Provider Data Import (PDI)

Specifications Document

Build <mark>960</mark>

* Changes to this document since the last update, on 8/21/2018, have been highlighted yellow.

I. Overview

The Provider Data Import (PDI) is designed to provide an easy 'intermediate step' in the complicated process of importing data from other applications into CAREWare. It utilizes an Access database to provide a standard format for data that the CAREWare business tier can then use to populate the CAREWare database. Thus a user can populate a few tables in an easy-to-use Access format and CAREWare will do the rest.

Note: CAREWare can also import data from an XML file.

1. The File

As a default, CAREWare will be configured to import MS Access 2000 database files, though the central site may alter a business tier setting that would allow other data formats. CAREWare retains a blank import file called PDI Template.mdb in the RW CAREWare Business Tier and RW CAREWare Client Tier folders, which can be used as a template. That file will contain empty tables: exp_adap_enrollment_history, exp_annual_review, exp_appointment, exp_attachments, exp_case_note, *exp_client*, exp_counseling_testing, exp_custom_subform, exp_diagnosis, exp_drug_payment, exp_eligibility, exp_form_design_data, exp_immunization, *exp_insurance_assessment,* exp_map_client_provider, exp_medication, exp_message, *exp_poverty_level_assessment, exp_pregnancy, exp_provider, exp_receipt, exp_referral, exp_relations, exp_service,* exp_sharing_request*, exp_subservice, exp_test, exp_vital_sign*. The relational structure of these tables is simple: exp_adap_enrollment_history, exp_annual_review, exp_appointment, exp_case_note, exp_counseling_testing, exp_custom_subform, exp_diagnosis, exp_drug_payment, exp_eligibility, exp_immunization, *exp_insurance_assessment,* exp_map_client_provider, exp_medication, *exp_poverty_level_assessment, exp_pregnancy, exp_referral, exp_relations, exp_service, exp_test, exp_vital_sign* have foreign keys that refer to the primary key in *exp_client*. Note that these tables have primary keys as well, even though these are not referenced by foreign keys in other tables. The table *exp_provider*, which will contain basic information about the exporter, will not be a part of the relational structure.

The only requirement for filenames will be that they have the .mdb or .accdb extension that is common for MS Access databases. However, the central site may require a site ID and an export date in the filename to make file management easier.

Note: The RW CAREWare Business Tier and RW CAREWare Client Tier folders are located in the CAREWare folder at C:\Program Files (x86)\CAREWare by default.

2. The Data

Exporters are recommended to include any record that was added, edited, or deleted since the most recent export. The export files can contain data from any range of dates, though it will be important for the central site to be able to know the chronological sequence of the export files. The import process will add new records and edit or delete existing records based on rules for each record type. If there is an existing record based on these values it will be updated to match the incoming record. Otherwise, a new record will be added. An existing record will be deleted if it matches an existing one and the *is_delete* field is set to 'yes'.

CLIENT records will be imported and matched based on the client's URN (this value is generated by CAREWare based on the client's first name, last name, gender, and DOB). An incoming client record that generates the URN of an existing client will be treated as the same client and the existing client record may be updated based on options chosen by the user running the import (see below).

Note: The client's first and/or last names can be excluded from the client records if necessary, but Date of Birth (DOB) and Gender are always required. In this case the EURN (Encrypted URN) field for each client <u>will be required</u>, as it will be used to match existing clients instead of the URN. For help with generating valid EURN values:
- *See Appendix A for information and sample code for programmatically creating an EURN for clients.*
- *See Appendix B for information on using the access mdb template file to automatically create the EURNs.*

Client records should be included if they have been added or edited since the last export OR if any other record related to that client is included (i.e., any service, referral, annual review, etc). Deletion of client records will not be handled through the export/import process.

ADAP ENROLLMENT HISTORY records the ADAP enrollment history of clients. This table is only used for ADAP provider domains. This table is matched to client, date, and domain.

ANNUAL REVIEW – This table has been entirely deprecated as of the 800+ builds of CAREWare. Data from this table will still be imported for historical purposes, but this table in CAREWare is no longer used. Insurance and poverty level

data are now held on the tables *exp_insurance_assessment* and *exp_poverty_level_assessment*. Annual Screening data will now be recorded as screenings on *exp_test*. These data elements have been retained in *exp_annual_review* table but are deprecated; If used, they lose precedence over the corresponding data in the new areas. If there is an existing record, it may be updated based on options chosen by the user running the import (see below).
NOTE:

For Client, Annual Review and Insurance Assessment records, existing data fields will be updated according to the following rules:

- If a client is associated only with the provider that sent the current import, the incoming record always overwrites the existing record.
- For Client and Annual Review data shared by multiple providers the user specifies whether an incoming value should overwrite an existing value on an import-by-import basis. There are 2 exceptions to this:
    - An incoming Null value never overwrites a non-Null value.
    - An incoming "Unknown" value never overwrites a non-Null value. ("Unknown" values exist in the following fields: cln_gender, cln_hispanic, cln_vital_status, cln_enrollment_status, cln_hiv_status, ann_rv_housing_arrangement, ann_rv_insurance_type, and ann_rv_medical_care)

APPOINTMENT records will be matched on: client, domain, service type and date. An appointment will be considered a match if the date is within + or – 1 day of the date of the incoming record.

ATTACHMENTS records will be matched to attachment list, date, and domain.

CASE NOTE records will be matched on: client, date and domain. NOTE: If an existing case note is a match, the existing note will be overwritten, not appended to.

COUNSELING AND TESTING records will be matched on: client, test date, and domain.

COUNTY RFT provides a list of all county codes.

CUSTOM SUBFORM records will be matched on: client, date, and domain.

DIAGNOSIS records will be matched on: client, date, domain, and diagnosis code.

DRUG PAYMENT records will be matched on: client, date, domain, and NDC for drug overlaps. User can set a drug overlap days in the import settings to determine whether a drug is overlapped.

ELIGIBILITY records will be matched on: client, date, domain, and eligibility code.

FORM DESIGN DATA records will be matched on: client, date, domain, and form design code.

IMMUNIZATION records will be matched on: client, date, domain, and immunization code.

INSURANCE ASSESSMENT records will be matched on: client, date and domain. If there is an existing record, its values are updated based on the options chosen by the user (mentioned in NOTE above). The values in *exp_insurance_assessment* take precedence over the values entered in the respective fields of *exp_annual_review*.

MAP CLIENT PROVIDER matches client PK's to a client-provider FK and the provider name.

MEDICATION records will be matched on: client, medication code, and a date span based on the start and end date of the incoming medication (a medication with no end date is considered to always be active). The import will search for medications whose
active dates overlap the date span of the incoming medication record. Any matching records that are found will be treated as the same record and updated accordingly with the following exceptions:
- Start Date is only updated if the incoming value is BEFORE the existing one.
- End Date is only updated if the incoming value is AFTER the existing one.

Message records will be matched on client, date, and domain.

OWNERSHIP STATUS RFT is a reference code defining what kind of organization the provider is.

POVERTY LEVEL ASSESSMENT records will be matched on client, date and domain. The values in *exp_poverty_level_assessment* take precedence over those entered in the corresponding fields of *exp_annual_review*.

PREGNANCY records will be matched on: client, domain, and estimated conception date. If there is an existing record with an Estimated Conception date within 30 days of the incoming record, then this will be treated as the same record and updated accordingly.

PROVIDER links the import file to the provider domain in CAREWare during the import process. This record imports the provider data for funding sources, grantee information, and other information created using the setup wizard during the provider setup.

PROVIDER TYPE RFT provides pk's for types of providers mapped to the provider table.

RECEIPTS records are tied to a specific service record and all receipts for a service will be synced to the incoming receipts for a service. Note that because of this behavior it is important to send all receipts for a service, not just new ones.

REFERRAL records will be matched on: client, date referred, (*referred from*) domain, service category, referred-to site.

RELATIONS records will be matched on: domain, index client, and dependant client.

SERVICE records will be matched based on: client, domain, service date, and subservice. Note regarding service contracts - If there is a value in the srv_contract_name field, then this value MUST match to the name of a valid contract for the domain (a valid contract is one where the subservice is be active for the contract and the service date falls between the start and end dates of the contract). If no value is entered in the contract name, then there must be exactly one valid contract for the subservice and date of service.

