Accreditation Council for Continuing Medical Education

Batch Uploading Process

Introduction

This tutorial provides an overview of the new learner completion batch upload process. The creation and formatting of tab delimited and xml files remains the same as before.

Tab Delimited Template: An excel file with built in formatted fields to enter learner completion data
Tab Delimited Template Instructions: Formatting and submission instructions for the excel template above.

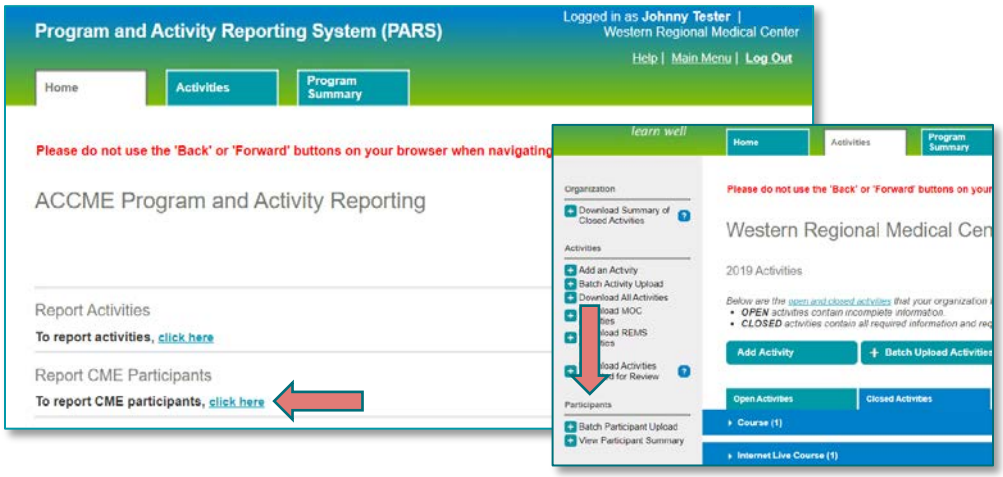
XML Learner Submission Instructions: Describes the XML file format to be used for submitting learners.
Sample XML Submission files: These sample files are useful to support both implementation of the web services (see below) and XML batch upload file development.

The batch upload process for learners is now an asynchronous process. The upload processing will happen in the background and you will receive an email once the upload has completed. A few notes about the batch upload enhancements:

- Providers can now upload up to 2,500 learners in a file (previously only up to 1,000 records could be submitted in each file).
- **PARS will not reject entire files due to data entry errors.** The upload will process all correct records in the file, and only those that have mis-matched information will not process. PARS will provide an error report of the not-processed records with explanations of the errors.
- Providers can make changes directly in the downloaded error file, re-save as a tab delimited file, and upload back into PARS.
- PARS has duplicate file monitoring in place to ensure that the same files are not uploaded twice by accident.
- PARS provides a batch upload history for the last 30 days. You can view the files and learners that were successfully uploaded during this time frame, as well as download a list of rejected records.

Accessing PARS for Learner Submission

Accessing the system is the same as before. You must first click on the “Report Participants” link at the bottom of the Home tab in PARS. You can also reach the Learner Reporting section of PARS by clicking on the “View Participant Summary” link on the left-hand side of the screen under the “Activities” tab.



