

Let's look at how this is done...

## Preparing the File

Before you can upload a course completions record file, first you must format your data so that it is readable by Sircon's online services.

The course completions upload function requires a comma-separated format file, or \*.csv. To format your course completions record file, you may use a spreadsheet application, such as Microsoft® Excel®, or you may enter the data in a text file saved with a .csv extension.

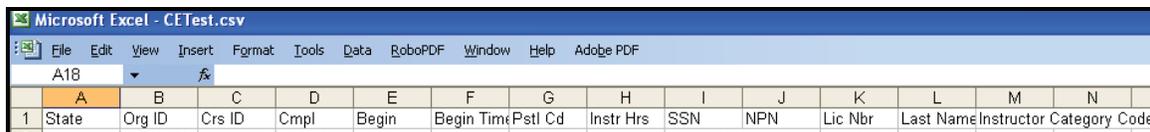
The following sections provide instructions for using either formatting method:

### Using a Spreadsheet Application

Launch a spreadsheet application, such as Microsoft® Excel®.

With a new, blank spreadsheet open, using consecutive cells in Row 1, enter the following field names (refer to the illustration below):

- State
- Provider Org ID
- Course ID
- Course Completion Date
- Course Begin Date
- Course Begin Time
- Course Postal Code
- Instructor Credit Hours
- Student SSN
- Student NPN
- Student License Number
- Student Last Name (Only for continuing education course completions. For more information, see the note on page 32.)
- Instructed Category Code



The field names you enter in Row 1 constitute the file's header row. The header row will make it easier for you to enter course completion data in the correct fields. However, the course completions upload function will ignore header row data.

In the appropriate cells in Row 2 of the spreadsheet, enter actual data from the first course completion record. For example, enter the first record's state abbreviation in the State field; enter the first record's provider organization ID number in the Provider Org ID field, etc. Obviously you'll want to pay special attention to the student identifying information, such as SSN, NPN, or License Number.

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**Important:** Pre-licensing course completions file requirements are different from those of continuing education course completions. To help ensure system validation of your data, please

refer to “Pre-Licensing Education Course Completions Records File Requirements” on page 97 and to “Continuing Education Course Completions Records File Requirements” on page 98.

Don't worry if a course completion record does not contain data to satisfy all of the fields identified in the header row. For fields where there is no data to enter, simply leave them blank. Use caution, however, not to enter data in the wrong field.

**Note:** The **Student Last Name** field is required only in certain states; however if you enter a value in the **Student Last Name** field, then it will be validated against the state database. If your state does not require last name information and you do not enter a value in the **Student Last Name** field, then only the data that you do enter will be used for validation.

Enter the data from the second course completion record in the appropriate cells in the next row on the spreadsheet. Continue to enter course completion information for each student, each on its own row, until all course completion data is entered in the spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	State	Provider ID	Course ID	End Date	Begin Date	Begin Time	Postal Code	Instructed Hours	SSN	NPN	Lic Nbr	Last Name	Instructed Category Code	
1	PA	10001	9672	2/10/2007	2/10/2006	9:00 AM	43333	12			2908210	Gerard	GEN	
2	PA	10001	9672	2/10/2007	2/10/2006	9:00 AM	43333	3			1913370	Anastosi	ETH	
3	PA	10001	1234	3/1/2007	3/1/2007	6:00 PM	43164				2202390	Wilson		
4														
5														
6														
7														

**Note:** The number of rows uploaded is limited to 200 rows.

When you are finished, from the **File** menu, select **Save As**. The **Save As** dialog box will open. From the **Save As Type** drop-down menu, select CSV (Comma Delimited) (\*.csv). In the **File Name** field, enter an 8-character name for the course completions record file.

Using the navigation options on the **Save As** dialog box, browse for a location on your system to save the course completions record file. Click the **Save** button. The **Save As** dialog box will close.

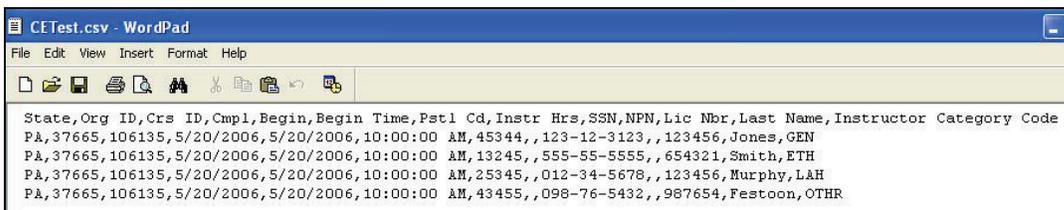
Your file is now saved in a comma-separated format and is ready for upload through Sircon's online services to the state.