Sharing Request records will be matched on client, date, and domain.

STATE RFT provides the reference codes for all states.

SUBSERVICE records the names of subservices and creates a pk for each.

TEST records will be matched on: client, date, domain, and test definition.

TEST DEFINITION records the names of test definitions and creates a pk for each.

VERSION records the version of this PDI template.

VERSION HISTORY records changes made to this version of the PDI template.

VITAL SIGN records will be matched to client, date, and domain.
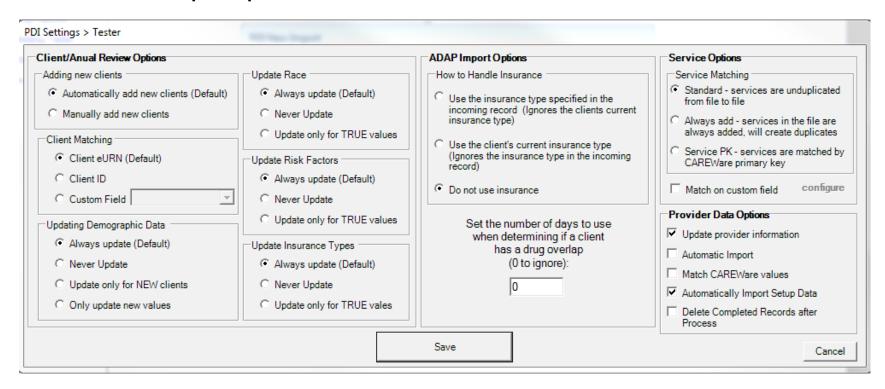
II. The File Format

The bulleted lists the Description/Comments column specifies what codes CAREWare uses for each value. Exporters are not *required* to use these codes, though using them would help to simplify the mapping process. Whatever values are used, it is <u>very important</u> that the exporters coordinate with the central importer to establish what codes will be used for what values and that the same values are consistently used. Failure to do this will result in incorrect data being imported.

NOTE: The state and county fields are exceptions to this, as they use designated FIPS codes. The available codes are included in the template file in the *exp_state_rft and exp_county_rft* tables.

NOTE: The minimum required fields for an import are based on the import options chosen.

- If *Client Matching* is set to the default setting of Client eURN (Default); the client's first name, last name, date of birth, and gender will be required for any import.
- If *Client Matching* is set to match on client ID, the cln_client_id will be a required field.
- If *Client Matching* is set to Custom Field, that custom field will be a required field.
- The client primary key and the provider name are always required. The client primary key is the cln_pk in the exp_client table. The provider name is entered in the prv_name column in the exp_provider table.

Provider Data Import Options

PDI Settings > Tester

Client/Anual Review Options

Adding new clients
- ● Automatically add new clients (Default)
- ○ Manually add new clients

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 Race
- ● Always update (Default)
- ○ Never Update
- ○ Update only for TRUE 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 vales

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):

[0]

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]

Client/Annual Review Options

Adding new clients
- Automatically add new clients (Default) – CAREWare using the client matching choice to determine if a client record is a new client and adds that client. If there is a similar record, users will be prompted to match that client to a record in CAREWare in PDI Details.
- Manually add new clients – Users will be prompted to match imported client records to records in CAREWare before records can be processed.

Client Matching
- Client eURN (default) – Matches clients on the encrypted unique identifier in CAREWare generated using the client's first name, last name, DOB, and gender.
- Client ID – Matches clients using an ID value set by users for that provider domain.
- Custom Field – Matches clients based on a custom field selected from the drop down list.

Updating Demographic Data
- Always update (Default) – CAREWare uses the imported data to update the clients record.
- Never Update – CAREWare only uses the exp_client primary key to match client records and makes no changes to demographics records using the imported data.
- Update only for NEW clients – Ignores imported demographics records for clients that are a match to records already in CAREWare.
- Only update new values – Only updates values for matched client records for clients in CAREWare, when there is a change to that clients record.

Update Race
- Always update (Default) – Uses the values included in the import file to update all race records for the client.
- Never Update – Ignores race fields when updating client records.
- Update only for True values – Only updates if a value is entered for a race field. Ignores blank values.

Update Risk Factors
- Always update (Default) – Uses the values included in the import file to update all risk factors for the client.
- Never Update – Ignores risk factors when updating client records.
- Update only for True values – Only updates if a value is entered for an risk factors. Ignores blank values.
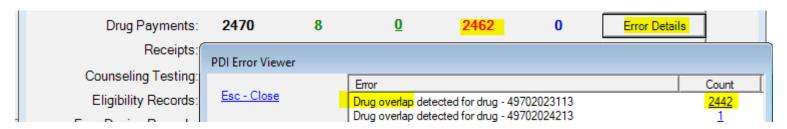
Update Insurance Types
- Always update (Default) – Uses the values included in the import file to update all insurance records for the client.
- Never Update – Ignores insurance types when updating client records.
- Update only for True values – Only updates if a value is entered for an insurance type. Ignores blank values.

ADAP Import Options

How to Handle Insurance
- Use the insurance type specified… - Imported insurance records override the clients current insurance in CAREWare.
- Use the client's current insurance type… - Ignores imported insurance records.
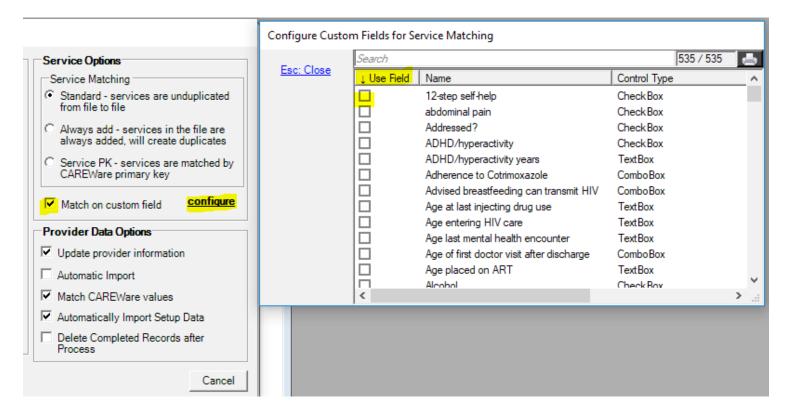- Do not use insurance – Ignores imported insurance records.

Set the number of days to use when determining if a client has a drug overlap. – Based on the drug payment date, drug payment duration, and current drug payment records for the client in CAREWare. If an overlap occurs for a drug payment record, an error will occur in the PDI Details stating "Drug overlap detected for drug – 4970203113". 4970203113 is an example of an NDC number for a drug payment during an ADAP import.

Drug Payments:	2470	8	0	2462	0	Error Details

PDI Error Viewer

Esc - Close

Error	Count
Drug overlap detected for drug - 49702023113	2442
Drug overlap detected for drug - 49702024213	1

Service Options

Service Matching

- Standard – Matches service records based on the service date and subservice code. Ignores duplicate services.
- Always add – CAREWare imports all service records with a matching client. This may lead to duplicate services being imported.
- Service PK – Matches using the srv_pk value.
- Match on custom field – Services are matched using a custom service field selected by clicking *configure*.

