

Carers Census Step by Step Instructions

July 2021

Health and Social Care Analysis – Scottish Government

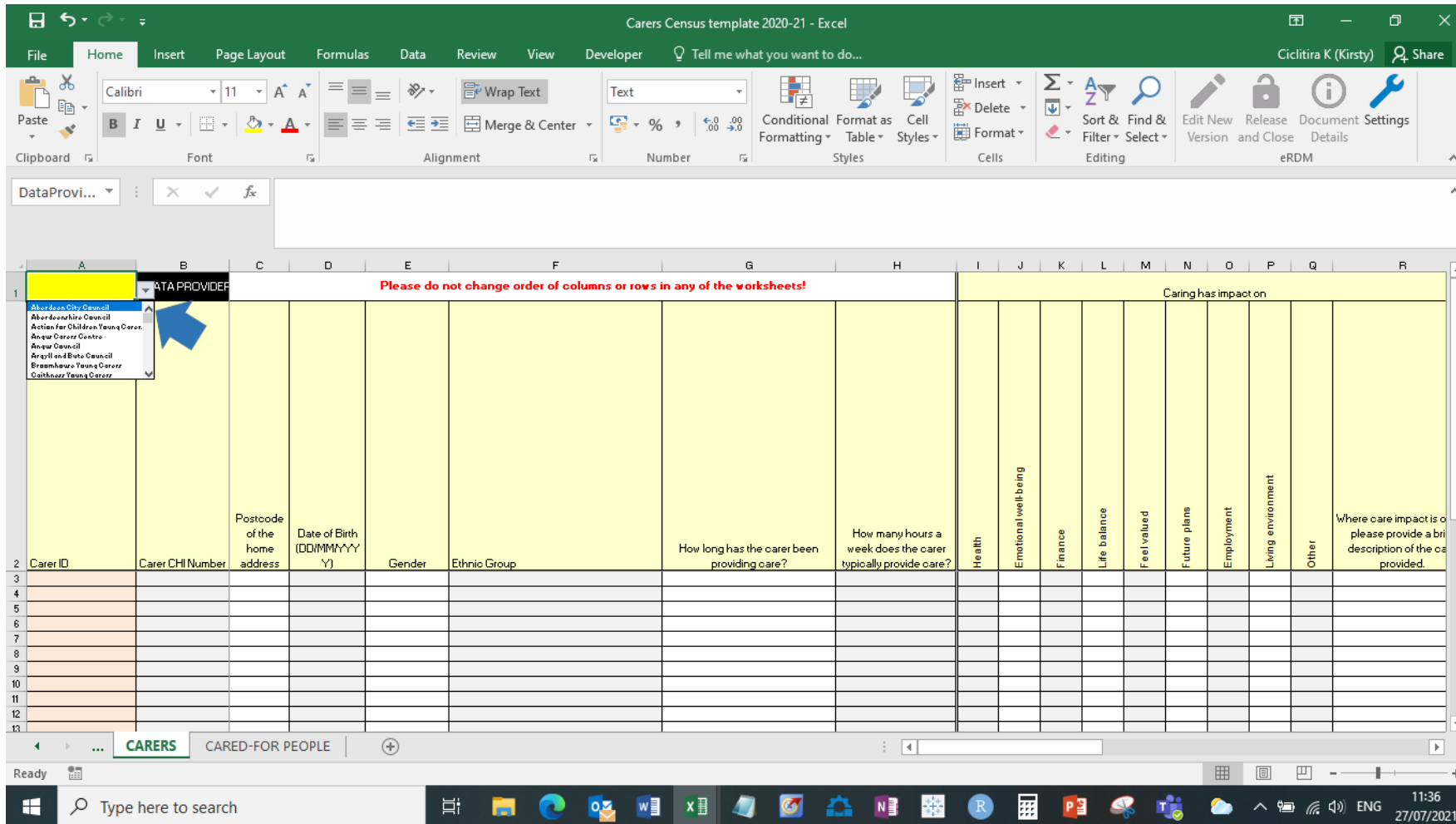
At a glance, part 1

1. Open the template, making sure the CARER tab is selected, and select your organisation from the drop down list in the top left corner.
2. Paste (using the Paste Special > Values option) or manually enter the data.
3. Change to the CARED-FOR PEOPLE tab and start by entering the Carer ID from the CARER tab. This must match exactly.
4. Continue to paste in or manually enter the data and then save the file in XML Spreadsheet 2003 format.
5. Go to [ProcXed](#) and login with your username and password (contact SWStat@gov.scot if you do not have this).
6. You should see a screen which includes both Carers Census collections. Click on “Overview”.
7. You will now see the “Manage Data Returns” screen. Click on “Upload”.
8. Click the “Transform data first” checkbox.

9. Select the "CARERS-spreadsheet-to-procxd" Upload Data Transformer option.
10. Check the "Auto-upload" checkbox.
11. Click "Browse" and select the XML Spreadsheet file. Click "Upload Data Return".
12. Check that the upload was successful.
13. Click on "Menu" > "Data Returns" > "Manage Data Returns". Click the "View" button and sense check your data.
14. Click "Back" and then click on "View Errors". You should now see a list of errors.
15. Click on the "Select" button next to an error to view details. Correct errors and repeat upload.
16. Once all errors have been addressed and you are content with your data, go to "Menu" > "Data Returns" > "Manage Data Returns".
17. Click on "Submit". You should see the message: "The Data Return was submitted successfully".

Step 1: Opening the template

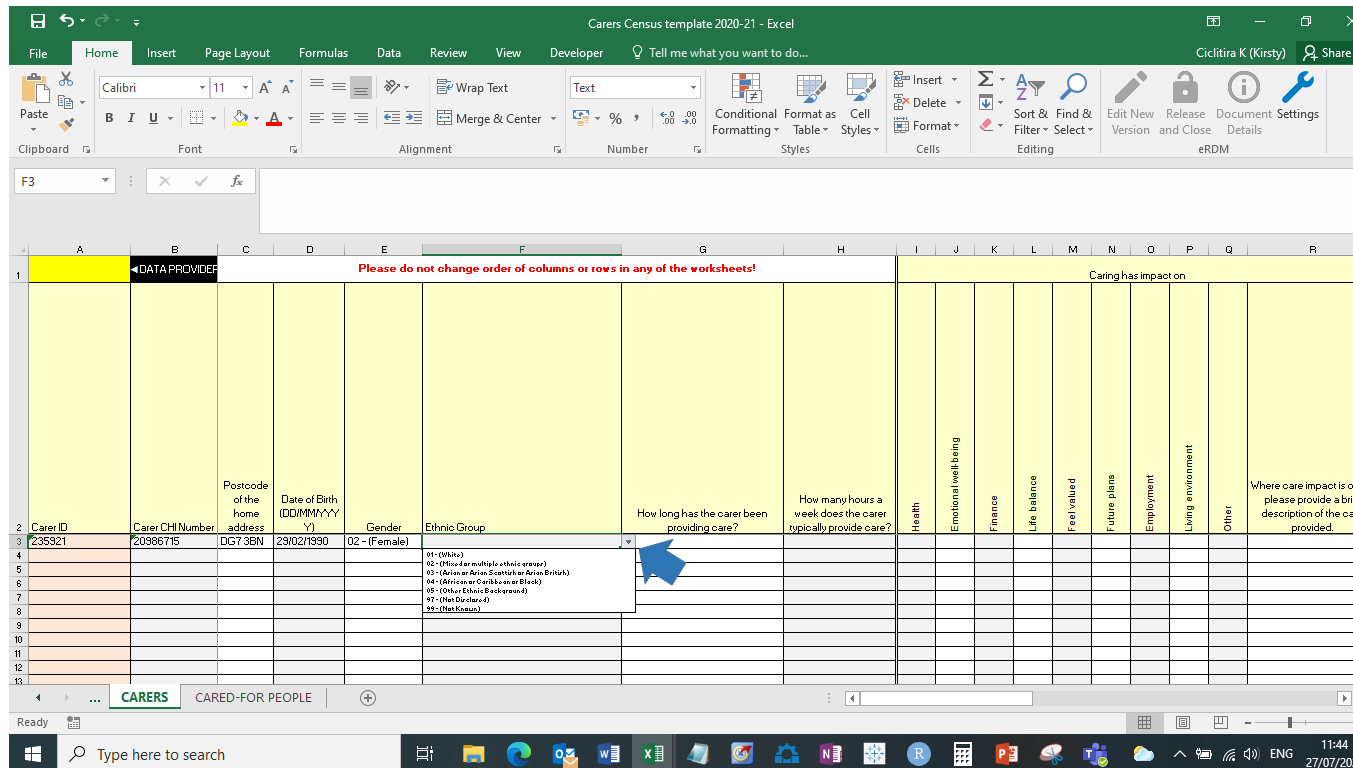
- ▶ Open Excel. Click File > Open and select the correct template file ending .xml.
- ▶ Make sure the CARERS tab is selected.
- ▶ Select your organisation from the drop down list in the top left corner.



