



PARS Participant Tab Delimited File Upload Instructions

REMS Learner Template A

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Version History

| Version | Date | Notes |
|---------|------------|---|
| 1.1 | 03/11/2019 | Adapted Learner Template B instruction document to create this version, which includes instructions to submit participants for OA REMS. |



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Introduction

The tab delimited batch upload function in ACCME's Program and Activity Reporting System (PARS) offers providers the ability to add or delete multiple participant records at one time. Although this function is available for use by all providers, it will be particularly useful to organizations that already have their own CME tracking system and have the ability to map the fields in their system to the fields in PARS.

Instructions for Using Learner Template A: These instructions provide detail for providers using "Learner Template A" to upload participant data for CME activities that are also registered for the following:

Opioid Analgesic: Risk Evaluation and Mitigation Strategy

The main section of these instructions describes how to use a Microsoft (MS) Excel template to organize your participant data in such a way that it can be uploaded into PARS.

Appendix A — describes the data that are necessary for the upload.

Appendix B – Upload Processing Rules describes how to resolve error messaging that may occur on file upload.

Getting help with PARS: You can click on Help from any screen within PARS to access frequently asked questions and helpful videos. If you can't find what you're looking for in this information, you can submit your questions to the ACCME using the contact support interface within PARS. You may also contact the ACCME at info@accme.org with your questions.



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Creating a Tab Delimited File Using the Excel File Template

It is important to note that it is not possible to upload data directly from an MS Excel file into PARS.

The PARS MS Excel file template is offered as a tool to facilitate entry of data in a structured format. Once the data is in Excel, it is then easy to save it as a tab-delimited text file (.txt), which can be uploaded into PARS.

It is not necessary to use the MS Excel file template to create a tab-delimited text file. Other applications and data systems may offer the capability to export data directly into this format, although you may need some technical knowledge of the software that currently stores your data in order to set up this export. For detailed information about the fields required in the tab-delimited file, please refer to [Appendix A](#).

How to Upload Participant Data Using the MS Excel File Template

1. Download the appropriate MS Excel Participant upload template from [here](#) and save a copy to your computer.
2. The MS Excel Participants upload template displays a header row followed by sample data rows. After reviewing the sample data, Clear Contents of the sample data rows. In Excel, you can Clear Contents by highlighting the rows, right clicking with the mouse, and then choosing Clear Contents.

Note: You may also delete these sample data rows, but deleting them will remove the validation on the cells. This validation provides helpful information during manual data entry.

If you plan to copy and paste data into the spreadsheet from other sources, or if you plan to use Excel formulas to add data to the spreadsheet, it is recommended that you delete the sample data rows instead of clearing them, to ensure that the format of the copied data is preserved.

3. Copy one of the rows you cleared in Step Two, and paste it in the number of rows below that you will need for entering all the participants. This will copy the cell validation into the rows.
4. Enter participant data into this file. All data on the same row must relate to the same activity, and one row is needed per participant.

See the **Appendix A - Tab Delimited File Format** section of this document for specific data requirements. Additionally, please follow the below rule when using the Excel template to help ensure a successful upload:

- Do not change the order in which the columns appear. Even if data is not required in a field, the system will expect the field to appear in the record with a blank (**null**) value, and the null value should be separated by tab-delimiters. If you use the Excel template file, leave the cells that do not contain data completely blank (do not enter a zero or a space—enter no character at all). The columns left empty will create the appropriate blank (or null) values automatically when you save the file as a tab-delimited .txt file.



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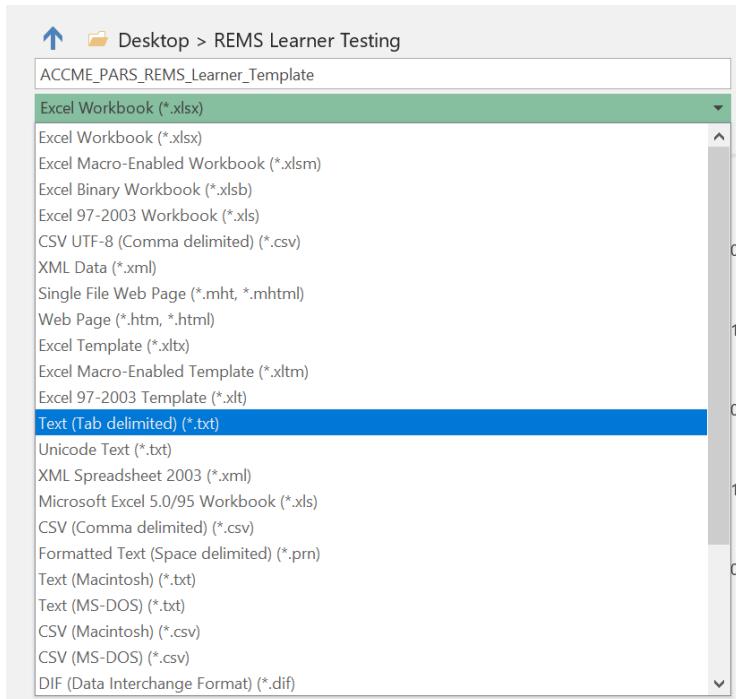
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- Save the file in the Excel format (.xls or .xlsx). This .xls or .xlsx version can be used if further changes are needed to the file. Below is an example of what your Excel file (with sample data) will look like after this step:

