

# CAREWare Data Management Service Instructions

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## CAREWare Data Management Service

### Product Information

#### Specifications:

- **Product Name:** Custom PDI Template
- **Compatibility:** CAREWare
- **Functionality:** Data Import and Export Features
- **Usage:** Exporting and Importing custom fields

### Product Usage Instructions

1. Log into CAREWare.
2. Click on "Administrative Options."
3. Choose "Data Import and Export Features."
4. Select "Provider Data Export."
5. Click on "New Export."
6. Proceed to "Edit Custom Fields."
7. Click on "Apply Template."
8. Highlight the desired template.
9. Decide whether to "Append Template Fields" or "Replace With Template Fields."
10. Finally, click "Save" to activate the custom fields for the template.

Once the custom fields are set up in the template, you can import data using the custom PDI template.

## Frequently Asked Questions (FAQ)

- **Can I use multiple custom templates for data import?**

Yes, you can create and save multiple custom templates for importing different sets of data.

- **How can I edit an existing custom template?**

To edit an existing template, go to the Data Import and Export Features, select the template you want to edit, and choose the “Edit” option.

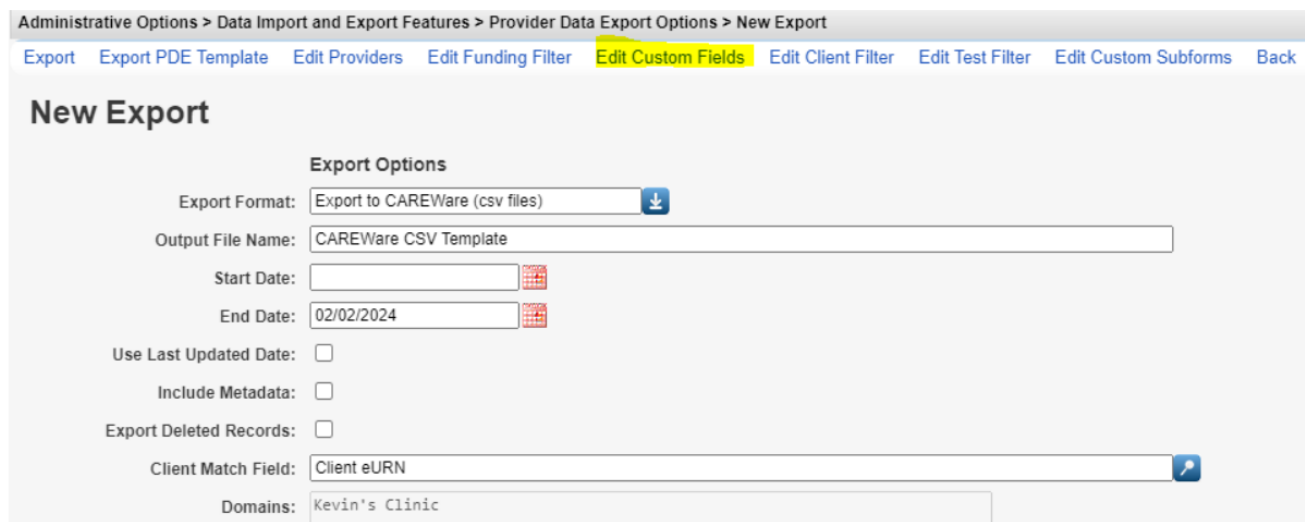
- **What happens if I import data with missing custom fields?**

The system will typically prompt you about any missing fields and give you options to map them or skip the data import for those fields.

## Usage Instructions

To export the custom PDI template, follow these instructions:

1. Log into CAREWare.
2. Click Administrative Options.
3. Click Data Import and Export Features.
4. Click Provider Data Export.
5. Click New Export.
6. Click Edit Custom Fields.



The screenshot shows the 'New Export' form in the CAREWare system. The breadcrumb trail at the top reads: 'Administrative Options > Data Import and Export Features > Provider Data Export Options > New Export'. The navigation bar includes links: 'Export', 'Export PDE Template', 'Edit Providers', 'Edit Funding Filter', 'Edit Custom Fields' (highlighted in yellow), 'Edit Client Filter', 'Edit Test Filter', 'Edit Custom Subforms', and 'Back'. The main heading is 'New Export'. Under the 'Export Options' section, the following fields are visible: 'Export Format' (set to 'Export to CAREWare (csv files)' with a download icon), 'Output File Name' (set to 'CAREWare CSV Template'), 'Start Date' (empty with a calendar icon), 'End Date' (set to '02/02/2024' with a calendar icon), 'Use Last Updated Date' (checkbox), 'Include Metadata' (checkbox), 'Export Deleted Records' (checkbox), 'Client Match Field' (set to 'Client eURN' with a search icon), and 'Domains' (set to 'Kevin's Clinic').

7. Click Apply Template.

[Save](#) [Apply Template](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

## PDE Custom Field Setup

Search: 

Selected	Custom Field	Location	Template Field Name
<input checked="" type="checkbox"/>	1 0 test	cw_client_custom	1_0_test
<input checked="" type="checkbox"/>	1 0 test	cw_eligibility_custom	1_0_test



8. Click the Template to highlight it.
9. Click Append Template Fields or Replace With Template Fields.

[Append Template Fields](#) [Replace With Template Fields](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

## PDE Custom Field Templates

Search: 

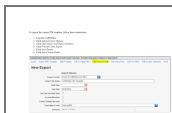
Template	Custom Fields
oral health	5
template 1	41
Waterdeep_SystemTemplate	1
Steve's Test Agenc_SystemTemplate	65
TESTING_COMBO_BOX	1



10. Click Save.

Once these custom fields are activated for a custom field template, data for those fields can be imported using a custom PDI template.

## Documents / Resources



[CAREWare Data Management Service](#) [pdf] Instructions  
Data Management Service, Management Service, Service

## References

- [User Manual](#)

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

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