

Real Estate Board: Continuing Education Reporting

How to Upload Continuing Education Credits to DPOR SFTP Server using Excel

Education providers (vendors) report continuing education credits to the Real Estate Board at DPOR by sending properly formatted files via SFTP.

DPOR requires data files be submitted in comma-delimited format (popularly referred to as CSV files) but allows vendors to create the CSV files using any method available. An example of how to generate a CSV data file using Microsoft Excel is provided below.

The following instructions assume you have [installed and set up an SFTP client](#). If you have further questions, please contact the [Board's Education Section](#).

Upload File Format

DPOR will only accept comma-delimited (CSV) text files for reporting education credits. The files you upload **must conform to this format**, which is compatible with MS Excel. Text data is not quoted. The file should contain a header row.

Format Specification

Header	Description	Format	Examples	Notes
BD	Board	always "02"	02	Always "02"
OC	Occupation	always "25"	25	Always "25"
CERT	Certification (License) Number	6 digits, zero padded	000123	654321
SSN	Social Security Number	9 digits, zero padded	123456789	May be empty
FIRST NAME	First Name	up to 16 characters	John	These 3 fields must match exactly what DPOR has on file Use License Lookup to ensure the data you are entering is valid.
MIDDLE INL	Middle Name	up to 16 characters	J	
LAST NAME	Last Name	up to 20 characters	Snow	
GEN	Generation	up to 3 characters	3rd or III	
MM	Class Month	01-12	07	
DY	Class Day	01-31	12	
YYYY	Class Year	4 digit year	2012	
SCHOOL CODE	School Code	the right-most 4 digits of your school number	0987	In this example, the school number is 0211000987
CLASS CODE	Class Code	5 digits, zero padded	12345 or 01234	

Formatted File Example

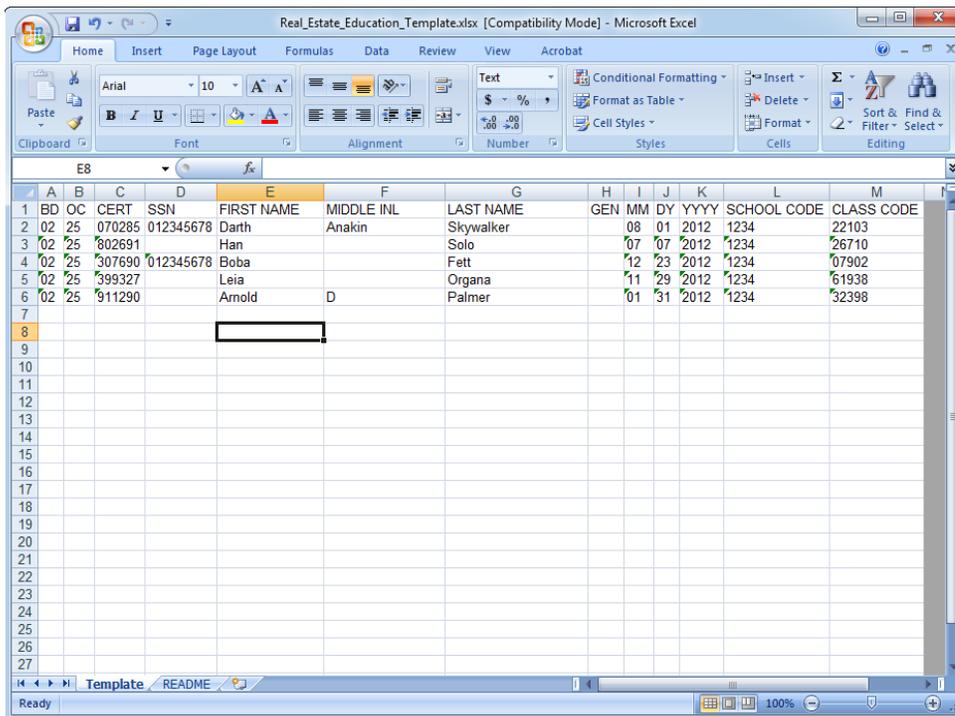
Below is an example of what a properly formatted upload file looks like in a text editor (such as Notepad):

```
BD,OC,CERT,SSN,FIRST NAME,MIDDLE INL, LAST NAME,GEN,MM,DY,YYYY,SCHOOL CODE,CLASS  
CODE  
02,25,070285,012345678,Darth,Anakin,Skywalker,,08,01,2012,1234,22103  
02,25,802691,,Han,,Solo,,07,07,2012,1234,26710  
02,25,307690,012345678,Boba,,Fett,,12,23,2012,1234,07902  
02,25,399327,,Leia,,Organa,,11,29,2012,1234,61938  
02,25,911290,,Arnold,D,Palmer,,01,31,2012,1234,32398
```