Provider Data Options

- Update provider information – Updates provider domain information using records imported in the exp_provider table and updating records in Setup Wizard for a provider domain or ADAP setup for an ADAP domain.
- Automatic Import – CAREWare will process any records that are ready to process automatically.
- Match CAREWare values – CAREWare matches imported records based on CAREWare values reducing the number of missing mapping values.
- Automatically Import Setup Data – Imports a provider domains setup data using meta data tables in the import file.
- Delete Completed Records after Process – CAREWare will purge processed records from the holding tanks.

exp_provider

Field Name	Data Type	Size	Required	Old Name	Description/Comment
prv_name	Text	60	Yes	Prvname1	The name of the provider
prv_part_a_provided	Yes/No	n/a	No*	Title1	Whether or not the provider receives Part A funds.
prv_part_a_prv_id	Text	4	No	Prvid	The Part A provider ID.
prv_part_b_provided	Yes/No	n/a	No*	Title2	Whether or not the provider receives Part B funds.
prv_part_b_prv_id	Text	4	No	Prvid	The Part B provider ID.
prv_part_a_grn_id	Text	4	No	Grantid	The Part A grantee ID.
prv_part_b_grn_id	Text	4	No	Grantid	The Part B grantee ID.
prv_part_c_provided	Yes/No	n/a	No*	Title3	Whether or not the provider receives Part C funds.
prv_part_c_grn_id	Text	14	No	Grantid	The Part C grantee ID.
prv_part_d_provided	Yes/No	n/a	No*	Title4	Whether or not the provider receives Part D funds.
prv_part_d_grn_id	Text	14	No	Grantid	The Part D grantee ID.
prv_street	Text	60	No	Prvaddr1	Provider's street address
prv_city	Text	25	No	Prvcity	Provider's city
prv_state	Text	2	No	State	Value must be a key from exp_state_rft (FIPS code)
prv_zip	Text	9	No	Zip & Zip4	Provider's zipcode
prv_contact_name	Text	30	No	Contname	Contact staff for provider
prv_contact_title	Text	30	No	Conttitl	Contact staff for provider's title
prv_contact_phone	Text	25	No	Phone	Contact staff for provider's phone number
prv_contact_fax	Text	25	No	Fax	Contact staff for provider's fax number
prv_contact_email	Text	35	No	Email	Contact staff for provider's email address
prv_qa_rep_name	Text	30	No	-	Name of the provider's quality assurance representative.
prv_qa_rep_email	Text	35	No	-	Email of the provider's quality assurance representative.
prv_taxpayer_id	Text	9	No	Taxid	The agency's taxpayer ID.
prv_provider_type	Text	2	No	Prvtype	Code for: • 01 - Hospital or hospital-based client • 02 - Publicly-funded Community Health Center • 03 - Publicly-funded Community Mental Health Center • 04 - Other Community-based Service Organization (CBO) • 05 - Health Department • 06 - Substance abuse treatment center • 07 - Solo/Group Private Medical Practice

					• 08 - Agency Reporting for Multiple Fee-for-Service Providers • 09 - PLWHA coalition • 10 - VA facility • 11 - Other facility • 12 - HL7 Import Provider
prv_reporting_scope	Text	1	No	?	A legacy CADR field that remains in the Provider Setup Wizard. Code for: • 1 - ALL Clients receiving a service ELIGIBLE for Title 1 or 2 funding • 2 - ONLY Clients receiving a Title 1 or 2 FUNDED service
prv_ownership_ status	Text	2	No	Owner	Code for: • 1 - Public/Local • 2 - Public/State • 3 - Public/Federal • 4 - Private, Non-profit (not faith-based) • 5 - Private, For-profit • 6 - Unincorporated • 7 - Faith-based organization • 8 - Other
prv_num_paid_staff	Single	n/a	No	Paidstaf	Total paid HIV staff in FTEs.
prv_num_volunteers	Single	n/a	No	Volstaff	Total paid volunteer staff in FTEs.
prv_minority_board	Yes/No	n/a	No*	RaceBrd	*Yes* if racial/ethnic minority group members make up greater than 50% of your agency's board members.
prv_minority_staff	Yes/No	n/a	No*	Racestf	*Yes* if racial/ethnic minority group members make up greater than 50% of your agency's professional staff members in HIV direct services.
prv_minority_ clinicians	Yes/No	n/a	No*	Racesolo	*Yes* if your agency is a solo or group private health care practice in which greater than 50% of the clinicians are racial/ethnic minority group members.

prv_minority_served	Yes/No	n/a	No*	Tradprv	*Yes* if your agency is a traditional provider that has historically served racial/ethnic minority patients/clients but does not meet the criteria in the fields above.
prv_minority_other	Yes/No	n/a	No*	Othprv	Yes if your agency does not meet the criteria of any of the four preceding fields.
prv_receives_330_funding	Text	20	No	-	Code for: • 0 – No • 1 – Yes • 9 - Unknown
prv_receives_Mai_funding	Text	20	No	-	Code for: • 0 – No • 1 – Yes • 9 - Unknown
prv_other_provider_type	Text	50	No	-	Allows for specification of what provider type is when 'other' is chosen for prv_provider_type
prv_other_owner_status	Text	50	No	-	Allows for specification of what ownership status is when 'other' is chosen for prv_ownership_status

exp_client

Note: an exp_client record must be included for any associated record in the file, even if the client record itself has not changed since the last export.

Field Name	Data Type	Size	Required	Old Name	Description/Comment
cln_pk	Text	38	Yes	PK	Used only for database relations within this file.
cln_eurn	Text	20	No*	Urn	Encrypted URN (usually nine characters). Required if cln_first_name or cln_last_name is blank.
cln_urn_suffix	Text	1	No***		Used to distinguish multiple clients with the same URN.
cln_client_id	Text	16	No *****	-	Domain specific identification field for clients.
cln_last_name	Text	40	No	Lname	Required if cln_eurn is blank and import settings are matching on URN
cln_first_name	Text	25	No	Fname	Required if cln_eurn is blank and import settings are matching on URN
cln_middle_name	Text	25	No	Minit	New field holds 25 characters, but initial is acceptable.
cln_street	Text	50	No	-	Street Address
cln_city	Text	30	No	-	City
cln_state	Text	75	No	-	FIPS code for the state. See exp_state_rft table
cln_county	Text	50	No	-	FIPS code for the county. Must be a valid county code for the given State. If no state is given then this must be null as well. See exp_county_rft table
cln_zip	Text	10	No	Clntzip	Client Zip code
cln_phone	Text	25	No	-	Client Phone
cln_dob	Date/Time	n/a	Yes	Bmonth, Bday, Byear	Full DOB is required.
cln_dob_estimated	Yes/No	n/a	No	-	Signifies whether or not the DOB is an estimate.
cln_gender	Text	20	Yes	Sex	Code for: • 1 - Male • 2 - Female • 3 - Transgender Unk • 4 - Transgender MtF • 5 - Transgender FtM • 6 - Refused to Report • 9 - Unknown
cln_race_white	Yes/No	n/a	No*	White	Checked if the client is white.

cln_race_black	Yes/No	n/a	No*	Black	Checked if the client is African American.
cln_race_asian	Yes/No	n/a	No*	Asian	Checked if the client is Asian.
cln_race_pacific	Yes/No	n/a	No*	Pacisl	Checked if the client is Native Hawaiian or Other Pacific Islander.
cln_race_indian	Yes/No	n/a	No*	Natamer	Checked if the client is American Indian or Alaska Native.
cln_race_other	Yes/No	n/a	No*	Othrace	Checked if the client is a race other than the options listed.
cln_race_unknown	Yes/No	n/a	No*	unkrace	Checked if the client's race is unknown (another race box cannot be checked).
cln_hispanic	Text	20	No**	Hispanic	Code for: • 0 - No • 1 - Yes • 9 - Unknown
cln_risk_msm	Yes/No	n/a	No*	Hivrisk <1-4>	Men who have Sex with Men; now a separate Boolean value.
cln_risk_idu	Yes/No	n/a	No*	Hivrisk <1-4>	Intravenous Drug Use; now a separate Boolean value.
cln_risk_hetero	Yes/No	n/a	No*	Hivrisk <1-4>	Heterosexual contact; now a separate Boolean value.
cln_risk_hemo	Yes/No	n/a	No*	Hivrisk <1-4>	Hemophilia/coagulation disorder; now a separate Boolean value.
cln_risk_perinatal	Yes/No	n/a	No*	Hivrisk <1-4>	Perinatal transmission; now a separate Boolean value.
cln_risk_transfusion	Yes/No	n/a	No*	Hivrisk <1-4>	Receipt of transfusion of blood, blood components, or tissue; now a separate Boolean value.
cln_risk_other	Yes/No	n/a	No*	Hivrisk <1-4>	Now a separate Boolean value.
cln_risk_other_ description	Text	40	No		Description of the "other" risk; now a separate Boolean value.
cln_risk_unknown	Yes/No	n/a	No*	Hivrisk <1-4>	Now a separate Boolean value.
cln_vital_status	Text	20	No**	Vitalst	Code for: • 1 - Alive • 3 - Deceased • 4 - Unknown Enrollment Status is now a separate value.

