The *Provider Data Export* is used to export data from selected tables for a specified date span. Data can be exported from a single provider domain or from multiple provider domains. Exporting data from a single provider domain can be edited and re-imported. Exporting data for multi provider domains can be used for reporting purposes and cannot be re-imported. A Provider Data Export file can include provider setup information and metadata.

To access the Provider Data Export:

1. Click *Administrative Options*.
2. Click *Export Menu*.
3. Click *Provider Data Export.*
4. Click *New Export*.

	Export Date	Begin Date	End Date	User	Export Config	Clients
	8/1/2017	5/1/2017	7/30/2017	CWTEMP	default	18
	8/1/2017	7/1/2017	7/30/2017	CWTEMP	default	13
F1: New Export	8/1/2017	7/20/2017	7/30/2017	CWTEMP	default	13
	8/1/2017	7/1/2017	7/30/2017	CWTEMP	default	13
F2: Setup Automatic Export	7/31/2017	7/30/2017	7/30/2017	SYSTEM	default	0
	7/31/2017	7/30/2017	7/30/2017	SYSTEM	default	0
Del: Delete Export	7/31/2017	7/30/2017	7/30/2017	SYSTEM	default	0
	7/28/2017	7/27/2017	7/27/2017	SYSTEM	default	0
	7/28/2017	7/27/2017	7/27/2017	SYSTEM	default	0
	7/28/2017	7/28/2017	7/28/2017	CWTEMP	default	0
Esc: Close	7/27/2017	7/26/2017	7/26/2017	SYSTEM	default	7
	7/27/2017	7/26/2017	7/26/2017	SYSTEM	default	7
	7/26/2017	7/25/2017	7/25/2017	SYSTEM	default	5
	7/26/2017	7/25/2017	7/25/2017	SYSTEM	default	5
	7/26/2017	7/25/2017	7/25/2017	SYSTEM	default	5
	7/25/2017	7/24/2017	7/24/2017	SYSTEM	default	1
	7/24/2017	7/23/2017	7/23/2017	SYSTEM	default	0
	7/21/2017	7/20/2017	7/20/2017	SYSTEM	default	0
	5/16/2017	5/5/2016	6/16/2016	CWTEMP	default	942

Provider Data Export

Export Log

Provider Data Export

Select the type of export.

Click Ellipsis to select file folder location and name export file.

Save export file to:
MDBFile
C:\Users\kevin.JPROG1\Desktop\Test E[...]
MDBFile
XMLFile
SQLPDE
...

Select Providers
Providers
☐ ADAP
☐ Default
☐ Inactive Test Provider
☐ Tester

Check the box for the provider to be exported

Export Options:
☑ Name
☑ Address
☐ Common Notes
☑ Services
  ◉ All Services
  ○ Specify Funding: Setup

Specify Funding will filter services by funding source.

☐ Custom Fields   Configure
☐ Vital Signs
☐ Counseling and Testing Records
☐ Receipts
☐ Eligibility Records

☐ Annual Review
☐ Diagnoses
☐ Medications
☐ Labs/Screenings
☐ Immunizations
☐ Referrals
☐ Pregnancy History
☐ Case Notes
☐ Appointments
☐ Relations
☐ Insurance
☐ Poverty Level
☐ ADAP Enrollment
☐ Drug Payments
☐ Form Design Data

Check the table to be included in the export file

Click Configure to setup custom fields to be included in the export.

☐ Include Provider Setup Info   ☐ Include Metadata

Examples of metadata include contract information, subservices and clinical definitions.

From Date: Through Date:
5/1/2017   7/30/2017

Export   Close   ☐ Select All

Check this box to include Provider information created in the Setup Wizard

The date span determines which clients will be included in the export based on the dates of client records. Example: If services is checked, a service was entered during this date span, the client that received that service will be included in this export file.

A Provider Data Export can export a MDB file, a XML file, or export the data to the CAREWare database using SQLPDE. The MDB and XML file types save to a specific file folder location. The SQLPDE will save the records in the CAREWare database in the CW_PDI database.

In addition to the options included in the instructions for Configure, custom fields can be exported using *Manual Field Selection*.