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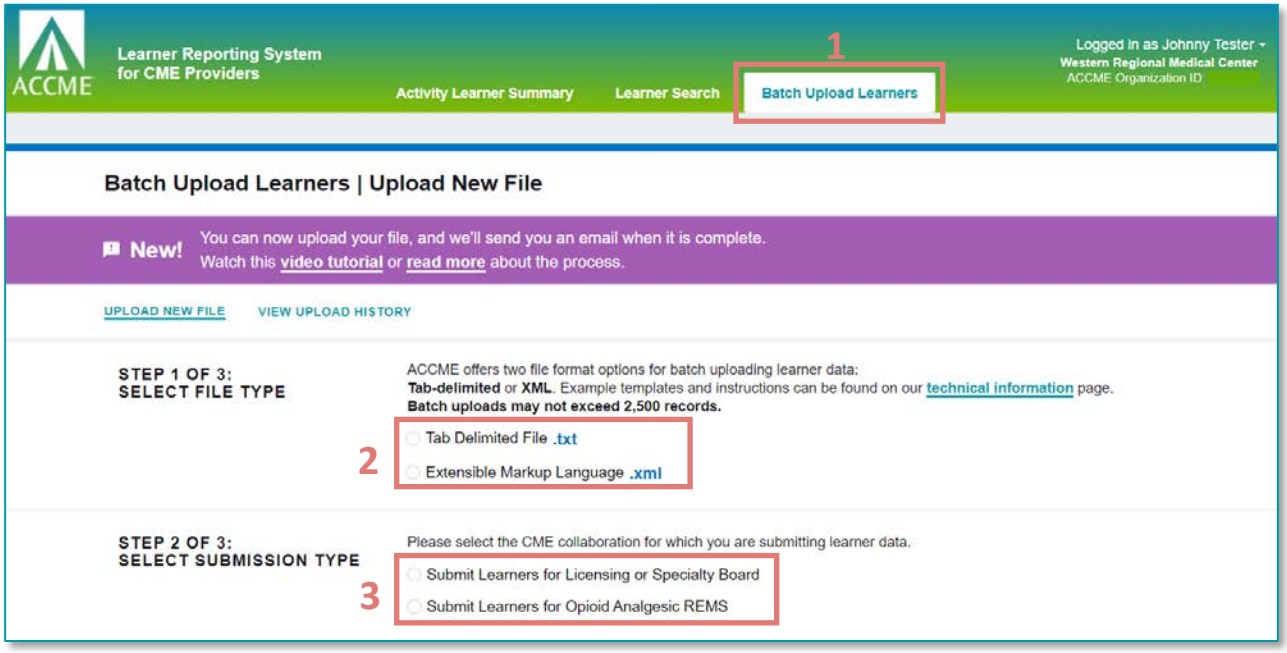
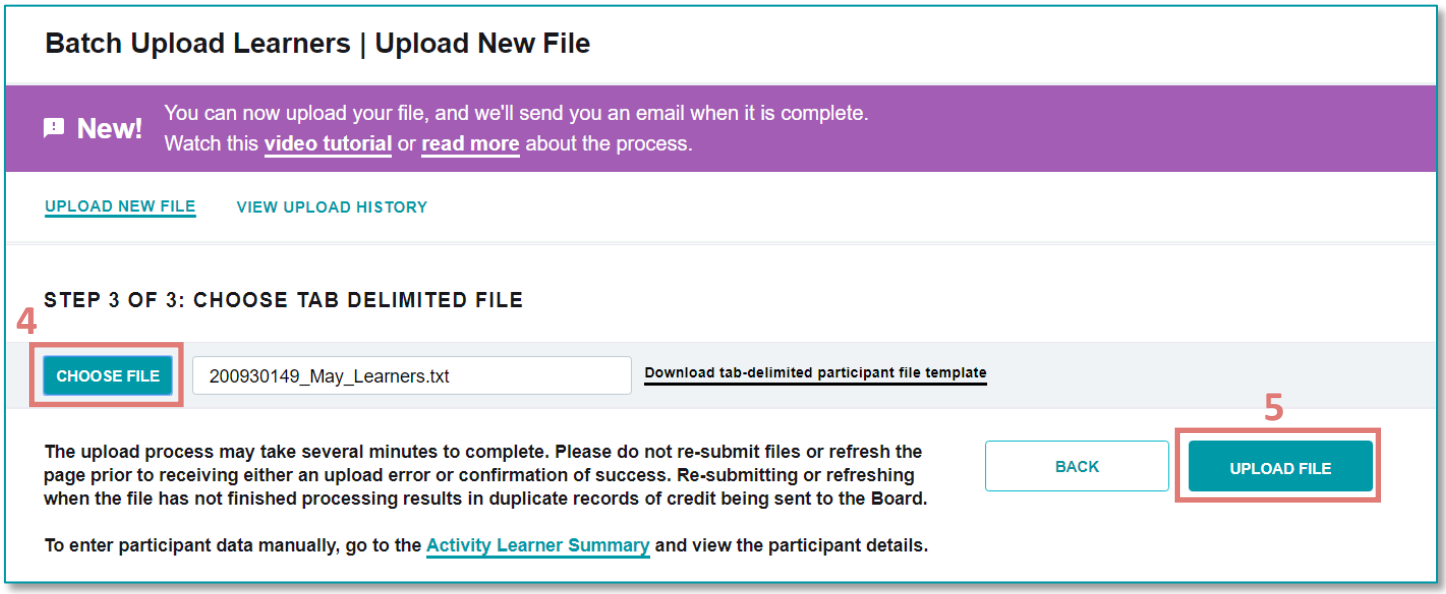
Process Overview

Step 1: Click on the Batch Upload Learners tab.
Step 2: Click on the button for the tab delimited or the XML upload, then select Next. This page also includes a link to the ACCME's technical information page, which contains descriptions of each batch uploading method, instructions about the process, a template for the tab delimited format, and schema for the XML format.
Step 3: Choose the program for which you are looking to upload learners. *If you are not a provider participating in the REMS program, the second option will be unavailable.*