cln_date_of_death	Date/Time	n/a	No	Dod	
cln_enrollment_ status	Text	20	No**	Vitalst	Code for: • 1 – Active • 2 – Inactive/Case Closed (deprecated) • 3 – Referred or Discharged • 4 – Removed • 5 - Incarcerated • 6 - Relocated • 9 - Unknown (deprecated)
cln_enrollment_date	Date/Time	n/a	No	Enrldate	Date of client's first enrollment.
cln_date_case_ closed	Date/Time	n/a	No	Enddate	Case closed date
cln_hiv_status	Text	20	No **	Hivstat	Code for: • 1 - HIV-positive (not AIDS) • 2 - HIV-positive (AIDS status unknown), • 3 - CDC defined AIDS, • 4 - HIV-negative (affected), • 5 - HIV-indeterminate, or • 9 – Unknown (deprecated)
cln_hiv_date	Date/Time	n/a	No	-	The date on which the client was diagnosed HIV+.
cln_hiv_date_est	Yes/No	n/a	No*	-	*Yes* if the HIV+ date is an estimate.
cln_aids_date	Date/Time	n/a	No	-	The date on which the client was diagnosed with AIDS.
cln_aids_date_est	Yes/No	n/a	No*	-	*Yes* if the AIDS date is an estimate.
cln_date_art_first_ prescribed	Date/Time	n/a	No	-	Date client was first prescribed ARV medications.
cln_pre_art_reason	Text	20	No	-	Code for explanation of why client was not prescribed ART after diagnosed with HIV: • 1 - Treatment not medically indicated per guidelines, • 2 - Client not ready (as determined by clinician), • 3 - Client refused therapy, or • 4 - Other extenuating circumstances (e.g. inadequate insurance, ability to pay)
cln_med_allergies	Text	255	No	-	Free text description of any allergies to medications.
cln_notes	Memo	n/a	No	-	Free text for additional client notes
cln_encrypted_UCI	Text	50	No	-	If URN fields are supplied then this value is not used (it is generated from the

					URN).
cln_adap_application_date	Date/Time	n/a	No		Date of received ADAP application
cln_race_label	Text	50	No	-	Alternate method for importing Race. This text value will be mapped to one or more values for Race during import.
cln_risk_label	Text	50	No	-	Alternate method for importing Risk Factors. This text value will be mapped to one or more values for Risk Factors during import.
cln_birth_gender	Text	20	No		Gender at birth. Code for: • 1 - Male • 2 - Female
cln_hispanic_subgroup	Text	50	No		Only imported if cln_hispanic = "1". Code for: • 1 – Mexican, Mexican American, Chicano/a • 2 - Puerto Rican • 3 - Cuban • 4 – Another Hispanic, Latino/a or Spanish origin **** See Note below
cln_pacific_subgroup	Text	50	No		Only imported if cln_race_pacific = Yes. Code for: • 1 – Native Hawaiian • 2 – Guamanian or Chamarro • 3 - Samoan • 4 - Other Pacific Islander **** See Note below
cln_asian_subgroup	Text	50	No		Only imported if cln_race_asian = Yes. Code for: • 1 – Asian Indian • 2 - Chinese • 3 – Filipino • 4 – Japanese • 5 – Korean • 6 – Vietnamese • 7 – Other Asian **** See Note below
cln_phone_type	Text	50	No		Phone Type Code for: • 01 - Home • 02 - Mobile • 03 - Work

					• 04 - Fax
cln_mailing_street	Text	50	No		Street Address
cln_mailing_city	Text	30	No		City
cln_mailing_state	Text	75	No		FIPS code for the state. See exp_state_rft table
cln_mailing_zip	Text	10	No		Client Zip code
cln_mailing_phone_1	Text	25	No		Phone number
cln_mailing_phone_1_type	Text	50	No		Phone Type Code for: • 01 - Home • 02 - Mobile • 03 - Work • 04 - Fax
cln_mailing_phone_2	Text	25	No		Phone number
cln_mailing_phone_2_type	Text	50	No		Phone Type Code for: • 01 - Home • 02 - Mobile • 03 - Work • 04 - Fax
cln_primary_diagnosis_code	Text	7	No		Diagnosis Code in Billing Information in Insurance Assessment for Annual Review used for billing module.
cln_primary_diagnosis_date	Date/Time	n/a	No		Date of Diagnosis in Billing Information in Insurance Assessment for Annual Review used for billing module.
cln_common_notes	Memo	n/a	No		General comments for users.

* All Boolean fields are required by CAREWare. Any left null will be interpreted as FALSE.

** CAREWare dropdown lists that specify an Unknown option do not permit null values. Any left null will be interpreted as "Unknown."

*** Null value will default to 'U'

****These are placeholder positions. For each racial subgroup that is true place a "1" and for each racial subgroup that is false place a "0". (I. e., a client is Puerto Rican and Cuban. You will place a 0110 in the Hispanic Subgroup column.)

***** If the provider data import option is set to match clients based on Client ID, then this field is required. Matching clients based on Client ID is an option to replace matching clients on URN. To review this setting, refer to the PDI User Manual here.

exp_adap_enrollment_history

Field Name	Data Type	Size	Required	Description/Comment
adp_en_hs_pk	Text	38	Yes	Uniquely identifies each record.
adp_en_hs_cln_fk	Text	38	Yes	Points to the client record to which this record is related
adp_en_hs_date	Date/Time	n/a	Yes	Date of enrollment update
adp_en_hs_status_code	Text	38	No	Code for current enrollment status: • 01 - Enrolled, receiving services • 02 - Enrolled, on waiting list • 03 - Enrolled, services not requested • 04 - Disenrolled • 05 - Legacy Enrolled • 06 - Legacy Disenrolled NOTE: 05 and 06 are only for historical purposes. These are not valid values for current data.
adp_en_hs_status_label	Text	100	No	Descriptive label for status code
adp_en_hs_disenroll_code	Text	38	No	Code for disenrollment reason: • 01 - Ineligible, change in ADAP program FPL requirements • 02 - Ineligible for ADAP, now eligible for Medicaid • 03 - Ineligible, other reason • 04 - Did not recertify • 05 - Did not fill prescription • 06 – Deceased • 07- Dropped out, no reason given • 08 - Other/Unknown • 09 – Ineligible due to change in ADAP eligibility • 10 – Ineligible for ADAP, no longer meets ADAP eligibility
adp_en_hs_disenroll_label	Text	100	No	Descriptive text for disenrollment reason
adp_en_hs_other_disenroll_code	Text	38	No	Code for other disenrollment reason
adp_en_hs_other_disenroll_label	Text	100	No	Descriptive text for other disenrollment reason
adp_en_hs_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.

exp_annual_review (DEPRECATED)

Field Name	Data Type	Size	Required	Old Name	Description/Comment
ann_rv_pk	Text	38	Yes	-	Not used by the import process; only useful for user reference.
ann_rv_cln_fk	Text	38	Yes	-	Points to the client record to which this record is related.
ann_rv_year	Text	4	Yes	-	4 digit year to which this annual review applies.
ann_rv_household_ size	Integer	n/a	No	Hhsize	DEPRECATED 1-9999
ann_rv_household_ income	Currency	n/a	No	Hhinc	DEPRECATED $0.00 - $999,999,999.99
ann_rv_housing_ arrangement	Text	2	No*	Nohome	DEPRECATED Code for: • 0 – Stable/Permanent • 1 - Non-permanently Housed • 2 - Institution • 3 – Other • 9 -Unknown/Unreported
ann_rv_insurance_ type	Text	2	No*	Primpay	DEPRECATED Code for: • 1 - Private • 2 - Medicare • 3 - Medicaid • 4 - Other public (e.g. Campus, VA) • 5 - No Insurance • 6 - Other • 9 - Unknown
ann_rv_medical_ care	Text	2	No*	Primcare	DEPRECATED Code for: • 1 - Publicly-funded clinic or health dept. • 2 - Private practice • 3 - Hospital outpatient center • 4 - Emergency Room • 5 - No primary source of care • 8 - Other • 9 - Unknown

