



PARS Participant Tab Delimited File Upload Instructions – REMS Learner Template A

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Version History

Version	Date	Notes
1.2	02/12/2020	Included updated instructions for the batch upload process
1.1	03/11/2019	Adapted Learner Template B instruction document to create this version, which includes instructions to submit participants for OA REMS.

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 [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 additional 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.

Note:

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.

5. 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:

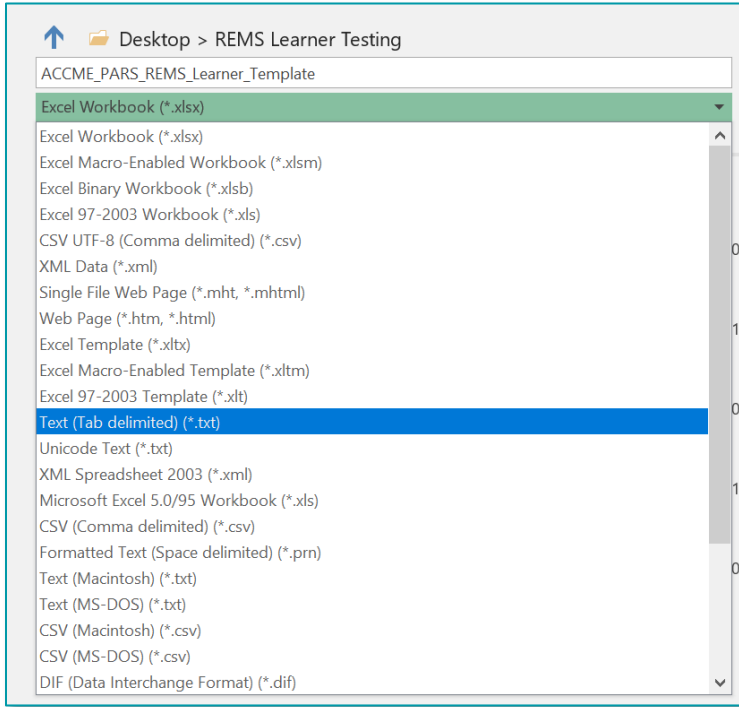
1. Template (DO NOT ALTER OR DELETE THIS COLUMN)	2. ACCME Activity ID	3. Provider Learner ID	4. Completion Date	5. Practice State	6. Profession	7. Practice Area	8. DEA Registration	9. Surgical Procedures	10. Time in Practice	11. Record Action
REMS Learner Template A	201105188	Example12-45	3/6/2019	Illinois	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



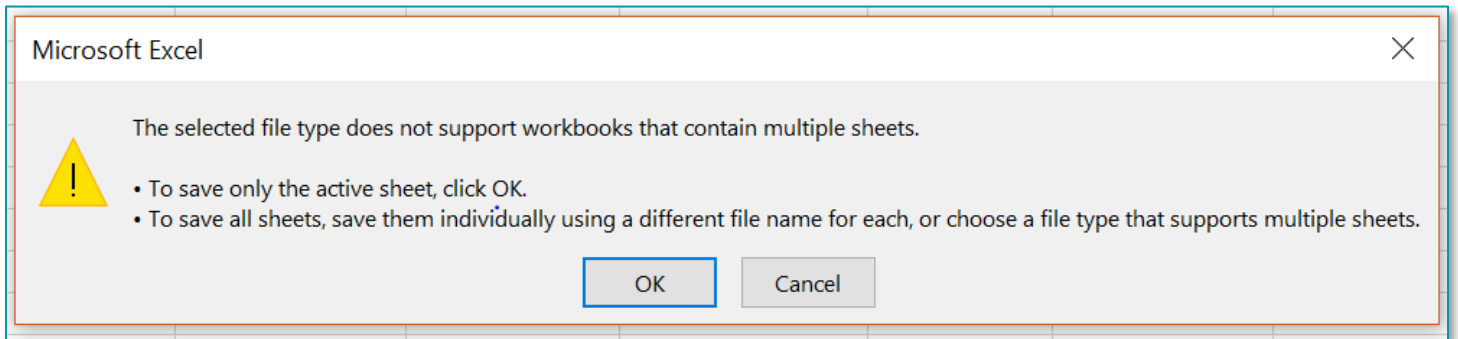
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How to Create a Tab-Delimited Text File from the Excel File

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



2. 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.



