

Provider Data Export Manual

December 2019 v2.0

Yellow highlights indicate changes since the last version.

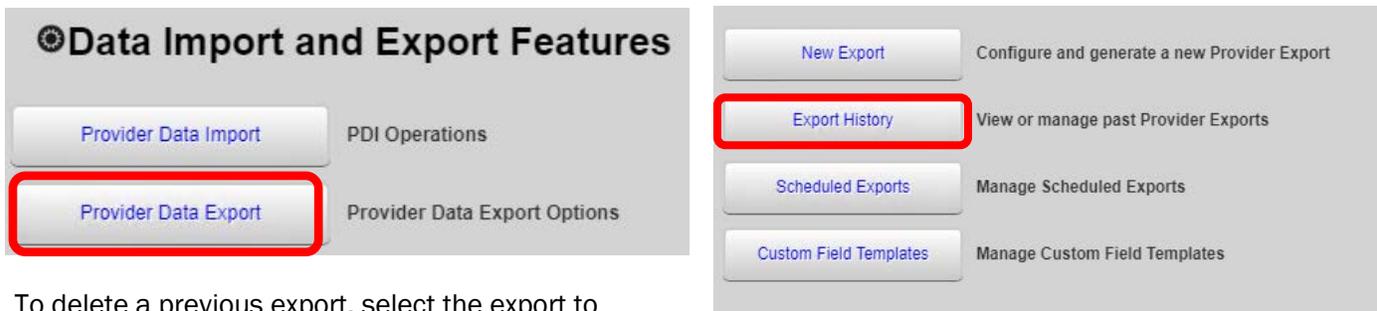


This document contains step-by-step instructions for running the Provider Data Export (PDE) in CAREWare.

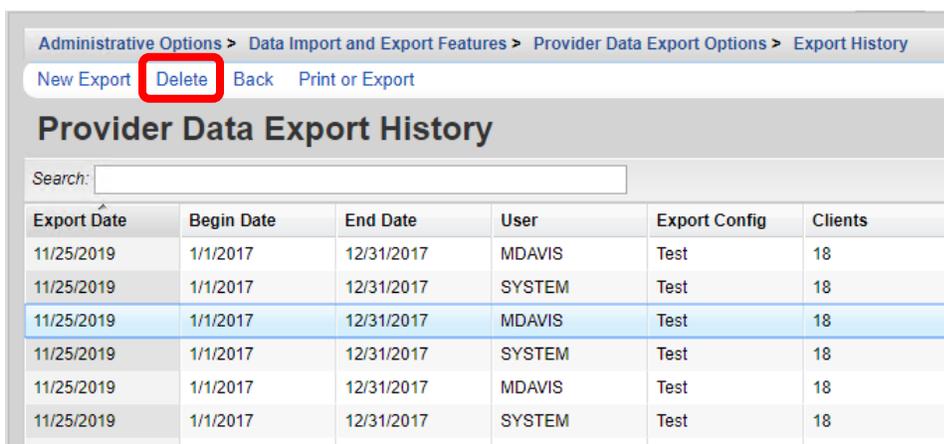
1. Log onto the Remote Desktop server and into CAREWare (see “CAREWare MA Login Instructions” for details). Once logged into CAREWare, click on “Administrative Options” and then click on “Data Import and Export Features”.



2. On the Import and Export Features page, click “Provider Data Export” to create a new export, view export history, schedule exports, or set up a custom template. If your agency has previously exported files you will see them listed under Export History, along with information about when they were created and the type and number of records they contain.