ann_rv_q*_ substance_abuse_ history	Text	1	Yes	Subhxq <1-4>	Code for: • 0 - No • 1 - Yes, active history within last 3 months • 2 - Yes, but not active within last 3 months
ann_rv_q*_ substance_abuse_ treatment	Text	2	Yes	Subtrq <1-4>	Code for: • 01 - In Treatment • 02 - Waiting list for treatment • 03 - Refused Treatment • 04 - Completed Treatment • 05 - Pre-treatment process • 06 - Dropped out of treatment • 07 - No active treatment or counseling • 08 - Other • 88 - Not applicable
ann_rv_q*_mental_ health_history	Text	1	Yes	Mhhxq <1-4>	Code for: • 0 - No • 1 - Yes, active history within last 3 months • 2 - Yes, but not active within last 3 months
ann_rv_q*_mental_ health_treatment	Text	2	Yes	Mhtrq <1-4>	Code for: • 01 - In Treatment • 02 - Waiting list for treatment • 03 - Refused Treatment • 04 - Completed Treatment • 05 - Pre-treatment process • 06 - Dropped out of treatment • 07 - No active treatment or counseling • 08 - Other • 88 - Not applicable
ann_rv_ins_tp_private	Yes/No	n/a	No*	-	DEPRECATED Adds private insurance as other insurance
ann_rv_ins_tp_medicare	Yes/No	n/a	No*	-	DEPRECATED Adds Medicare insurance as other insurance
ann_rv_ins_tp_medicaid	Yes/No	n/a	No*	-	DEPRECATED Adds Medicaid insurance as other insurance

ann_rv_ins_tp_other_public	Yes/No	n/a	No*	-	DEPRECATED Adds Other Public insurance as other insurance
ann_rv_ins_tp_no_insurance	Yes/No	n/a	No*	-	DEPRECATED Adds No insurance as other insurance.
ann_rv_ins_tp_other	Yes/No	n/a	No*	-	DEPRECATED Adds Other insurance as other insurance
ann_rv_ins_tp_unknown	Yes/No	n/a	No*	-	DEPRECATED Adds Unknown insurance as other insurance
ann_rv_other_insurance	Text	50	No	-	DEPRECATED Allows specification of other insurance if ann_rv_ins_tp_other is chosen
ann_rv_mental_health_yes_nmi_rfk	Text	2	No	-	DEPRECATED Code for: • 0 – No • 1 – Yes • 2 – Not Medically Indicated • 9 - Unknown
ann_rv_sub_abuse_yes_nmi_rfk	Text	2	No	-	DEPRECATED Code for: • 0 – No • 1 – Yes • 2 – Not Medically Indicated • 9 - Unknown
ann_rv_hiv_counseled	Yes/No	n/a	No*	-	DEPRECATED Yes if this client was HIV Counseled for this review year
ann_rv_counseled_by	Text	50	No	-	DEPRECATED Code for: • 1 – Primary care clinician • 2 – Case mgr/social worker • 3 – Other trained counselor • 9 – Unknown

exp_appointment

Field Name	Data Type	Size	Required	Description/Comment
app_pk	Text	50	Yes	Uniquely identifies each record.
app_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
app_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
app_date	Date/time	n/a	Yes	Date of the appointment.
app_amount	Currency	n/a	No	Amount of any payment collected.
app_employee	Text	38	No	Employee creating the appointment.
app_comment	Memo	n/a	No	Free text used to supply additional information.
app_sent_to_employee	Text	38	No	Employee the client was sent to contact.
app_subservice	Text	38	Yes	Service which is the purpose of the appointment.
app_employee_label	Text	100	No	Descriptive label to help with matching.
app_sent_to_employee_label	Text	100	No	Descriptive label to help with matching.
app_subservice_label	Text	100	No	Descriptive label to help with matching.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_attachments

Field Name	Data Type	Size	Required	Description/Comment
att_pk	Text	36	Yes	Uniquely identifies each record.
att_att_ls_fk	Text	38	Yes	Unique foreign key which records the record in the attachment list table in the database.
att_file_name	Text	255	Yes	Name of the file
att_cnt_tp_label	Text	35	Yes	Date the note was entered.
att_comment	Text	100	No	Comments on this attachment.
att_file_date	Date/Time	n/a	Yes	Date of the file
att_attach_date	Date/Time	100	Yes	Date file was attached
att_file_type	Text	5	Yes	Type of file. i.e. PDF, DOC, TXT, etc.

exp_case_note

Field Name	Data Type	Size	Required	Description/Comment
cas_nt_pk	Text	38	Yes	Uniquely identifies each record.
cas_nt_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
cas_nt_date	Date/Time	n/a	Yes	Date the note was entered.
cas_nt_note	Memo	n/a	Yes	Text of the note.
cas_nt_employee	Text	38	No	Employee entering this case note.
cas_nt_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare
cas_nt_employee_label	Text	100	No	Descriptive label to help with matching.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_counseling_testing

Field Name	Data Type	Size	Required	Description/Comment
cns_ts_pk	Text	38	Yes	Primary key for the record that must be unique.
cns_ts_cln_fk	Text	38	Yes	Foreign key to the cw_client table.
cns_ts_pre_counsel	Text	20	No	Indicates whether or not there was pretest counseling.
cns_ts_pre_counsel_date	Date/Time	n/a	No	Date of pretest counseling.
cns_ts_post_counsel	Text	20	No	Indicates whether or not there was post-test counseling.
cns_ts_post_counsel_date	Date/Time	n/a	No	Date of post-test counseling.
cns_ts_reason_no_post_counsel	Text	50	No	The reason the client was not given post-test counseling.
cns_ts_post_counsel_referred	Yes/No	n/a	No	Indicates whether or not there was post-test counseling.
cns_ts_hiv_tested	Text	20	No	Indicates whether or not the client was HIV tested.
cns_ts_hiv_tested_label	Text	50	No	Descriptive text for whether or not HIV testing was completed
cns_ts_hiv_tested_result	Text	20	No	The results of HIV testing
cns_ts_hiv_tested_result	Text	50	No	Descriptive text for the results of HIV testing

Field Name	Data Type	Size	Required	Description/Comment
_label				
cns_ts_hiv_tested_date	Date/Time	n/a	No	Date of the HIV test.
cns_ts_pn_offered	Text	20	No	Indicates whether or not the client was offered partner notification services.
cns_ts_pn_offered_label	Text	50	No	Descriptive text for whether or not the client was offered partner notification services.
cns_ts_pn_number	Number	n/a	No	The number of partners notified.
cns_ts_comment	Text	255	No	Additional comments added by the user.
cns_ts_delete	Yes/No	n/a	No	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
prv_name	Text	60	Yes	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
cns_ts_pre_counsel_label	Text	50	No	Descriptive text for whether or not there was pretest counseling.
cns_ts_post_counsel_label	Text	50	No	Descriptive text for whether or not there was post-test counseling.

exp_custom_subform

Field Name	Data Type	Size	Required	Description/Comment
cst_sb_pk	Text	38	Yes	Primary key for the record that must be unique.
cst_sb_cln_fk	Text	38	Yes	Foriegn key to the cw_client table.
cst_sb_date	Date/Time	N/A	Yes	Date of custom subform record
cst_sb_cst_sb_tb_key	Text	38	Yes	Foreign key to the cw_custom_subform_tab table.
cst_sb_cst_sb_tb_label	Text	100	Yes	Label of custom subform tab
prv_name	Text	60	Yes	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
cst_sb_delete	Text	N/A	No	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.

