

PE & CE COURSE SCHEDULE REPORTING

Revised 7/8/11

All providers must report PE and CE classroom schedules. **The course must be approved and active at the time the course schedule is submitted.** Course schedules must be reported on a monthly basis and at least 30 days prior to the date of the course offering. In-person, on-site audits will be conducted by our office and/or its designee. All course offerings must be submitted via e-mail to Megan Schultz at OFIR-CEOfferings@michigan.gov.

Course schedules should be submitted as an Excel spreadsheet or a program compatible with Excel Office 2000. Fields should not be labeled and punctuation should not be used. When saving the file, choose SAVE AS then select the type option Text (Tab delimited) from the drop down menu. If the course schedule is submitted using Microsoft Word or another word processing program, type the information exactly as described in the samples below; select SAVE AS then select the type option Text (.txt) from the drop down menu. If using a word processing program, open the document in Notepad or other text editor software to be sure the information is correctly formatted.

Always save in a tab delimited (.txt) text extension format or a comma delimited (.csv) extension format. Using a spreadsheet program makes it easier to see the alignment of the data in columns and to copy repetitive data.

Multiple entries can be submitted on one file. Begin the next course schedule information on a new row or line. Do NOT put blank lines between entries. In other words, immediately following the entry for the email address of the contact person press the "enter" key on the keyboard one (1) time and begin typing the next course schedule. See examples below.

Global rules, required data and definitions:

1. All data fields must be submitted in the exact order as described below and entered across the page.
2. Once the data is prepared, select the SAVE AS type either as (.txt) Text extension (Tab delimited) or (.csv) Comma delimited extension.
3. Do not add punctuation within each field. If the location of course is being held at a particular suite or floor, submit the information in the location field as follows: "OFIR STE 101" or "OFIR 2nd Floor".
4. The data fields are:
 - Record type must be specified (1 character): N (New); R (Revision to a course schedule already submitted); or C (Cancellation of a course schedule already submitted)
 - Provider identification number (4 digits)
 - Provider name (35 characters)
 - Approved hours (2 characters)
 - Course identification number (5 characters)
 - Course name as approved (72 characters)
 - Start date (use format mm/dd/2011, including slashes)
 - End date (use format mm/dd/2011, including slashes)
 - Location (provider's office, building name, floor number, and/or suite number)
 - Street address
 - City
 - State (2-character abbreviation)
 - Zip code (5 characters)
 - Start time (8:00 a.m., 3:00 p.m.)
 - End time (9:00 a.m., 4:15 p.m.)
 - Enter Y or N (1 character) if any Michigan producers are registered for the course
 - Estimated number of attendees
 - Enter Y or N (1 character) if the program is part of another program offered the same day
 - E-mail address of contact person

Examples of field entry:

COMMA DELIMITED

"N","0123","ABC Company","2","12345","Annuities","01/05/11","01/05/11","Eagle Towers STE 200","123 Main Street","Lansing","MI","12121","2:30p.m.","4:30p.m.","Y","10","N","jttester@abc.net"

EXCEL SPREADSHEET

Open a new spreadsheet. Highlight column B; right mouse click; select Number from Menu bar; select text; select OK. This will allow you to add "leader zeros", e.g., 0023. Do NOT type field titles in the first row. Begin typing across the page with the required field in each cell. Continue to type all 19 required fields in each cell. No formatting is necessary. Start the next course schedule in row 2 cell A; continue entering the 19 required fields. The third course schedule would begin in row 3 cell A, etc.

Once the designated contact person's e-mail address is typed, do not go to the next row. In other words, save immediately upon typing the e-mail address. To convert a spreadsheet to a text document, select SAVE AS, "Save as type" and choose either Tab delimited or Comma delimited from the drop down menu. Before closing the file, name the file "crs, Your Prov #, and the month of course offering, e.g., crs0020Mar.txt. Once the document is saved, close it.

Prepare an e-mail message to Megan Schultz at OFIR-CEOfferings@michigan.gov, and attach the saved document to the e-mail. Open the document to be sure it can be opened then send.