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.



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How to Upload the Tab-Delimited Text File

1. Log into the ACCME Program and Activity Reporting System (PARS).

The screenshot shows the ACCME Program and Activity Reporting System (PARS) home page. The header includes the ACCME logo and the text 'Accreditation Council for Continuing Medical Education Program and Activity Reporting System (PARS)'. A navigation menu contains links for HOME, PROFILE, PROCESSES, FORMS, NOTIFICATIONS, DOCUMENTS, HISTORY, and CONTACT US. A notification states 'You are assigned to more than 1 Organization.' The main content area is divided into two columns. The left column displays organization details for 'AAA Test Organization', including ID 1234567, location (New York, NY), website (http://www.accme-etc.org), and primary contact information (Provider Contact Tester, ProviderContactTester@accme.org, Chicago, IL). The right column features a 'Program and Activity Data' link, highlighted with a red box, and two progress indicators: 'CURRENT PROCESS' for 'DEMO Reaccreditation Process' (0% complete, in progress since 01/23/2020) and 'CURRENT FORMS' for 'Confirmation of Intent - AAA Test Organization' (10% complete, scheduled for 01/23/2020 to 01/27/2020).

2. On the home page of the Program and Activity Reporting screen, click on **Report CME Participants**.

The screenshot shows the 'Program Summary' page in the ACCME PARS system. The header includes the ACCME logo, the text 'Program and Activity Reporting System (PARS)', and user information: 'Logged in as Johnny Tester | 1234567 AAA Test Organization'. Navigation links for 'Home', 'Activities', and 'Program Summary' are visible. A red warning message states: 'Please do not use the 'Back' or 'Forward' buttons on your browser when navigating in system.' Below this, the page title is 'ACCME Program and Activity Reporting'. Under the heading 'Report Activities', there are two links: 'To report activities, click here' and 'To report CME participants, click here'. The second link is highlighted with a red box.



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3. Navigate to the **Batch Upload Learners** tab. From here you can select the Tab Delimited option, and the option to submit learners for certain programs. Select the option to submit for Opioid Analgesic REMS.

The screenshot shows the 'Batch Upload Learners' page in the ACCME Learner Reporting System. The page has a green header with the ACCME logo and navigation links: 'Activity Learner Summary', 'Learner Search', and 'Batch Upload Learners' (highlighted with a red box). The user is logged in as Johnny Tester, an AAA Test Organization with ID 1234567.

The main content area is titled 'Batch Upload Learners | Upload New File'. A purple banner contains a 'New!' notification: 'You can now upload your file, and we'll send you an email when it is complete. Watch this [video tutorial](#) or [read more](#) about the process.' Below this are two buttons: 'UPLOAD NEW FILE' (highlighted with a red box) and 'VIEW UPLOAD HISTORY'.

STEP 1 OF 3: SELECT FILE TYPE

ACCME offers two file format options for batch uploading learner data: **Tab-delimited** or **XML**. Example templates and instructions can be found on our [technical information](#) page. **Batch uploads may not exceed 2,500 records.**

Two radio button options are shown: 'Tab Delimited File .txt' (selected and highlighted with a red box) and 'Extensible Markup Language .xml'.

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 2,500 records.**

STEP 2 OF 3: SELECT SUBMISSION TYPE

Please select the CME collaboration for which you are submitting learner data.

Two radio button options are shown: 'Submit Learners for Licensing or Specialty Board' and 'Submit Learners for Opioid Analgesic REMS' (selected and highlighted with a red box).