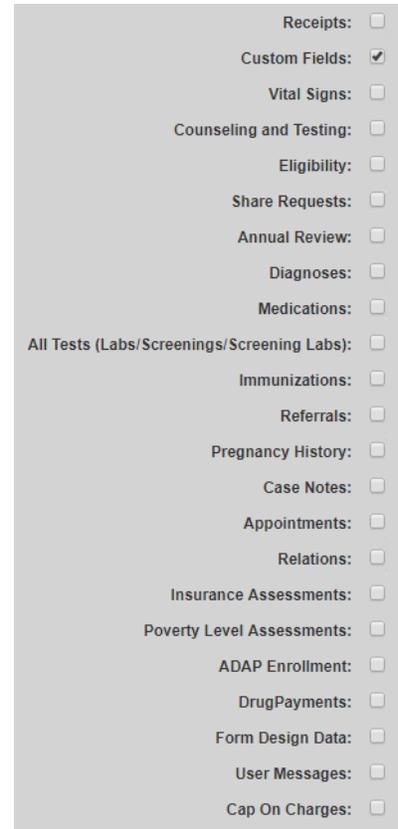


3. To delete a previous export, select the export to highlight the row and then click “Delete”.

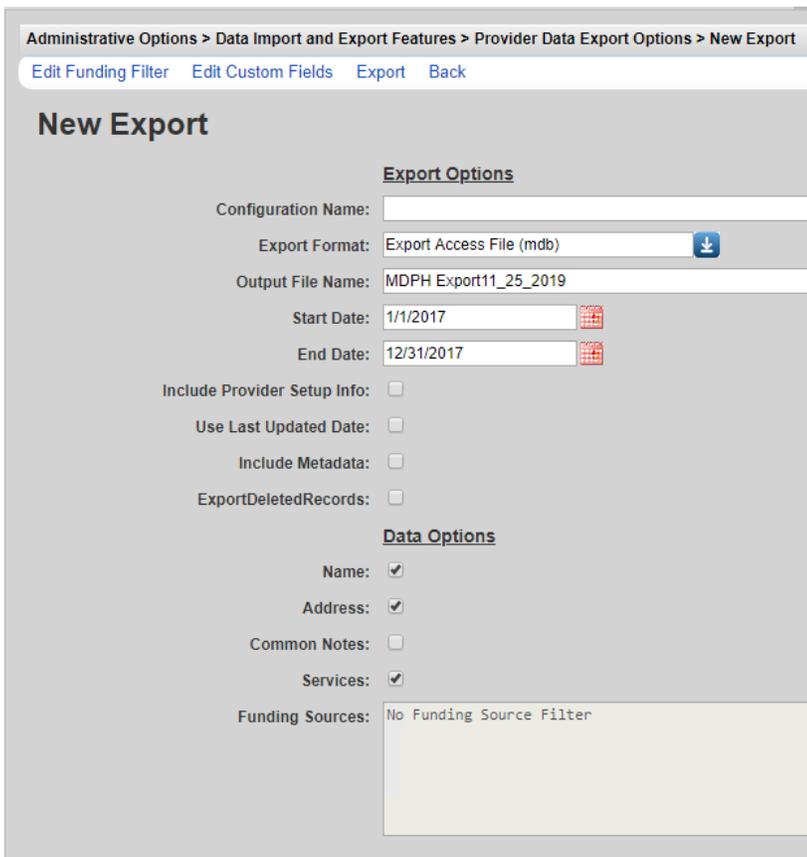


- To create a new export, click “New Export”. You will see the Export Field list, shown above. At the top of the page, fill in the Configuration Name box. Select the format of the file from the dropdown list – MDB or XML. (You will most likely want “MDB” – Microsoft Access Database – format.) Select the type(s) of data you want to export. Some types of data will not be exported until an associated type of data is included. For example, “Name” or “Address” data is not exported unless “Services” is also checked.

The bottom of the Provider Data Export page (pictured right) has checkboxes that control if internal information about the export fields such as setup information and/or metadata, are included in the export.



- Receipts:
- Custom Fields:
- Vital Signs:
- Counseling and Testing:
- Eligibility:
- Share Requests:
- Annual Review:
- Diagnoses:
- Medications:
- All Tests (Labs/Screenings/Screening Labs):
- Immunizations:
- Referrals:
- Pregnancy History:
- Case Notes:
- Appointments:
- Relations:
- Insurance Assessments:
- Poverty Level Assessments:
- ADAP Enrollment:
- Drug Payments:
- Form Design Data:
- User Messages:
- Cap On Charges:



Administrative Options > Data Import and Export Features > Provider Data Export Options > New Export

