

Participant-Level Data Template Tip Sheet

Download the Template

1. Open the Human Subjects System (HSS).
2. In the Study Record, go to the *Inclusion Enrollment Report*.
3. Under the Cumulative (Actual) Enrollment table, click **Download Participant Level Data Template** below the Cumulative (Actual) table.
4. You can also download the template from the [eRA Training - Human Subjects System \(HSS\)](#) website.

Important: the template contains sample data to provide examples of acceptable values for each variable.

Remove the Sample Data

Delete all the sample data before entering information about your participants.

Do not change:

- Column names
- Column order
- File format

If you change these items, the file may not upload correctly.

Enter Participant Data

Enter one participant per row.

You can:

- Type data directly into the template, or
- Copy data from another source.

Before copying data into the template:

- Remove all formulas or paste values only.
- Make sure the columns in the source are in this order: race, ethnicity, sex, age, age unit.

Use only these allowed 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:* Female, Male, or Unknown.
- *Age:* enter age as a whole number with up to four digits.
 - Leave the *Age* cell **blank** if:
 - Age is unknown, or
 - the participant is 90 years or older.
 - Do not use placeholder numbers, such as 99 or 9999.

- *Age Units*: use one of these values:
 - Minutes
 - Hours
 - Days
 - Months
 - Years
 - Ninety Plus (for participants age 90 or older)
 - Unknown (if age is unknown or not reported)

Participants may have different age units.

Save the File

Save the file as a CSV (.csv) file (CSV UTF-8 (Comma delimited)). *Do not save it as another file type.*

Upload the File

1. Return to HSS.
2. Go to the Inclusion Enrollment Report.
3. Select the **Upload Participant Level Data Attachment** button.
4. Upload the CSV file.
5. The system will update the Cumulative (Actual) counts automatically.

Save your upload

- Click the **Save and Release Lock** button, or
- Select the **Save and Keep Lock** button to continue editing.

Instructions are also available within the [HSS Online Help](#) under *How Do I Edit Studies* and *Additional Resources*.

Troubleshooting Checklist

If you run into an upload error, check the following:

- The spreadsheet contains no formulas.
 - Paste values only when copying data.
 - Use the “Find” tool to search for “=” or other formula elements.
- Race and ethnicity entries use the required category names.
 - Review the entries to confirm the values.
 1. Turn on filters and review the values in each column.
 2. Correct any names that do not match the allowed values.
 3. Remove the filters.
- Unknown ages are entered correctly.
 - Filter the Age column for blank values. For each blank age, confirm that the Age Unit is "Unknown."
 - Filter the Age Unit column for "Unknown" and confirm that the Age field is blank.
 - Remove the filters when done.
- There are no blank rows between participant records.
 - Filter to blanks in the Race column, and delete any blank rows, or
 - Scroll through the spreadsheet and delete blank rows.
 - Remove the filters when done.
- There are no blank spaces or extra characters before or after values.
 - Filter each column and review the values. Check for blank spaces and extra characters.
 - Remove the filters when done.
- The columns are in this order: Race → Ethnicity → Sex → Age → Age Unit
 - Check the order of the columns.
 - If the columns are out of order:
 1. Rearrange the columns.
 2. Open a new copy of the template.
 3. Copy and paste values only into the new template.
- The file is saved as CSV (.csv).
 - If you need to save the file again as a CSV, choose CSV UTF-8 (Comma delimited) from the file type options.

If you continue to experience problems, [submit a Web Ticket](#) to contact the [eRA Help Desk](#).