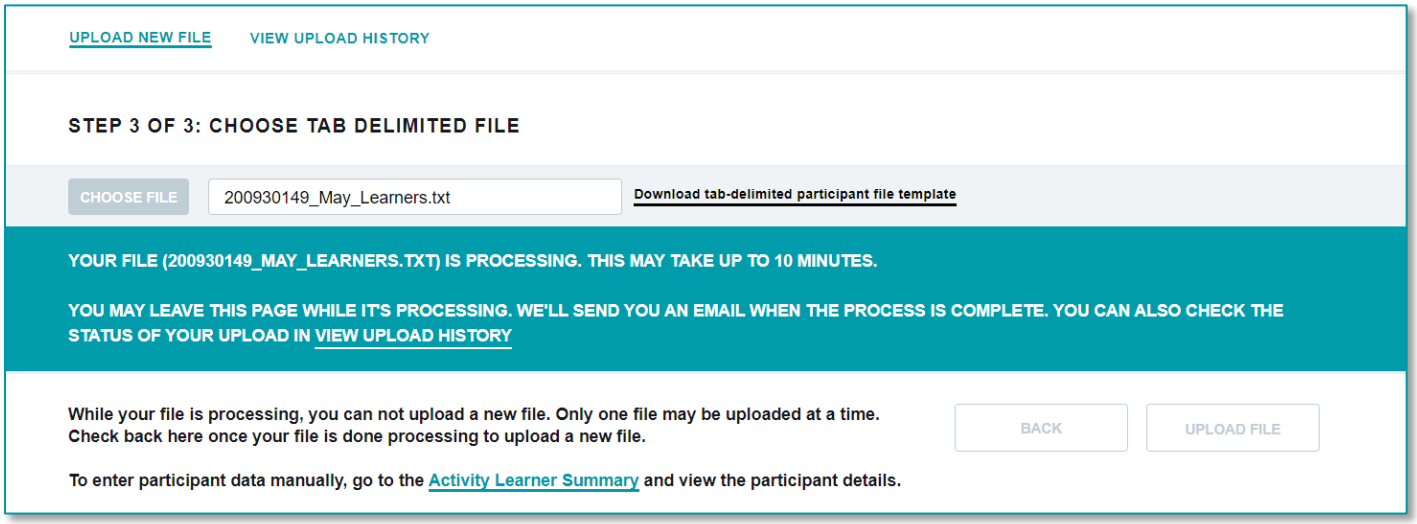


Step 4: Click on the **Choose File** button and browse to the file that you will be uploading.
Step 5: Click on the **Upload File** button.



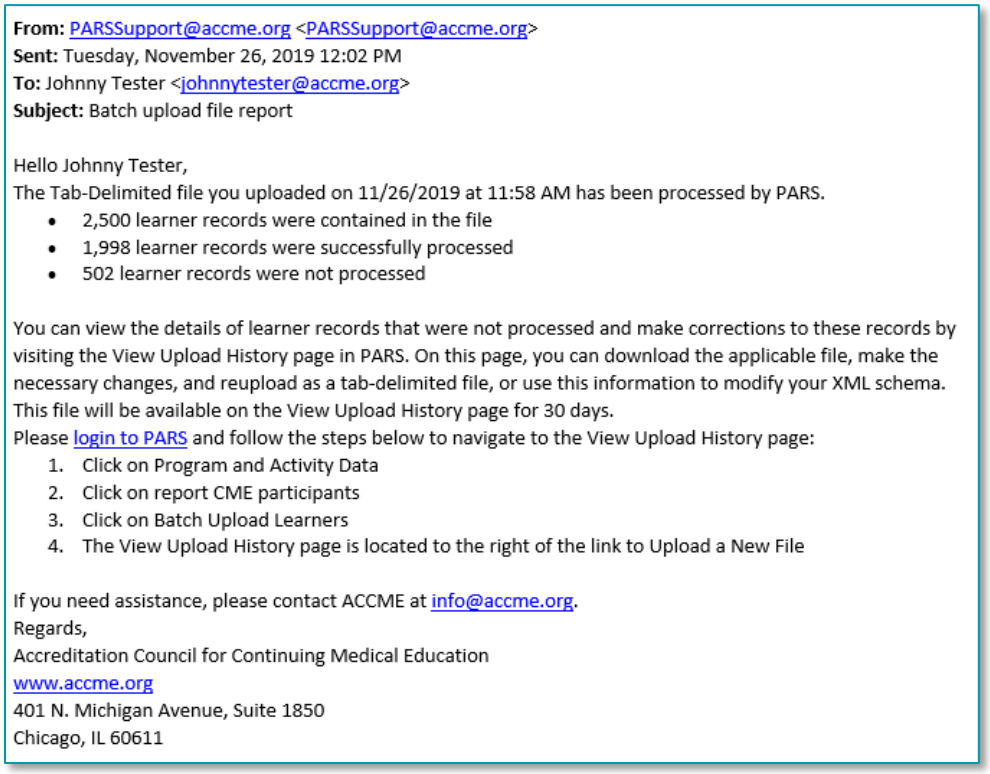
Step 6: If your file is in the correct format you will receive a "file processing" message. You will be unable to upload an additional file until the current file has completed processing. You may navigate away from this page

while processing is running.



Step 7: Once the file has completed processing, PARS will send an email to the email address associated with the user who uploaded the file. The email will provide information about the file you uploaded:

- Type of file uploaded
- How many total records in the file
- How many successfully processed records
- How many errors (records that were not processed)
- Date and time of the upload
- Further instruction on next steps (if you have records that were not processed)



From: PARSSupport@accme.org <PARSSupport@accme.org>
Sent: Tuesday, November 26, 2019 12:02 PM
To: Johnny Tester <johnnytester@accme.org>
Subject: Batch upload file report

Hello Johnny Tester,
The Tab-Delimited file you uploaded on 11/26/2019 at 11:58 AM has been processed by PARS.

