
| County      | 19             | NJ - Hunterdon                   | cw_county_rft   |
| Race Label  | 0              | Unknown                          | race_binary_map |
| Race Label  | 1100000        | White, Black or African American | race_binary_map |

Click a row where CAREWare Value is blank.

4. Click Edit Mapping.
5. Click Edit.
6. Click CAREWare Value.



Administrative Options > Data Import and Export Features > PDI > Import History > Import Details > Edit Mappings > Edit Mapping > Edit

Save Cancel

### Edit

Record Type: Test Definition

Incoming Value: CD4 %

CAREWare Value:

Skip Import: ☐

7. Select the CAREWare Value that matches the incoming value.
8. Click Save.

Once the clients are matched, mappings are completed, and errors are resolved. Users can click Re-check Import to remove the error counts and move the records to the Ready to Process column.


**Note:** If Skip Import is checked, CAREWare always excludes client records with that value from the import process even if that value is mapped to a CAREWare Value.

Any records with errors and/or missing mappings are skipped during the process. If a user intends to leave records unmapped, they can also clean up the import history by removing the records associated with the missing mappings by using the Purge Unmapped Values option.

- This process begins immediately once the button is clicked. The process does delete records in the holding tanks. If this button is clicked unintentionally, the file would have to be imported again to complete those mappings and process those records.

| Administrative Options > Data Import and Export Features > PDI > Import History > Import Details > PDI Processing Queue |          |                        |       |  |
|---|----------|------------------------|-------|--|
| Refresh Cancel Import Back Print or Export Hide/Show Columns  |          |                        |       |  |
| <b>PDI Processing Queue</b>   |          |                        |       |  |
| Search: <input type="text"/>  |          |                        |       |  |
| Status  | Provider | File Name              | User  |  |
| Queued to Purge Unmapped Values   | Default  | DefaultDTMServices.zip | KEVIN |  |
|   | Default  | DefaultDTMServices.zip | KEVIN |  |

## Documents / Resources

|   |  |
|---|--|
|  | <p><a href="#">CareWare CSV and Data Translation Module</a> [pdf] User Guide<br/>           CSV and Data Translation Module, Data Translation Module, Translation Module, Module</p> |
|---|--|

## References

- [User Manual](#)

[Manuals+](#), [Privacy Policy](#)

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