**Using a Text Editor**

You can also format your course completion information as a simple text file. Here's how...

Launch a text editor application, such as Notepad® or WordPad®.

With a new, blank file open, enter the following field names. State,Provider Org ID, Course ID, Course Completion Date, Course Begin Date, Course Begin Time, Course Postal Code, Instructor Credit Hours, Student SSN, Student NPN, Student License Number, Instructed Category Code. Separate each field name with a comma, but do not use a space as a separator.



The field names you enter constitute the file's header line. The header line may make it easier for you to recognize the course completion data in the file. However, the course completions upload function will ignore header line data.

Press the Enter key to move the cursor to the next line.

Enter data from the first course completion record. Enter each data value in the order specified in the header line (for example, first enter the State value, then enter the Provider Org ID value, then the Course ID value, etc.) Separate each data value with a comma, but do not use a space as a separator.

Press the Enter key to move the cursor to the next line. Then enter data from the second course completion record, using the correct order and separating values only with a comma.

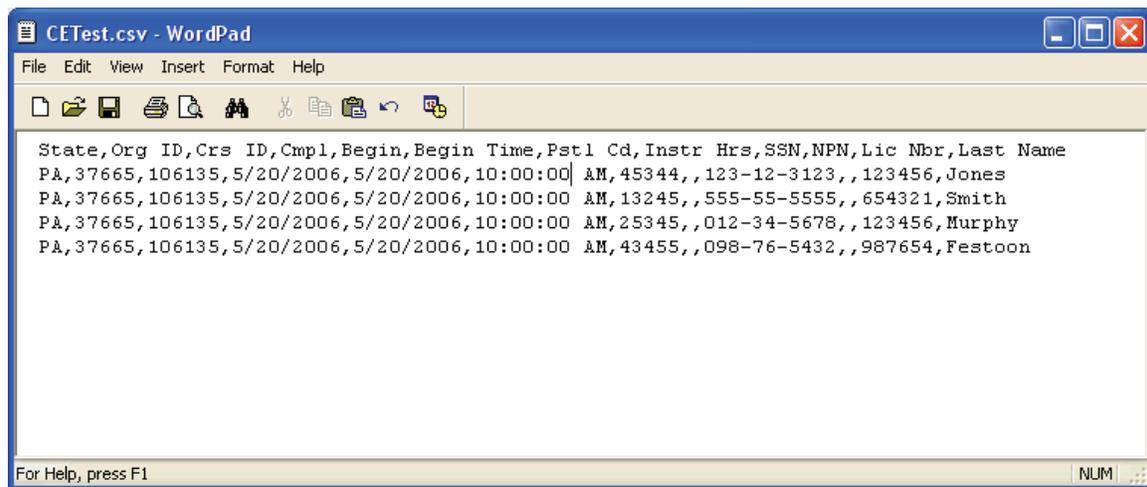
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**Important:** Pre-licensing course completions file requirements are different from those of continuing education course completions. To help ensure system validation of your data, please refer to “Pre-Licensing Education Course Completions Records File Requirements” on page 97 and to “Continuing Education Course Completions Records File Requirements” on page 98.

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Don't worry if a course completion record does not contain data to satisfy all of the fields identified in the header line. For fields where there is no data to enter, simply enter a comma.

Continue to enter course completion information for each student, each on its own line, until all course completion data is entered in the file.




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**Note:** The number of rows uploaded is limited to 200 rows.

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When you are finished, from the **File** menu, select **Save As**. The **Save As** dialog box will open. In the **File Name** field, enter an 8-character name for the course completions record file, then enter a period, and then enter "csv".

Using the navigation options on the **Save As** dialog box, browse for a location on your system to save the course completions records file. Click the **Save** button. The **Save As** dialog box will close.