The screenshot shows the Microsoft Excel interface for the 'Carers Census template 2020-21'. The 'CARERS' tab is active. In the top-left corner, a dropdown menu for 'DATA PROVIDER' is open, displaying a list of organizations including Aberdeenshire Council, Action for Children Young Carers, Anquet Carers Centre, Anquet Council, Argyll and Bute Council, Braemar Young Carers, and Caithness Young Carers. A blue arrow points to this dropdown menu. The spreadsheet grid shows columns for Carer ID, Carer CHI Number, Postcode of the home address, Date of Birth (DD/MM/YYYY), Gender, Ethnic Group, How long has the carer been providing care?, How many hours a week does the carer typically provide care?, and a section titled 'Caring has impact on' with sub-columns for Health, Emotional well-being, Finance, Life balance, Feel valued, Future plans, Employment, Living environment, and Other. A red warning message states: 'Please do not change order of columns or rows in any of the worksheets!'. The bottom status bar shows 'Ready' and the system tray includes a search bar and the date/time '11:36 27/07/2021'.

Steps 2 - 4: Enter the Data

- ▶ Paste in or manually enter the data. If pasting, use the Paste Special > Values option to avoid corrupting the XML template.
- ▶ Change to the CARED-FOR PEOPLE tab and start by entering the Carer ID from the CARER tab. This must match exactly for the system to recognise the relationship between the Carer and Cared-For persons.
- ▶ Continue to paste in or manually enter the data and then save the file in XML Spreadsheet 2003 format. It must remain in this format or it will not upload.



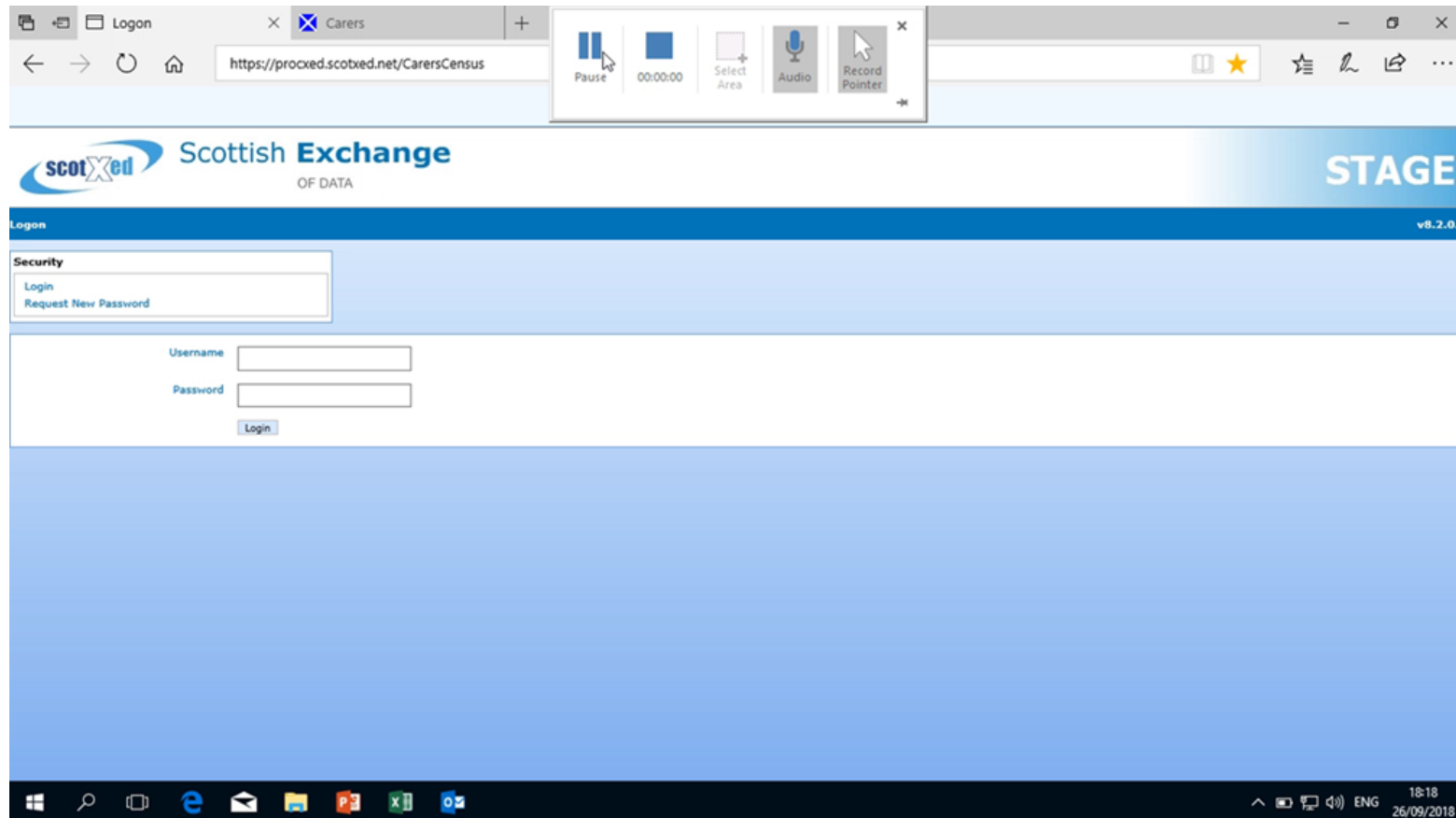
The screenshot shows an Excel spreadsheet with the following columns and data:

Column	Header	Description
A	Carer ID	235921
B	Carer CHI Number	20986715
C	Postcode of the home address	DG7 3BN
D	Date of Birth (DDMMYYYY)	23/02/1990
E	Gender	02 - (Female)
F	Ethnic Group	01 - (White)
G	How long has the carer been providing care?	
H	How many hours a week does the carer typically provide care?	
I	Health	
J	Emotional well-being	
K	Finance	
L	Life balance	
M	Feel valued	
N	Future plans	
O	Employment	
P	Living environment	
Q	Other	
R	Where care impact is please provide a brief description of the care provided.	

The spreadsheet also includes a red warning message: "Please do not change order of columns or rows in any of the worksheets!". The bottom of the spreadsheet shows tabs for "CARERS" and "CARED-FOR PEOPLE".