Check a custom field listed to include that custom field in the export file.

Once a Provider Data Export is completed a file will be saved in the file folder location or in the case of a SQLPDE the CW_PDI tables will be updated with those export records.

The MDB export file uses the PDI Template. Click here to review the PDI Template Specifications.

The XML export file uses the following XML format:

1. Schema records.

```
<NewDataSet>
  <xs:schema id="NewDataSet" xmlns="" xmlns:xs="http://www.w3.org/2001/XMLSchema"
    <xs:element name="NewDataSet" msdata:IsDataSet="true" msdata:UseCurrentLocale=
      <xs:complexType>
        <xs:choice minOccurs="0" maxOccurs="unbounded">
```

2. Table Name = element name

```
<xs:element name="exp_adap_enrollment_history">
  <xs:complexType>
    <xs:sequence>
      <xs:element name="adp_en_hs_pk" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_cln_fk" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_date" msdata:DateTimeMode="Unspecified" type="xs:dateTime
      <xs:element name="adp_en_hs_status_code" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_status_label" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_disenroll_code" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_disenroll_label" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_other_disenroll_code" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_other_disenroll_label" type="xs:string" minOccurs="0" />
      <xs:element name="adp_en_hs_delete" type="xs:boolean" minOccurs="0" />
    </xs:sequence>
  </xs:complexType>
```

3. Table columns are elements under sequence
4. After tables are defined, client data records are listed starting with a client's primary key.

```
<exp_client>
  <cln_pk>a1b3934a-f4b5-43d5-8d33-a3ff97531c49</cln_pk>
  <cln_eurn>TK9SwjPw4</cln_eurn>
  <cln_urn_suffix>U</cln_urn_suffix>
  <cln_last_name>Beginningtest</cln_last_name>
  <cln_first_name>Brock</cln_first_name>
  <cln_city>Yeppers</cln_city>
  <cln_state>22</cln_state>
  <cln_county>069</cln_county>
  <cln_zip>74043</cln_zip>
  <cln_dob>1990-01-01T00:00:00</cln_dob>
```

The table and column records are in the same format as the PDI Template, which can be reviewed using the PDI Specifications guide here.

SQLPDE exports data to the CW_PDI table in the CAREWare database. The CW_PDI database records can be reviewed using SQL Server Management Studio.

1. Connect to the CAREWare database instance using SQL Server Management Studio.
2. Expand *Databases*.
3. Expand *CW_PDI*.

Provider Data Export can be setup to automatically export data.

1. Click *Setup Automatic Export*.

2. Click *Schedule New Export*.

PDE - Export Schedule Setup

Enter a label for this Export:

Test Export

Export Options:
- ☑ Name
- ☑ Address
- ☐ Common Notes
- ☑ Services
  - ⦿ All Services
  - ○ Specify Funding: Setup
- ☐ Custom Fields   Configure
- ☐ Vital Signs
- ☐ Counseling and Testing Records
- ☐ Receipts
- ☐ Eligibility Records

- ☐ Annual Review
- ☐ Diagnoses
- ☐ Medications
- ☐ Labs/Screenings
- ☐ Immunizations
- ☐ Referrals
- ☐ Pregnancy History
- ☐ Case Notes
- ☐ Appointments
- ☐ Relations
- ☐ Insurance
- ☐ Poverty Level
- ☐ ADAP Enrollment
- ☐ Drug Payments
- ☐ Form Design Data

Select Providers

Providers
- ☐ ADAP
- ☐ Default
- ☐ Inactive Test Provider
- ☑ Tester

1. Name the export file.
2. Check *Provider(s)*.
3. Check tables to be included.
4. Edit the *Export Schedule*.
5. Click Save.

Export Schedule: edit

Every Sunday, Monday, Tuesday, Wednesday, Thu

Next Export: Tuesday, 8/1/2017 1:17:24 PM

Save   Cancel   ☑ Select All

3. Click *Edit*.

Event Scheduler   — ☐ ✕

F1: Save
Esc: Cancel/Close

Test Export

Select a start date.

