

Carers Census Step by Step Instructions

August 2022

Health and Social Care Analysis – Scottish Government

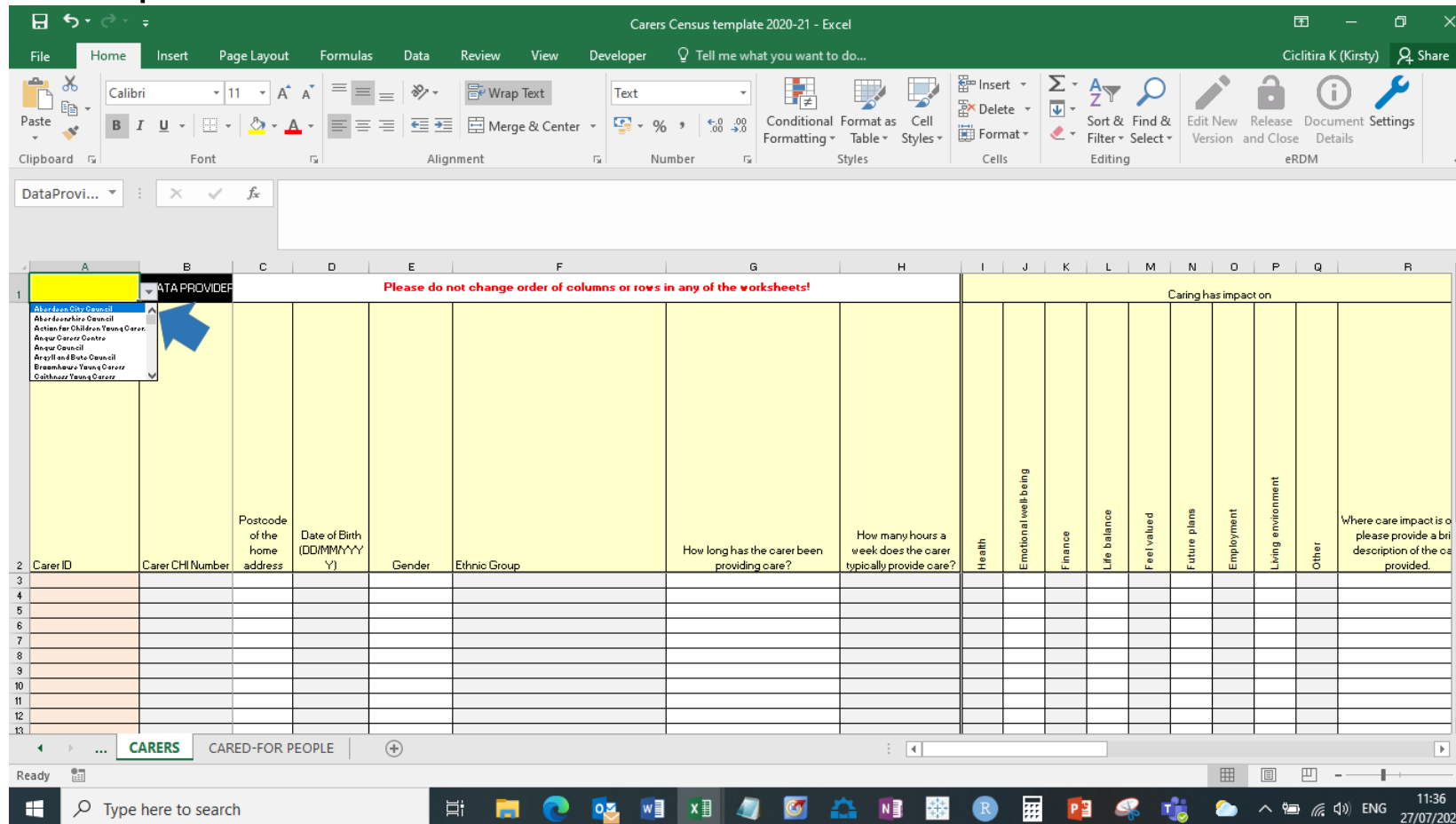
At a glance, part 1

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. Please DO NOT change the list of Data Providers.
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 the Carers Census collection. 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-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 on your template 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 the “Submit” button. You should see the message: "The Data Return was submitted successfully”.

Step 1: Opening the template

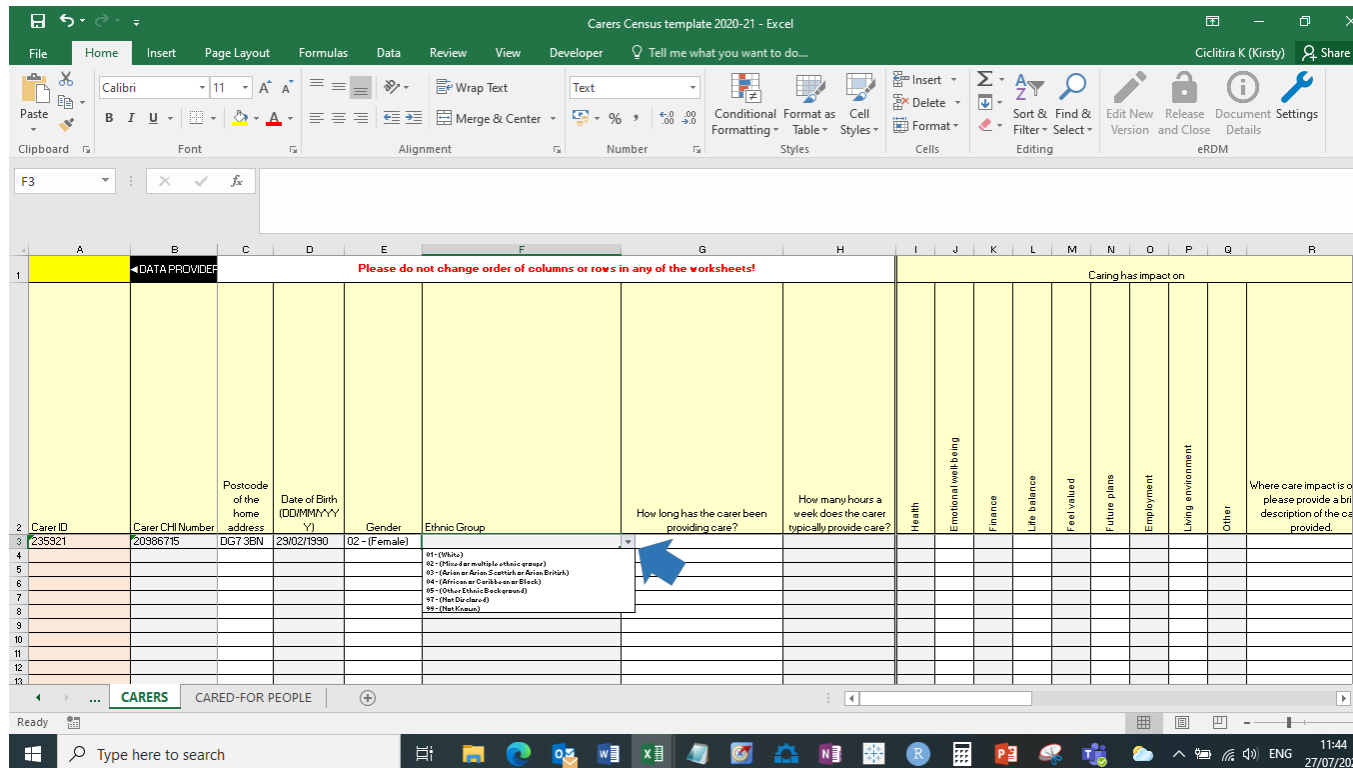
- ▶ Open Excel. Click File > Open and select the correct template file ending .xml.
- ▶ Make sure the CARERS tab is selected.
- ▶ Select your organisation from the drop down list in the top left corner. DO NOT change the list of providers.