- 2,500 learner records were contained in the file
- 1,998 learner records were successfully processed
- 502 learner records were not processed

You can view the details of learner records that were not processed and make corrections to these records by visiting the View Upload History page in PARS. On this page, you can download the applicable file, make the necessary changes, and reupload as a tab-delimited file, or use this information to modify your XML schema. This file will be available on the View Upload History page for 30 days.
Please login to PARS and follow the steps below to navigate to the View Upload History page:

1. Click on Program and Activity Data
2. Click on report CME participants
3. Click on Batch Upload Learners
4. The View Upload History page is located to the right of the link to Upload a New File

If you need assistance, please contact ACCME at info@accme.org.
Regards,
Accreditation Council for Continuing Medical Education
www.accme.org
401 N. Michigan Avenue, Suite 1850
Chicago, IL 60611

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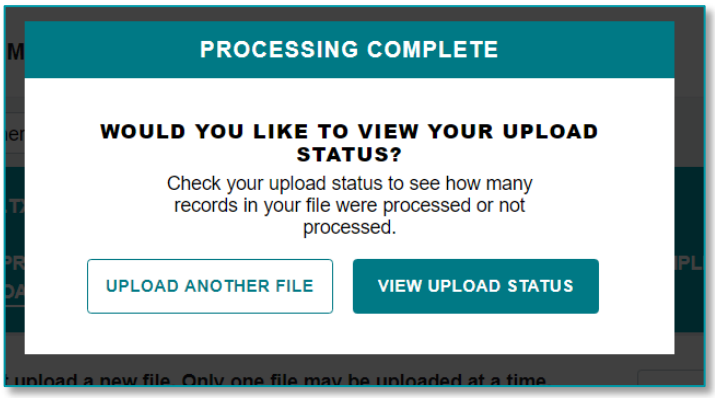
If you do not navigate away from the processing screen, once the file has finished processing the following message will pop-up. You may choose to view your submission or to upload additional files.



You can view recent submissions under the **View Upload History** tab in the batch upload section. Here you can see when files were uploaded, how many records successfully processed, and if there were any records with errors upon processing. You can download a list of learners which were not able to be processed by the system. Please see the errors section of this document for more information on troubleshooting batch uploads. The tab delimited and XML specific instructions also go into greater detail into error resolution and formatting requirements.

If you would like to view the successfully processed records, you can click View to the right of the listed number of records processed. This will prompt a PDF download of all submitted learners and their status upon submission (either Accepted or Submitted depending on the board). You can also look in the Activity Learner Summary, as these learners should appear under the activity for which they were submitted.

Submitted Learner Summary Report Created by johnnytester@accme.org | Exported at November. 26, 2019 04:29 PM from ACCME PARS

Showing 1 - 13 of 1998 results

LEARNER ID	FIRST NAME	LAST NAME	DOB	ACCME ACTIVITY ID	ACTIVITY TITLE	ACTIVITY TYPE	ACCREDITED PROVIDER	DATE COMPLETED	POINTS/ CREDITS	CREDITS AWARDED	STATUS
97979	Georgia	O'Keeffe	11/15	200931353	Internet Enduring Material 999 MOC	Internet Activity Enduring Material	Test Provider for Asynchronous Batch Tes ...	10/28/2019	0.25	Lifelong learning	ACCEPTED
96969	Jackson	Pollock	01/28	200931353	Internet Enduring Material 999 MOC	Internet Activity Enduring Material	Test Provider for Asynchronous Batch Tes ...	06/12/2019	0.25	Lifelong learning	ACCEPTED
98989	Vincent	Van Gogh	03/30	200931353	Internet Enduring Material 999 MOC	Internet Activity Enduring Material	Test Provider for Asynchronous Batch Tes ...	06/02/2019	0.25	Lifelong learning	ACCEPTED
97979	Georgia	O'Keeffe	11/15	200931353	Internet Enduring Material 999 MOC	Internet Activity Enduring Material	Test Provider for Asynchronous Batch Tes ...	05/03/2019	0.25	Lifelong learning	ACCEPTED
95959	Claude	Monet	11/14	200931353	Internet Enduring Material 999 MOC	Internet Activity Enduring Material	Test Provider for Asynchronous Batch Tes ...	09/30/2019	0.25	Lifelong learning	ACCEPTED

If you click on the Activity ID in the **Activity Learner Summary** tab you will see all the learners who have been successfully Submitted or Accepted within the activity over time and their current status.