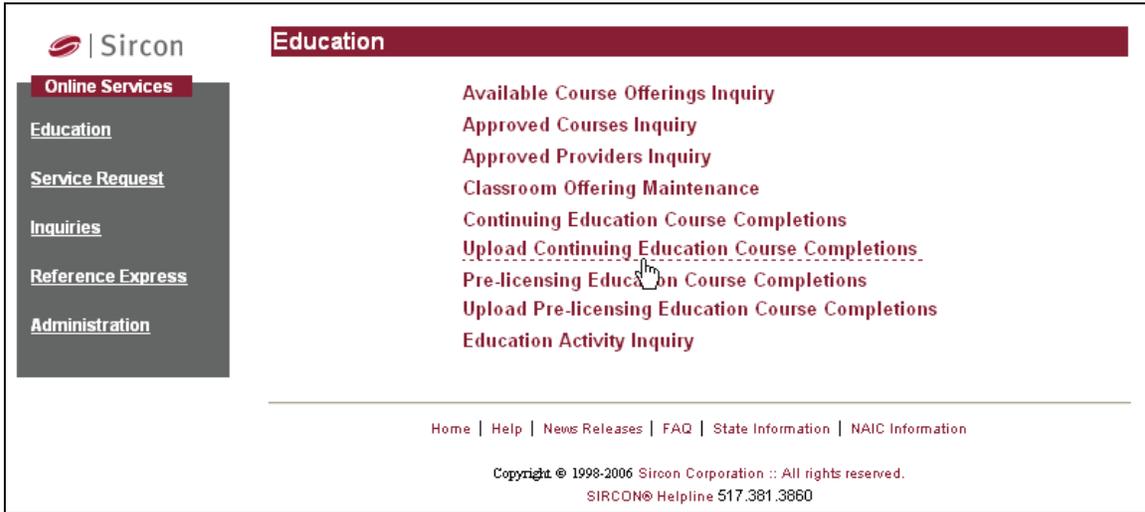
Your file is now saved in a comma-separated format and is ready for upload to the state through Sircon's online services.

## Uploading the File

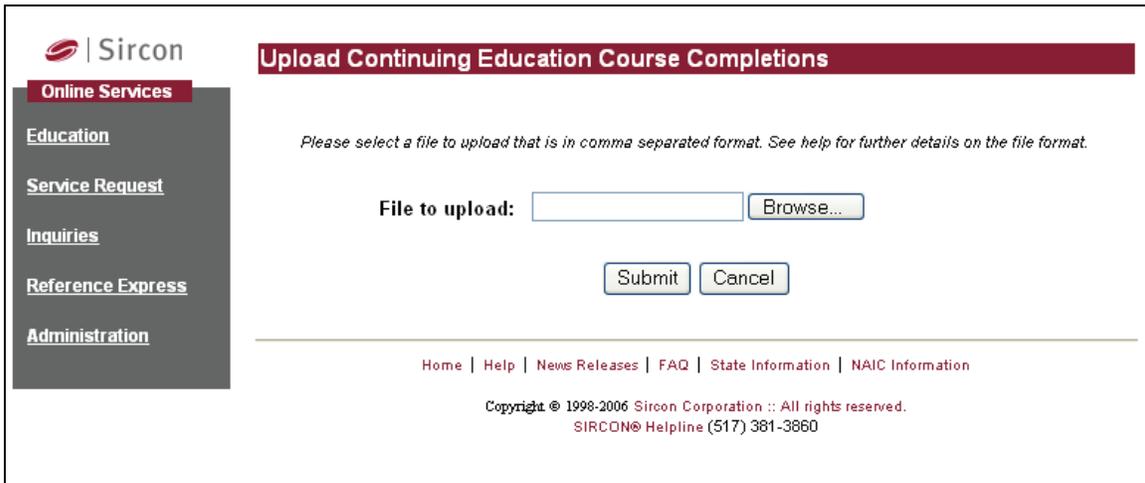
With your course completion information entered and formatted in either a spreadsheet or text file, you are ready to upload the file to Sircon.

Log in to Sircon for Education Providers and navigate to the **Education Services Menu**. (For instructions on logging in and navigating to the **Education Services Menu** page, see “Getting Started” on page 9.)