The screenshot displays the Microsoft Excel interface for the 'Carers Census template 2020-21'. The 'Home' ribbon is selected, showing options for font, alignment, and styles. A dropdown menu for 'Data Provider' is open in cell B1, listing various Scottish councils and organizations. A blue arrow points to this dropdown menu. The spreadsheet grid shows columns for Carer ID, CHI Number, Postcode, Date of Birth, Gender, Ethnic Group, Care duration, Care hours, and various well-being categories. A warning message reads: 'Please do not change order of columns or rows in any of the worksheets!'. The bottom status bar shows the 'CARERS' tab is selected.

Steps 2 - 4: Enter the Data

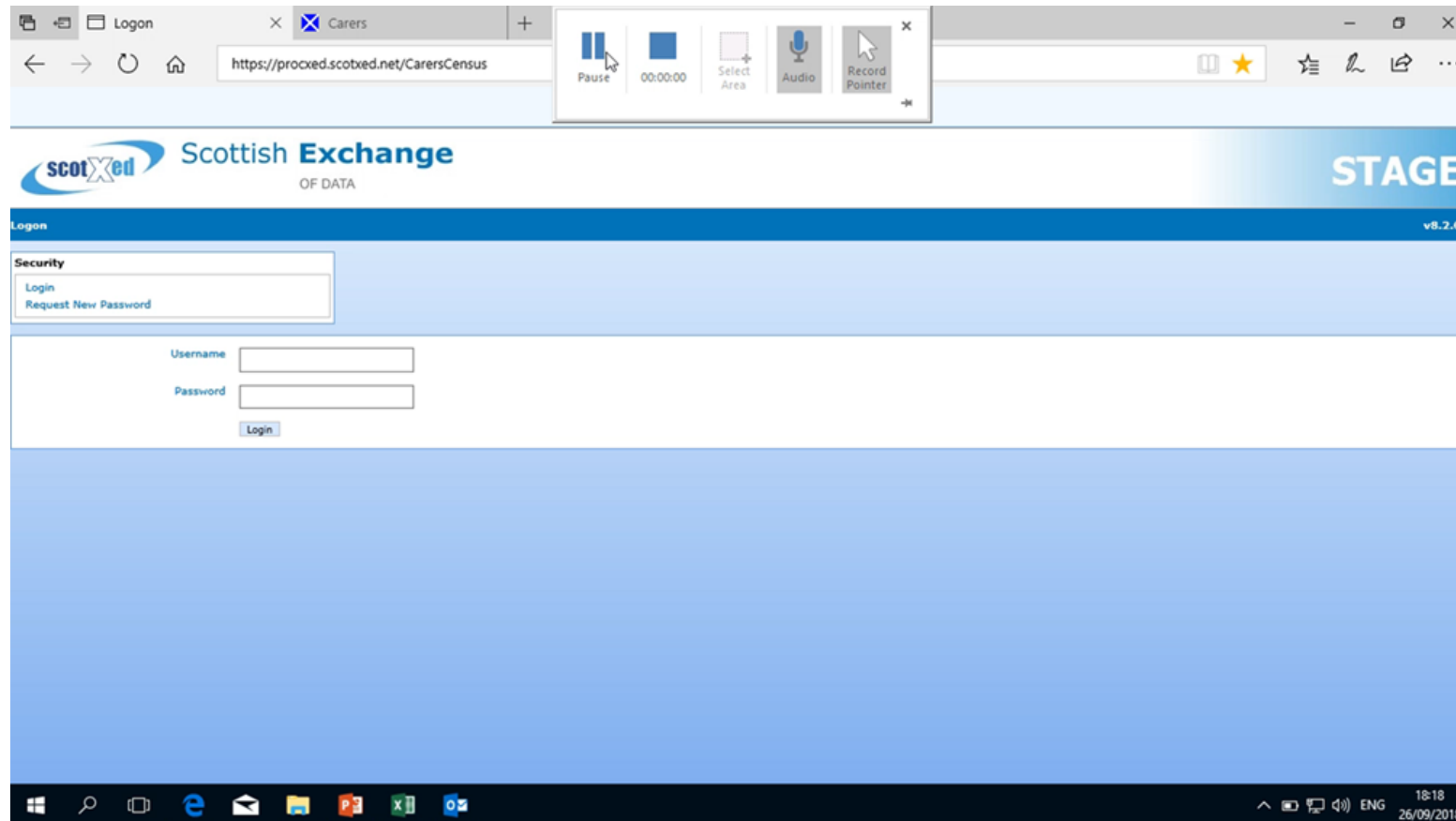
- ▶ Paste in or manually enter the data. If pasting, use the Paste Special > Values option to avoid corrupting the XML template.
- ▶ Change to the CARED-FOR PEOPLE tab and start by entering the Carer ID from the CARER tab. This must match exactly for the system to recognise the relationship between the 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 the 'CARED-FOR PEOPLE' tab in an Excel spreadsheet. The spreadsheet is titled 'Carers Census template 2020-21 - Excel'. The ribbon is set to 'Home'. The spreadsheet has columns A through R. Column A is 'Carer ID', B is 'Carer CHI Number', C is 'Postcode of the home address', D is 'Date of Birth (DDMMYYYY)', E is 'Gender', F is 'Ethnic Group', G is 'How long has the carer been providing care?', H is 'How many hours a week does the carer typically provide care?', I is 'Health', J is 'Emotional well being', K is 'Finance', L is 'Life balance', M is 'Feel valued', N is 'Future plans', O is 'Employment', P is 'Living environment', Q is 'Other', and R is 'Where care impact is observed please provide a brief description of the impact provided'. A dropdown menu is open for the 'Ethnic Group' column, showing options: 01 - (White), 02 - (Black or African, Scottish or African British), 03 - (Asian or Asian, Scottish or Asian British), 04 - (African or Caribbean or Black), 05 - (Other Ethnic Background), 06 - (Non Declared), 07 - (Other Ethnic). A blue arrow points to the dropdown menu.

