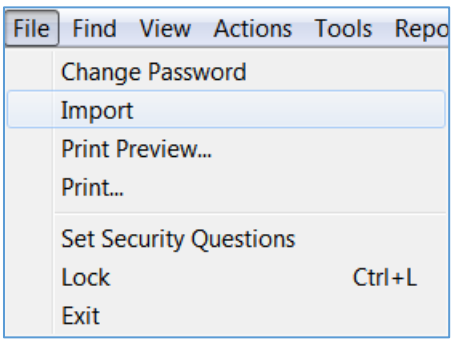
Imports

You can import Client Records, Client Sub Records and Activity Records into Provide® Enterprise.

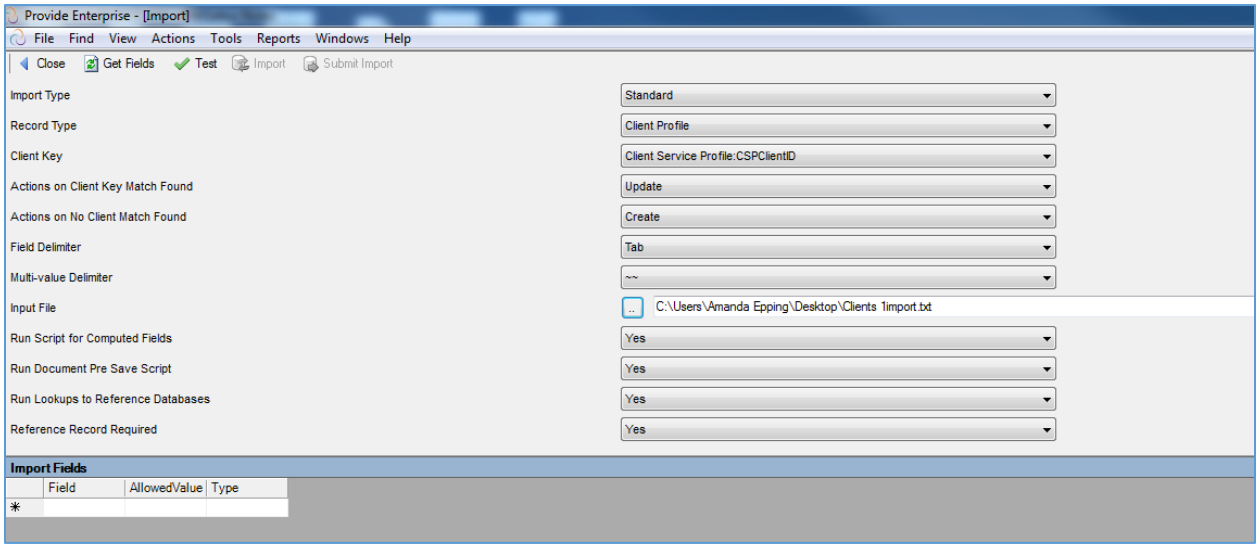
There are a number of common characteristics that you must keep in mind when preparing to import records into the system.

- All input files need to be formatted as an ASCII delimited text files with the first record (header) containing the Provide® field names.
- GTI recommends using "tab" for the field delimiter as input files may contain commas or semicolons.
- GTI does not support the import of rich text fields.
- All dates must be in MM/DD/YYYY format
- Imports require a unique file for each table. For example, data fields for the client profile cannot be imported at the same time as data fields for an allergy record. You must do two separate imports.
- Additionally, each record must have a separate row in the input file. For example, you cannot have three vaccinations in one row. A separate record would be needed for each vaccination.
- All records have a certain number of required fields that are needed in order to save a record. Within Provide® Enterprise these fields are marked with a red asterisk. When importing, however, the only time all required fields are necessary is when doing the initial client import. Though you may be able to import records without including all required fields, it is always better to include them. Not importing all required fields may cause errors when editing the record at a later date.
- All imports generate error files.
- In order for Client Sub-Records and Activity Records to be imported, the record's Client Key ("Client ID", "Client Name", "HealthPlan + Member ID" or "SSN") must match an existing Client Key of a Client Service Profile that fits the user's (Importer's) User Profile.
- In order for Client Sub-Records and Activity Records to be imported, the Client Profile or a backup Client Profile must be released to the record's Organization-Program.

To import into Provide, Click on "File – Import."



