Carers Census Step by Step Instructions

July 2021

Health and Social Care Analysis – Scottish Government
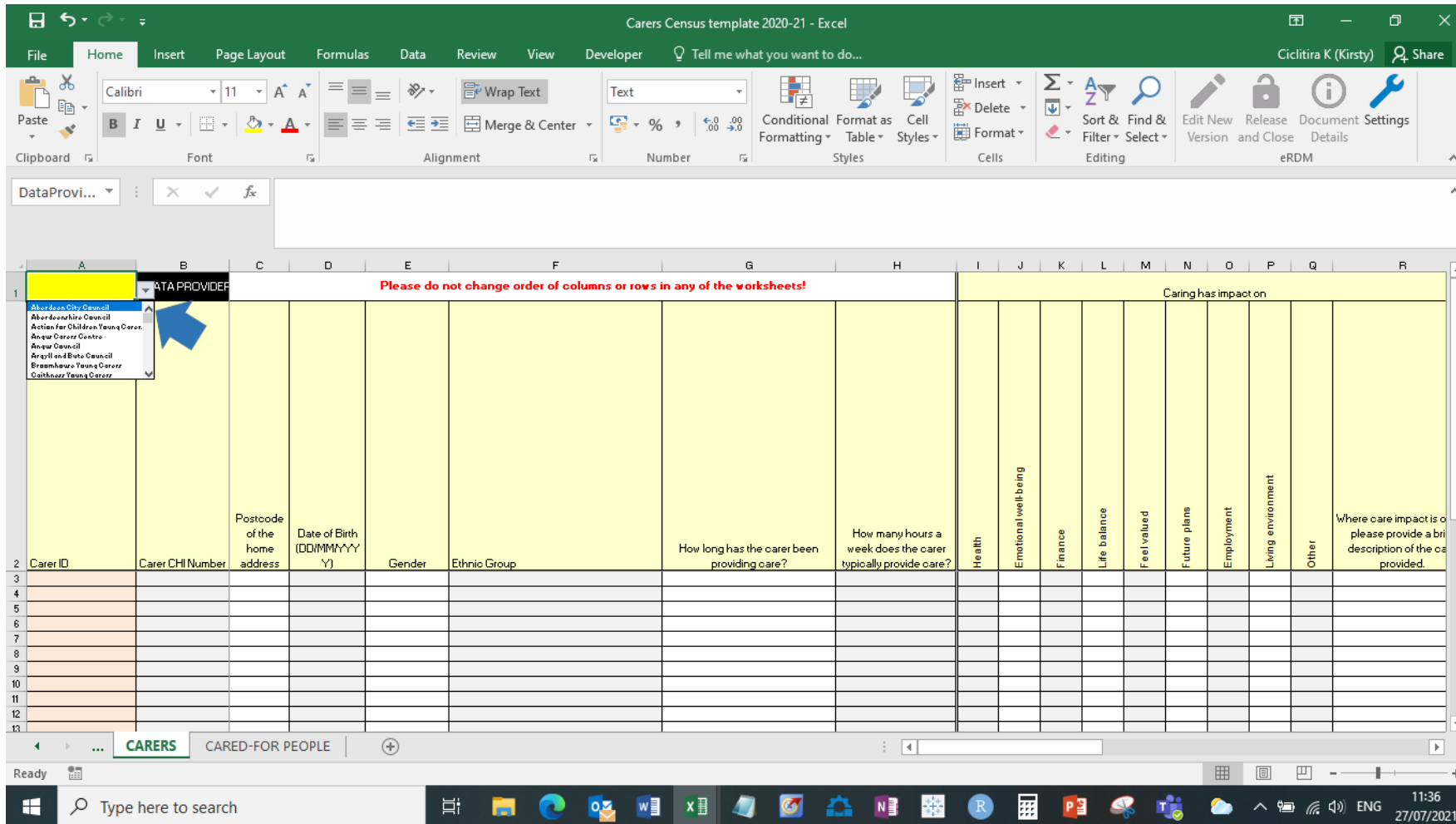
At a glance, part 1

Scottish Government
Riaghaltas na h-Alba
gov.scot

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.