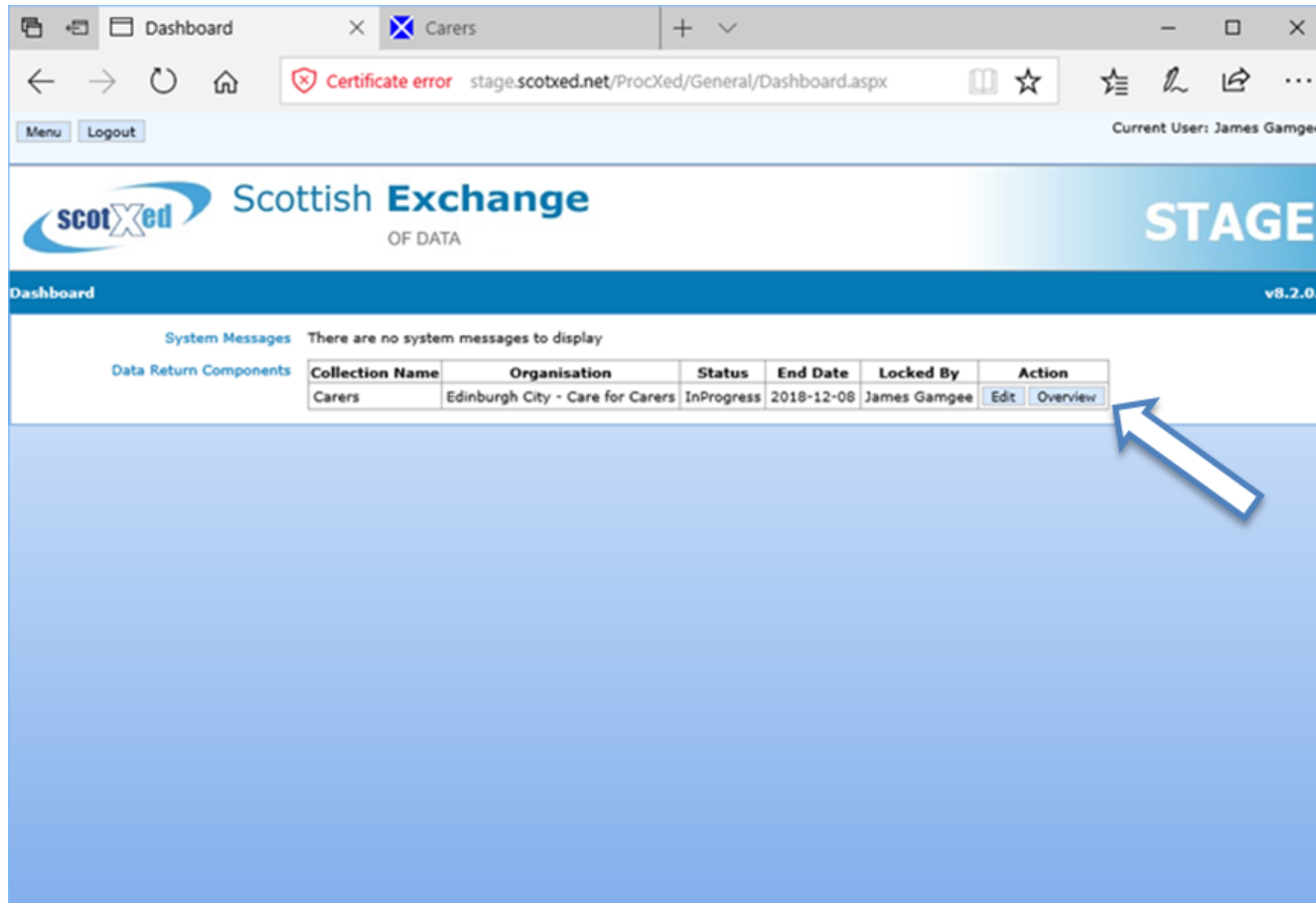
Step 5: Logging into ProcXed

- ▶ 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 the Carers Census 2021-22 collection.
- ▶ Click on the “Overview” button.



