Course Record Importer Instructions

The course record importer allows you to import participants into a course that is not using the ICEP learning portal for enrollment/registration.

To obtain a current template, go to <your activity> > enrollments > import > Download a template.

Below each Field Name is a column in the template. Remove any columns that are not required. If you see any reference to "global course importer" please ignore. We ONLY import at the course level, never at a global level.

Columns in the CSV correspond to rows in the grid below. **Use only columns in the CSV that are highlighted below.** If you desire to use a column that is not highlighted, discuss with Julie Martinelli first.

- **Green = REQUIRED by ICEP**
- **Orange = REQUIRED only if we are providing credits and credit types for the learner.** This is NOT the preferred method. The preferred method is that the import enrolls the learner in the course, and the learner is then directed to log in and complete any items such as evaluations, as well as claim credit.

If you are providing credits/credit types for the learner:

- If the learner IS eligible for the healthcare ce credit that is being offered, award him/her this credit ONLY. DO NOT also award him/her CEUs
- If the learner IS NOT eligible for the healthcare ce credit that is being offered, award him/her UW CEUs
- All records can be uploaded at one time using one spreadsheet CSV. For example, if a learner is eligible for two healthcare credit types that are being offered, create two rows for that learner, changing out only the credits and credit type information.

Additional Notes in *italics* are ICEP-specific.

Field Name	Required	Format	Notes
external_course_id	No	alphanumeric	A unique identifier for the course associated with each import row. This will match with the "external ID" field of a course. Only required when importing to the global importer.
title	No	alphanumeric	The title of the course associated with each import row. Only required when importing to the global importer.
external_user_id	Either external_user_id or external_mail is required.	alphanumeric	A unique id for the user associated with each import row. Customers with SSO can use the external_user_id to match users with course records.
external_email	Either external_user_id or external_email is required.	alphanumeric	The email of the user associated with the credit record. Used to match the import record with a user.
first_name	No	alphanumeric	The first name of the user associated with the credit record.
last_name	No	alphanumeric	The last name of the user associated with the credit record.
enrollment_start	No	ISO 8601	The date the learner's enrollment happened. **When this date is included a record will be counted for PARS or JA PARS (if enabled). Requires a value in the participant_category field.** *Make the enrollment_start date the same as the first day of the activity.*
enrollment_end	No	ISO 8601	The date the learner's enrollment ends.
credits	No	decimal (6.2)	The number of credits.
credit_type	No	alphanumeric	The type of credits. **Must use the values defined for each EthosCE implementation. If you don't know what these are, please check before importing.** ***These values are located at*** *<your activity> > enrollments > import > Valid credit types. Must be written exactly as is. (For example, "ama," not "AMA")*
credit_expiration	No	ISO 8601	The expiration date of the credit record.

complete	No	boolean	1 if the course was completed by the user associated with the credit record. 0 if the course was not completed by the user associated with the credit record. *Is only needed if ICEP is entering "credits" and "credit_type." Otherwise this will be marked complete once they finish any objects, including claiming credit.*
date_completed	No	ISO 8601	The date the credit was awarded. If a date is not present and the import record has a 1 in the "complete" column, then the date of the user's next login will be used for completion date. *Make the date_completed date the same as the last day of the activity.* *Is only needed if ICEP is entering "credits" and "credit_type." Otherwise this will be the date they finish any objects, including claiming credit.*
attended	No	boolean	1 if the user attended. 0 if the user did not attend.
city	No	alphanumeric	255 characters maximum.
province	No	ISO-3166-2	
country	No	ISO-3166-2	
participant_category	No		Requires a value in the enrollment_start field. This value is passed directly to the PARS XML. Pharmacists/Pharm techs are reported elsewhere and should be counted as "other" For JA PARS use *(written exactly as is):* - Physician - physician assistant - psychologist - optometrist - social worker - nurse - dentist - allied dental staff - athletic trainers - registered dietitians - dietetic technicians registered - pharmacist - pharmacy technician - other