Starting: 7/21/2017 12:02:27 PM

Next Scheduled Event:
Tuesday, 8/1/2017 1:17:24 PM

Select a frequency to repeat exports

Repeat:
- ⦿ Daily   Every   ☑ S ☑ M ☑ T ☑ W ☑ T ☑ F ☑ S
- ○ Weekly   Every   [▼] Week(s) On: [▼]
- ○ Monthly   Every   [▼] Month(s) On: [▼]
- ○ Yearly   Every   [▼] Year(s) In: [▼] On: [▼]

Every Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday

4. Click *Save*.

Scheduled Provider Data Export files are saved in a file folder location saved in Common Storage Settings. The Common Storage Settings can be accessed using CW Admin in the RW CAREWare Business Tier folder or using SQL Server Management Studio.
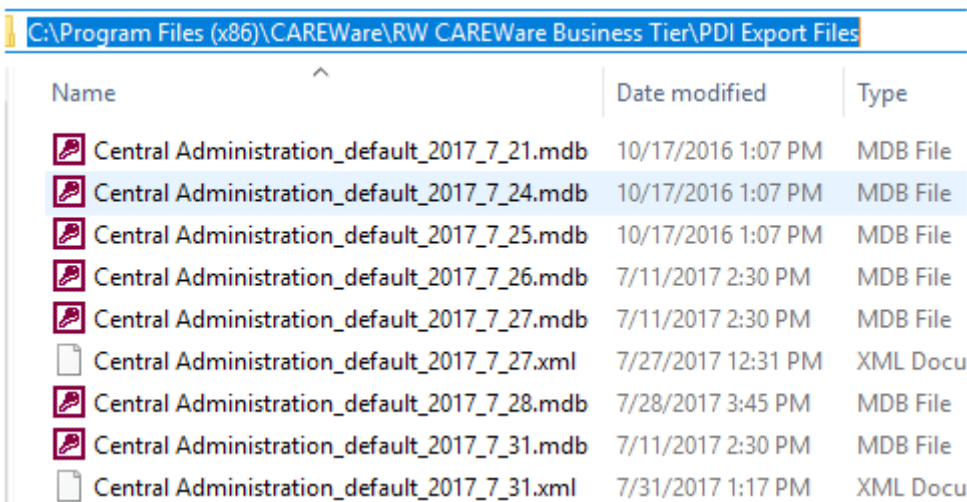
CW_Admin:

1. Go to *C:\Program Files (x86)\CAREWare\RW CAREWare Business Tier*.
2. Right Click *CW Admin.exe.*
3. Click *Run as Administrator.*
4. Click *Stop Server.*
5. Click *Common Storage Settings*.
6. Click *cmm_st_pk* to sort the row in order
7. Scroll to *PDI_ExportDirectory.*

The *cmm_st_text* is the file folder path where the export file will appear.

SQL Server Management Studio:

1. Connect to the CAREWare database instance.
2. Expand *Databases*.
3. Expand *CW_Data*.
4. Expand *Tables*.
5. Right click *cw_common_storage.*
6. Click *Select Top 1000 Rows*.
7. Scroll down to *PDI_ExportDirectory* under *cmm_st_pk*.

The *cmm_st_text* is the file folder path where the export file will appear.

| C:\Program Files (x86)\CAREWare\RW CAREWare Business Tier\PDI Export Files |

Name	Date modified	Type
Central Administration_default_2017_7_21.mdb	10/17/2016 1:07 PM	MDB File
Central Administration_default_2017_7_24.mdb	10/17/2016 1:07 PM	MDB File
Central Administration_default_2017_7_25.mdb	10/17/2016 1:07 PM	MDB File
Central Administration_default_2017_7_26.mdb	7/11/2017 2:30 PM	MDB File
Central Administration_default_2017_7_27.mdb	7/11/2017 2:30 PM	MDB File
Central Administration_default_2017_7_27.xml	7/27/2017 12:31 PM	XML Docu
Central Administration_default_2017_7_28.mdb	7/28/2017 3:45 PM	MDB File
Central Administration_default_2017_7_31.mdb	7/11/2017 2:30 PM	MDB File
Central Administration_default_2017_7_31.xml	7/31/2017 1:17 PM	XML Docu