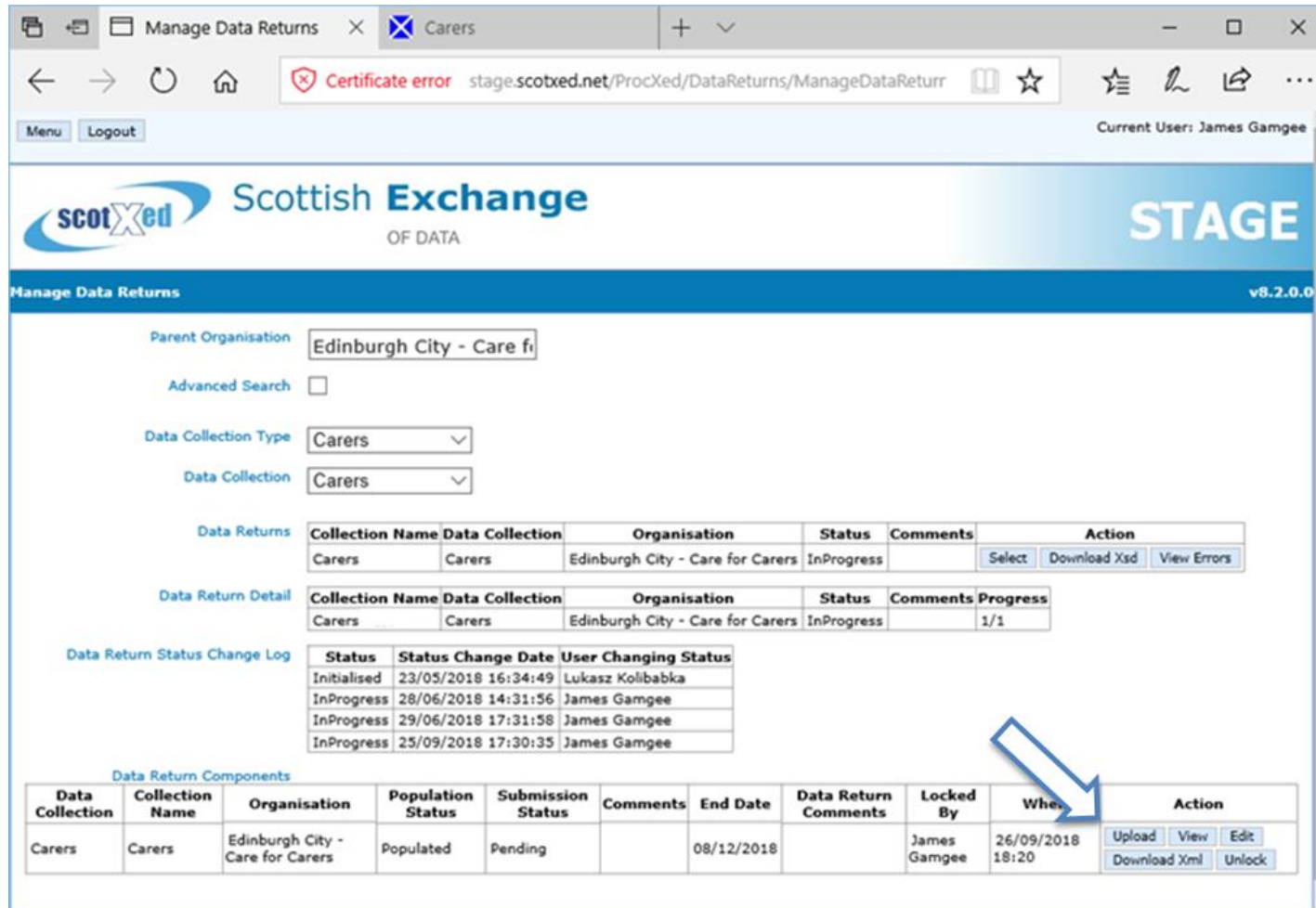
The screenshot shows a web browser window with the URL `stage.scotxed.net/ProcXed/General/Dashboard.aspx`. The page header includes the **scotXed** logo, **Scottish Exchange OF DATA**, and **STAGE**. The current user is identified as James Gamgee. Below the header, there is a section for **System Messages** (no messages) and **Data Return Components**. A table lists 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.



Parent Organisation:

Advanced Search:

Data Collection Type:

Data Collection:

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

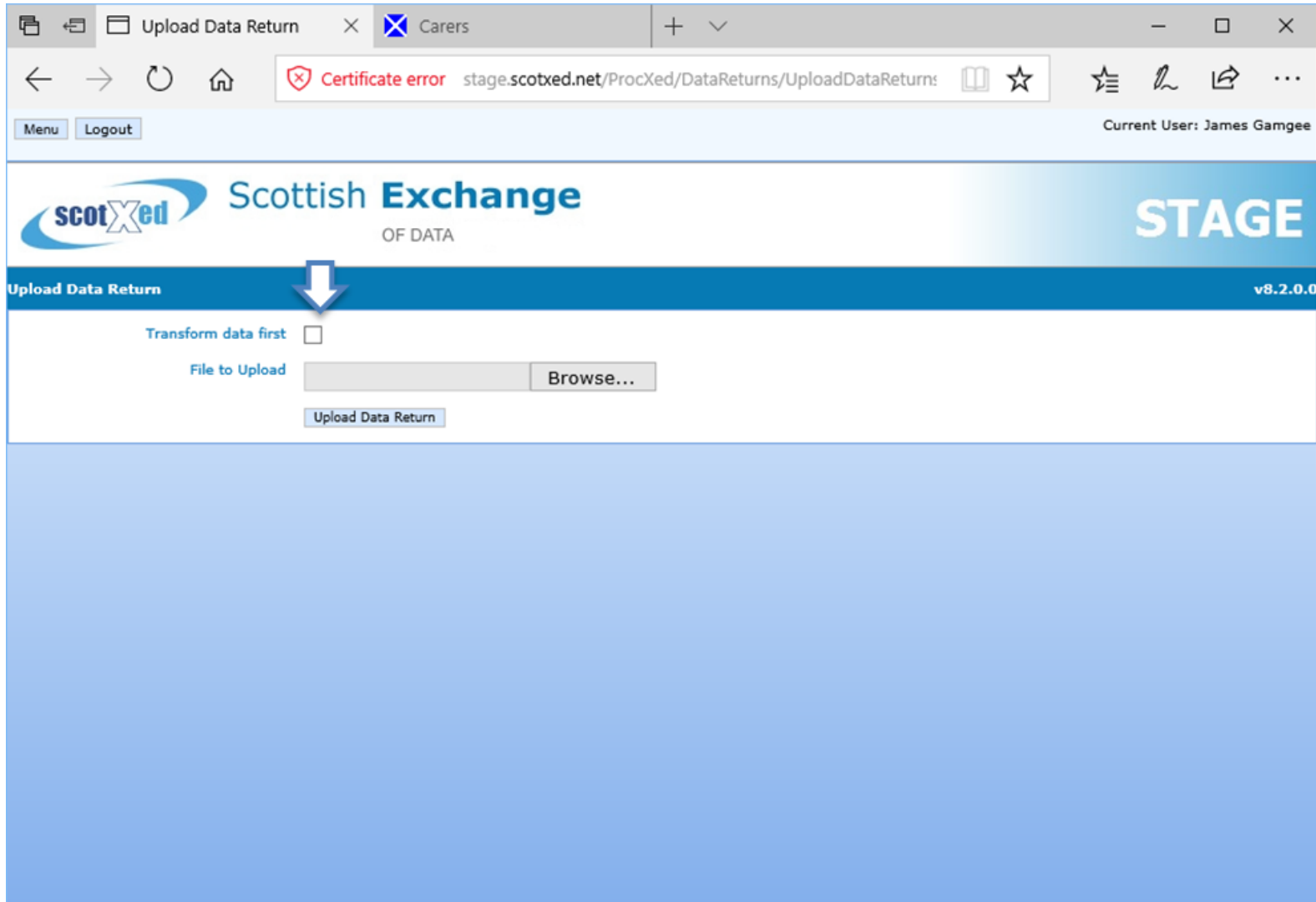
Data Return Detail	Collection Name	Data Collection	Organisation	Status	Comments	Progress
	Carers	Carers	Edinburgh City - Care for Carers	InProgress		1/1

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

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		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.