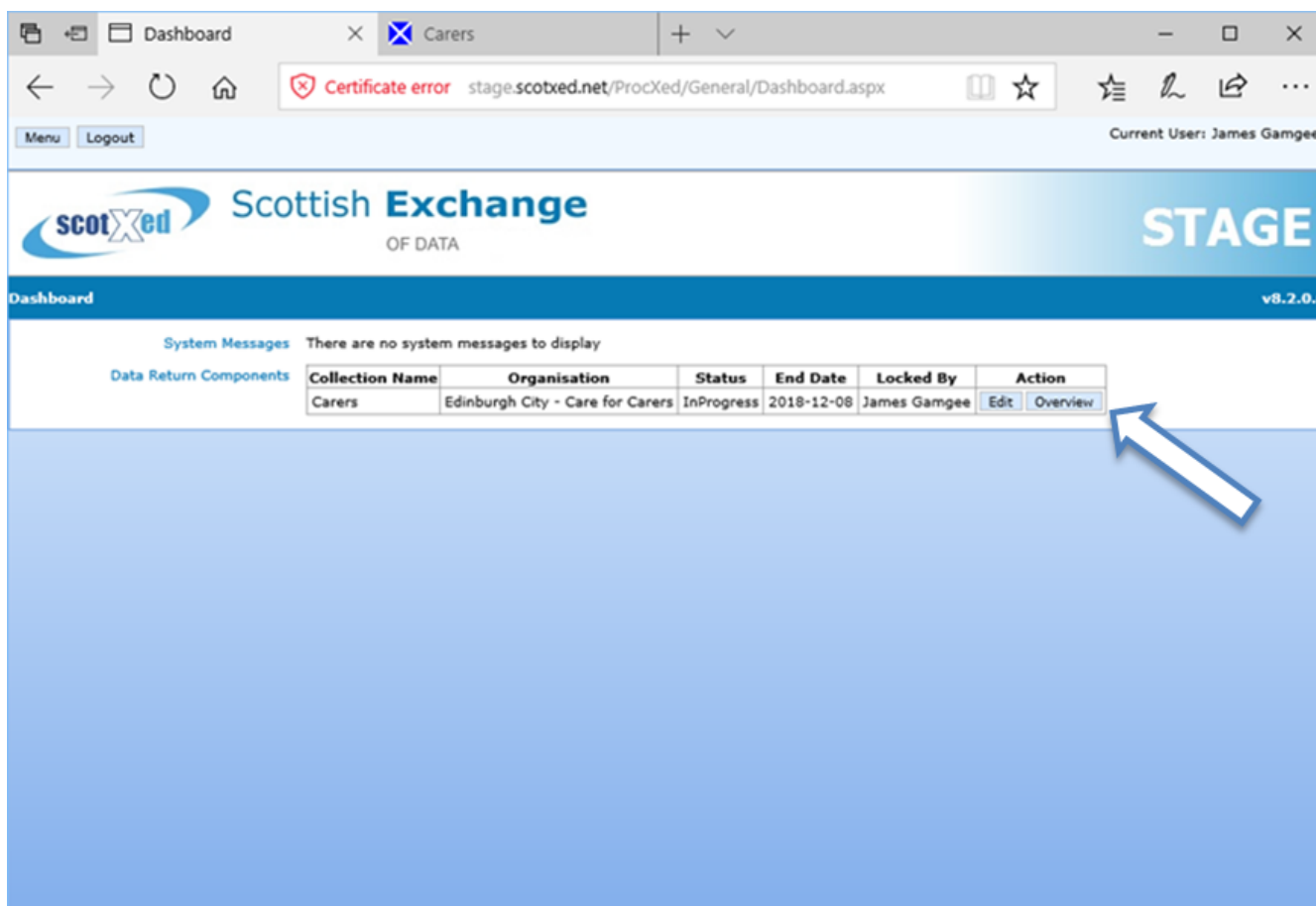
Step 5: Logging into ProcXed

- ▶ Go to [ProcXed](https://procxed.scotxed.net).
- ▶ Login with your username and password (contact SWStat@gov.scot if you do not have this).



Step 6: Getting to the Overview screen

- ▶ You should see a screen which includes both the Carers Census 2019-20 and 2020-21 collections.
- ▶ Click on the “Overview” button for the collection you are trying to complete. **Make sure that you are uploading the correct template to the appropriate collection i.e. upload the 2019-20 template to the 2019-20 collection.**



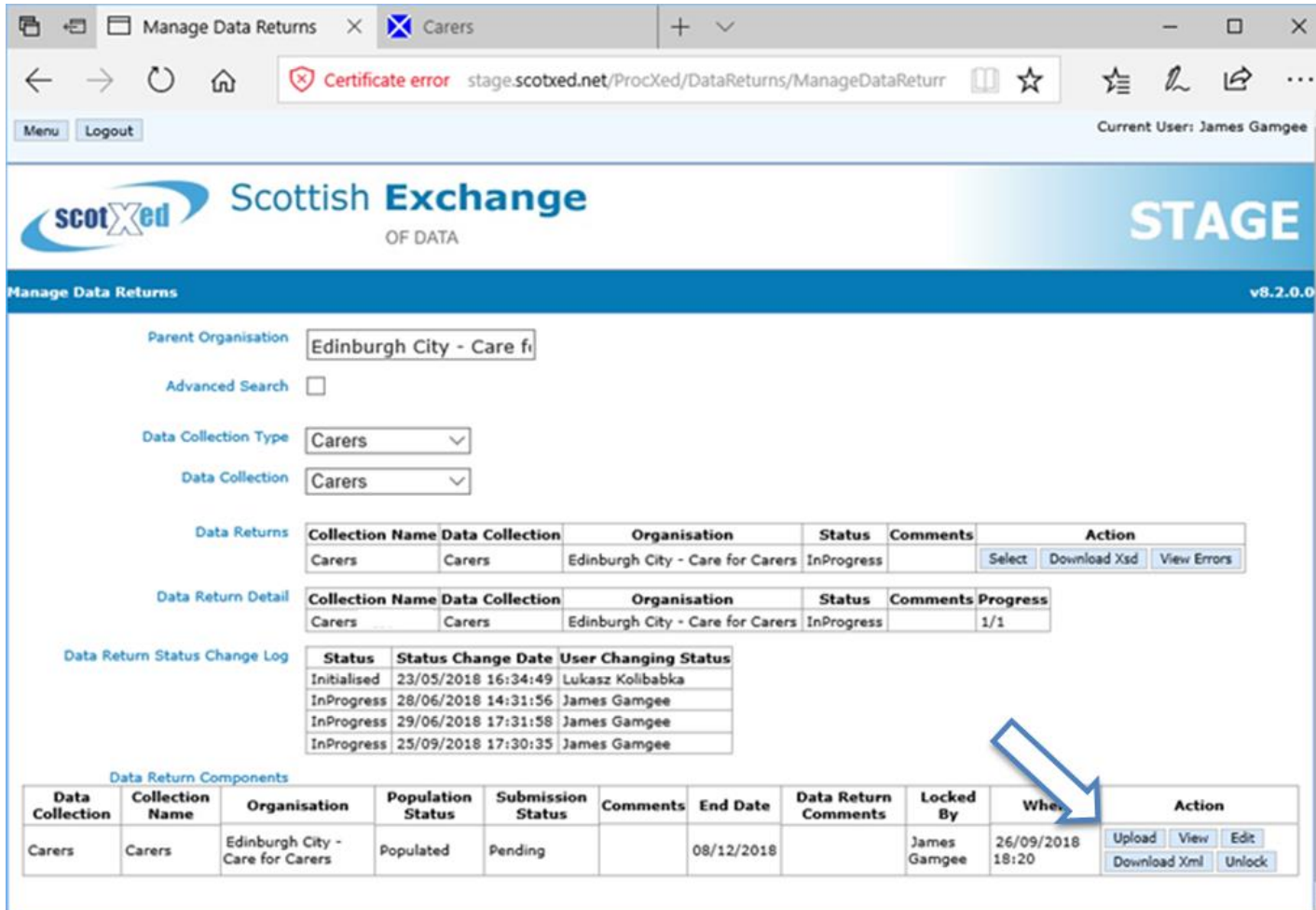
The screenshot shows a web browser window displaying the Scottish Exchange dashboard. The browser address bar shows a certificate error for the URL `stage.scotxed.net/ProcXed/General/Dashboard.aspx`. The dashboard header includes the 'scotXed' logo, 'Scottish Exchange OF DATA', and 'STAGE'. Below the header, there is a 'Dashboard' section with a version number 'v8.2.0.0'. A 'System Messages' section indicates 'There are no system messages to display'. A 'Data Return Components' section contains a table with the following data:

Collection Name	Organisation	Status	End Date	Locked By	Action
Carers	Edinburgh City - Care for Carers	InProgress	2018-12-08	James Gamgee	Edit Overview

A white arrow points to the 'Overview' button in the 'Action' column of the table.

Step 7: Uploading

- ▶ You will now see the “Manage Data Returns” screen.
- ▶ Click on the “Upload” button. **Make sure that you are uploading the correct template to the appropriate collection i.e. upload the 2019-20 template to the 2019-20 collection.**



Manage Data Returns

Parent Organisation:

Advanced Search:

Data Collection Type:

Data Collection:

Collection Name	Data Collection	Organisation	Status	Comments	Action
Carers	Carers	Edinburgh City - Care for Carers	InProgress		Select Download Xsd View Errors

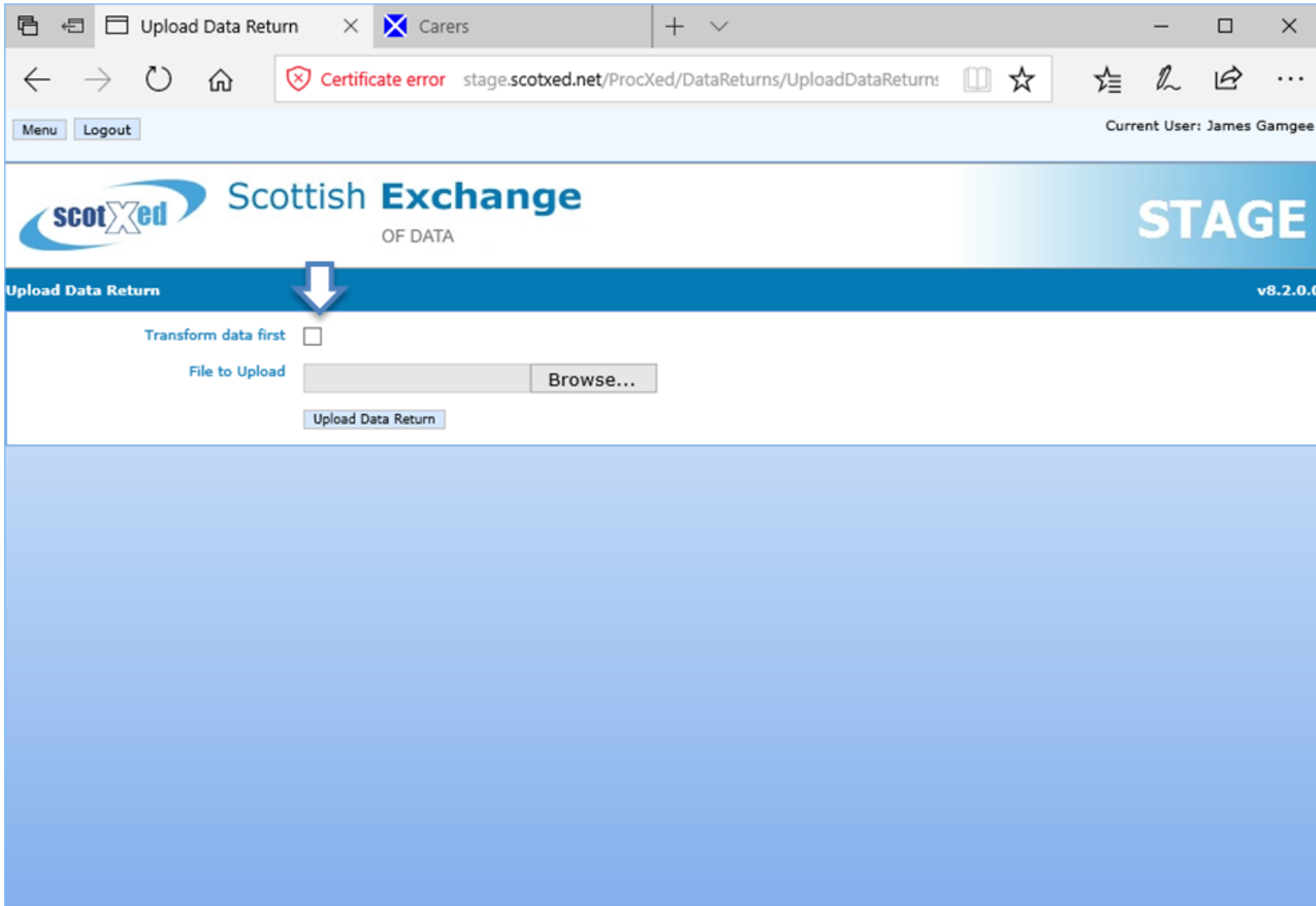
Collection Name	Data Collection	Organisation	Status	Comments	Progress
Carers	Carers	Edinburgh City - Care for Carers	InProgress		1/1

Status	Status Change Date	User Changing Status
Initialised	23/05/2018 16:34:49	Lukasz Kolibabka
InProgress	28/06/2018 14:31:56	James Gamgee
InProgress	29/06/2018 17:31:58	James Gamgee
InProgress	25/09/2018 17:30:35	James Gamgee

Data Collection	Collection Name	Organisation	Population Status	Submission Status	Comments	End Date	Data Return Comments	Locked By	When	Action
Carers	Carers	Edinburgh City - Care for Carers	Populated	Pending		08/12/2018		James Gamgee	26/09/2018 18:20	Upload View Edit Download Xml Unlock