[Edit Funding Filter](#) [Edit Custom Fields](#) [Export](#) [Back](#)

New Export

Export Options

Configuration Name:

Export Format:

Output File Name:

Start Date:

End Date:

Include Provider Setup Info:

Use Last Updated Date:

Include Metadata:

Export Deleted Records:

Data Options

Name:

Address:

Common Notes:

Services:

Funding Sources:

- Custom Fields can be included in the export file. Click “Edit Custom Fields” you will see the Custom Field Setup page. This page shows which table contains the Custom Field, the column name for the field in the table and the name of the CAREWare variable that is mapped to the column. Check off the fields you would like to include in the file.

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

Save Apply Template Back Print or Export

PDE Custom Field Setup

Search:

Selected	Custom Field	Location	Template Field Name
<input checked="" type="checkbox"/>	Total Acuity Score	cw_service_custom	Total_Acuity_Score
<input type="checkbox"/>	Status of Referral	cw_service_custom	cst_Status_of_Referral
<input type="checkbox"/>	Referred by	cw_service_custom	cst_Referred_by
<input type="checkbox"/>	Referral Types	cw_service_custom	cst_Referral_Types
<input type="checkbox"/>	Reason for Closing Case	cw_client_custom	cst_Reason_for_Closing_Case
<input type="checkbox"/>	Primary Language	cw_client_custom	cst_Primary_Language
<input type="checkbox"/>	Primary Caregiver	cw_client_custom	cst_Primary_Caregiver
<input type="checkbox"/>	Other language (specify)	cw_client_custom	cst_Other_language_specify
<input type="checkbox"/>	Next Acuity Assessment	cw_client_custom	cst_Next_Acuity_Assessment
<input type="checkbox"/>	MassCARE Acuity Level	cw_service_custom	cst_MassCARE_Acuity_Level

Creating Templates

If you run the same exports in CAREWare on a regular basis, using templates to run exports will allow you to save the custom fields you need to refer to. Here is how to create one:

1. On the Provider Data Export Options page, select “Custom Field Template.” This will bring you to a list of custom templates. You can edit saved templates by highlighting the name and clicking “Edit Field List” which will bring you to a table with the custom field items to choose from.
2. If you do not already have a template saved, you can create a new one by clicking “Add” which will bring you to a new page with a textbox to input the template name. Once you have added the name of the export template, click “Next” at the top of the page.

Provider Data Export Options

- [New Export](#) Configure and generate a new Provider Export
- [Export History](#) View or manage past Provider Exports
- [Scheduled Exports](#) Manage Scheduled Exports
- [Custom Field Templates](#) Manage Custom Field Templates

Administrative Options > Data Import and Export Features > Provider Data Exp

View [Add](#) [Edit Field List](#) [Make MDB](#) [Delete](#) [Back](#) [Print or Export](#)

Custom Field Templates

Search:

Template	Custom Fields
July2019 TEST	45
Mikey's test	2
TEST custom fields	24

Administrative Options > Data Import and Export Features :

[Next](#) [Back](#)

Add

Template Name:

3. Check off the fields you would like to apply from the Custsom Field List. Once you have selected the fields for your template, click “Save” and you will be brought back to the page with a list of custom templates that have been saved.

Administrative Options > Data Import and Export Features > Provider Data Export Options > Custom Field Templates > C

[Save](#) [Back](#) [Print or Export](#)

Custom Field List

Search:

Selected	Custom Field	Location	Template Field Name
<input type="checkbox"/>	# of children delivered during reporting	cw_quarterly_custom	cst__of_children_delivered_
<input type="checkbox"/>	# of children delivered during reporting	cw_custom_subform	cst__of_children_delivered_
<input type="checkbox"/>	12-step self-help	cw_referral_custom	cst_12step_selfhelp
<input type="checkbox"/>	abdominal pain	cw_referral_custom	cst_abdominal_pain
<input type="checkbox"/>	Acuity Score: Current HIV Health Statu	cw_service_custom	cst_Acuity_Score_Current_H
<input checked="" type="checkbox"/>	Acuity Score: Current Housing Status	cw_service_custom	cst_Acuity_Score_Current_H
<input type="checkbox"/>	Acuity Score: Current Legal Status	cw_service_custom	cst_Acuity_Score_Current_L
<input checked="" type="checkbox"/>	Acuity Score: Current Mental Health St	cw_service_custom	cst_Acuity_Score_Current_M
<input type="checkbox"/>	Acuity Score: Current Nutritional Status	cw_service_custom	cst_Acuity_Score_Current_M
<input checked="" type="checkbox"/>	Acuity Score: Current Substance Use	cw_service_custom	cst_Acuity_Score_Current_S