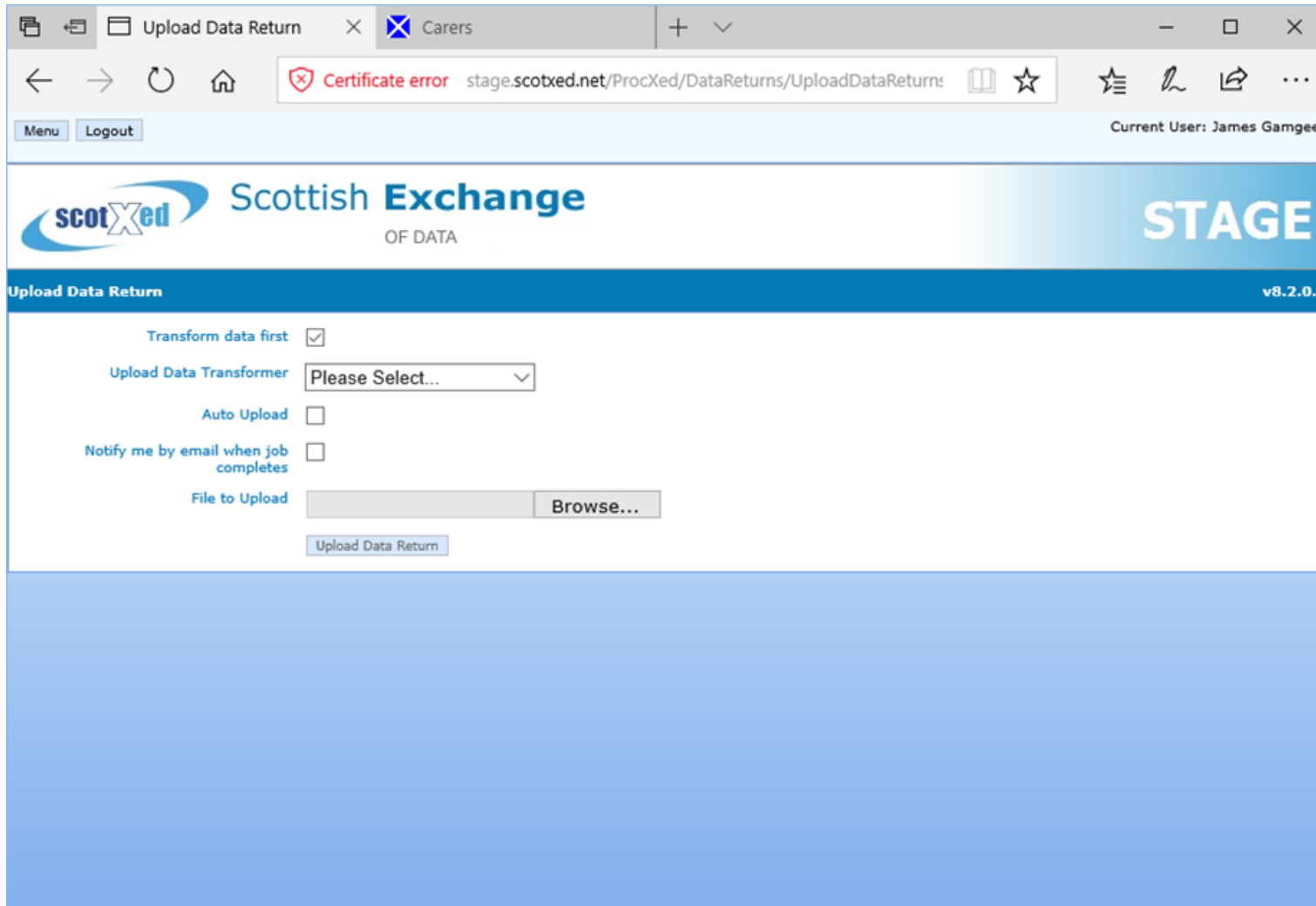


The screenshot shows a web browser window with the following elements:

- Browser tabs: "Upload Data Return" and "Carers".
- Address bar: "stage.scotxed.net/ProcXed/DataReturns/UploadDataReturns" with a "Certificate error" warning.
- Navigation: "Menu" and "Logout" buttons.
- Header: "scotXed Scottish Exchange OF DATA" logo and "STAGE" branding.
- Page Title: "Upload Data Return" with version "v8.2.0.0".
- Form: "Transform data first" checkbox (unchecked), "File to Upload" text input, "Browse..." button, and "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.



