Manuals+ — User Manuals Simplified.

CAREWare Data Management Service Instructions

Contents

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.
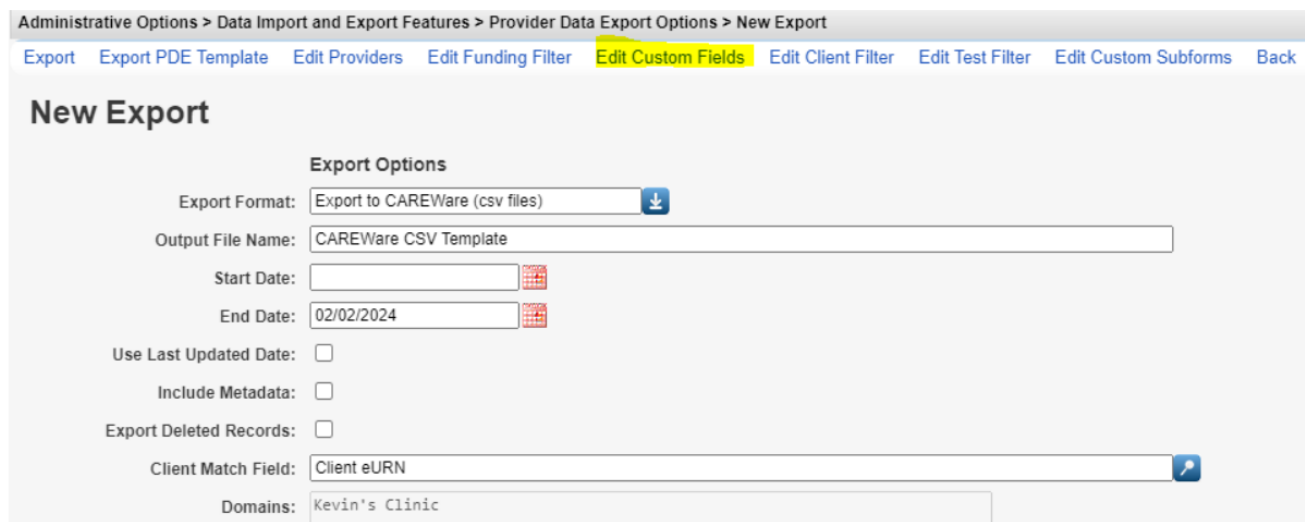- **What happens if I import data with missing custom fields?**
  The system will typically prompt you about any missing fields and give you options to map them or skip the data import for those fields.

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.

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	
☑	1 0 test	cw_client_custom	1_0_test	
☑	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.

Administrative Options > Data Import and Export Features > Provider Data Export Options > New Export > PDE Custom Field Setup > Apply Template

Append Template Fields   Replace With Template Fields   Back   Print or Export   Hide/Show Columns
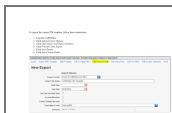
PDE Custom Field Templates

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**