Using Excel to Generate an Upload File

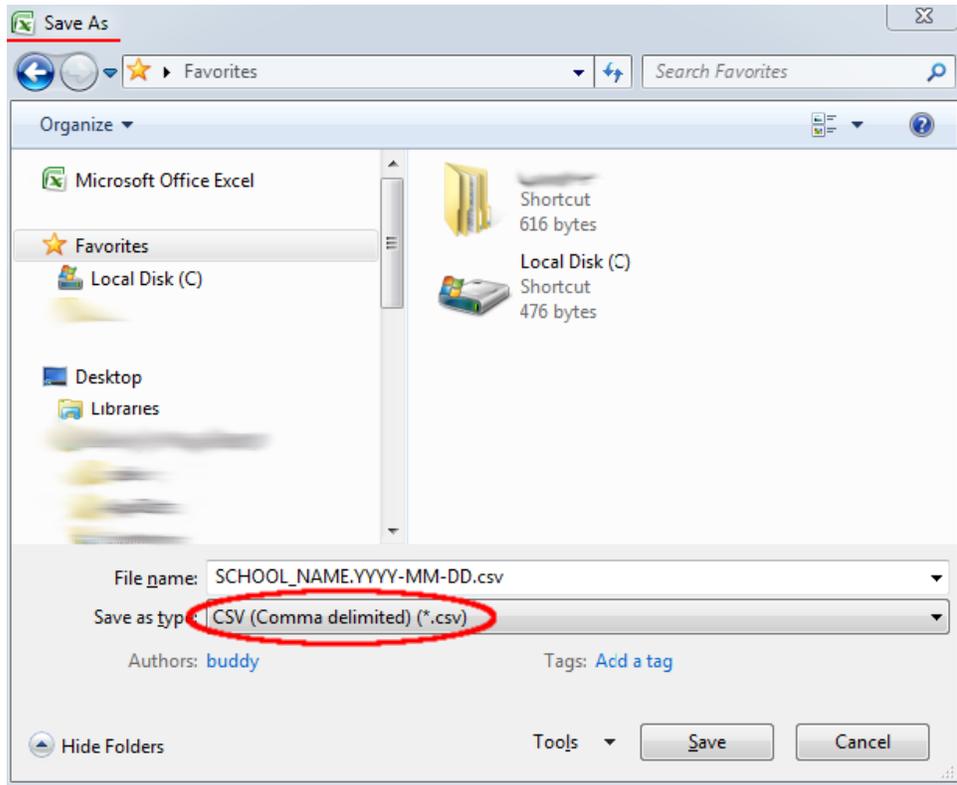
One way to create the CSV format required by DPOR is to use a spreadsheet program such as MS Excel. The following instructions describe the process for using Excel to enter, format and finally export your data into a CSV file.

1. Download the [Template for Real Estate CE Data \(Excel spreadsheet\)](#), which is configured to use the field formats DPOR requires. Open the file.
2. Enter your data into the **Template tab**, being careful to fill in the spreadsheet columns according to the data [format specifications](#) required by DPOR.

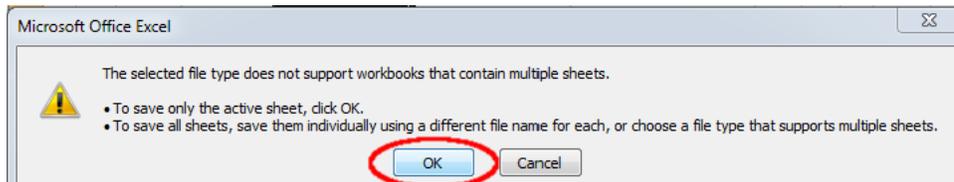


3. (Optional) You may choose to save a copy of the data you entered in Excel format (.xls or .xlsx), so you can easily correct, export or resubmit if DPOR has problems processing the file.