Upload Data Return x Carers + - □ ×

Certificate error stage.scotxed.net/ProcXed/DataReturns/UploadDataReturns: ☆ ☆ ☆

Menu Logout Current User: James Gamgee

 **Scottish Exchange**
OF DATA **STAGE**

Upload Data Return v8.2.0.0

Transform data first

Upload Data Transformer Please Select... ▾

Auto Upload

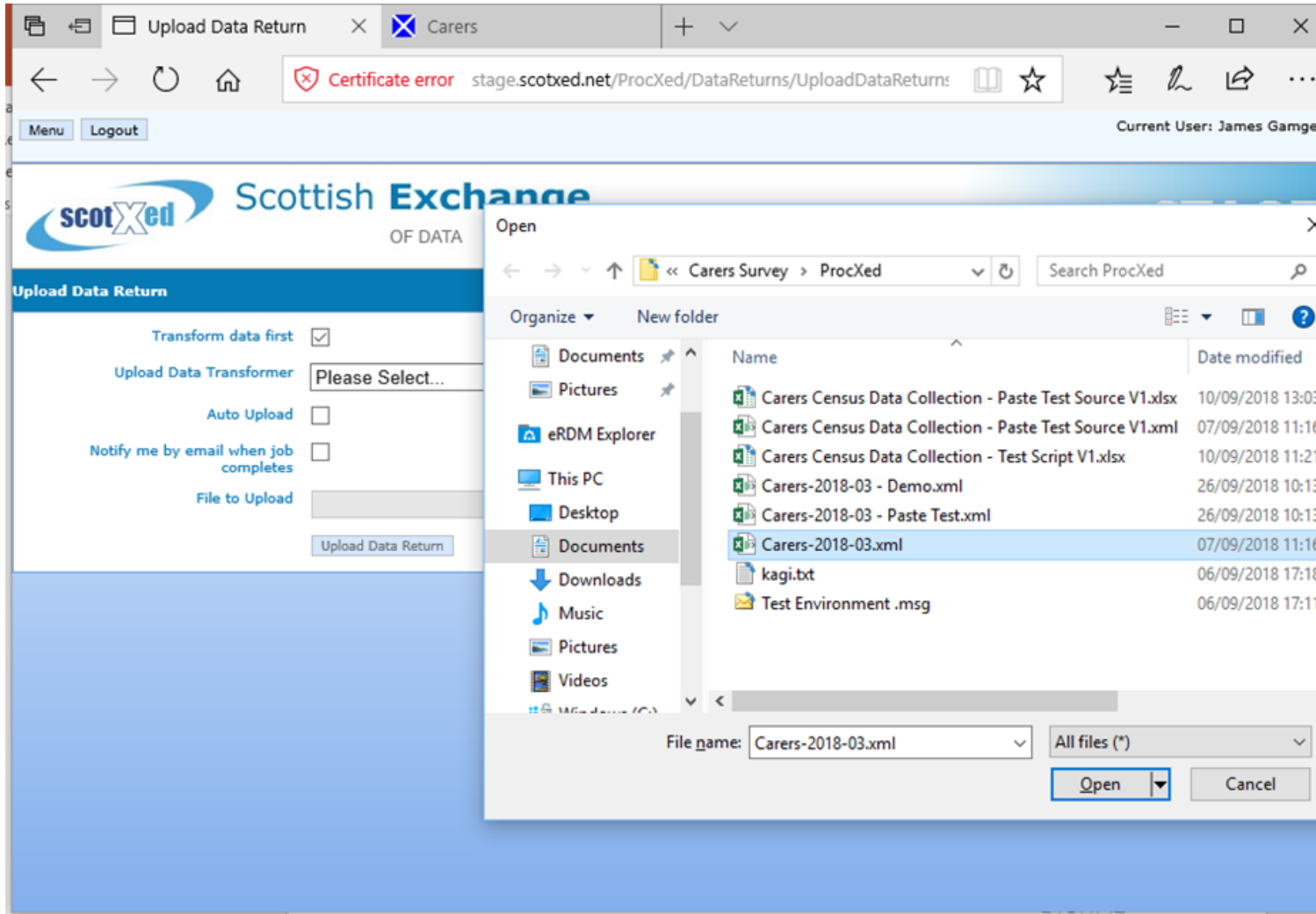
Notify me by email when job completes

File to Upload Browse...

Upload Data Return

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 'Upload Data Return' page on the Scottish Exchange OF DATA portal. The browser address bar shows a 'Certificate error' and the URL 'stage.scotxed.net/ProcXed/DataReturns/UploadDataReturn:'. The current user is identified as 'James Gamgee'. The page features a 'Menu' and 'Logout' button. The main content area includes a 'Transform data first' checkbox (checked), an 'Upload Data Transformer' dropdown menu (set to 'Please Select...'), an 'Auto Upload' checkbox (unchecked), and a 'Notify me by email when job completes' checkbox (unchecked). The 'File to Upload' field is currently empty. An 'Upload Data Return' button is visible at the bottom of the form.

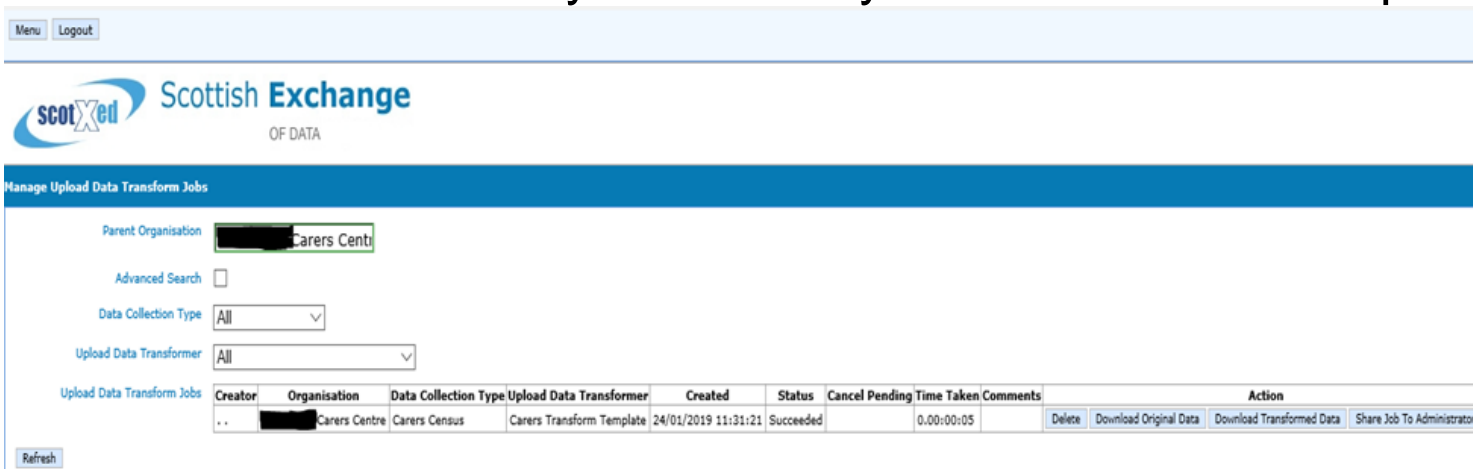
An 'Open' file explorer window is overlaid on the page, showing the 'ProcXed' directory. The file list includes:

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


The 'File name' field in the file explorer is set to 'Carers-2018-03.xml' and the file type is set to 'All files (*)'. The 'Open' button is highlighted.

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 SWStat@gov.scot.