At a glance, part 2

9.   Select the "CARERS-spreadsheet-to-procxed" 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
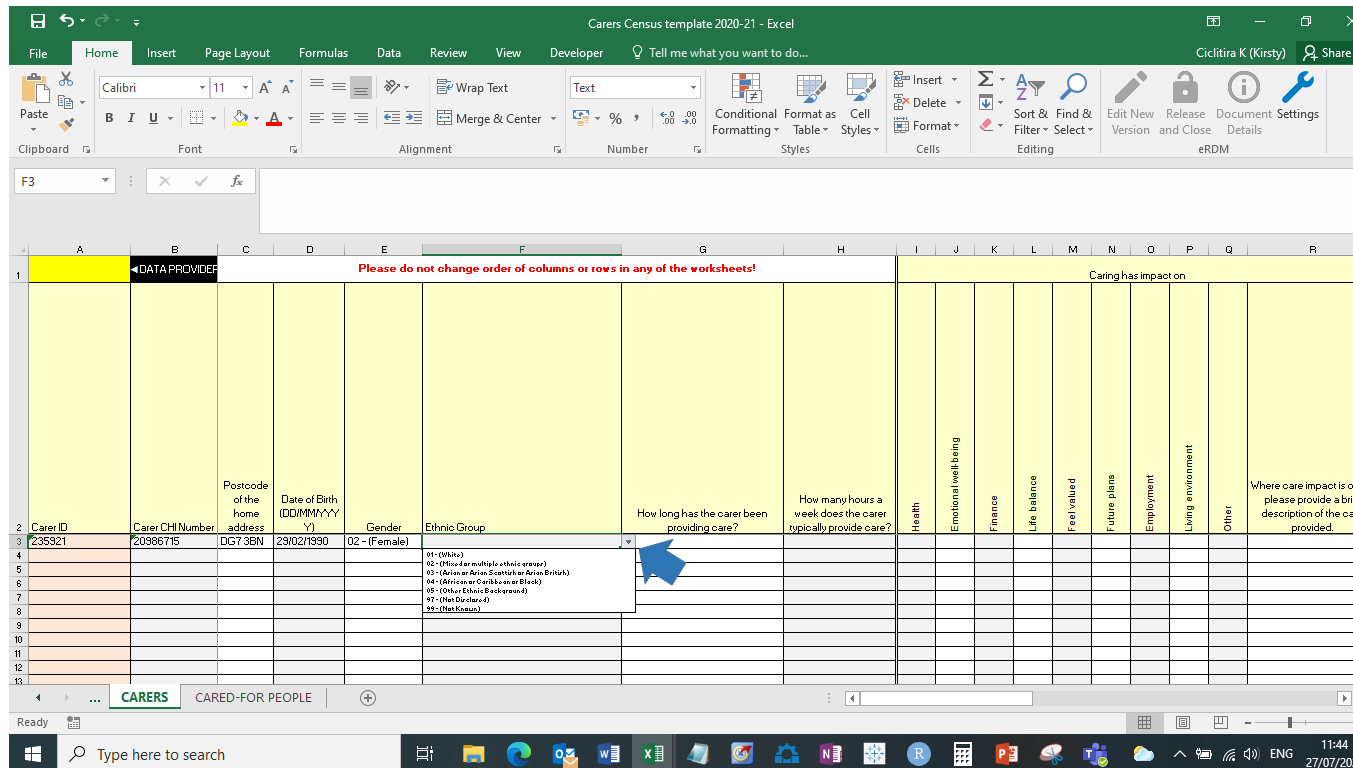
► Open Excel. Click File > Open and select the correct template file ending .xml.

► Make sure the CARERS tab is selected.

► Select your organisation from the drop down list in the top left corner.

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.

Step 5: Logging into ProcXed

►   Go to [ProcXed](#).

