

## Assigning Teams and Programs via an Import

This document only applies to the following special imports:

- \*Client Program
- \*Client Team
- \*Employee Program
- \*Employee Team

Add/Delete Column ..... 1

Usage of the Primary Flag ..... 1

Existing Assignments ..... 1

\*Client Program ..... 2

\*Client Team ..... 2

\*Employee Program ..... 2

\*Employee Team ..... 2

## ADD/DELETE COLUMN

Import Builder: ClientPrograms

---

Import Name:

Format:  Delimiter (CSV):  Parent XML Element:

Allow Invalid Fields:  **Add/Delete Column:**  Replace/Delete ALL:

Use External ID:  Use Internal ID:

Pre Query:

Post Query:

---

Select all columns that will be in the import file:

- If you are only going to assign programs/teams via the import, you do *not* need to select Add/Delete Column.
- If are going to unassign or unassign and assign via the same import file, you must select Add/Delete Column and the first column of the import file **MUST** be 'A' or 'D'. This indicates that the assignment is being Added or Deleted. The Add/Delete column will not appear as a column in the import tool itself; it will only be in the actual file.

For example, to unassign client 1001 from the Outpatient team, the row will be:  
D,1001,Outpatient

## USAGE OF THE PRIMARY FLAG

- If not imported at all or if imported as '0', and there are no existing assignments, will set the first assignment in the import file as the primary.
- If imported as '1', will override the existing primary assignment if it exists.
- If multiple assignments for the same client or employee are imported as '1', only the last one in the file will be the primary.

## EXISTING ASSIGNMENTS

If you try to add an assignment that already exists, the following error message will display:

*The INSERT statement conflicted with the FOREIGN KEY constraint*

It is not possible to update an existing assignment (keeping the assignment but changing the primary flag) via an import.

### \*CLIENT PROGRAM

Field	Usage
External Client ID	Required; either the client's external ID or the Credible ID
Program Code	Required; either the Program Code or the Program External ID
Primary Flag	Optional; 0 (for no) or 1 (for yes)

### \*CLIENT TEAM

Field	Usage
External Client ID	Required; either the client's external ID or the Credible ID
Team Name	Required; either the Team Name or the Team External ID
Primary Flag	Optional; 0 (for no) or 1 (for yes)

### \*EMPLOYEE PROGRAM

Field	Usage
External Employee ID	Required; either the employee's external ID or the Credible ID
Program Code	Required; either the Program Code or the Program External ID
Primary Flag	Optional; 0 (for no) or 1 (for yes)

### \*EMPLOYEE TEAM

Field	Usage
External Employee ID	Required; either the employee's external ID or the Credible ID
Team Name	Required; either the Team Name or the Team External ID
Primary Flag	Optional; 0 (for no) or 1 (for yes)