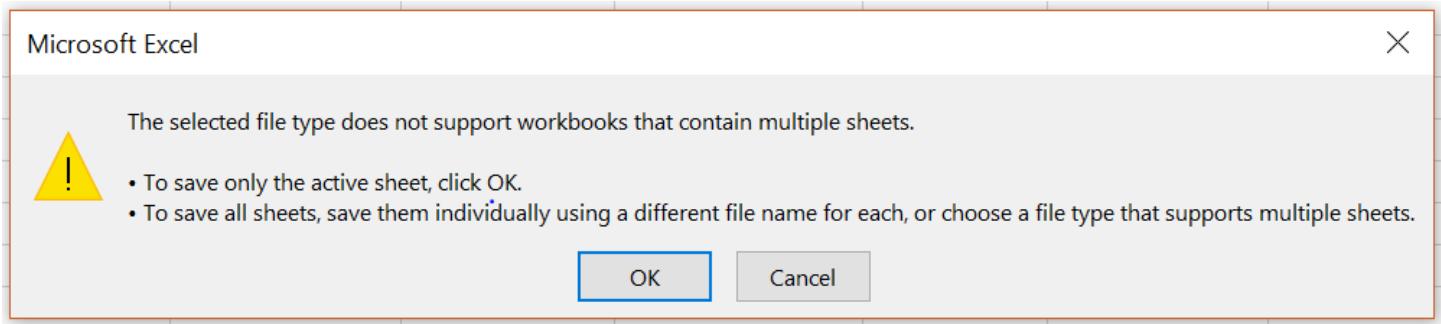
| 1. Template (DO NOT ALTER OR DELETE THIS COLUMN) | 2. ACCME Activity ID | 3. Provider Learner ID | 4. Completion Date | 5. Practice State | 6. Profession | 7. Practice Area | 8. DEA Registration | 9. Surgical Procedures | 10. Time in Practice | 11. Record Action |
|---|----------------------|---------------------------|-----------------------|-------------------|---------------|------------------------|---------------------|---------------------------|-------------------------|----------------------|
| REMS Learner Template A | 201105188 | Example12-45 | 3/6/2019 | Illinois | Physician | Substance Use Disorder | Individual | Yes | Trainee | Add |
| REMS Learner Template A | 201105188 | Example9876a | 3/6/2019 | Louisiana | Physician | N/A | None | No | 16-20 years | Add |
| REMS Learner Template A | 201105188 | Example9876a | 3/7/2019 | Florida | Physician | N/A | None | No | 16-20 years | Add |

How to Create a Tab-Delimited Text File from the Excel File

- Choose the Save As option and save the Excel file as type Text (Tab delimited) (.txt).



- After clicking Save, you may see a prompt in Excel that the selected file type does not support multiple sheets. Click the "OK" button to continue.





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Note: The Excel file saved in Step 5 is only used for updating the file if changes are needed. The actual file that will be uploaded is the tab-delimited file saved within this step.

How to Upload the Tab-Delimited Text File

8. Log into the ACCME Program and Activity Reporting System (PARS).
9. Click the Activities tab
10. In the left navigation in the “Activities” section, click the **Batch Participant Upload** link.

The screenshot shows the ACCME Program and Activity Reporting System (PARS) interface. At the top, there is a navigation bar with the ACCME logo, the title "Program and Activity Reporting System (PARS)", and a user session message: "Logged in as 0008001 Western Regional Medical Center Help | Main Menu | Log Out". Below the navigation bar, there are three main tabs: "Home" (selected), "Activities", and "Program Summary".

The main content area displays the "Western Regional Medical Center" activities for the year 2019. It includes a note: "Please do not use the 'Back' or 'Forward' buttons on your browser when navigating in system." Below this, it lists "2019 Activities" and provides a summary of "Open and closed activities".

On the left sidebar, under the "Activities" section, the "Batch Participant Upload" link is highlighted with a red box. Other links in this section include "Add an Activity", "Batch Activity Upload", "Download All Activities", "Download MOC Activities", "Download REMS Activities", and "Download Activities Selected for Review".

At the bottom of the sidebar, under "Participants", are links for "Batch Participant Upload" and "View Participant Summary".