►   Login with your username and password (contact SWStat@gov.scot if you do not have this).
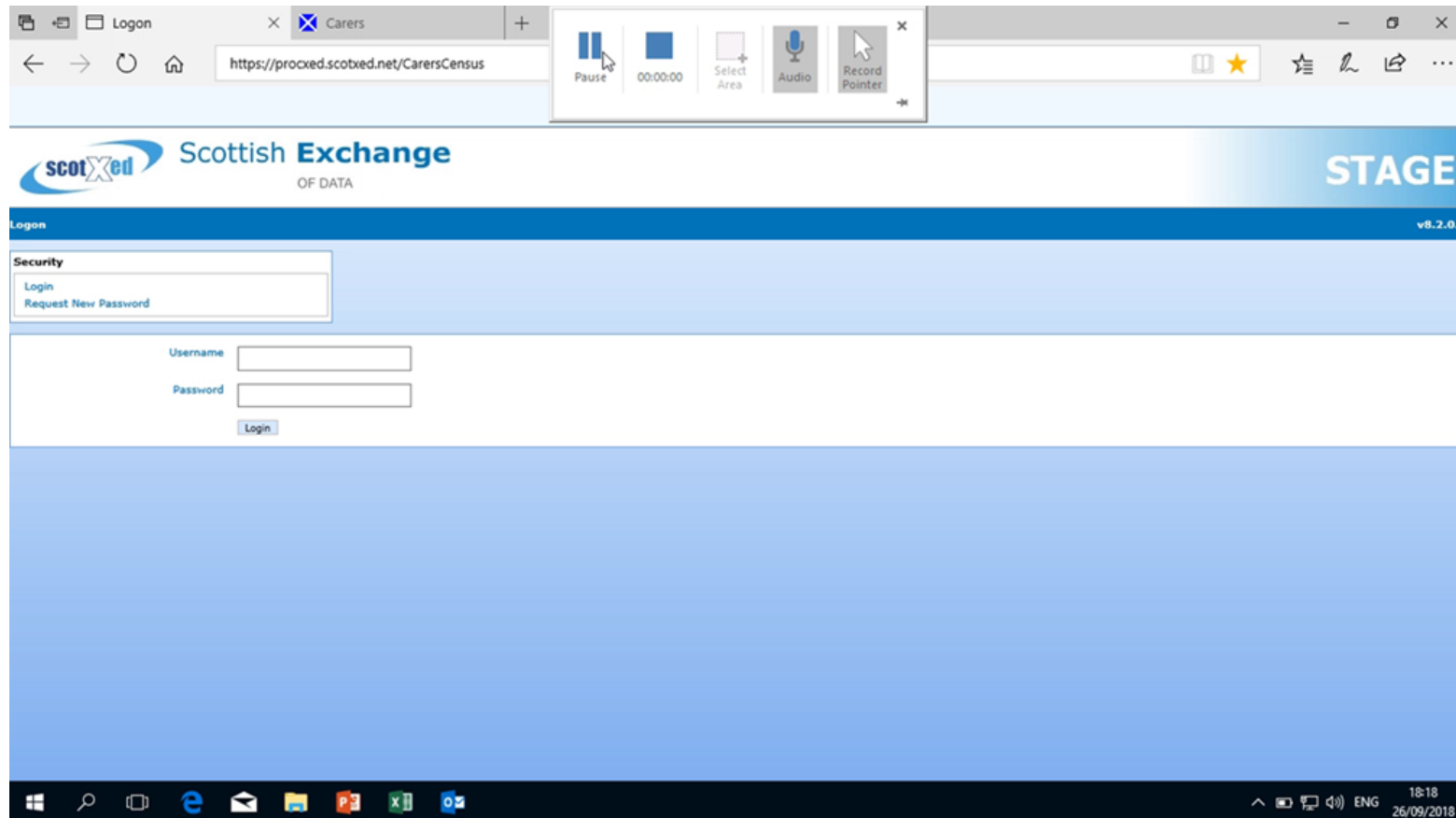
Step 6: Getting to the Overview screen

► 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.**

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.**

Step 8: Configuring the upload - part 1

► Click the "Transform data first" checkbox.

Steps 9 – 10: Configuring the upload – part 2

► Select the "CARERS-spreadsheet-to-procxed" Upload Data Transformer option.

► Click the "Auto Upload" checkbox.

Step 11: Find your file and upload it

- ► Click "Browse" and select the correct XML Spreadsheet.

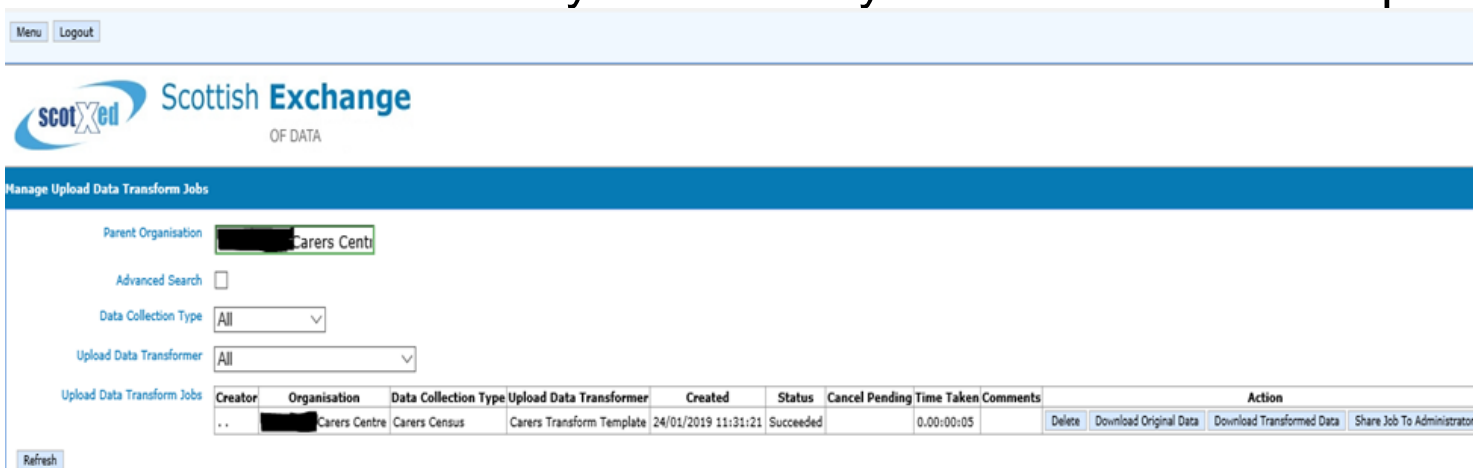- ► You should see the path to the XML Spreadsheet file in the "File to Upload" field. Click "Upload data return".