The following screen will appear:



Import Type: Select Standard or Custom
Record Type: Select the record type you wish to import.
Client Key: Select the client key that is based on the record type.
Multi-Value Delimiter: Select comma, tab, semicolon, colon, or ~~.

Input File: Click on the and select the file you are importing.

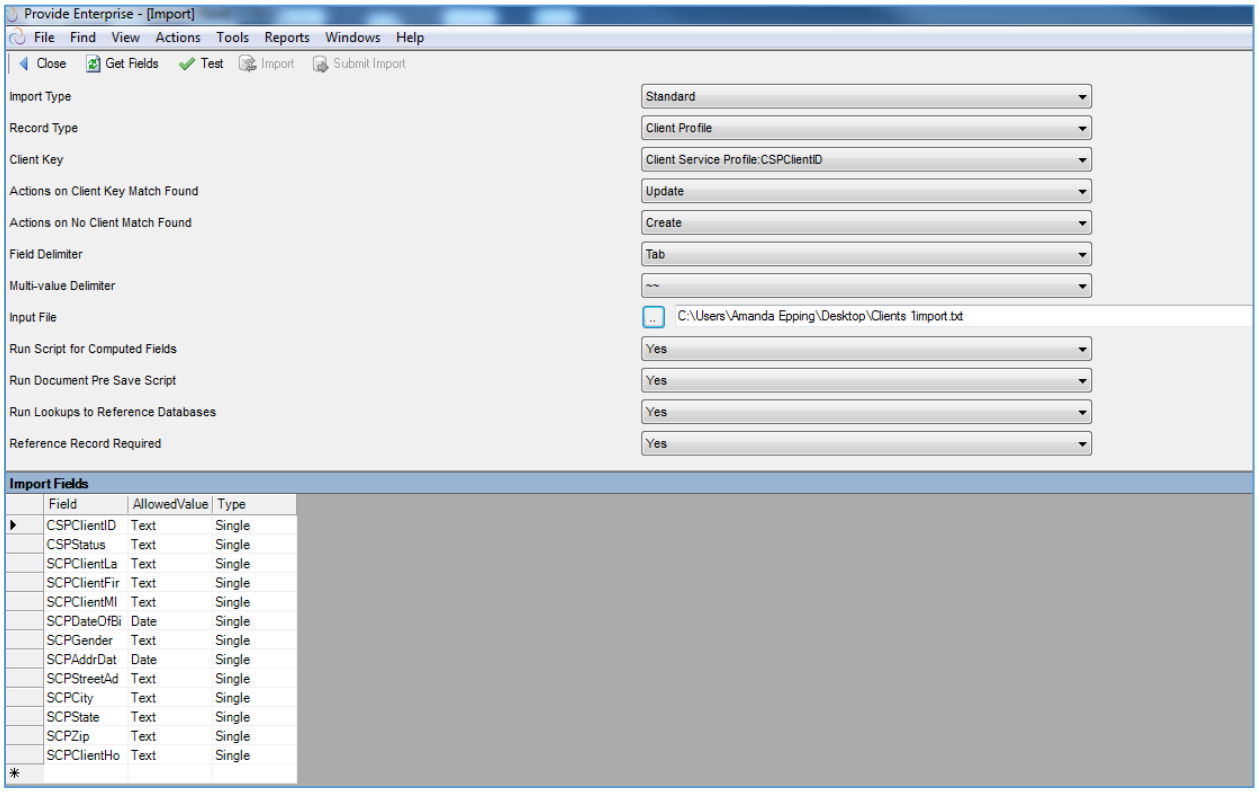
Run Script for Computer Fields: Select "Yes" or "No." Within the Data Dictionary, there are a number of fields that are computed automatically within Provide® Enterprise. Examples of computed fields include the "ACreateDate" (the date a document is created in the system) and the Selector Description (the description of each document that shows in the database views). If you wish to automatically compute these fields at the time of import, simply leave this field set to "Yes". If you wish to actually include the computed fields in your import file, select "No" and make sure that you include all of the computed fields in your import file.

Run Document Pre Save Script: Select "Yes" or "No." There are a few documents in Provide® Enterprise that have an associated "Pre Save Script", meaning that prior to saving the document completely; a script is activated to perform a specific function. For example, when creating a Client Service Profile, there is a Pre Save Script in effect to create a Client Service Profile History record. If you want the system to automatically run these Pre Save scripts at the time of import, simply leave the field set to "Yes". If you do not want to run the Pre Save scripts, set the field to "No".