Step 8: Configuring the upload - part 1

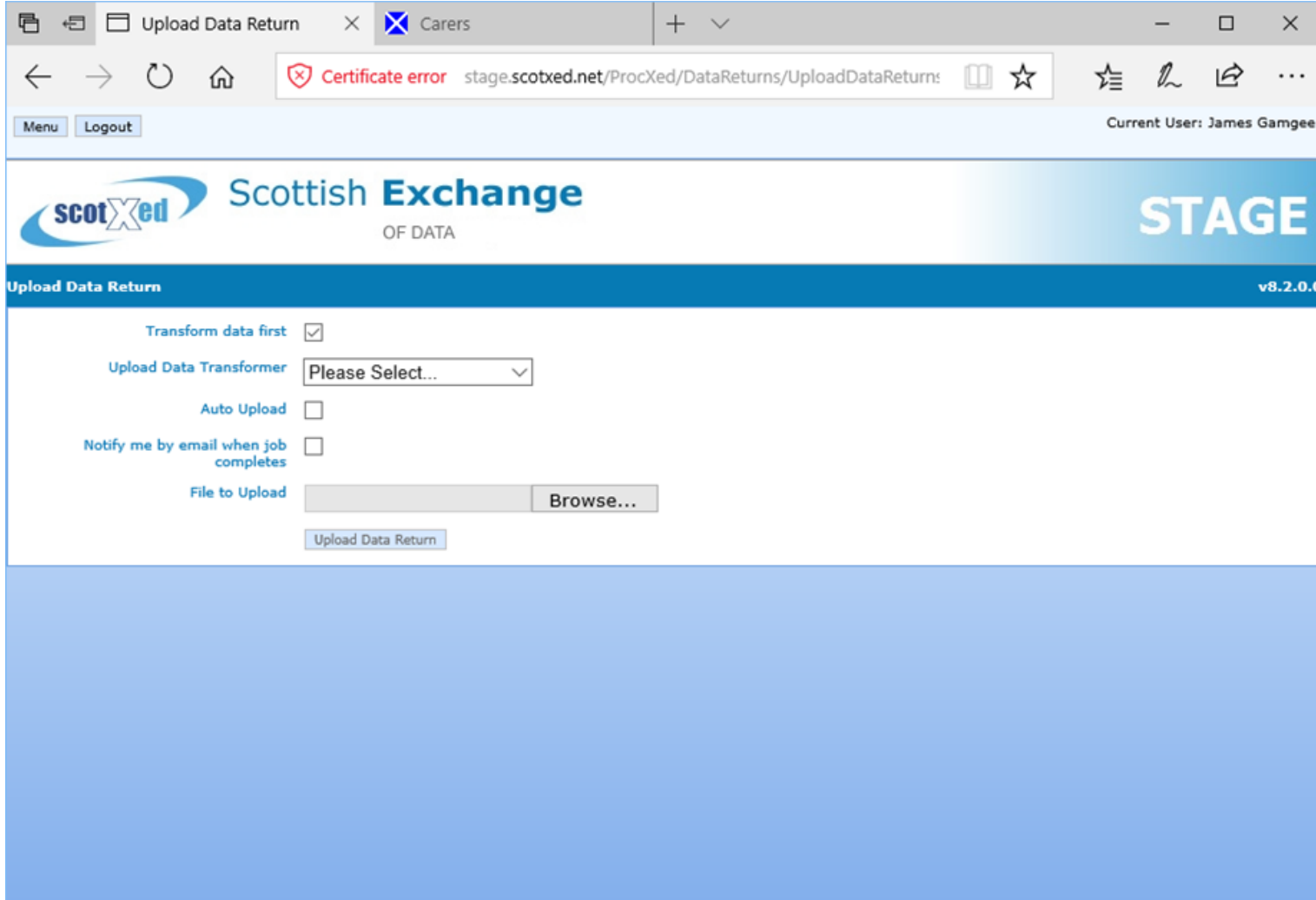
- ▶ Click the “Transform data first” checkbox.



The screenshot displays the 'Upload Data Return' interface within the 'Scottish Exchange STAGE' application. The browser window title is 'Upload Data Return' and the address bar shows a 'Certificate error' for the URL 'stage.scotxed.net/ProcXed/DataReturns/UploadDataReturns'. The current user is 'James Gamgee'. The page header includes the 'scotXed' logo, 'Scottish Exchange OF DATA', and 'STAGE'. The main content area features a blue bar with 'Upload Data Return' and 'v8.2.0.0'. Below this, there is a 'Transform data first' checkbox, which is currently unchecked. A blue arrow points to this checkbox. Below the checkbox is a 'File to Upload' field with a 'Browse...' button and an 'Upload Data Return' button.

Steps 9 – 10: Configuring the upload – part 2

- ▶ Select the “CARERS-spreadsheet-to-procxed” Upload Data Transformer option.
- ▶ Click the "Auto Upload" checkbox.



The screenshot shows a web browser window with the URL `stage.scotxed.net/ProcXed/DataReturns/UploadDataReturn`. The browser shows a "Certificate error" warning. The page header includes the "scotXed" logo, "Scottish Exchange OF DATA", and "STAGE". The current user is identified as "James Gamgee".

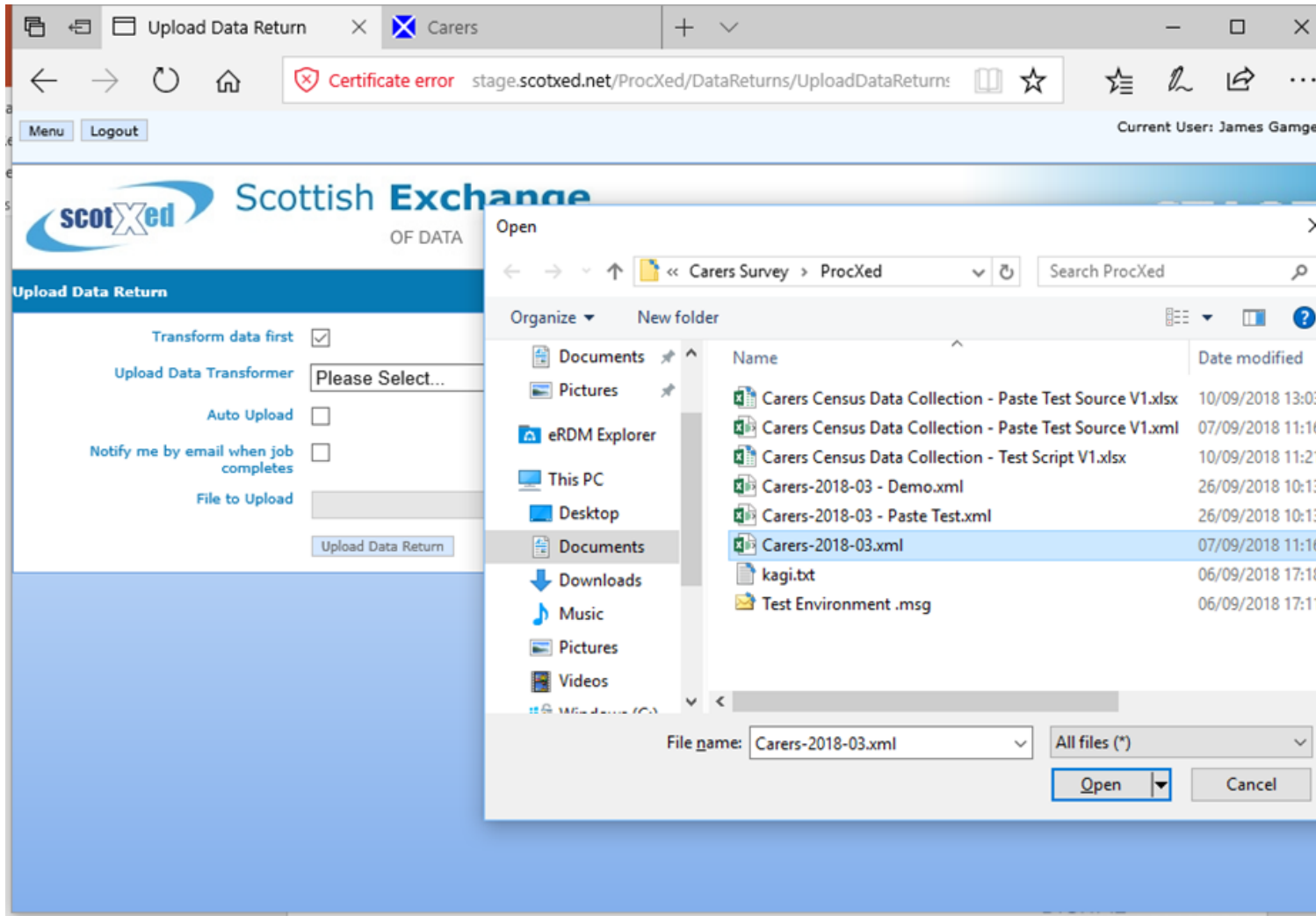
The main content area is titled "Upload Data Return" and contains the following configuration options:

- Transform data first**:
- Upload Data Transformer**: A dropdown menu currently showing "Please Select...".
- Auto Upload**:
- Notify me by email when job completes**:
- File to Upload**: An empty text input field followed by a "Browse..." button.