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.
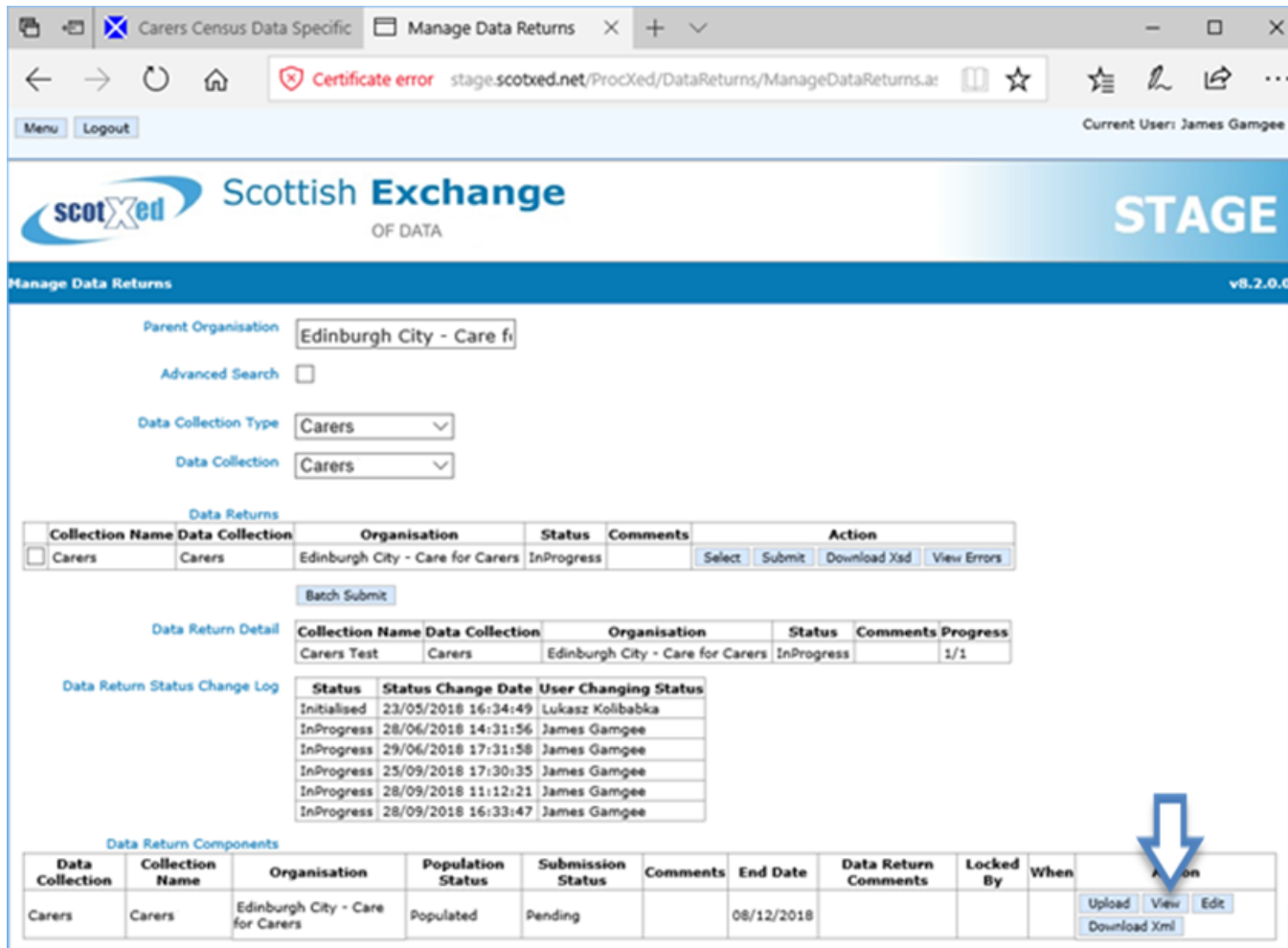
► If the Status column reads "Running" or "Uploading" the job is still In Progress. Wait 30 seconds and refresh the page to see if the Status has changed.

► 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.

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.

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.

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.**

Useful resources

► 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](#).