

CAREWare can be set up for automatic imports using the Provider Data Import option.

## A. Configure the Provider Data Import Folder

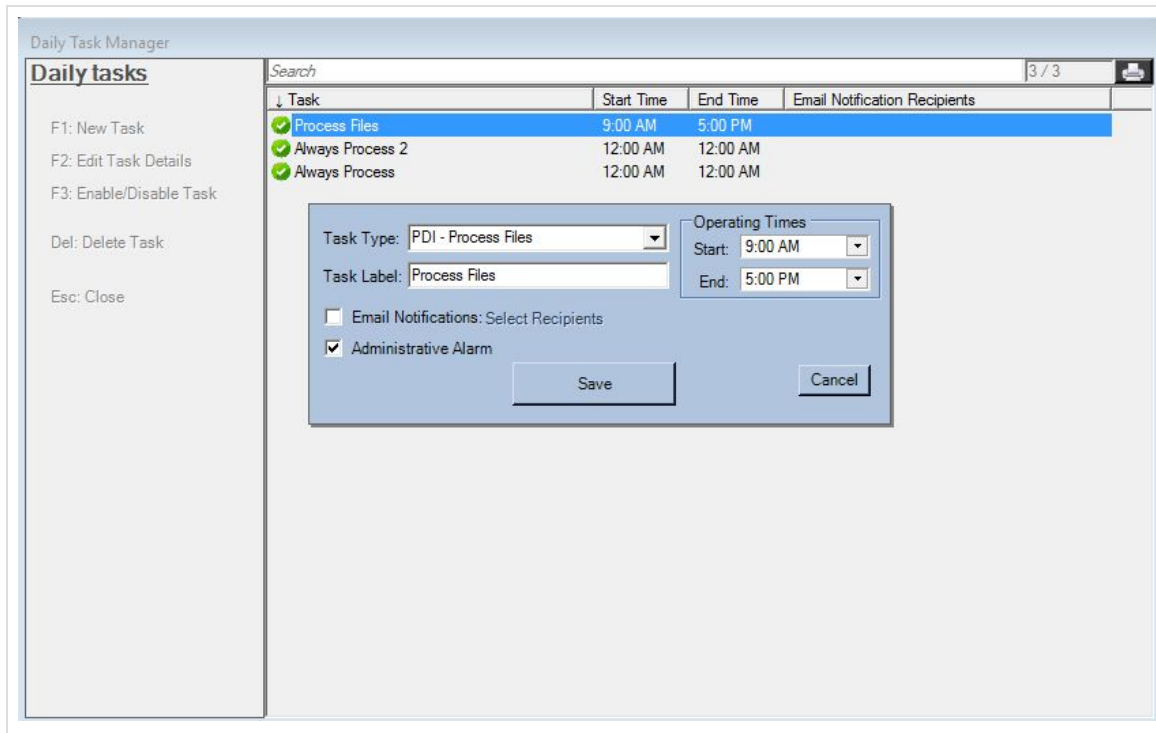
1. Go to C:\Program Files (x86)\CAREWare\RW CAREWare Business Tier.
2. Right click *CW Admin*.
3. Click *Run as Administrator*.
4. Click *Stop Server*.
5. Click *Common Storage Settings*.
6. Click *cmm\_st\_pk* to set in alphabetical order.
7. Scroll to *PDIFolder*.
8. Set the folder path to the folder you want to use for importing data. The default setting is: C:\Program Files (x86)\CareWare\RW CAREWare Business Tier\PDIFiles.
9. Make sure there is a *PDIFiles* folder in the business tier folder.
10. Click *Server Settings*.
11. Click *Start Server*.

	cmm_st_pk	cmm_st_text
85	minimumPasswordNumericCh...	NULL
86	minimumPasswordSpecialChars	NULL
87	minimumPasswordUCaseChars	NULL
88	mName1stDeduction	NULL
89	mNamettlDeduction	NULL
90	NumBackupLogs	NULL
91	ObservationProvider	#####-0000-0000-0000-000000000002
92	PasswordResetTokenExpiration	NULL
93	PDI_ADAPAvailableMedFileN...	
94	PDI_ExportDirectory	C:\Program Files (x86)\CareWare\RW CAREWare Business Tier 895\PDI Ex
95	PDIFolder	C:\Program Files (x86)\CareWare\RW CAREWare Business Tier 895\PDIFile
96	perYearDeduction	NULL
97	PIIFieldsEncrypted	NULL
98	PM_EmailReqAuth	NULL
99	PM_EmailReqSSL	NULL
100	PM_EmailServer	NULL
101	PM_EmailUserName	NULL