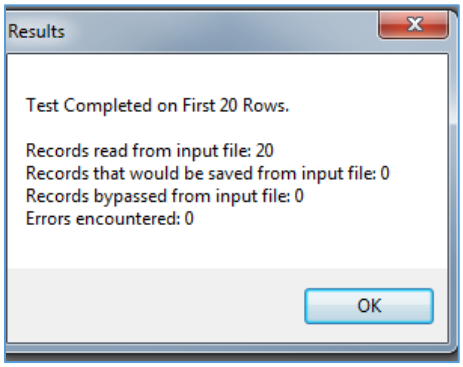
Run Lookups to Reference Databases: Select "Yes" or "No." For selected Activity imports, the system has the ability to lookup information in the Reference databases to ensure that data in the import file matches information in the Reference Databases. For example, if you are importing Procedure records, Provide® Enterprise can look to the Code Sets Database to ensure that the CPT Codes you are importing are valid. If you want the system to automatically Run lookups to the Reference Databases, leave this field set to "Yes". If not, change the field to "No". NOTE: It is recommended that you use the lookups to the Reference Databases to ensure data quality.

Reference Record Required: Select “Yes” or “No.”

After you enter the information above, click on Get Fields. The fields there are giong to be imported are then indicated under “Import Fields.”



Then, click on Test to complete a test of your import. The results will then appear as seen below:

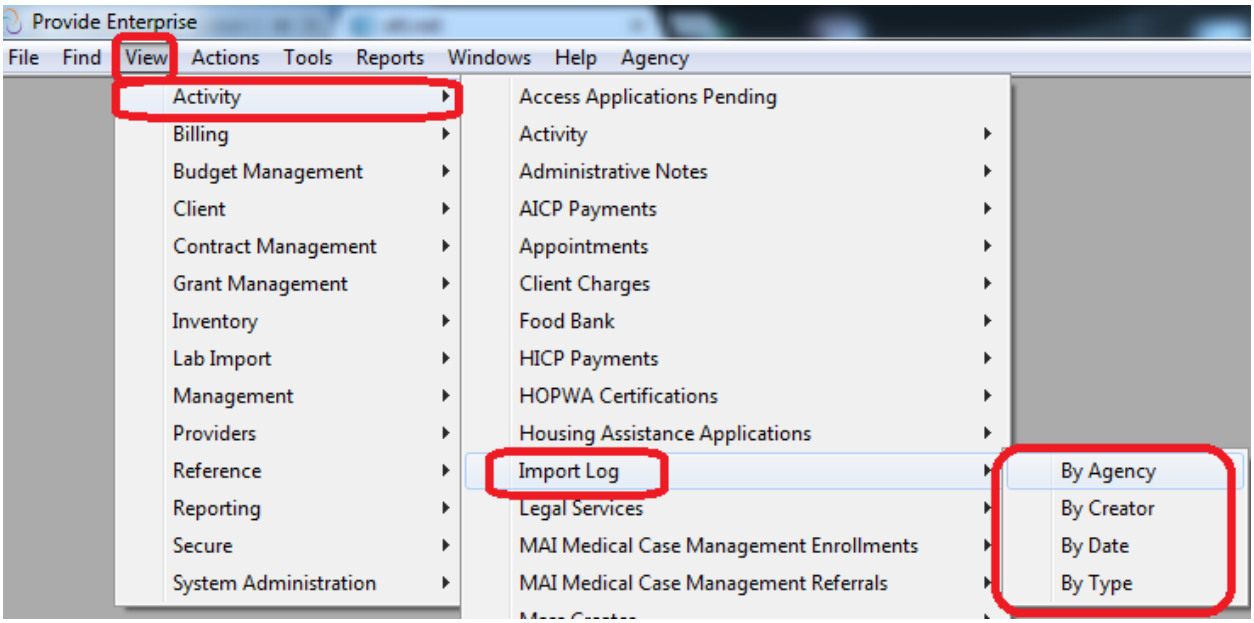


When you are satisfied with your results, you have two options to complete your import. If you click on Import, the import will be completed immediately in the system. If you click on Submit Import, the import will be completed in the system overnight.