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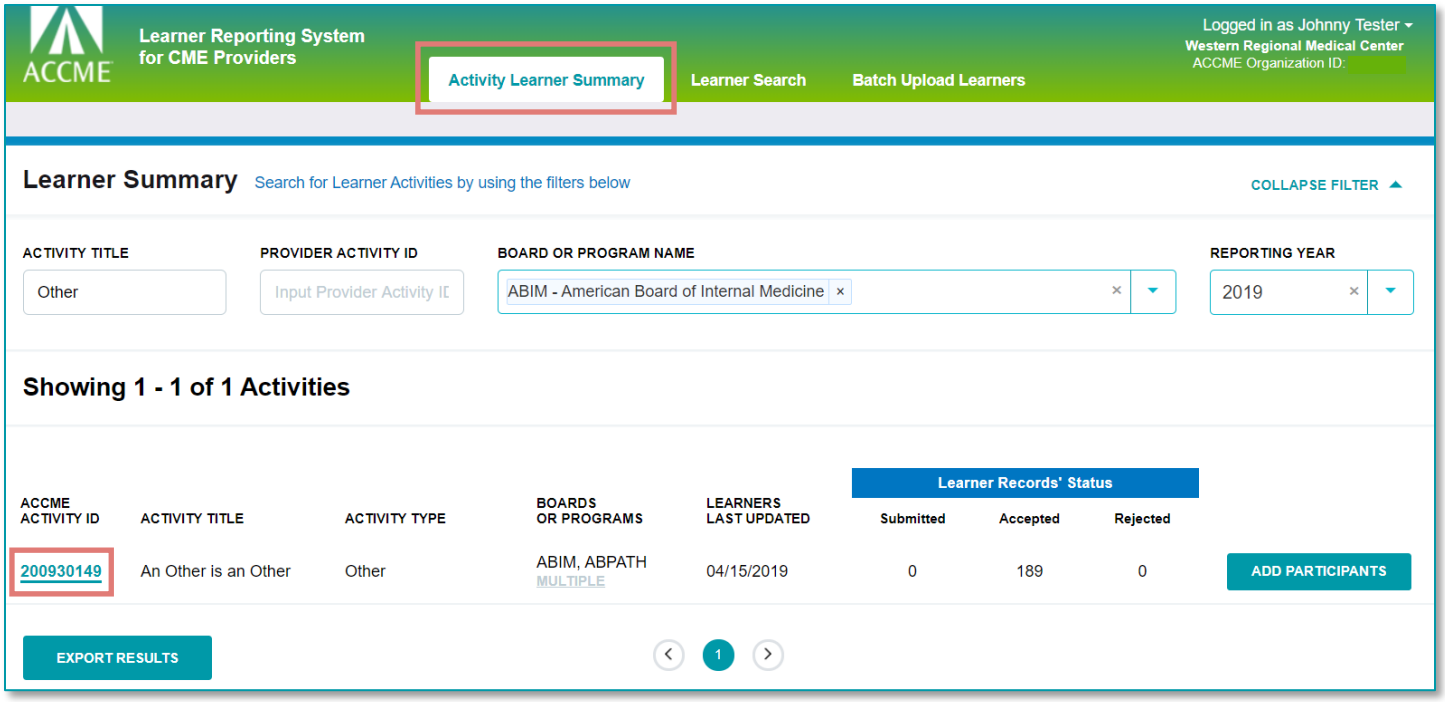
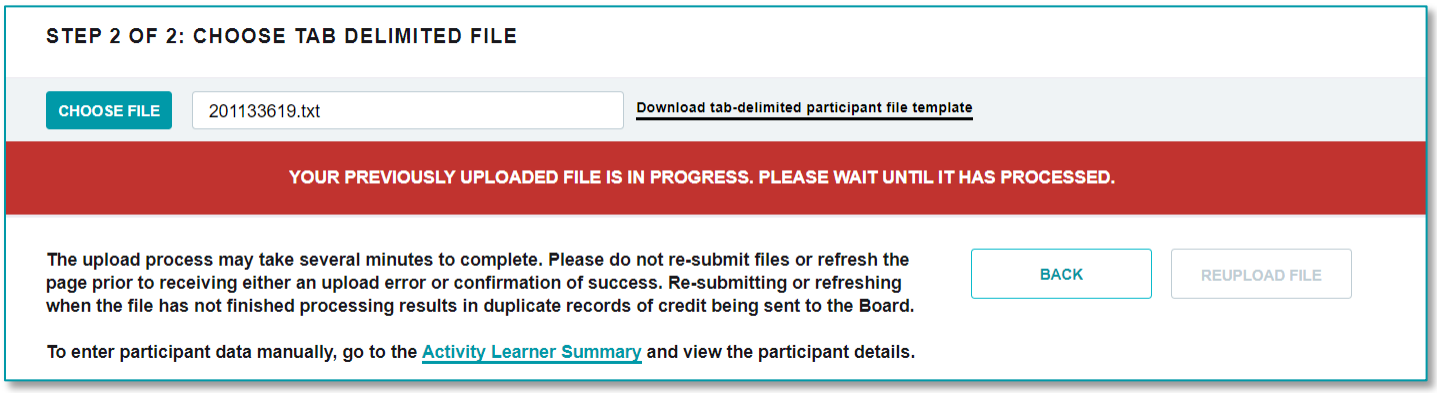


Errors and Troubleshooting

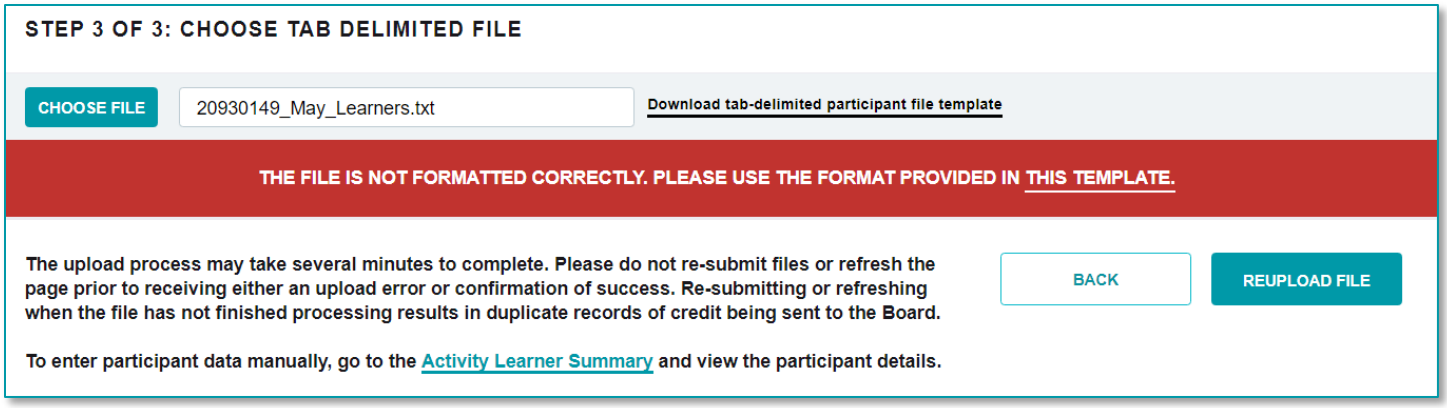
Initial Errors on submission

PARS will process records in the background even if there are data errors in your file, however there are a few error messages you may receive upon initial submission. These errors stem from incorrect file formatting or processing issues.