## B. Create a scheduled task to import files from the configured import folder

1. Log into *Central Administration*.
2. Click *Administrative Options*.
3. Click *Provider Data Import*.

4. Click *Scheduling Options*.
5. Click *New Task*.
6. Click the *Task Type* drop down.
7. Click *PDI - Process Files*.
8. Enter a *Task Label*.
9. Enter a *Start and End* time.
10. Click *Save*.



Note: The Operating Times drop down prompts users to choose a date for the task to be first started. The scheduled task will continue to start and end the task daily within the Operating Times window. After a user chooses a date, he or she can enter operating times (which default to 12:00 AM once the date is chosen).

During the Start and End times for the task, placing a PDI file in the PDIFiles folder will begin the Provider Data Import process. The import file data will go to the holding tanks, waiting for a user to process the file manually unless the provider is configured to import files automatically.

## Email Notifications

The screenshot shows a configuration window with the following elements:

- Task Type:** PDI - Process Files (dropdown menu)
- Task Label:** Process Files (text input field)
- Operating Times:** Start: 9:00 AM, End: 5:00 PM (dropdown menus)
- Email Notifications:** [Select Recipients](#)
- Administrative Alarm**
- Save** and **Cancel** buttons.

1. Check the box next to *Email Notifications* to activate.
2. Click *Select Recipients*.

The screenshot shows a dialog box titled "Select Email Recipients" with two panes:

- Email Recipients:** Contains "F1: Add Recipient" and "Esc: Close".
- Process Files:** Contains a search bar with "3 / 3" results and a list of email addresses:
  - "CW TEMP" <NA>
  - "Gredlwist Folsbogen" <Folsbogen.Grendlewist>
  - "RWCareWare System" <NA>

3. Click *Add Recipient*.

The screenshot shows a dialog box for adding a recipient with the following fields:

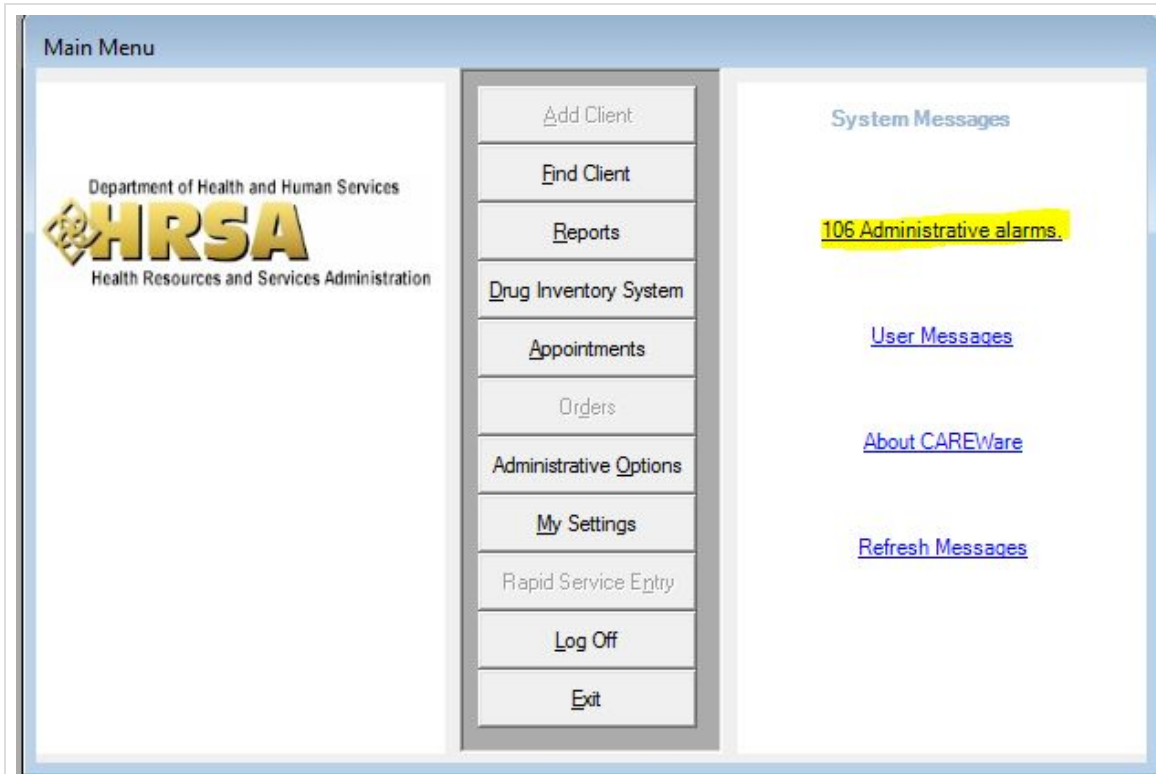
- Email Address:** Test@GMAIL.com (with a search icon)
- Name:** Test
- Save** and **Cancel** buttons.