4. Open the **Save As** file dialog box; using the school name and date (school_name.2018-09-25.csv), save the file as a Comma delimited CSV file (the "Save as type:" **must be CSV**).



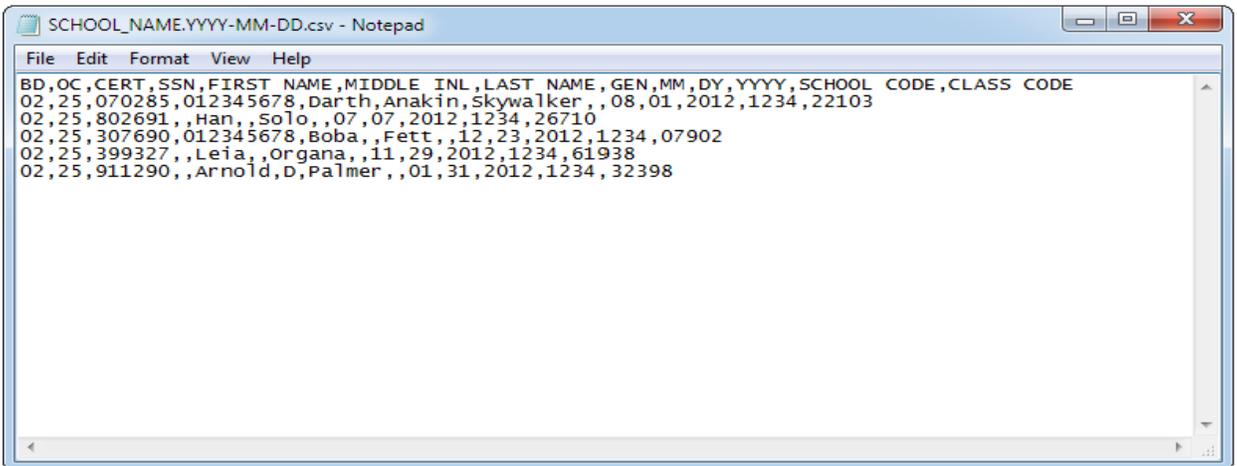
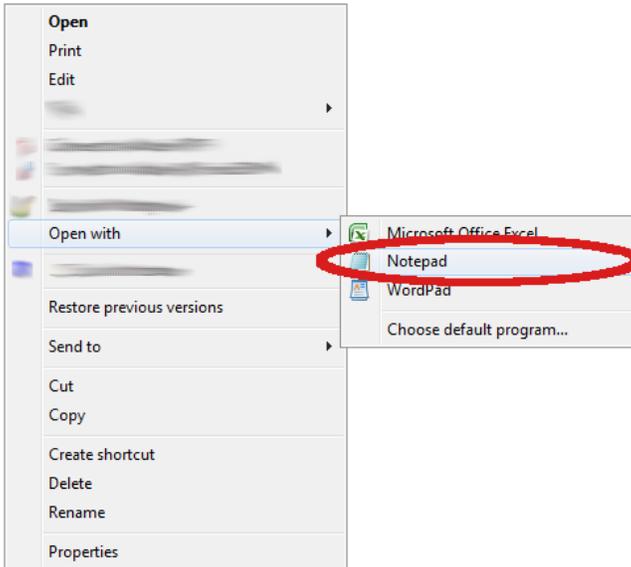
5. Excel may warn you that you may only save the current tab. **Click OK** to the warning.



6. Excel may also warn you that saving the file in CSV format may cause you to lose some functionality. **Click OK** to the warning.



7. (Optional) After you save the CSV file, you can open it with a text editor (such as Notepad) to verify it conforms to DPOR's format.



8. **Upload** your just-saved CSV file to DPOR's SFTP server using these [instructions](#).
9. You will receive a confirmation email at the end of the day if your upload is successful.