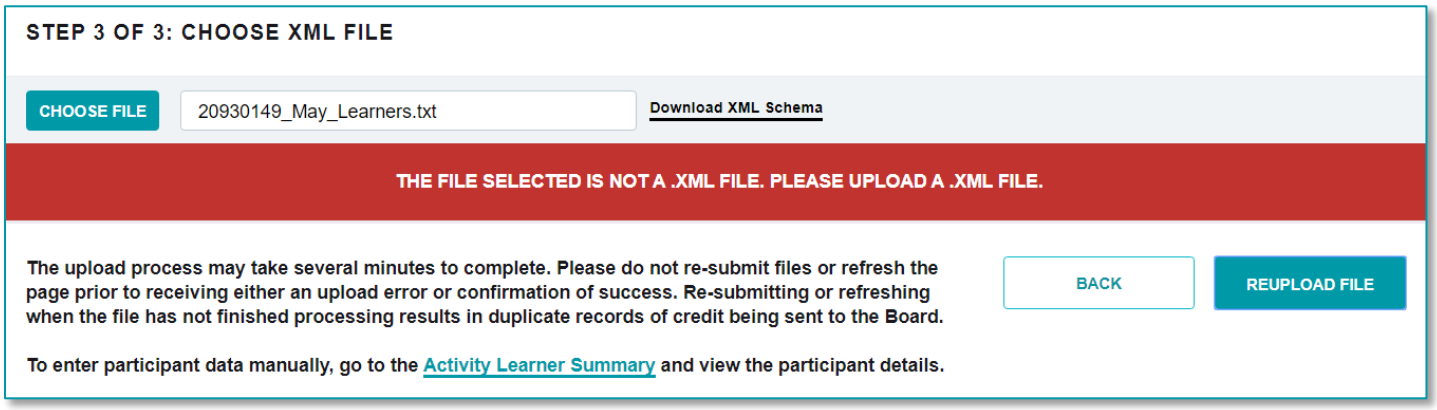
1) If you attempt to upload an additional file while the first file is still processing, you will receive the following error message. Only one batch upload can be processed at a time. Wait until your current file has finished processing, and then you may upload an additional file.



2) If your file is formatted incorrectly PARS will not be able to read the data and you will receive a formatting error. You should reference either the tab delimited instructions/template or the xml schema to ensure that the data is formatted in the correct way. Once the updates have been made you can select the updated file and attempt to reupload.

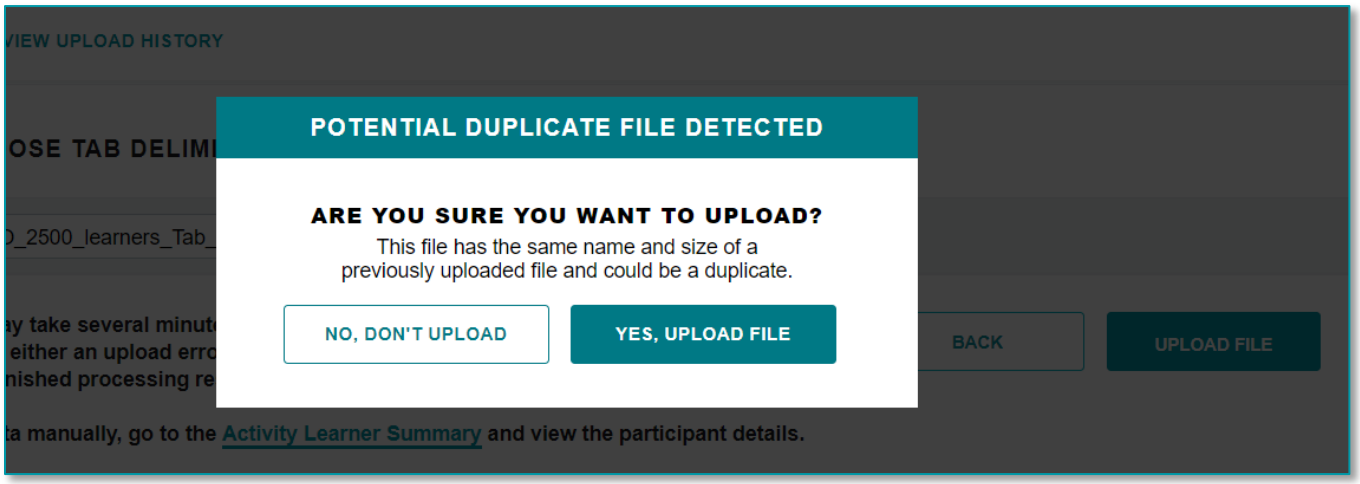


3) If you have uploaded the incorrect file type you will receive an error. Tab Delimited uploads must be in .txt form, and XML uploads must be in .xml. Make sure you are uploading the correct kind of file and resubmit.