4. Check the box next to the recipient's name to activate email alerts.

## Administrative Alarms

1. Check the box next to *Administrative Alarms* to activate.

2. Go back to the *Main Menu*.
3. Click *Administrative Alarms*.



Administrative Alarm

Unacknowledged Alarms: 107 Create Admini...

Activity Name	Date	Ackn...	
A task has completed	6/15/2016 10:5...	No	^
attempted permission violation	6/14/2016 7:27:...	No	
SQL Server Reindex Complete	6/13/2016 1:52:...	No	
unchanged expired password	6/13/2016 1:43:...	No	
unchanged expired password	6/13/2016 1:43:...	No	
unchanged expired password	6/13/2016 1:43:...	No	
A task has completed	6/10/2016 2:18:...	No	
A task has completed	6/10/2016 1:45:...	No	

Activity Message

Automated PDI Import Added(created with the IP address - 127.0.0.1).

### C. Configure provider domains to automatically process imports

1. Log into *Central Administration*.
2. Click *Administrative Options*.
3. Click *Provider Data Import*.

4. Click the provider to highlight it.
5. Click *Configure Provider*.

PDI Settings > Tester

**Client/Annual Review Options**

Adding new clients

- Automatically add new clients (Default)
- Manually add new clients

Update Race

- Always update (Default)
- Never Update
- Update only for TRUE values

Client Matching

- Client eURN (Default)
- Client ID
- Custom Field

Updating Demographic Data

- Always update (Default)
- Never Update
- Update only for NEW clients
- Only update new values

Update Risk Factors

- Always update (Default)
- Never Update
- Update only for TRUE values

Update Insurance Types

- Always update (Default)
- Never Update
- Update only for TRUE values

**ADAP Import Options**

How to Handle Insurance

- Use the insurance type specified in the incoming record (Ignores the clients current insurance type)
- Use the client's current insurance type (Ignores the insurance type in the incoming record)
- Do not use insurance

Set the number of days to use when determining if a client has a drug overlap (0 to ignore):

**Service Options**

Service Matching

- Standard - services are unduplicated from file to file
- Always add - services in the file are always added, will create duplicates
- Service PK - services are matched by CAREWare primary key

Match on custom field [configure](#)