exp_diagnosis

Field Name	Data Type	Size	Required	Description/Comment
dgn_pk	Text	38	Yes	Uniquely identifies each record.
dgn_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
dgn_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
dgn_definition_code	Text	38	Yes	Code for the specific diagnosis. The master list is created and maintained by the central administrator.
dgn_assessment	Text	20	No	Code for: • 1 - Definitive • 2 - Presumptive • 3 - Unknown
dgn_date	Date/Time	n/a	Yes	Date the diagnosis was given
dgn_comment	Text	255	No	Free text that can be used to supply additional information about the diagnosis.
dgn_definition_name	Memo	n/a	No	Descriptive label for diagnosis code, primarily used in the CAREWare PDE
prv_name	Text	60	Yes	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
dgn_problem	Text	75	No	Medical issue resulting in diagnosis
dgn_problem_status	Text	50	No	Status of client's problem
dgn_date_resolved	Date/Time	N/A	No	Date of when problem was resolved
dgn_icd10_code	Text	7	No	ICD-10 diagnosis code

exp_drug_payment

Field Name	Data Type	Size	Required	Description/Comment
drg_py_pk	Text	38	Yes	Uniquely identifies each record.
drg_py_delete	Yes/No	n/a	No	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare. Null value is false.
drg_py_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
drg_py_ndc	Text	11	Yes	Standardized NDC
drg_py_date	Date/Time	38	Yes	Date of disbursement
drg_py_quantity	Number	n/a	No	Must be <> 0 (a negative value is an adjustment)

drg_py_unit_price	Currency	n/a	No*	Must be >= 0. If null, will be calculated from total. (This should be null if total is supplied)
drg_py_total	Currency	n/a	No*	Defaults to 0 if total and unit price are Null. If total is null and unit price is supplied, this will be calculated from unit price and quantity.
drg_py_dispenser_code	Text	38	Yes	Unique key identifying the dispenser for this record.
drg_py_dispenser_label	Text	50	No	Descriptive label to help with mapping dispensers.
drg_py_funding_code	Text	38	Yes	Unique key identifying the drug funding.
drg_py_insurance_code	Text	38	No	Client's reported insurance type for this disbursement.
drg_py_funding_label	Text	50	No	Descriptive label to help with mapping drug funding.
drg_py_insurance_label	Text	50	No	Descriptive insurance type label for this disbursement.
drg_py_comments	Text	255	No	Place any comments you have about the drug payment here
drg_py_dispense_fee	Currency	n/a	No	Dispensing fee for this disbursement.
drg_py_duration	Number	n/a	Yes	Number of days covered by this disbursement.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

* - Either unit price OR total should be supplied. If both have values, then unit price will be ignored and will be calculated from total and quantity during import.

NDC values will not be mapped; these are expected to be the correct standardized NDC. Records without a valid NDC will be flagged with the appropriate error code. Note that a given NDC must be active in the CAREWare formulary in order to be valid for import.

exp_eligibility

Field Name	Data Type	Size	Required	Description/Comment
Elg_pk	Text	38	Yes	Uniquely identifies each record.
Elg_cln_fk	Text	38	Yes	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare. Null value is false.
Elg_date	Date/Time	38	Yes	Date of change to client's eligibility status
elg_yes_no_code	Text	20	Yes	Eligibility status confirmation reference code
elg_yes_no_label	Text	50	No	Descriptive label for confirmation
elg_elg_cs_code	Text	20	No	Eligibility status custom reference code
elg_elg_cs_label	Text	50	No	Descriptive label for custom fields
elg_comment	Text	255	No	Any comments the user wishes to enter.

elg_delete	Yes/No	N/A	No	
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
elg_fnd_sr_code	Text	36	Yes	Eligibility status funding reference code
elg_fnd_sr_label	Text	50	No	Descriptive label for funding source

exp_form_design_data

Field Name	Data Type	Size	Required	Description/Comment
frm_ds_pk	Text	38	Yes	Uniquely identifies each record.
frm_ds_cln_fk	Text	38	Yes	*Client FK from FormClientMap*
frm_ds_data_date	Date/Time	N/A	No	Date from FormData
frm_ds_form_data_pk	Text	38	No	PK from the fd_form_data record. This must be a GUID.
frm_ds_form_design_name	Text	50	No	Form Design name from FormDesign
frm_ds_mapping_table_name	Text	50	No	from FormControlDataMap
frm_ds_map_record_fk	Text	38	Yes	PK of the actual record (service, test, etc) from Form[Test/Service/etc]Map
frm_ds_delete	Text	Yes/No	No	Yes to delete existing record
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_immunization

Field Name	Data Type	Size	Required	Description/Comment
imm_pk	Text	38	Yes	Uniquely identifies each record.
imm_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
imm_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
imm_definition_code	Text	38	Yes	Code for the specific diagnosis. The master list is created and maintained by the central administrator.
imm_received_code	Text	20	Yes	Determines whether the immunization was given. CAREWare values:

Field Name	Data Type	Size	Required	Description/Comment
				• 1 - Yes • 2 - NMI • 3 - No • 4 - Refused
imm_date	Date/Time	n/a	Yes	Date the immunization was given
imm_immunity_code	Text	20	No	Code for any immunity: • 01 - Immune • 02 - Nonimmune • 03 - History of infection • 04 - History of vaccination • 99 - Unknown
Imm_label	Text	50	No	Identifying label

exp_insurance_assessment

Field Name	Data Type	Size	Required	Description/Comment
ins_as_pk	Text	38	Yes	Uniquely identifies each record.
ins_as_primary_insuranc e_code	Text	38	Yes	Primary Insurance for the client. Codes are: • 1 Private (Deprecated) • 2 Medicare (unspecified) • 3 Medicaid • 4 Other public (e.g. Campus, VA) • 5 No Insurance • 6 Other • 9 Unknown • 7 Medicare Part A/B • 8 Medicare Part D • 10 Private - Employer • 11 Private - Individual • 13 VA, Tricare and other military health care • 14 IHS
Ins_as_ins_tp_private	Yes/No	n/a	No*	DEPRECATED Adds private insurance as other insurance
Ins_as_ins_tp_medicare	Yes/No	n/a	No*	Adds Medicare insurance as other insurance

Ins_as_ins_tp_medicaid	Yes/No	n/a	No*	Adds Medicaid insurance as other insurance
Ins_as_ins_tp_other_public	Yes/No	n/a	No*	Adds Other Public insurance as other insurance
Ins_as_ins_tp_no_insurance	Yes/No	n/a	No*	Adds No insurance as other insurance.
Ins_as_ins_tp_other	Yes/No	n/a	No*	Adds other insurance as other insurance
Ins_as_ins_tp_unknown	Yes/No	n/a	No*	Adds unknown insurance as other insurance
Ins_as_other_insurance	Text	50	No	Stores the value of the 'other' insurance if 'ins_as_ins_tp_other' is chosen
Ins_as_date	Date/Time	n/a	Yes	Date the insurance record was added
Ins_as_cln_fk	Text	38	Yes	Points to the client record to which this record is related
Ins_tp_primary_insurance_label	Text	75	No	The client's Primary Insurance. This label field is not required, but the code field is (see above).
ins_as_ins_tp_medicare_ab	Yes/No	n/a	No	Adds Medicare insurance part A/B
ins_as_ins_tp_medicare_d	Yes/No	n/a	No	Adds Medicare insurance part D
Ins_as_delete	Yes/No	n/a	No	If set, it will delete the record
Ins_as_full_lis	Yes/No	n/a	No	With Medicare Part D Checked Full LIS Secondary Insurance
Ins_as_high_risk_pool	Yes/No	n/a	No	
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
Ins_as_ins_tp_private_ind	Yes/No	n/a	No	Adds Private – Individual as other insurance.
Ins_as_ins_tp_private_emp	Yes/No	n/a	No	Adds Private - Employer as other insurance.
Ins_as_ins_tp_va_military	Yes/No	n/a	No	Adds VA-military as other insurance.
Ins_as_ins_ihs	Yes/No	n/a	No	Adds Indian Health Services as other insurance.

exp_medication

Field Name	Data Type	Size	Required	Description/Comment
mdc_pk	Text	38	Yes	Uniquely identifies each record.
mdc_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
mdc_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
mdc_medication_code	Text	120	Yes	Code for the description of the medication provided. The master list is created and maintained by the Central Administrator.
mdc_units	Number	n/a	No	Number of does given
mdc_strength	Number	n/a	No	Strength of each does
mdc_frequency	Text	20	No	Code for (See Appendix C for a description of codes): • 01 – qd • 02 – bid • 03 – tid • 04 – qid • 05 – prn • 06 – qw • 07 – biw • 08 – tiw • 09 – qow • 10 – qod • 11 – qh • 12 – qhs • 13 – qm • 14 – q6h • 15 – q12h
mdc_start_date	Date/Time	n/a	Yes	Date medication started for client
mdc_end_date	Date/Time	n/a	No	Null for continuing medication.
mdc_indication	Text	20	No	Code for: • 01 – ART • 02 – OI Prophylaxis • 03 – OI Treatment • 99 - Other
mdc_prophylaxis	Text	20	No	Code for: • 01 – Pneumocytis carinii pneumonia (PCP)