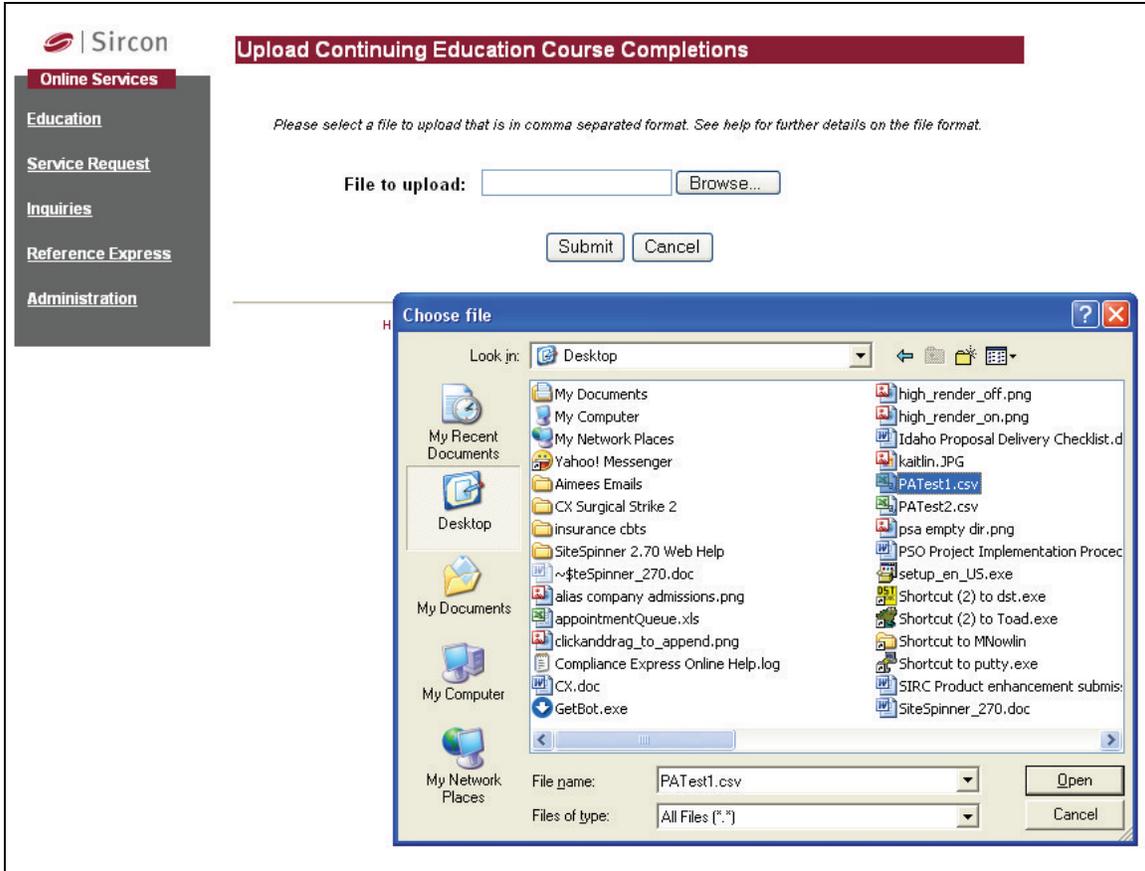
On the **Education Services Menu** page, click either the **Upload Pre-licensing Education Course Completions** or the **Upload Continuing Education Course Completions** link.



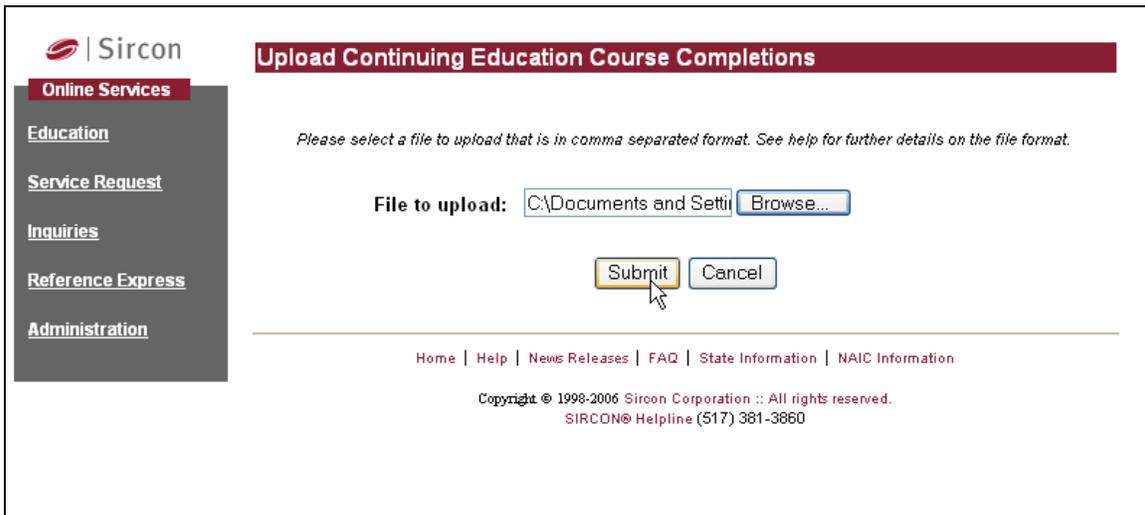
Either the **Upload Pre-licensing Education Course Completions** page or the **Upload Continuing Education Course Completions** page will open, depending whichever you have selected. (In this guide, we will use the Upload Continuing Education Course Completions service for illustration purposes.)



On the **Upload Continuing Education Course Completions** page, click the **Browse** button. The **Choose File** dialog box will open. Use the navigation options on the **Choose File** dialog box to locate the course completions record file (\*.csv) on your system. When the correct file name appears in the **File Name** field, click the **Open** button.



