

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.
- **Delete the sample data** in Rows 2 – 9.
 - 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 participant data** under the appropriate columns
 - Data may be copied/transferred into the template from another source or entered directly into the template.
 - If necessary, transform the variables into the necessary categories ***before*** copying the data to the template.
 - Note: data created from calculated cells will not transfer correctly. Data should be free of formulas before copying to the template.
 - Before copying:
 - Confirm that the variables are in the order provided in the template: race, ethnicity, gender, age, age unit.
 - Confirm the category names are ***exactly*** as provided in the template, including the upper and lower case structure for the variables.
 - *Race* should be entered as American Indian, Asian, Black, Hawaiian, More than one race, Unknown, or White.
 - *Ethnicity* should be entered as Not Hispanic or Latino, Hispanic or Latino, or Unknown.
 - Sex or gender may be entered under the *Gender* column as Female, Male, or Unknown.
 - *Age* should be entered as a whole number (up to four digits).
 - If age is 90 years or older, you may leave the *Age* cell blank, but assign the appropriate age unit. Leave the cell blank if age is unknown.
 - *Age Units* may range from minutes to years.
 - For individuals 90 years and older, Ninety Plus may be used for the age unit. Unknown may be entered if age is unknown.
 - Age units may differ among participants.
 - Confirm that there are no additional spaces, periods, or other punctuation within the cells.
- **Save the data**, maintaining the file as a csv file; **do not change to another file type**.
- Once the new totals have been entered into the template and the file has been saved, use the **Upload Participant Level Data Attachment** button to upload the file. 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*.

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 verbatim
- There are no additional spaces within cells/category names
- There are no blank rows between rows of data
- The order/format of the columns was not changed

If you identify any of these issues, adjust your data as needed and try again.

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