Menu Logout

 Scottish Exchange
OF DATA

Manage Upload Data Transform Jobs

Parent Organisation

Advanced Search

Data Collection Type

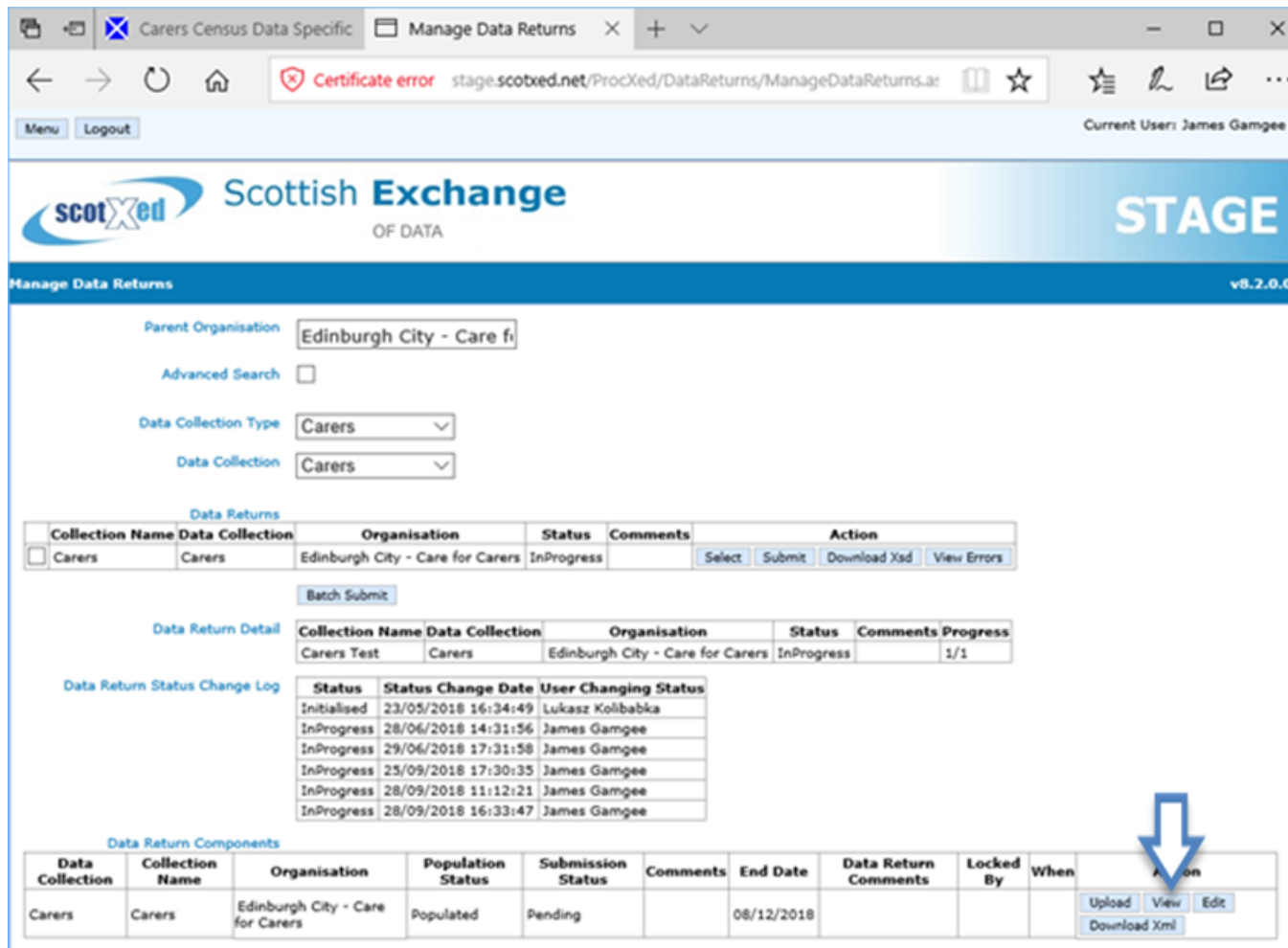
Upload Data Transformer

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

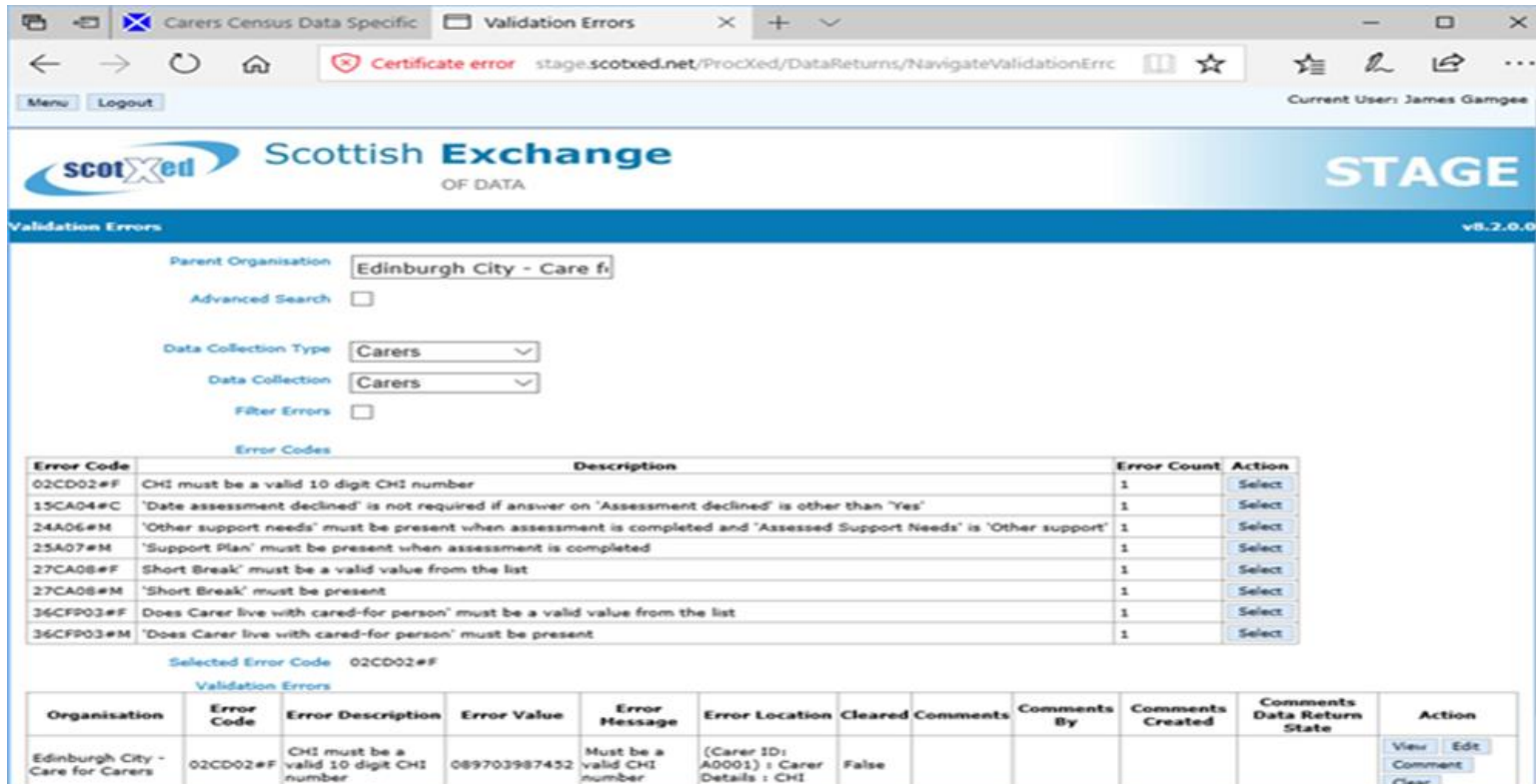
Status	Status Change Date	User Changing Status
Initialised	23/05/2018 16:34:49	Lukasz Kolibabka
InProgress	28/06/2018 14:31:56	James Gamgee
InProgress	29/06/2018 17:31:58	James Gamgee
InProgress	25/09/2018 17:30:35	James Gamgee
InProgress	28/09/2018 11:12:21	James Gamgee
InProgress	28/09/2018 16:33:47	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 using “Comment” and then “Clear” the error.