Rows : 10 | Page 2 of 8 | Displaying 11 to 20 of at least 74 items

4. To apply the saved template to your next export, return to the Provider Data Export Options page and select New Export. Continue to follow step number 4 on the first page of this guide.
5. Click “Edit Custom Fields” and in the table on the new page select “Apply Template.” Select the saved template you would like to use and choose “Replace With Template Fields.” Double check that the custom fields you would like are selected and click save.

Administrative Options > Data Import and Export Features > Provider Data Export Options > New Export

[Edit Funding Filter](#) [Edit Custom Fields](#) [Export](#) [Back](#)

New Export

Export Options

Configuration Name:

Export Format: [↓](#)

Output File Name:

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

Save **Apply Template** Back Print or Export

PDE Custom Field Setup

Search:

Selected	Custom Field	Location	Template Field Name
<input checked="" type="checkbox"/>	Care Access Client	cw_client_custom	Care_Access_Client
<input checked="" type="checkbox"/>	At Risk HIV Negative Client	cw_client_custom	At_Risk_HIV_Negative_Client
<input checked="" type="checkbox"/>	Are other family members enrolled in MassCARE?	cw_client_custom	Are_other_family_members_enr
<input checked="" type="checkbox"/>	Acuity Score: Current Income/Personal Fin.Mgt.Stat.	cw_service_custom	cst_Acuity_ScoreCurrent_Incom
<input checked="" type="checkbox"/>	Acuity Score: Support System and Relationships	cw_service_custom	cst_Acuity_Score_Support_Syste
<input checked="" type="checkbox"/>	Acuity Score: Sexual/Reproductive Health Status	cw_service_custom	cst_Acuity_Score_SexualReprod
<input type="checkbox"/>	Acuity Score: Other Non-HIV Related Medical Issues	cw_service_custom	cst_Acuity_Score_Other_NonHIV
<input checked="" type="checkbox"/>	Acuity Score: HIV Medication Adherence	cw_service_custom	cst_Acuity_Score_HIV_Medicatio
<input type="checkbox"/>	Acuity Score: HIV Care Adherence	cw_service_custom	cst_Acuity_Score_HIV_Care_Ad
<input checked="" type="checkbox"/>	Acuity Score: Health Insurance and HDAP Status	cw_service_custom	cst_Acuity_Score_Health_Insura

Administrative Options > Data Import and Export Features > Provider Data Export Options >

Append Template Fields **Replace With Template Fields** Back Print or Export

PDE Custom Field Templates

Search:

Template	Custom Fields
July2019 TEST	45
Mikey's test	2
Your Agency's Expo	3
TEST custom fields	24

Search:

Selected	Custom Field	L
<input type="checkbox"/>	Acuity Score: Current Transp./Mobility Status	c
<input checked="" type="checkbox"/>	Acuity Score: Current Substance Use	c
<input type="checkbox"/>	Acuity Score: Current Nutritional Status	c
<input checked="" type="checkbox"/>	Acuity Score: Current Mental Health Status	c
<input type="checkbox"/>	Acuity Score: Current Legal Status	c
<input type="checkbox"/>	Acuity Score: Current Housing Status	c
<input type="checkbox"/>	Acuity Score: Current HIV Health Status	c

6. Back in the New Export page, click “Export” at the top of the page. The pop-up window to the right-hand side of the screen will indicate that the export is being prepared. Once it is ready, click “Download Export File.” Save this export to your provider folder and continue to retrieve the file from the SFTP site (see SFTP instruction guide).