On the right side of the main content area, there are buttons for "Add Activity" and "Batch Upload Activities", a reporting year dropdown set to "2019", and links for "Open Activities" and "Closed Activities". There are also buttons for "View by Activity Type", "View All Open Activities", and "Delete Selected".



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11. On the Bulk Upload page, select the Tab Delimited option and then select Submit Learners for Opioid Analgesic REMS and select Next

Bulk Upload Learners

**STEP 1 OF 3:
SELECT FILE TYPE**

.txt Tab Delimited File

Tab-delimited: This type of upload accepts a TXT (Text) file that has been specially formatted. This type of file can easily be created by a spreadsheet program such as Microsoft Excel. [Learn more](#) about the tab-delimited upload option, including detailed instructions and an electronic file template you can download.
Batch uploads may not exceed 1,000 records.

.xml Extensible Markup Language

**STEP 2 OF 3:
SELECT SUBMISSION TYPE**

Submit Learners for Licensing or Specialty Board
 Submit Learners for Opioid Analgesic REMS

To enter participant data manually, go to the [Activity Learner Summary](#) and view the participant details. NEXT

12. Find the tab-delimited text file that you want to upload, and select the **Upload File** button.

Bulk Upload Learners

STEP 3 OF 3: CHOOSE TAB DELIMITED FILE

CHOOSE FILE No File Selected [Download tab-delimited participant file template](#)

The upload process may take several minutes to complete. Please do not re-submit files or refresh the page prior to receiving either an upload error or confirmation of success. Re-submitting or refreshing when the file has not finished processing results in duplicate records of credit being sent to the Board.
To enter participant data manually, go to the [Activity Learner Summary](#) and view the participant details.

BACK TO STEP 1 UPLOAD FILE



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13. The system will validate the file. If there are errors in the file, you will see a message on the screen that lists the problems and no participants will be uploaded to the system. To correct the errors, go back to the Excel file from Step 5 and fix the errors. Then complete subsequent steps to save a corrected tab-delimited (.txt) file for upload.

Bulk Upload Learners

STEP 3 OF 3: CHOOSE TAB DELIMITED FILE

CHOOSE FILE [Download tab-delimited participant file template](#)

LRS FOUND THE FOLLOWING ERRORS (2) :
PLEASE RESOLVE ERRORS AND TRY UPLOADING AGAIN **EXPORT ERRORS**

1 Line: 2 - 783737 - Error Code: 690 - ACCME activity ID does not exist
2 Line: 3 - 12434 - Error Code: 690 - ACCME activity ID does not exist

14. If there are no errors in the file, a confirmation message will appear.

Bulk Upload Learners

STEP 3 OF 3: CHOOSE TAB DELIMITED FILE

CHOOSE FILE [Download tab-delimited participant file template](#)

FILE HAS BEEN SUCCESSFULLY UPLOADED
NUMBER OF LEARNERS ADDED: 2
NUMBER OF LEARNERS DELETED: 0



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Appendix A – Tab Delimited File Format

- The tab-delimited text file must be saved and uploaded as a .txt file.
- There must be at least 11 fields present in each participant record. Even if data is not required in a field, the system will expect the field to appear in the record with a blank (**null**) value, and the null value should be separated by tab-delimiters. If you use the Excel template file, leave the cells that do not contain data completely blank (do not enter a zero or a space—enter no character at all). The columns left empty will create the appropriate blank (or null) values automatically when you save the file as a tab-delimited .txt file.
- When you prepare the Excel file that will be used to create a tab-delimited .txt file for upload to PARS, there are certain characters that should be avoided in the text entries. These characters, known as control codes, impart formatting to text within a cell and can include tabs within cells, carriage returns, and line feeds. When the Excel file is saved in tab-delimited .txt format, these characters will cause the columns and rows in your .txt file to break unexpectedly, and you will receive validation errors when you attempt to upload the file. Control characters should be removed from text in Excel before you create the .txt file for upload.
- The following table provides the details of the file format specifications:



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List of Tab-Delimited File Format Fields

| No | Field Name | Type/Format | Required Field? | Comments | Example Data |
|----|----------------------------|--|-----------------|---|--------------------|
| 1 | Template | Text | Yes | The text "Learner Template A" must appear in this field. | Learner Template A |
| 2 | ACCME Activity ID | Number (unique numeric ACCME Activity ID) | Yes | ACCME Activity ID is assigned by PARS, and can be found on the activity detail screen in PARS. | 100000000 |
| 3 | Provider Learner ID | Text (must be unique for each participant) | Yes | The ID assigned by the organization identified in the Learner ID Type field. May be any combination of letters and numbers, as long as it is unique for each learner. | 1234girems |
| 4 | Completion date | Date in the format of MM/DD/YYYY | Yes | The date on which the participant completed the activity. This date must be equal to or greater than the activity start date and equal to or before the activity end date. The date must also be equal to or before today's date. | 03/30/2019 |
| 5 | Practice State | Name of US State or Territory | Optional | The state that the learner has identified as being the primary state in which he or she practices. | Illinois |
| 6 | Profession | Valid values are: Physician, Advanced practice nurse, Physician Assistant, Dentist, Podiatrist, Nurse, Pharmacist, Optometrist, Psychologist, Other health care professional, Other. | Required | The learner's profession. | Physician |