Validation Errors

Parent Organisation:

Advanced Search:

Data Collection Type:

Data Collection:

Filter Errors:

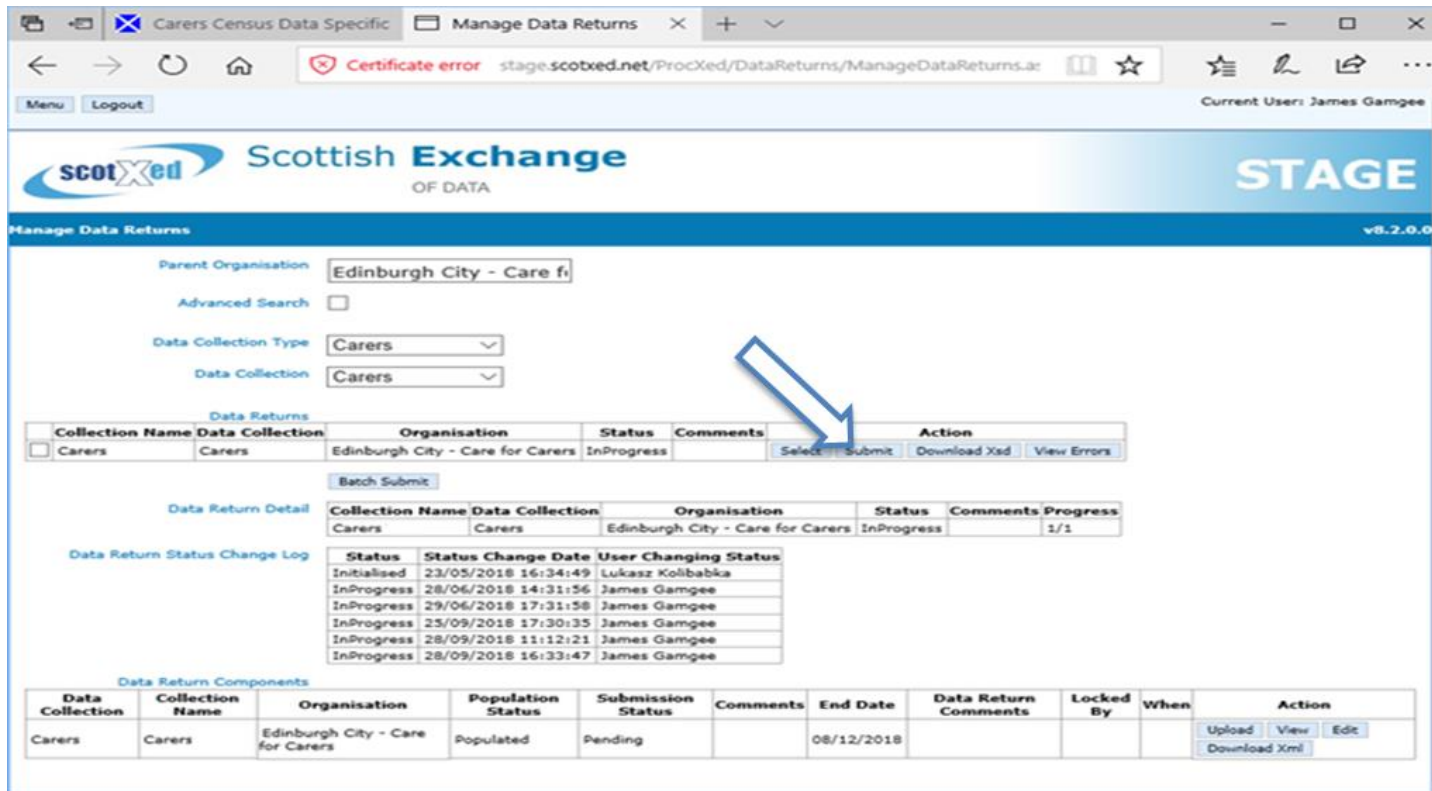
Error Code	Description	Error Count	Action
02CD02#F	CHI must be a valid 10 digit CHI number	1	Select
13CA04#C	'Date assessment declined' is not required if answer on 'Assessment declined' is other than 'Yes'	1	Select
24A06#M	'Other support needs' must be present when assessment is completed and 'Assessed 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
36CFP03#F	Does Carer live with cared-for person' must be a valid value from the list	1	Select
36CFP03#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".



Current User: James Gamgee

Parent Organisation:

Advanced Search:

Data Collection Type:

Data Collection:

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

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
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InProgress	28/09/2018 16:33:47	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				Upload View Edit Download Xml

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