**Provider Data Options**

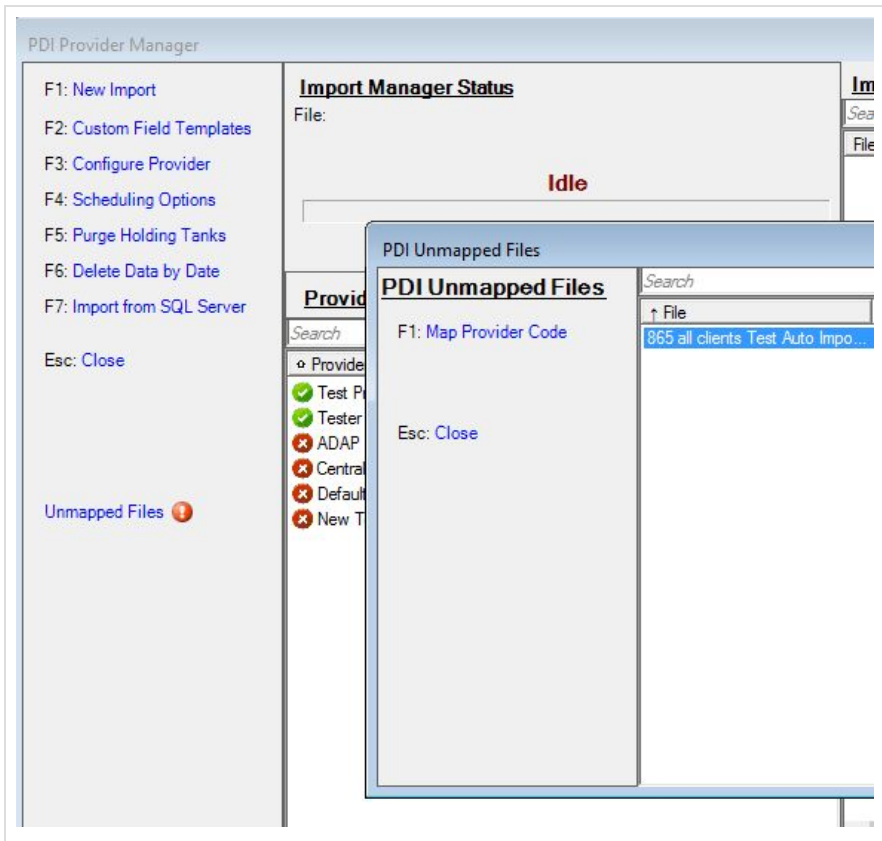
- Update provider information
- Automatic Import
- Match CAREWare values
- Automatically Import Setup Data
- Delete Completed Records after Process

Save Cancel

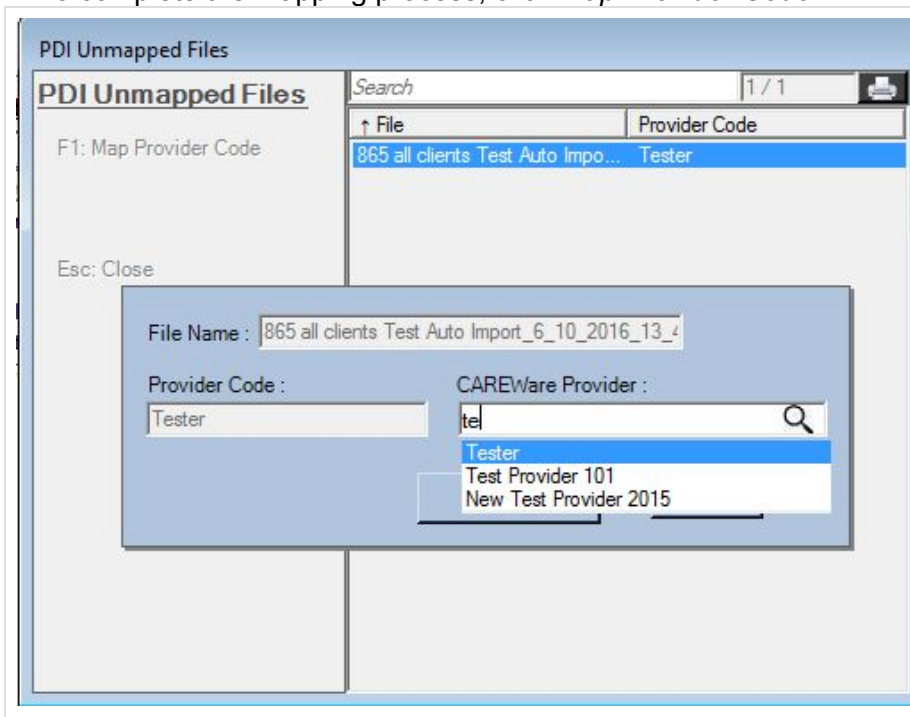
A provider that is configured for automatic processing of imports automatically begins processing the import file from the holding tanks. Provider domains that are configured for automatic imports have a green check next to the provider name in the PDI Provider Manager.

Provider Data Import files that require mapping of the provider name are placed in the Unmapped Files subfolder in the PDIFiles folder. Unmapped Files will appear in the PDI Provider Manager menu.

1. Click *Unmapped Files* to view them.



2. To complete the mapping process, click *Map Provider Code*.



3. Enter the CAREWare Provider code.
4. Click Save.