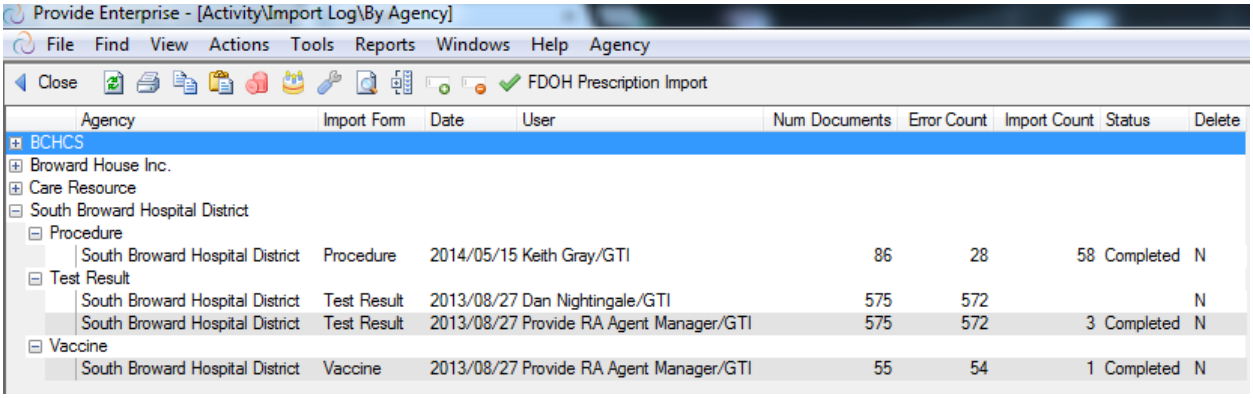
Monitoring Imports

After imports have been run, the import log contains the original import file as well as an error file (listing any errors that occurred during the Import Process), and an error records file (a file containing the records that caused errors during the initial import.) The Error Records file can be used to import corrections once they have been made (either in the file itself or the matching client files in Provide® Enterprise. It is important to monitor the import logs, especially if the system is automatically importing data from another system.

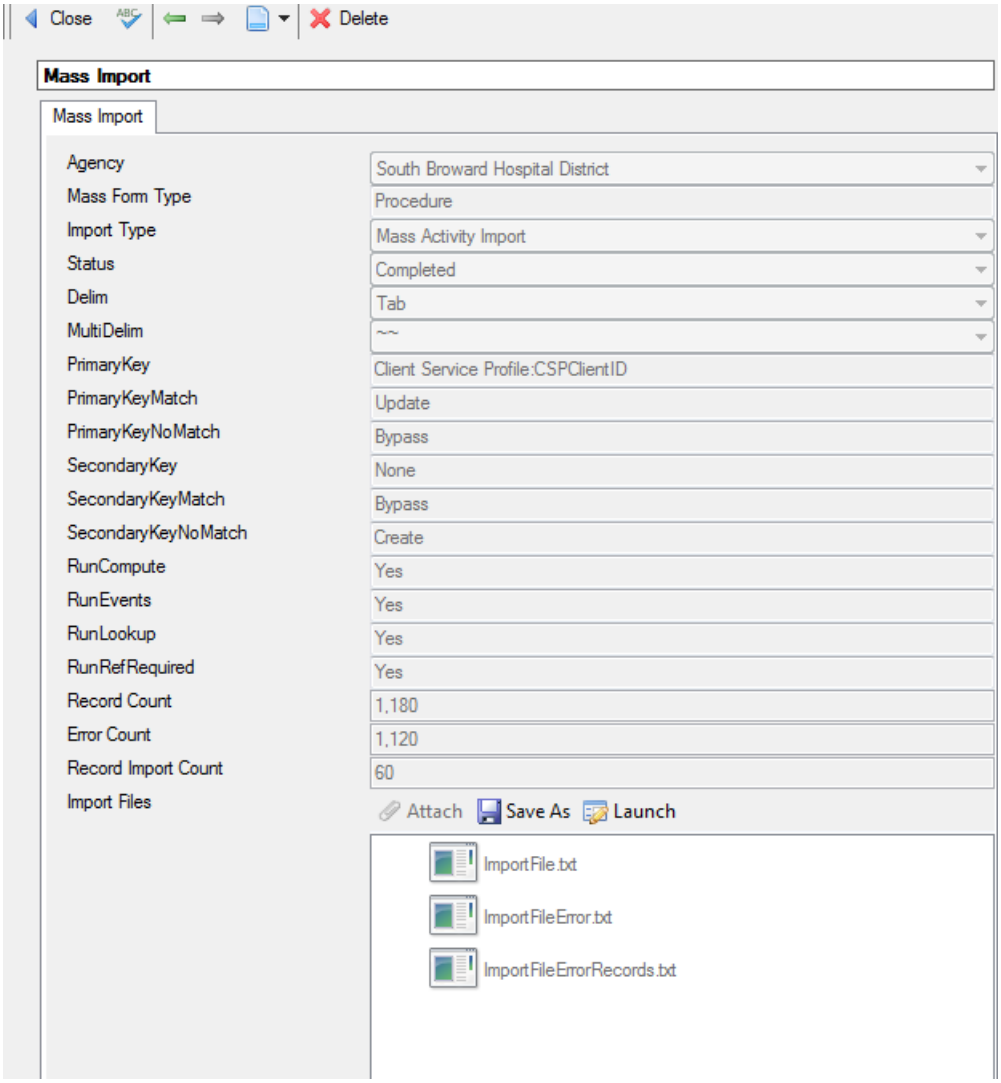
To view the Import Logs, navigate to the "Imports" Views, under "View\Activity\Import Log…"



