

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, gender, 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 or gender should be entered under the *Gender* 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.

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](#).