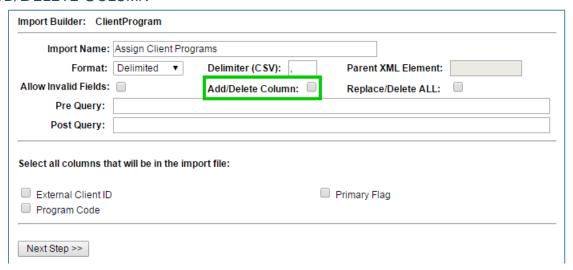# Assigning Teams and Programs via an Import

This document only applies to the following special imports:

> *Client Program
>
> *Client Team
>
> *Employee Program
>
> *Employee Team

ADD/DELETE COLUMN

```
Import Builder:   ClientProgram

   Import Name:  Assign Client Programs

        Format:  Delimited  ▼    Delimiter (CSV): ,    Parent XML Element:

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

      Pre Query:

     Post Query:

Select all columns that will be in the import file:

☐ External Client ID                    ☐ Primary Flag
☐ Program Code

[ Next Step >> ]
```

- 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)

Revised 2016-07-27