At the bottom of the form is an "Upload Data Return" button.

Step 11: Find your file and upload it

- ▶ Click "Browse" and select the correct XML Spreadsheet.
- ▶ You should see the path to the XML Spreadsheet file in the "File to Upload" field. Click "Upload data return".

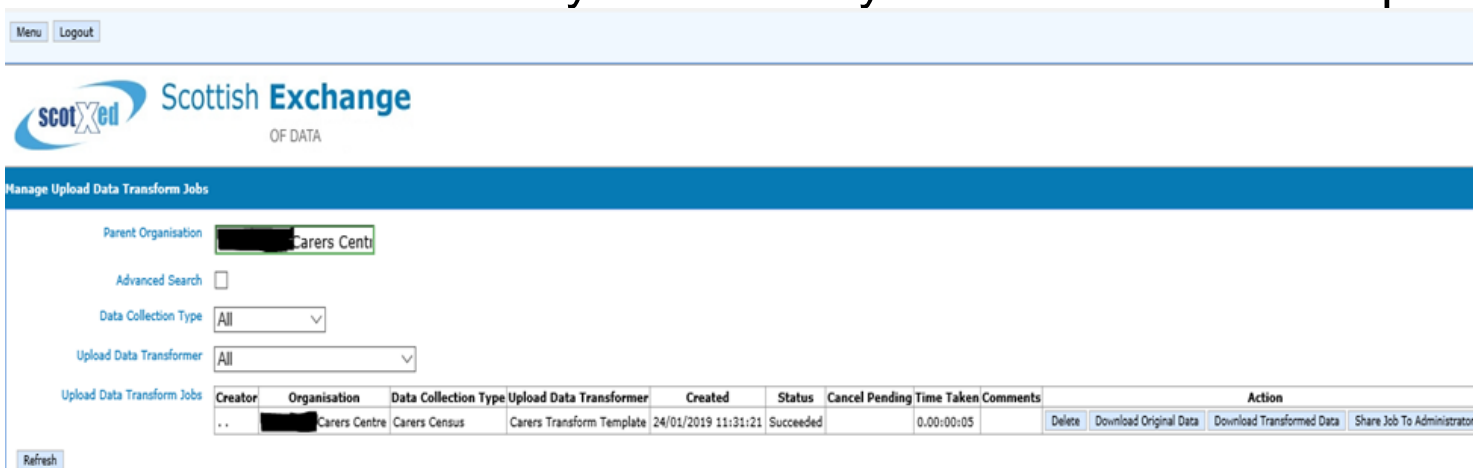


The screenshot shows a web browser window displaying the 'Scottish Exchange' application. The browser address bar shows 'stage.scotxed.net/ProcXed/DataReturns/UploadDataReturn:' with a 'Certificate error' warning. The application interface includes a 'Menu' and 'Logout' button, and a 'Current User: James Gamgee' indicator. The main content area is titled 'Upload Data Return' and features several options: 'Transform data first' (checked), 'Upload Data Transformer' (set to 'Please Select...'), 'Auto Upload' (unchecked), 'Notify me by email when job completes' (unchecked), and a 'File to Upload' field. An 'Upload Data Return' button is visible at the bottom of this section. A file explorer window is overlaid on the application, showing the path 'Carers Survey > ProcXed'. The file explorer displays a list of files with columns for 'Name' and 'Date modified'. The file 'Carers-2018-03.xml' is selected. The 'File name' field at the bottom of the file explorer contains 'Carers-2018-03.xml' and the file type is set to 'All files (*)'. The 'Open' button is highlighted.

Name	Date modified
Carers Census Data Collection - Paste Test Source V1.xlsx	10/09/2018 13:03
Carers Census Data Collection - Paste Test Source V1.xml	07/09/2018 11:16
Carers Census Data Collection - Test Script V1.xlsx	10/09/2018 11:21
Carers-2018-03 - Demo.xml	26/09/2018 10:13
Carers-2018-03 - Paste Test.xml	26/09/2018 10:13
Carers-2018-03.xml	07/09/2018 11:16
kagi.txt	06/09/2018 17:18
Test Environment .msg	06/09/2018 17:11

Step 12: Check upload has completed

- ▶ You should see the message: "The Data Return was uploaded to the transform queue successfully."
- ▶ Click on "Menu" > "Data Returns" > "Manage Upload Data Transform Jobs". When the "Status" column reads "Succeeded" the transform is complete and your data return form should be populated.
- ▶ If the Status column reads "Running" or "Uploading" the job is still In Progress. Wait 30 seconds and refresh the page to see if the Status has changed.
- ▶ If the Status reads "Failed" you will see some text in the Comments field which may help determine the cause. If you need any assistance with an upload contact scotxed@gov.scot.