You will see all Import Logs that have been created in the system, similar to that in the figure below:



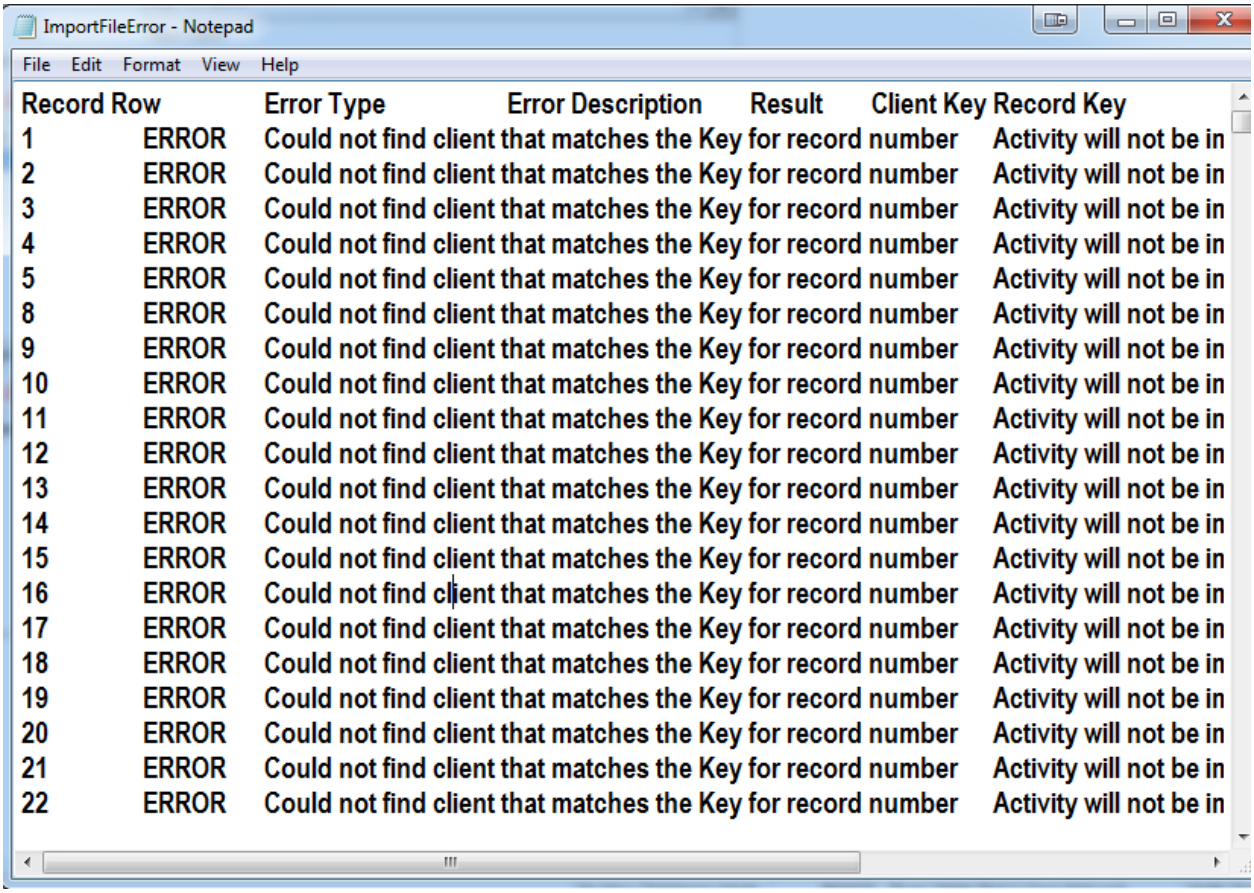
Click on the ⊞ next to a given category in the view to expand that section. Once the section is expanded, you can double click on the actual import log to open the log file. When the file opens, it will look similar to that in the figure below.