The **Choose File** dialog box will close, and the system path to the file will appear in the **File to Upload** field.



Click the **Submit** button.

Sircon’s online services will import the file. When it is finished, the **File Load Results** page will appear. You can use the **File Load Results** page to review and confirm the results of the continuing education course completions record file upload process.



Upload Continuing Education Course Completions: File Load Results

*Click the submit button to send loaded rows to the state for processing.*

<b>Provider</b>	: 101958
<b>Service Type</b>	: Course Completion Maintenance
<b>Request Date</b>	: 05-10-2006
<b>State</b>	: Pennsylvania
<b>Requestor</b>	: Demo Provider

Row	ST	Provider ID	Course ID	End Date	Begin Date	Begin Time	Postal Cd	Instr Hrs**	SSN	NPN Lic Nbr
1	PA	37665	103512	4/22/2006	4/22/2006	900	19064		111111111	
2	PA	37665	103512	4/22/2006	4/22/2006	900	19064		222222222	
3	PA	37665	103512	4/22/2006	4/22/2006	900	19064			123455

*Note that all rows submitted to the state will incur a processing fee regardless of the outcome.*

\* These rows will not be sent to the state and hence will not incur a charge.  
 \*\* Instructor Hours must only be used when an instructor gets extra CE credit for teaching a course.

**Current User**  
11560: provider  
[Logout](#)

The top part of the page displays summary information about this transaction, including **Provider ID and Name, Service Type, Request Date, State, and Requestor**. This information is transmitted to the state along with the course completion data.

Below the summary information is a list of all course completion records that have been uploaded to Sircon online services in this upload session. The records are sorted in ascending order by row number. The list provides the following visual information about the status of the uploaded records:

- Records displaying **black text characters** have been successfully validated by Sircon’s online services and are ready for transmission to the state. (Regular processing fees will be charged for these records regardless of whether they are processed or not processed because of state-validation errors.)
- Records displaying **red text characters and error messages** have not passed validation and will not be transmitted to the state. Read the contents of the error message and make necessary corrections to the upload file before again attempting upload to Sircon’s online services. (Records containing validation errors displayed on the **File Load Results** page will not be transmitted and will not incur a processing fee.)

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**Note:** If you included a header row or line in your upload file, it will appear as an errored record on the **File Load Results** page. It is not necessary to correct the header row or line.

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To transmit validated records to the state, click the **Submit** button. When the operation is complete, the **State Submission Results** page will open. Use the **State Submission Results** page to review the continuing education course completion records that have been successfully transmitted to the state in this session.

**Upload Continuing Education Course Completions: State Submission Results**

**Provider** : 101958  
**Service Type** : Course Completion Maintenance  
**Request Date** : 06-26-2006  
**State** : Pennsylvania  
**Requestor** : Demo Provider

**Course** : 103512 - Estate Planning & Preservation

Row	SSN	NPN Lic Nbr	Name	Conf ID	Status	Ref ID	Message
1	xxx-xx-1111		FREDRIC D BOOMBER	2803342	Processed	1025073	
2	xxx-xx-2222		SALMON SPANKER	2803343	Processed	1025074	
3		123455	SILVIO LACHRYMOSA	2803344	Processed	1025075	

[Done](#)

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 SIRCON® Helpline (517) 381-3860

The top part of the page displays summary information about this transaction, including **Provider ID** and **Name**, **Service Type**, **Request Date**, **State**, and **Requestor**. This information was transmitted to the state along with the course completion data. (Note that Social Security Number information is masked.)

Below the summary information is a list of all course completion records that were transmitted to the state in this upload session. Records are sorted by **Course Name**, **Offering ID**, and **row number**.

Each record contains a confirmation number (**Conf ID**) to track successful transmission to the state. Only processed records contain a reference number (**Ref ID**). A record not processed because of a state-validation error will display an error message in the **Message** field. Note that all records submitted to the state are charged regular fees, regardless of whether they were processed or not processed because of errors.

**Note:** Errors identified on the confirmation page are typically the result of incorrect data entry or formatting. If you receive an error, use the error description to pinpoint the error. Resolve the error, and then resubmit the information.

You may use the **Print** command in your browser to print the **State Submission Results** page, if desired.

When you are finished, click the **Done** button to return to the **Education Services Menu** page.

## ***Applying for State Approval of a Course***

Using Sircon for Education Providers, you can quickly and easily apply to your home state for approval of new continuing education courses. Then, once the home state application is approved, you can apply for course approval in reciprocal states (that is, states that accept course applications based on approval from your home state).