Menu Logout

scotXet Scottish Exchange
OF DATA

Manage Upload Data Transform Jobs

Parent Organisation

Advanced Search

Data Collection Type

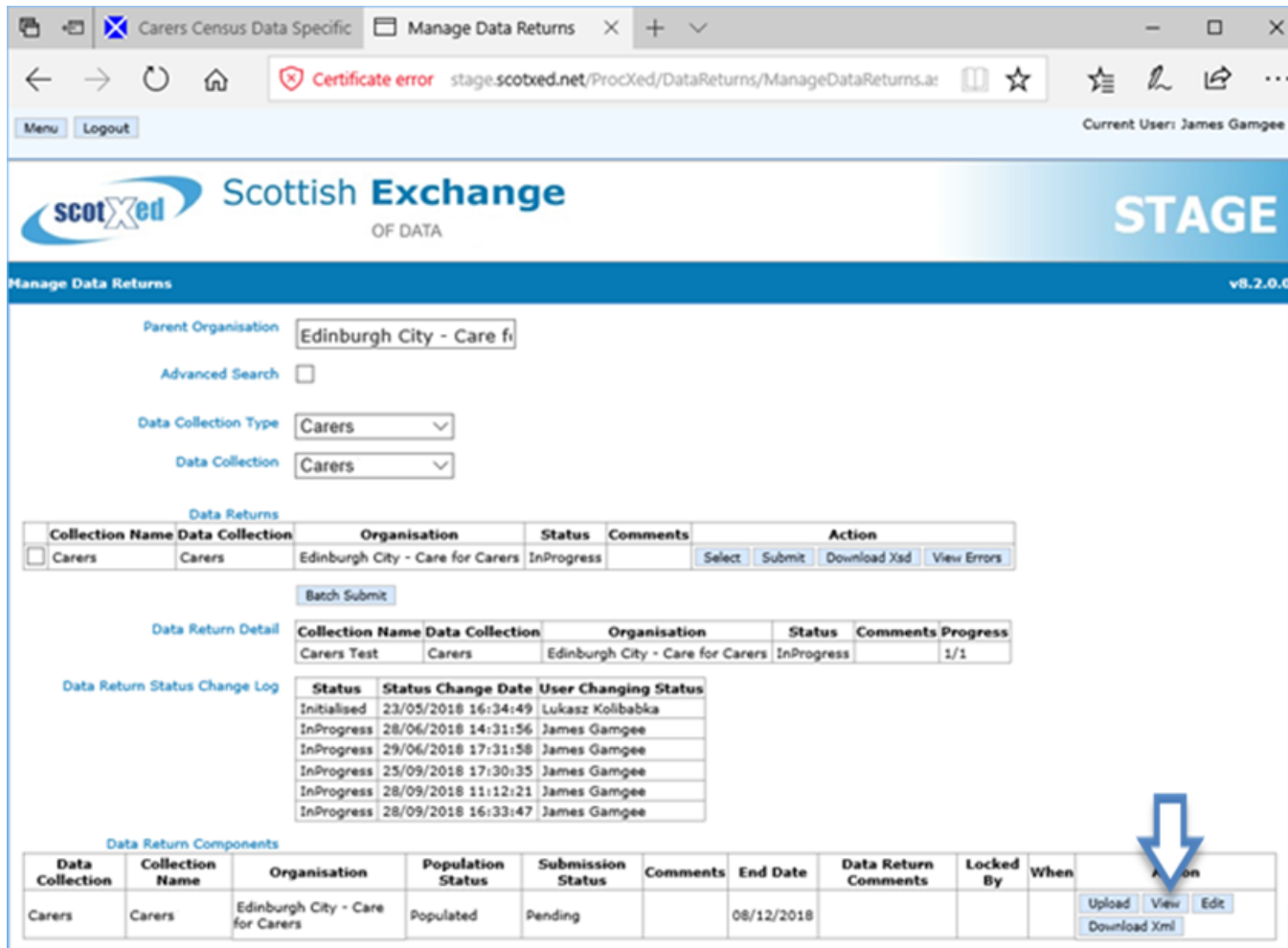
Upload Data Transformer

Upload Data Transform Jobs	Creator	Organisation	Data Collection Type	Upload Data Transformer	Created	Status	Cancel Pending Time Taken	Comments	Action
..	..	Carers Centre	Carers Census	Carers Transform Template	24/01/2019 11:31:21	Succeeded	0.00:00:05		Delete Download Original Data Download Transformed Data Share Job To Administrators

Refresh

Step 13: Check content of data form

- ▶ Click on "Menu" > "Data Returns" > "Manage Data Returns". Click the "View" button and sense check your data. e.g. You should see a selection list where the number of Carer IDs equals the number of rows you populated in the CARERS tab of your spreadsheet.



Parent Organisation:

Advanced Search:

Data Collection Type:

Data Collection:

Data Returns

Collection Name	Data Collection	Organisation	Status	Comments	Action
<input type="checkbox"/>	Carers	Edinburgh City - Care for Carers	InProgress		Select Submit Download Xsd View Errors

Batch Submit

Data Return Detail

Collection Name	Data Collection	Organisation	Status	Comments	Progress
Carers Test	Carers	Edinburgh City - Care for Carers	InProgress		1/1

Data Return Status Change Log

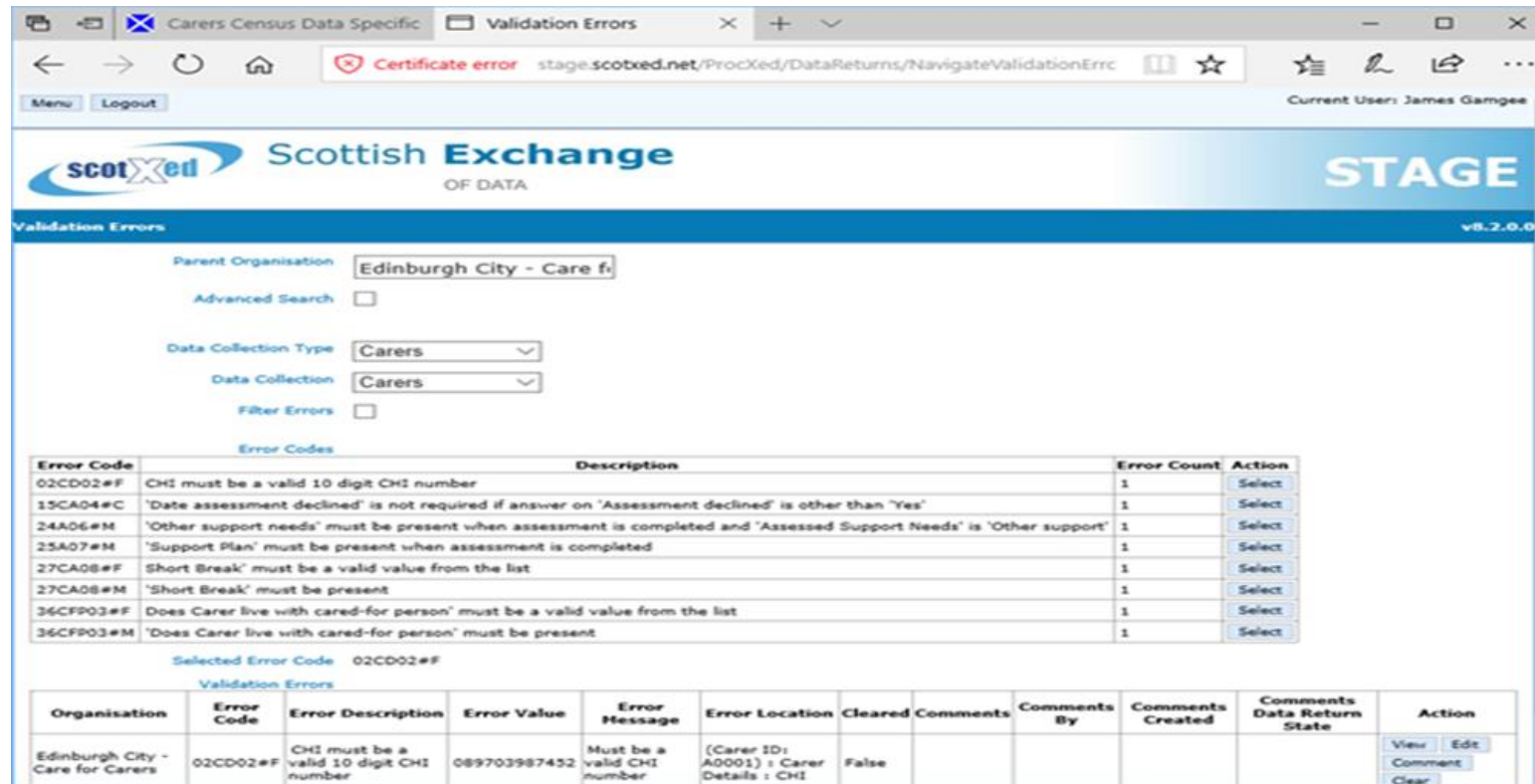
Status	Status Change Date	User Changing Status
Initialised	23/05/2018 16:34:49	Lukasz Kolibabka
InProgress	28/06/2018 14:31:56	James Gamgee
InProgress	29/06/2018 17:31:58	James Gamgee
InProgress	25/09/2018 17:30:35	James Gamgee
InProgress	28/09/2018 11:12:21	James Gamgee
InProgress	28/09/2018 16:33:47	James Gamgee

Data Return Components

Data Collection	Collection Name	Organisation	Population Status	Submission Status	Comments	End Date	Data Return Comments	Locked By	When	Action
Carers	Carers	Edinburgh City - Care for Carers	Populated	Pending		08/12/2018				Upload View Edit Download Xml

Steps 14 - 15: View errors

- ▶ Click “Back” and then click on “View Errors”.
- ▶ You should now see a list of errors. Click on “Select” next to an error to see more detail.
- ▶ You should fix errors in your template and repeat the upload to clear them.
- ▶ Most errors should be resolved. However if errors remain that cannot be remedied then you should add an appropriate comment and “Clear” the error.