Validation of Duplicate Files

PARS will store uploaded file details for 30 days. In an attempt to prevent duplicate files from processing, PARS will identify files with the same name, type, and size as files previously uploaded within this timeframe. If the file is mistakenly a duplicate of a file previously uploaded, you can choose to not submit. If you intended to upload this file, you can override this message and upload your learners.



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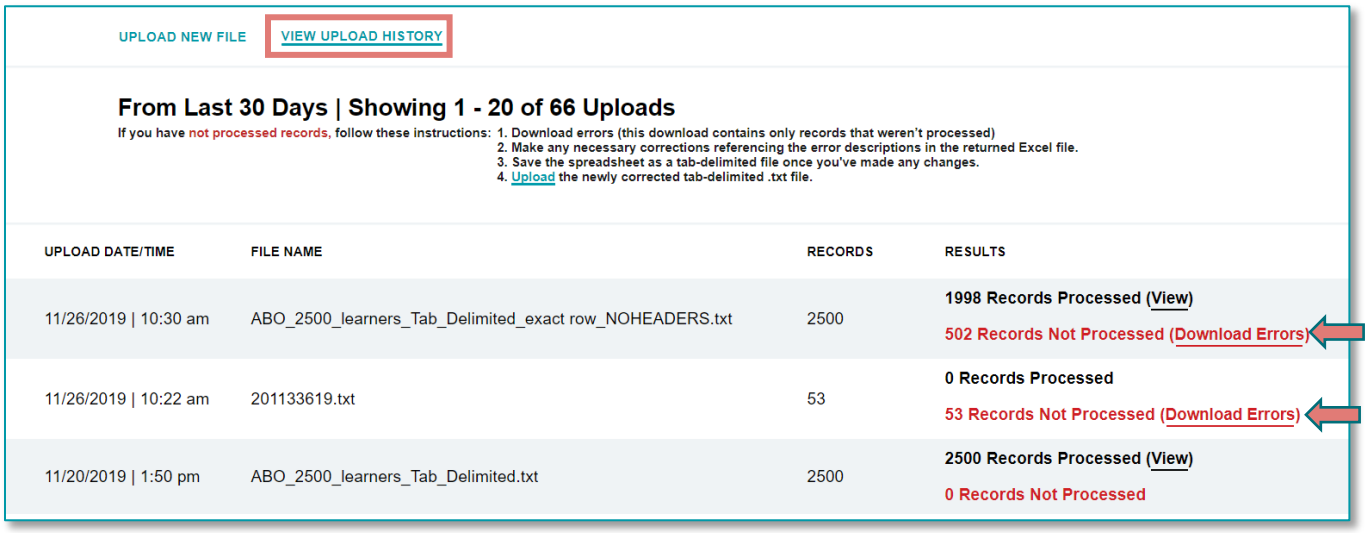
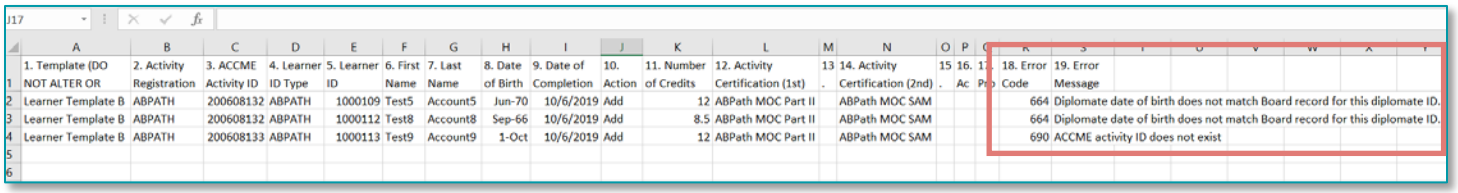
Correcting Records that were Not Processed

When a file has uploaded, you can view the learner record processing results by clicking on the View Upload History tab. You can see if the file had any records that were not processed. If you click on Download Errors, this will prompt a .csv file download right in your browser containing any records which were rejected from the system.