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| No | Field Name | Type/Format | Required Field? | Comments | Example Data |
|----|----------------------------|--|-----------------|--|-----------------|
| 7 | Practice Area | Valid values are: Anesthesiology, Critical Care, Dentistry, Emergency, Family Medicine, Geriatric, Hematology, Hospice and/or Palliative Care, Internal Medicine, Neurology, Obstetrics/Gynecology, Oncology, Ophthalmology, Pain, Pediatric, Physical Medicine and Rehabilitation, Psychiatry, General surgery, Orthopedic surgery, Other surgical specialty, Substance Use Disorder, Urology, Other, N/A. | Optional | The clinical area in which the learner practices. | Family Medicine |
| 8 | DEA Registration | Valid values are: Individual, Institutional, None. | Optional | Indicates whether or not the learner is able to prescribe controlled substances, and if so, the type of registration which allows him or her to do so. | Individual |
| 9 | Surgical Procedures | Valid entries: Yes No | Optional | Indicates whether the learner performs surgical procedures. | No |
| 10 | Time in Practice | Valid values are: Trainee, 0-5 years post training, 6-10 years, 11-15 years, 16-20 years, 21+ years. | Optional | The length of time the learner has been in practice. | 6-10 years |
| 11 | Record Action | Valid entries: Add Delete | Yes | If the participant data is being added, this field should have a value of "add". If the record is being removed, this field should have a value of "delete." | Add |



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Appendix B – Upload Processing Rules

Is File Readable?

PARS will check that the file can be opened and read as a text (.txt) file.

If the file cannot be opened/read as a text file, you will see the following error message in the error report:
“File unreadable or file format not valid.”

Are Required Fields Included?

PARS will check that data is included in each of the required fields shown in the table in Appendix A. The following error messages may appear if required fields are not populated:

| Error Message | Action Needed |
|---|---|
| Profession missing | Each participant record must include the learner profession. |
| Invalid surgical/procedures value | Each participate record must include a selection of either yes or no. |
| Missing activity completion date. | Each participant record must include the date on which the participant completed the activity. |
| Missing ACCME activity ID. | The ACCME ID associated with the activity must be included with the participant record. The ACCME activity ID can be found in PARS. |
| Missing Provider Learner ID | The Provider Learner ID associated with the activity must be included with the participate record. The ID assigned by the organization identified in the Learner ID Type field. |
| Learner record action was not specified. | An action of either “add” or “delete” must be included for each record, to indicate the action that should be taken. |
| Minimum number of required columns were not supplied. | This error typically indicates that the file was uploaded as a CSV file instead of a tab-delimited text file, and the contents of required fields cannot be read. |

Are Fields in the Correct Format?



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In addition to checking for missing fields, PARS will check that the data in each field is in the required format, specified in the table in Appendix A. The following error messages may appear if there are problems with the format of the data in any field:

| Error Message | Action Needed |
|---|--|
| Learner record action was not specified | An action other than “add” or “delete” appears in the Action field. |
| Activity completion date not valid. | The completion date must be expressed as MM/DD/YYYY. This error may also appear if participant data is submitted for an activity with a completion date that occurs in the future or after the activity end date listed in PARS. |

Does the Participant Record Follow Submission Rules?

When participant data is uploaded to PARS, some fields are validated immediately upon upload, to allow providers to correct errors in real time. The participant records are submitted to the specialty board at the end of each day. Additional validation occurs with specialty board processing and appears in PARS the following day.

The following error messages may appear in real time:

| Error Message | Action Needed |
|--|---|
| ACCME activity ID does not match with a registered OA REMS activity. | Participant data can be submitted only for activities that have been registered for OA REMS. To register an activity for OA REMS, locate the activity in PARS, chose the “update” option, and complete the “OA REMS” section on the activity detail. Participants can be added to an activity immediately after it is registered for OA REMS. |
| Activity completion date precedes activity start date. | Completion date for each participant record cannot occur before the date for the activity itself. |

Correcting a File with Errors

If an error appears when a file is uploaded, none of the records in the file will be processed. Return to the original file and check that all required fields are included, and that the file has been saved as a tab-delimited text file. After saving any revisions to the file, upload it again, and repeat the process until all errors are resolved.