Validation Errors

Parent Organisation:

Advanced Search:

Data Collection Type:

Data Collection:

Filter Errors:

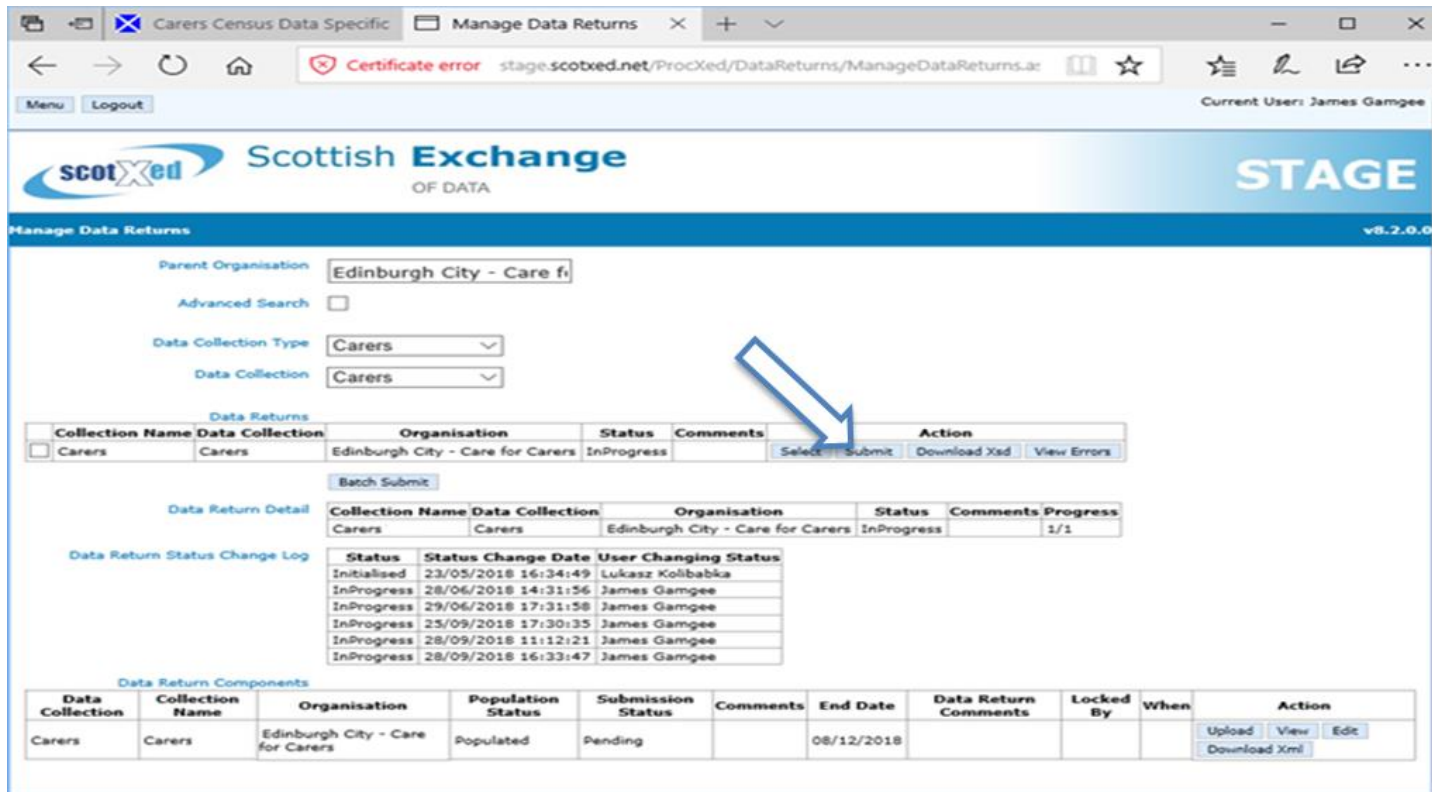
Error Code	Description	Error Count	Action
02CD02#F	CHI must be a valid 10 digit CHI number	1	Select
15CA04#C	'Date assessment declined' is not required if answer on 'Assessment declined' is other than 'Yes'	1	Select
24A06#M	'Other support needs' must be present when assessment is completed and 'Assessed Support Needs' is 'Other support'	1	Select
25A07#M	'Support Plan' must be present when assessment is completed	1	Select
27CA08#F	'Short Break' must be a valid value from the list	1	Select
27CA08#M	'Short Break' must be present	1	Select
36CF03#F	Does Carer live with cared-for person' must be a valid value from the list	1	Select
36CF03#M	'Does Carer live with cared-for person' must be present	1	Select

Selected Error Code: 02CD02#F

Organisation	Error Code	Error Description	Error Value	Error Message	Error Location	Cleared	Comments	Comments By	Comments Created	Comments Data Return State	Action
Edinburgh City - Care for Carers	02CD02#F	CHI must be a valid 10 digit CHI number	089703987452	Must be a valid CHI number	{Carer ID: A0001} : Carer Details : CHI	False					View Edit Comment Clear

Steps 16 -17: Submit

- ▶ When you are content with your data, click on "Menu" > "Data Returns" > "Manage Data Returns".
- ▶ You will now see the "Manage Data Returns" screen. Click on "Submit".
- ▶ You can now repeat the same process for the other Carers Census collection. **Data for each period must be uploaded separately to the correct collection.**



The screenshot shows the 'Manage Data Returns' interface for 'Scottish Exchange OF DATA'. The page title is 'STAGE' and the version is 'v8.2.0.0'. The current user is 'James Gamgee'. The interface includes a 'Menu' and 'Logout' button in the top left. The main content area has a search bar for 'Parent Organisation' (Edinburgh City - Care for Carers) and filters for 'Data Collection Type' and 'Data Collection' (both set to 'Carers').

The 'Data Returns' table is as follows:

Collection Name	Data Collection	Organisation	Status	Comments	Action
<input type="checkbox"/>	Carers	Edinburgh City - Care for Carers	InProgress		Select Submit Download Xsd View Errors

Below this table is a 'Batch Submit' button. The 'Data Return Detail' table shows:

Collection Name	Data Collection	Organisation	Status	Comments	Progress
Carers	Carers	Edinburgh City - Care for Carers	InProgress		1/1

The 'Data Return Status Change Log' table is:

Status	Status Change Date	User Changing Status
Initialised	23/05/2018 16:34:49	Lukasz Kolibabka
InProgress	28/06/2018 14:31:56	James Gamgee
InProgress	29/06/2018 17:31:58	James Gamgee
InProgress	25/09/2018 17:30:35	James Gamgee
InProgress	28/09/2018 11:12:21	James Gamgee
InProgress	28/09/2018 16:33:47	James Gamgee

The 'Data Return Components' table is:

Data Collection	Collection Name	Organisation	Population Status	Submission Status	Comments	End Date	Data Return Comments	Locked By	When	Action
Carers	Carers	Edinburgh City - Care for Carers	Populated	Pending		08/12/2018				Upload View Edit Download Xml

- ▶ Carer census resources can be found on the [Data Supplier webpage](#) on the Scottish Government website.
- ▶ For questions about the data, please e-mail us at SWStat@gov.scot.
- ▶ For questions about using ProcXed, please e-mail us at ScotXed@gov.scot.
- ▶ You can find a detailed ProcXed user guide on the Scottish Government [website](#).