Note: In the screenshot above, the first Import file is the original file that was imported into Provide Enterprise.

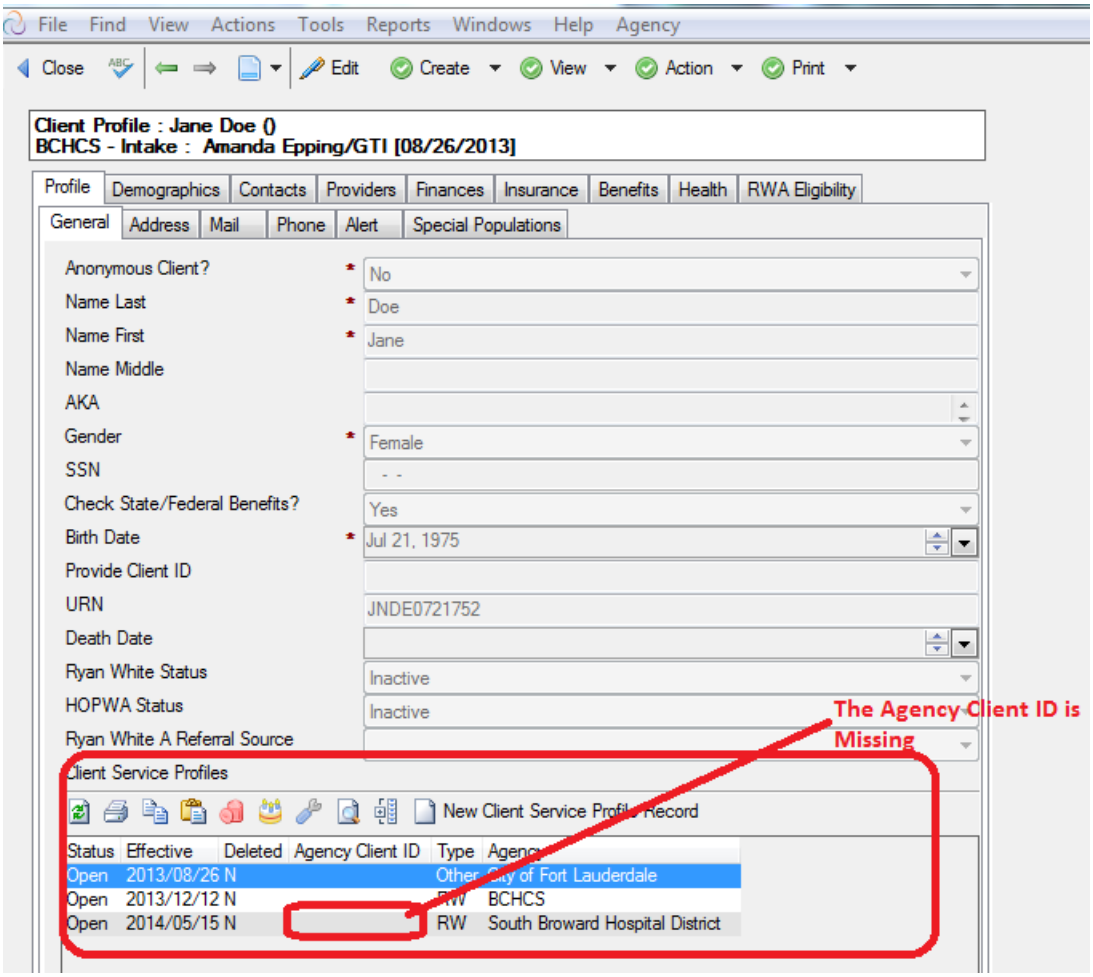
The “Import File Error” file is the file that lists out each error that resulted from the import. The “Import File Error Records” is the file containing all of the records that generated errors.