				• 02 – M. avium complex (mac) • 03 – M. tuberculosis (Mtb) • 04 – Candida • 05 – Cytomegalovirus (CMV) • 06 – Toxoplasma gondii • 07 – Varicella zoster virus (VZV) • 08 - Other
mdc_discontinue_reason	Text	20	No	Code for: • 01 - Virologic Failure • 02 - Toxicity • 03 - Intolerance • 04 - Lost to followup • 05 - Dose Change • 06 - Other • 07 - Therapy completed • 08 - Improved immune function • 09 - Unknown • 10 - Stock out/supply disruption • 11 - Managed treatment interruption • 12 - Non-adherent • 13 - Immunologic Failure • 14 - Pregnant • 15 - Risk of Pregnancy • 16 - Newly diagnosed TB • 17 - Availability of New Drug • 18 - Illness or hospitalization • 19 - Patient lacks sufficient financial resource • 20 - Patient decision
mdc_comment	Text	50	No	Free text that can be used to supply additional information.
mdc_medication_label	Text	50	No	Descriptive label for medication code, primarily used in the CAREWare PDE.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
mdc_instructions	Text	35	No	Instruction for client's medication

exp_message

Field Name	Data Type	Size	Required	Description/Comment
mss_pk	Text	38	Yes	Primary Key of the record.
mss_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
mss_to_provider	Text	60	Yes	Sent to Provider
mss_from_user	Text	100	No	Sent from User
mss_to_user	Text	100	Yes	Sent to User
mss_send_date	Date/Time	N/A	Yes	Date message was sent
mss_message	Memo	N/A	Yes	Message text
mss_received	Yes/No	N/A	No	True if message has been acknowledged
mss_received_date	Yes/No	N/A	No	Date message was received
mss_resolved	Date/Time	N/A	No	True if message has been resolved
mss_resolved_date	Yes/No	N/A	No	Date message was resolved
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_poverty_level_assessment

Field Name	Data Type	Size	Required	Description/Comment
pvr_lv_pk	Text	38	Yes	Uniquely identifies each record.
Pvr_lv_household_income	currency	n/a	Yes	$0.00 - $999,999,999.99
Pvr_lv_household_size	number	n/a	Yes	1-9999
Pvr_lv_date	Date/Time	n/a	Yes	Date the poverty level record was added
Pvr_lv_cln_fk	Text	38	Yes	Points to the client record to which this record is related
Pvr_lv_delete	Yes/No	n/a	No*	If set, it deletes poverty level record
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_pregnancy

Fieldname	Data Type	Size	Required	Description/Comment
prg_pk	Text	38	Yes	Not used by the import process; only useful for user reference.
prg_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
prg_delete	Yes/No	n/a	No*	Yes if this record should be deleted.
prg_est_conception_ date	Date/Time	n/a	Yes	Estimated date of conception.
prg_pn_care_date	Date/Time	n/a	No	Date prenatal care began for this pregnancy.
prg_pn_visits	Number	n/a	No	Number of prenatal visits during this pregnancy.
prg_pn_art_counsel	Text	20	No	Was client counseled for ART? Code for: • 0 - No • 1 - yes • 9 - Unknown
prg_pn_art_offered	Text	20	No	Was ART offered to the client? Code for: • 0 - No • 1 – yes • 9 - Unknown
prg_pn_art_taken	Text	20	No	Was ART taken? Code for: • 0 - No • 1 – yes • 9 - Unknown
prg_pn_art_date	Date/Time	n/a	No	Date ART was started. Should only have a value if prg_pn_art_taken = 'yes'
prg_outcome	Text	20	No	Code for: • 01 – Live Birth • 02 – Therapeutic (induced) abortion • 03 – Spontaneous abortion (miscarriage) • 04 – Stillbirth • 05 - Unknown
prg_delivery_date	Date/Time	n/a	No	
prg_newborn_status	Text	20	No	HIV Status of newborn. Code for: • 0 – Negative • 1 – Positive • 2 – Indeterminate • 9 – Unknown/unreported
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name

Field Name	Data Type	Size	Required	Description/Comment
				acts as a referential key to the provider for each record.

exp_receipt

Field Name	Data Type	Size	Required	Description/Comment
rcp_pk	Text	38	Yes	Primary key for the record that must be unique.
rcp_srv_fk	Text	38	Yes	Foreign key to the cw_service table.
rcp_date	Date/Time	n/a	Yes	The date of the receipt.
rcp_source	Text	50	No	Indicates who paid the money received.
rcp_amount	Number	n/a	No	The amount received.
rcp_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_referral

Field Name	Data Type	Length	Required	Description/Comment
rfr_pk	Text	38	Yes	Not used by the import process; only useful for user reference.
rfr_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
rfr_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
rfr_referred_to	Text	38	Yes	Code for the agency to which the referral was made. This field will be used for both internal and external referrals. The master list, which combines internal and external providers, is created and maintained by the central administrator.
rfr_service_category	Text	38	Yes	Code representing a service category as defined by HRSA for the 2007 CADR.
rfr_date_referred	Date/Time	n/a	Yes	The date on which the referral was made.
rfr_status	Text	38	Yes	Code for: • 01 - Pending • 02 - Completed • 03 - Lost to follow up

				• 04 - Rejected
rfr_date_received	Date/Time	n/a	No	The date on which the referred service was provided.
rfr_class	Text	38	No	Code for a customizable list of referral classes. The master list is created and maintained by the central administrator.
rfr_comment	Text	255	No	Free text that can be used to supply additional information about the referral.
rfr_referred_to_label	Text	60	No	See rfr_referred_to, above. This label field is not required, but the code field is.
rfr_class_label	Text	60	No	See rfr_class above. This label field is not required, but the code field is.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
rfr_service_category _label	Text	255	No	Code for: • 001 - Outpatient/Ambulatory Health Services • 002 - Oral Health Care • 003 - Mental Health Services • 004 - Substance Abuse: Outpatient • 005 - Face-to-face Case Management • 006 - Other Case Management (non face-to-face) • 007 - Rehabilitation Services • 008 - Home Health: Professional Care • 009 - Home Health: Para-Professional Care • 010 - Home Health: Specialized Care • 011 - Hospice Services • 012 - Buddy/Companion Service • 013 - Client Advocacy • 014 - Respite Care • 015 - Emergency Financial Assistance • 016 - Housing Services • 017 - Food Bank/Home-delivered Meals • 018 - Medical Transportation Services

				• 019 - Service Outreach • 020 - Other Counseling (not mental health) • 022 - Health ed./risk reduction/prevention • 023 - Other support services • 025 - Medical Nutrition Therapy • 026 - Child Care Services • 027 - Child Welfare Services • 029 - Psychosocial Support • 030 - Substance Abuse: Residential • 031 - Early Intervention (Part A - B) • 032 - Referral: Health Care/Supportive • 033 - Referral: Clinical Research • 035 - Health Insurance Program (HIP) • 036 - ADAP Insurance • 037 - AIDS Pharmaceutical Assistance • 038 - Home Health Care • 039 - Home and Community-based Health Services • 040 - Medical Case Management • 041 - Case Management (non-medical) • 042 - Linguistics Services • 043 Other Professional Services • 800 - Non CARE Act Service
rfr_status_label	Text	255	No	Code for: • 01 – Pending • 02 - Completed • 03 – Lost to follow up • 04 – Rejected

exp_relations

Field Name	Data Type	Size	Required	Description/Comment
rlt_pk	Text	38	Yes	Uniquely identifies each record.
rlt_index_cln_fk	Text	38	Yes	FK to the index client in the relation.
rlt_dependant_cln_fk	Text	38	Yes	FK to the dependant client in the relation.
rlt_relation_fk	Text	38	Yes	Code for the relation the dependant client has with the index client.
rlt_relation_label	Text	50	No	Descriptive label to help with matching.
rlt_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_service

Field Name	Data Type	Length	Required	Description/Comment
srv_pk	Text	38	Yes	Not used by the import process; only useful for user reference.
srv_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
srv_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
srv_subservice	Text	127	Yes	Code for the description of the service provided to the client. The master list is created and maintained by the central administrator.
srv_date	Date/Time	n/a	Yes	Date of service provided
srv_quantity	Single	n/a	No**	Number of service units
srv_price	Currency	n/a	No***	Unit price. CAREWare multiplies this times quantity to calculate a total.
srv_subservice_label	Text	176	No	Descriptive label for Service code, primarily used in the CAREWare PDE
srv_contract_name	Text	50	No	Specifies which contract the service is attached to. NOTE: An error will occur if a value is provided and it does not match a valid contract name.
srv_category	Text	100	No	Label for the service category to which this service entry belongs. *This field is not imported*
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.
srv_billing_employee	Text	100	No	Employee setup record with Third Party Billing Settings completed.
srv_billing_start_time	Date/Time	n/a	No	Date and time service visit began. Used to calculate units of service provided.
srv_billing_end_time	Date/Time	n/a	No	Date and time service visit ended. Used to calculate units of service provided.