At the bottom, there is a link: 'To enter participant data manually, go to the [Activity Learner Summary](#) and view the participant details.' and a 'NEXT' button (highlighted with a red box).



PARS Participant Tab Delimited File Upload Instructions – REMS Learner Template A

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

Batch Upload Learners | Upload New File

New! You can now upload your file, and we'll send you an email when it is complete. Watch this [video tutorial](#) or [read more](#) about the process.

[UPLOAD NEW FILE](#) [VIEW UPLOAD HISTORY](#)

STEP 3 OF 3: CHOOSE TAB DELIMITED FILE

CHOOSE FILE Annual_Meeting_2020_Participants.txt [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.

[BACK](#) [UPLOAD FILE](#)

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

5. The system will then begin processing the file. This process will happen in the background and you will be sent an email once the file has finished processing. You can only upload one file at a time.

Batch Upload Learners | Upload New File

New! You can now upload your file, and we'll send you an email when it is complete. Watch this [video tutorial](#) or [read more](#) about the process.

[UPLOAD NEW FILE](#) [VIEW UPLOAD HISTORY](#)

STEP 3 OF 3: CHOOSE TAB DELIMITED FILE

CHOOSE FILE Annual_Meeting_2020_Participants.txt [Download tab-delimited participant file template](#)

YOUR FILE (ANNUAL_MEETING_2020_PARTICIPANTS.TXT) IS PROCESSING. THIS MAY TAKE UP TO 10 MINUTES.

YOU MAY LEAVE THIS PAGE WHILE IT'S PROCESSING. WE'LL SEND YOU AN EMAIL WHEN THE PROCESS IS COMPLETE. YOU CAN ALSO CHECK THE STATUS OF YOUR UPLOAD IN [VIEW UPLOAD HISTORY](#)

While your file is processing, you can not upload a new file. Only one file may be uploaded at a time. Check back here once your file is done processing to upload a new file.

[BACK](#) [UPLOAD FILE](#)

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

6. Once the file has uploaded, you can view the status of the upload from the View Upload History tab.



PARS Participant Tab Delimited File Upload Instructions – REMS Learner Template A

New! You can now upload your file, and we'll send you an email when it is complete. Watch this [video tutorial](#) or [read more](#) about the process.

[UPLOAD NEW FILE](#) [VIEW UPLOAD HISTORY](#)

From Last 30 Days | Showing 1 - 20 of 37 Uploads

If you have **not processed records**, follow these instructions:

1. Download errors (this download contains only records that weren't processed)
2. Make any necessary corrections referencing the error descriptions in the returned Excel file.
3. Save the spreadsheet as a tab-delimited file once you've made any changes.
4. [Upload](#) the newly corrected tab-delimited .txt file.

UPLOAD DATE/TIME	FILE NAME	RECORDS	RESULTS
01/16/2020 2:31 pm	200930149_May_Learners.txt	10	7 Records Processed 3 Records Not Processed (Download Errors)
01/02/2020 4:29 pm	01_02_small batch delete.txt	122	113 Records Processed (View) 9 Records Not Processed (Download Errors)
01/02/2020 4:22 pm	01_02_small batch add.txt	122	120 Records Processed (View) 2 Records Not Processed (Download Errors)
01/02/2020 2:31 pm	rejected_learners_2020_01_02_20_28_55.txt	20	8 Records Processed (View) 12 Records Not Processed (Download Errors)

7. The download will only show those records which couldn't be initially processed in PARS, along with an error code and message which explain the reason for failure. You can make any changes in this .csv file directly, save the file as a tab delimited and reupload back into the system



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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.	1234glrems
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 healthcare 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.

STEP 3 OF 3: CHOOSE TAB DELIMITED FILE

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

THE FILE SELECTED IS NOT A .TXT FILE. PLEASE UPLOAD A .TXT FILE.

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.

[BACK](#) [REUPLOAD FILE](#)

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

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?

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.