Participant-Level Data Template Tip Sheet

- Download the spreadsheet template for entering participant-level data from HSS. The template is housed within the *Inclusion Enrollment Report*. Click on the **Download Participant Level Data Template** button below the Cumulative (Actual) table.
  - Note: the template contains sample data to provide examples of acceptable values for each variable.
- **Delete** the **sample data**.
  - Note: The columns in the template ***should not be altered***; altering the format or category titles will result in an error during the uploading process.
- **Enter the data for each participant** under the appropriate columns.
  - Data may be copied/transferred into the template from another source or entered by hand into the template.
  - Data Transformation and Re-Coding: if necessary, conduct any data transformation and re-coding activities ***before*** copying the data to the template.
    - Data should be ***free of formulas*** before copying to the template.
    - Confirm that the variables are in the order necessary to match the columns in the template: race, ethnicity, sex, age, age unit.
    - Confirm that the values provided for each variable are acceptable values.
      - *Race:* American Indian, Asian, Black, Hawaiian, More than one race, Unknown, or White.
      - *Ethnicity:* Not Hispanic or Latino, Hispanic or Latino, or Unknown.
      - Sex should be entered under the *Sex* column as Female, Male, or Unknown.
      - *Age* should be entered as a whole number (up to four digits).
        - Leave the *Age* cell **blank** if:
          - Age is unknown
            - Be sure to remove numeric placeholders for unknown values, such as 99 or 9999.
          - Age is 90 years or older.
      - *Age Units:* minutes, hours, days, months, years, Ninety Plus, or Unknown.
        - For individuals 90 years and older, "Ninety Plus" should be used for the age unit. "Unknown" should be entered if age is unknown.
        - Age units may differ among participants.
- **Save the data**, maintaining the file as a csv file; **do not change to another file type**.
- Once the file has been saved, use the **Upload Participant Level Data Attachment** button to upload the file to HSS. This will update the Cumulative (Actual) counts.
- Click the **Save and Release Lock** button, or **Save and Keep Lock** to save your work and continue making changes to the study record.

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Instructions are also available within the HSS Online Help under *How Do I Edit Studies* and *Additional Resources,* and in the Entering Inclusion Data Using the Participant Level Data Template video and transcript.

Troubleshooting

Did you receive an error when attempting to upload? Check to make sure that:

- Your data are free of formulas
- The racial and ethnic categories for all participants match the required categories
- Unknown ages are represented with a blank age field and "unknown" as the age unit
- There are no empty rows between rows of data
- The order/format of the columns was not changed
- The file is saved as a .csv
  - If the file type changed upon download and you need to re-save as a csv, be sure to choose CSV UTF-8 (Comma delimited) from the available options.

If you identify any of these issues, adjust your data as needed and try again. You can also review the How to Address Errors When Using the Participant Level Data Template video or transcript for help.

If you continue to experience problems, submit a Web Ticket to contact the eRA Help Desk.

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