* All Boolean fields are required by CAREWare. Any left null will be interpreted as FALSE.

** The quantity field defaults to 1 if no value is supplied.

*** Price defaults to $0 if no values are supplied.

****Deprecated

exp_sharing_request

Field Name	Data Type	Size	Required	Description/Comment
Shr_rq_pk	Text	38	Yes	Primary Key of the record.
Shr_rq_cln_fk	Text	38	Yes	Points to the client record to which this record is related
Shr_rq_from_provider	Text	60	Yes	Shared from provider
Shr_rq_to_provider	Text	60	No	Shared with provider
Shr_rq_start_date	Date/Time	N/A	No	Share start date
Shr_rq_end_date	Date/Time	N/A	No	Share end date
Shr_rq_sharing_type	Text	50	Yes	Type of data to be shared. • 1 - Clinical • 2 – Service • 3 - Case notes • 4 - Custom Subform • 5 - Form Designer • 6 - Appointment
Shr_rq_delete	Yes/No	N/A	No	True if message has been acknowledged
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

exp_test

Field Name	Data Type	Size	Required	Description/Comment
tst_pk	Text	38	Yes	Uniquely identifies each record.
tst_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
tst_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
tst_test_definition_code	Text	38	Yes	Code for the specific type of test. The master list is created and maintained by the central administrator.
tst_date	Date/Time	n/a	Yes	Date of the test. (This is usually the date the specimen was collected)
tst_comment	Memo	n/a	No	Free text that can be used to supply additional information about the test.
tst_result	Text	72	Yes	Code for a qualitative test result. This is a customizable list of result codes. Note: if an operator is included in the result, it is expected to be one of the following: Acceptable values are: • "<" • "<=" • "=" • ">=" • ">"
tst_titer	Text	10	No	Include if the test produces a titer result.
tst_test_definition_label	Text	50	No	Descriptive label for Test code, primarily used in the CAREWare PDE.
tst_action_code	Text	38	No	Code for Action taken for this test. Will be mapped to a CAREWare test action.
tst_action_label	Text	200	No	Descriptive label for action.
prv_name	Text	60	No	Added to allow importing data from multiple domains in a single file; prv_name acts as a referential key to the provider for each record.

* All Boolean fields are required by CAREWare. Any left null will be interpreted as FALSE.

exp_vital_sign

Field Name	Data Type	Size	Required	Description/Comment
vtl_sg_pk	Text	38	Yes	Uniquely identifies each record.
vtl_sg_cln_fk	Text	38	Yes	Points to the client record to which this record is related.
vtl_sg_delete	Yes/No	n/a	No*	*Yes* if this record has been deleted at the provider and should be deleted in CAREWare.
vtl_sg_date	Date/Time	n/a	Yes	Date the value was recorded.
vtl_sg_vital_name	Text	50	No	Code for the type of value recorded in each record. Valid values: • Height • Weight • Pulse • Systolic • Diastolic • Temperature • NumVisits • NumHospitalDays • NumERVisits
vtl_sg_value	Number	n/a	No	Recorded value for the specified vital sign.
vtl_sg_notes	Text	75	No	Additional notes for this record.

Appendix A: Creating an encrypted URN (EURN)

CAREWare uses the URN32.dll (a standard Windows 32 bit dll that needs to be installed in the Windows system folder) to encrypt a client's URN and create a value for EURN. Here is some sample VB.NET code for how to use this dll to create an EURN:

```
' ## This code is part of CAREWare and is copyright, Jeff Murray's Programming Shop, Inc. (jProg).
' ## It is protected under US and international copyright laws and is provided only as a
' ## supplement to jProg's CAREWare. This code is provided as is without warranty of any kind,
' ## either express or implied, including but not limited to implied warranties of fitness for a
' ## particular purpose or merchantability.
' ## By providing this code, jProg grants a limited, nonexclusive license to distribute or modify
' ## this code solely for use in connection with CAREWare. This code is not to be used, modified,
' ## or distributed for any purpose other than to facilitate the use of CAREWare pursuant to a
' ## duly issued CAREWare license.

' ##MODULE_SUMMARY This object exposes a shared function that encrypts URNs.
Public Class jURNEncryption

'URN32.DLL has an function called MDString.
'You pass it string containing the URN and it returns
'the encrypted value
Declare Sub MDString Lib "URN32.DLL" (ByVal UURN As String)

' ## Encrypt the supplied URN.
' ##PARAM URN URN to encrypt.
' ##RETURNS Encrypted URN.
Public Shared Function EncryptURN(ByVal URN As String) As String

'Declare a string to send
Dim EncryptedURN As String

'If the URN ends in a U, trim the U for backward
'compatibility with other systems that don't use the U
'note: the U stands for Unique and was added with CW 4.0
If URN.Substring(URN.Length - 1, 1) = "U" Then
EncryptedURN = URN.Substring(0, 11)
```

```
Else
'If the last character is other than a U, then
'we can't be backwards compatible or it would cause
'a duplicate
EncryptedURN = URN
End If

'Call MDString in URN32.DLL
MDString(EncryptedURN)

'The original specification called for it to me no longer than
'9 characters, but sometimes it gets liberal with that
Return Left(EncryptedURN, 9)

End Function

End Class
```

Appendix B: Using the template mdb to create Encrypted URNs (EURN) for clients

If an exporter desires to exclude client names from the export this is allowed, but then each client MUST have a value for the EURN field. This can be done programmatically (see Appendix A) or from within the template mdb file. Exporters can use this functionality to generate the EURNs and then remove the client names before sending the export file.

In order to use the Template file to create the EURNs, the following criteria must be met:
- ✓ The computer must have the file URN32.dll in the appropriate Windows system folder (for example, in Windows XP it should be in C:\WINDOWS\system32).
- ✓ The CAREWare values for gender must be used for the column cln_gender:
- • 1 – Male
- • 2 – Female
- • 3 – Transgender Unk
- • 4 – Transgender MtF
- • 5 – Transgender FtM
- • 6 – Refused to Report
- • 9 – Unknown
- ✓ Note also that this functionality assumes the values for date of birth (cln_dob) are dates in the format mm/dd/yyyy.

Once these are met, to use the functionality:
1) Populate the client records with all information, including the URN-related fields in the client records (First Name, Last Name, Gender and DOB).
2) From inside the template press Ctrl-E to execute the macro that will create the EURN values for all clients. Note that if a client is missing any of the 4 fields that are used to create the EURN, the EURN will be left blank and this client record will be logged as an error during the export.
3) Once the EURNs are created, the exporter has the option of removing the first and last names of the clients. There is a macro built into the template that will automatically delete the first and last name for all clients – just press Ctrl-D to clear out those fields from within the database.

The export file will now have correct EURN values for the clients. Remember that DOB and Gender are always required.

Appendix C: Medication Frequency Codes

Frequency	Multiplier *	Description
qd	1	Every day (*quaque die*)
bid	2	Twice a day (*bis in die*)
tid	3	Three times a day (*ter in die*)
qid	4	Four times a day (*quater in die*)
prn	<none>	As Necessary (*pro re nata*)
qw	0.1428571	Once a Week (q = *quaque*)
biw	0.2857143	Biweekly
tiw	0.4285714	Three Times in a Week
qow	0.0714285	Every Other Week
qod	0.5	Every Other Day
qh	24	Every Hour (*quaque hora*)
qhs	1	Every Bedtime (*quaque hora somni*)
qm	1	Every Morning
q6h	4	Every 6 Hours
q12h	2	Every 12 Hours

* The Multiplier is a translation of the frequency into a number that indicates times per day