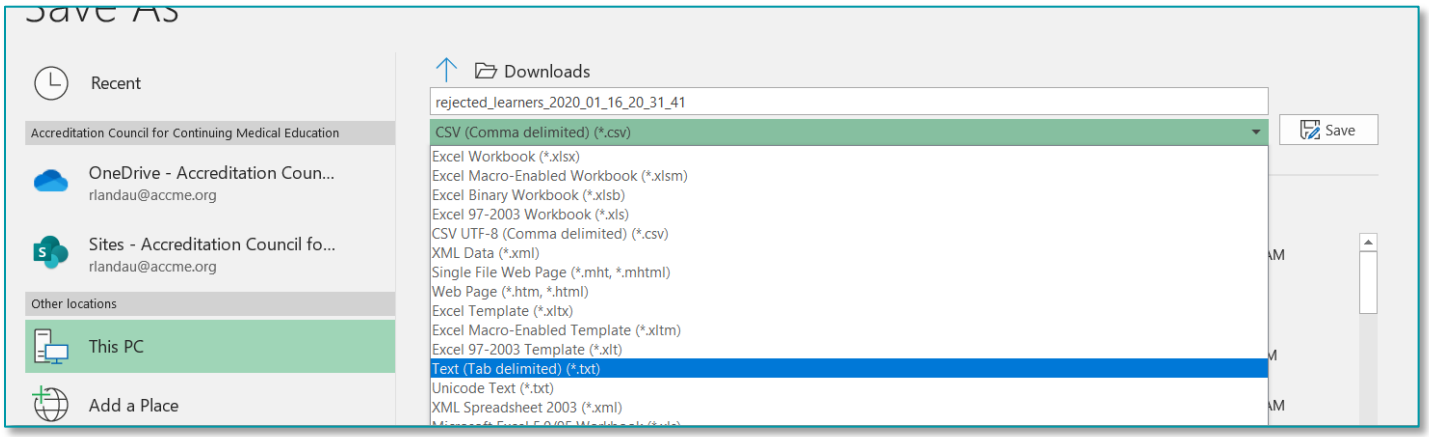


To download a .csv of the learner records that received errors upon submission, you can click on the Download Errors link to the right of the listed number of records not processed. This will prompt a download of the records that were entered and the error code and reason they were not accepted into the system.



1. Template (DO NOT ALTER OR	2. Activity Registration	3. ACCME Activity ID	4. Learner ID Type	5. Learner ID	6. First Name	7. Last Name	8. Date of Birth	9. Date of Completion	10. Action	11. Number of Credits	12. Activity Certification (1st)	13 .	14. Activity Certification (2nd)	15 .	16. Ac	17. Pro	18. Error Code	19. Error Message
Learner Template B	ABPATH	200608132	ABPATH	1000109	Test5	Account5	Jun-70	10/6/2019	Add	12	ABPath MOC Part II		ABPath MOC SAM				664	Diplomate date of birth does not match Board record for this diplomate ID.
Learner Template B	ABPATH	200608132	ABPATH	1000112	Test8	Account8	Sep-66	10/6/2019	Add	8.5	ABPath MOC Part II		ABPath MOC SAM				664	Diplomate date of birth does not match Board record for this diplomate ID.
Learner Template B	ABPATH	200608133	ABPATH	1000113	Test9	Account9	1-Oct	10/6/2019	Add	12	ABPath MOC Part II		ABPath MOC SAM				690	ACCME activity ID does not exist

The system is designed so that you can use this downloaded file to make changes to any errors, resave it as a tab-delimited file, and re-upload it into PARS. You will not need to remove the columns with the error codes in order to resubmit your corrected file.



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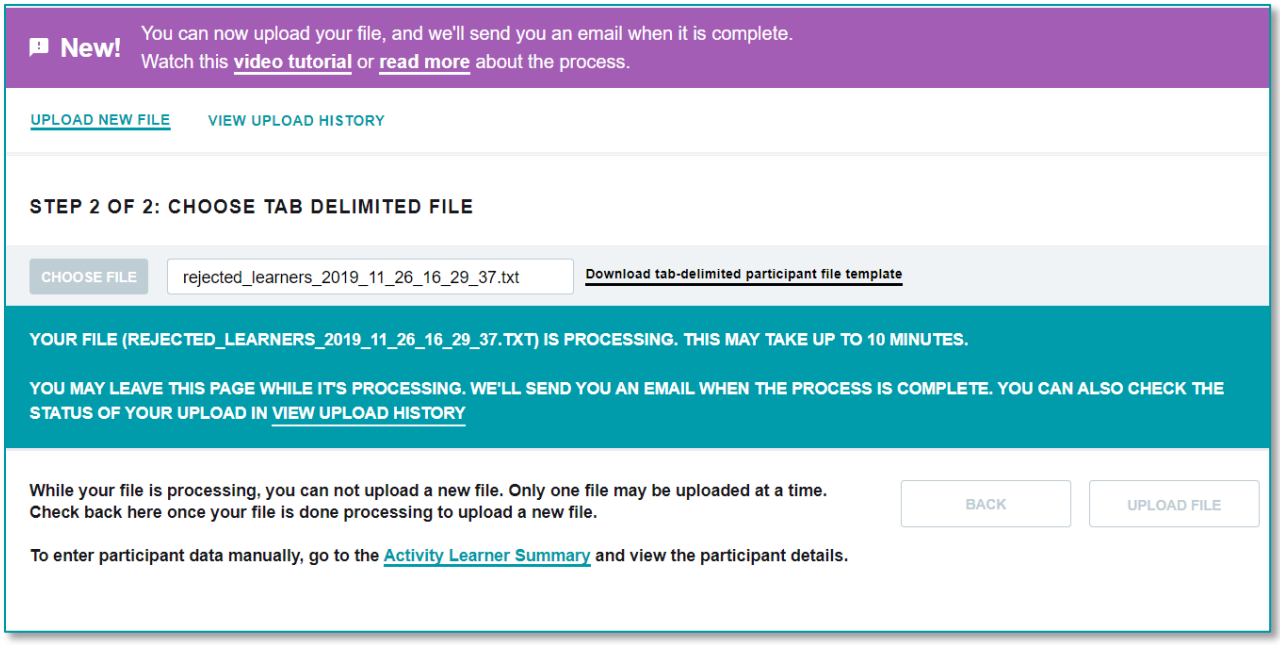
The file is pre-formatted to work when re-uploaded as a tab delimited file type. If you initially used .XML to upload these learner completions, you will receive the same .csv error report. You can either upload the newly corrected file as a tab delimited file type, or you can make any necessary changes to the incorrect records in your .XML file and upload that file.