If you “Launch” the Import File Error file, you will see messages defining what the specific errors were, seen in the figure below:



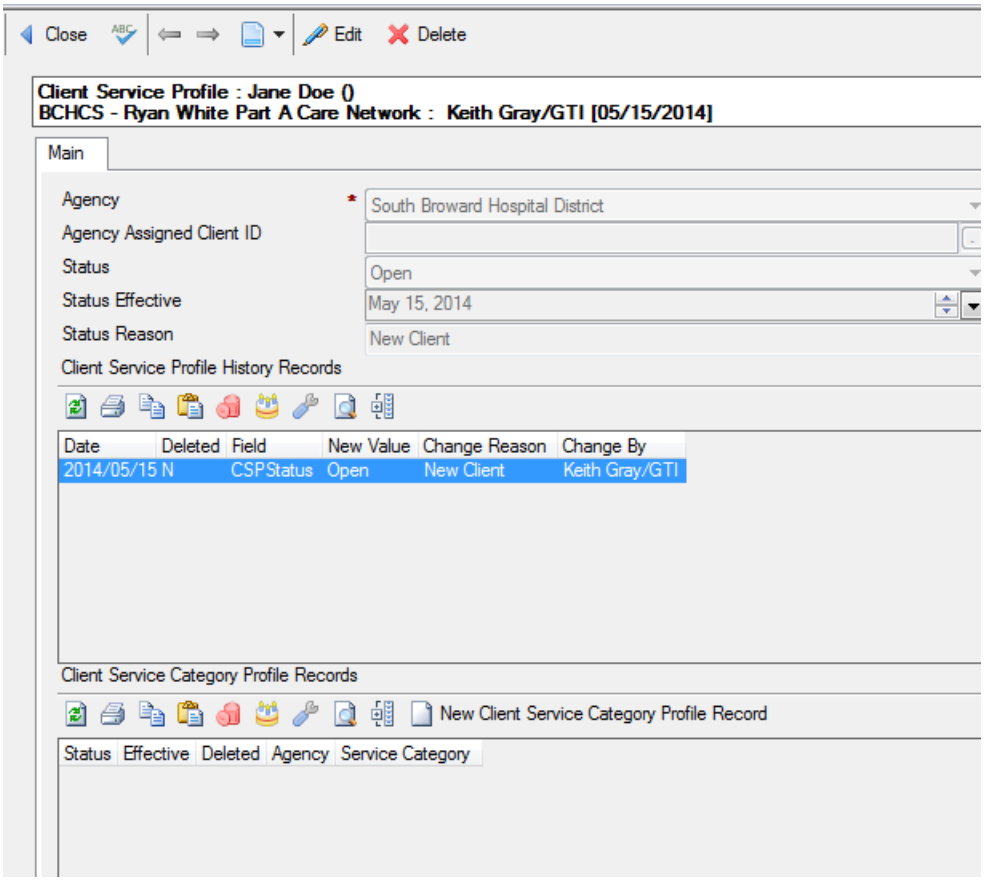
The most common error is “Could not find client that matches the Key for record number…”. This indicates that Provide Enterprise was unable to find a client using the key identified in your import file. Typically, this means that the client does not have a Client ID listed in their Client Service Profile Record.

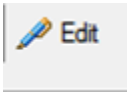
To fix this, you will need to find out who the client is from your EMR system. Once you have figured out who the client is, you can navigate to that client’s profile in Provide Enterprise (using one of the Views of clients or using the Find\Client function). Once in the Client Profile, you can see the Client Service Profiles on the bottom of the “Profile – General” tab, seen in the screenshot below:

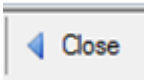


NOTE: In this case, the client is open to the importing Agency (South Broward Hospital District), because it is listed in this window. However, the client is missing an Agency Assigned Client ID (the key used in the import). If the client is not yet open to your Agency, you will not see the agency listed under Client Service Profiles. You can then open the client to the Agency by clicking on "New Client Service Profile Record and completing the details.

If the client is open to your agency, but missing a client ID, double click on the Client Service Profile to bring the Service Profile up on your screen. It will look similar to that in the figure below.



Click on the  button. You will then be able to type in the "Agency Assigned Client ID".

After entering the ID, simply click the  button to Close and save the record. This client will then be able to have services imported.

After fixing all appropriate errors, simply re-import the Import File Error Records by following the steps at the beginning of this guide.

Contact the Provide Help Desk (provide.help@grouptech.com) should you receive other errors during the import process.