# Inpatient Census 2017 Online Web Platform Guide: Part 1 – Mental Health Bed Census

All supporting materials can be found on the Scottish Government Mental Health Web Page. A reminder that there are three collections. This guide covers part 1 – The mental Health Bed Census. All three collections follow the same timescales:

- Census point – midnight (end of) Thursday 30 March 2017
- Submission Deadline – Wednesday 31 May 2017

You need to log into the web Platform to enter or upload data. Please enter your username and password which has already been provided to you.

Log in - https://procxed.scotxed.net/health/  (shown below)



Upon Successful Log in, you will be presented with a table similar to the one shown below. The collection has been set up with two levels, 'Health Board' and 'Hospital'. If you have been set up at Health Board Level, you will see all relevant hospitals within your health board area, as well as the other parts of the Inpatient Census collection. If you have been set up at hospital level, you will only see your specific hospital.

| | Collection Name | Organisation | Status | End Date | Locked By | Action | |
|---|---|---|---|---|---|---|---|
| Data Return Components | HospitalBasedComplexClinicalCareAndLongStay2017 | NHS Ayrshire & Arran | Initialised | 2017-05-31 | | Edit | Overview |
| | MHLD Inpatient Main 2017 | Ailsa Hospital | Initialised | 2017-05-31 | | Edit | Overview |
| | MHLD Inpatient Main 2017 | Arrol Park Resource Centre | Initialised | 2017-05-31 | | Edit | Overview |
| | MHLD Inpatient Main 2017 | Ayrshire Central Hospital | Initialised | 2017-05-31 | | Edit | Overview |
| | MHLD Inpatient Main 2017 | Crosshouse Hospital | Initialised | 2017-05-31 | | Edit | Overview |
| | MHLD Inpatient Main 2017 | East Ayrshire Community Hospital | Initialised | 2017-05-31 | | Edit | Overview |
| | MHLD Inpatient Main 2017 | NHS Ayrshire & Arran | Initialised | 2017-05-31 | | Edit | Overview |
| | Patients Outwith NHS provision 2017 | NHS Ayrshire & Arran | Initialised | 2017-05-31 | | Edit | Overview |

By clicking on "Overview" you will see the following tables displayed. This allows you to upload data (see below)



If you are logging in as a 'Health Board' you can click on the 'select' button under data returns to bring up all of the hospitals in your area. If you are logged in as a 'Hospital' clicking this will have no effect.

**There two ways to enter data into the form**, by *Data Upload* and *Manual Data Entry*. Both are explained below.

**Data Upload**

You will be able to upload a file for data that you have prepared in advance (either via an xml file- created using data Specification- or by using the template provided, which is in format 'xml spread sheet 2003').

- XML File Only – There is no need to click on the "Transform data first". Instead, just click on "Browse" and go to the destination of the file on your drive. Then click on "Upload data return".



- Template Upload – When using the template to upload your data in bulk follow the steps as circled below ticking the three boxes and selecting the appropriate transformer from the drop down (should only be one offered for each of the collections).



**Please Note:** If inputting data by template upload, a separate upload is required for each hospital.

**Manual Data Entry** Using Form – ("Edit" mode.)

You may decide to enter data in manually directly in to the form. To do this you need to ensure that you are in "edit" mode.  By clicking on "edit" as shown below – you will be presented automatically with the data entry form.



Please ensure that you refer to the Guidance document available on the Mental Health Web Page, this will help you to clarify the data to be entered. There will be a combination of manual entry, data selectors and drop lists to use.

- Adding multiple entries. There are a number of fields where it is possible to add more than one answer for the question. For example, Location, ward, patient, diagnosis codes. To do this click on "add after" which will provide you with another entry for selection. It is the same process throughout the two forms.
- Removing entries. It is possible to remove multiple entries. A good example would be that you uploaded 20 patients as part of a bulk upload but then realised that a patient was discharged before midnight on the 29th October. Click on "remove" and you will be asked to confirm this action – click on "remove" for a second time for that entry to be removed.



**Creating data by Hospital and Ward**

Each Hospital should comprise of one record for that hospital. Each Hospital can contain records for multiple wards.

Selecting Location: When the record for the hospital is first selected, the location of that hospital must be selected. To do this, click on the first drop down box within the Hospitals record:



This will bring up a list of all NHS Hospitals in Scotland. Select the one that matches the return you are completing:

Only select **one location per Hospital** return. Using the 'Add Before' or 'Add After' options to create multiple locations will cause problems with the data.

**Adding Ward data**

If there is no ward data present in the return then you can type the data for your ward directly into the ward section, as below. If there is ward data already present, and you wish to add details of patients **in the same ward**, then you can use the 'Add Before' or 'Add After buttons in the 'Patient Details' as shown below:



If you wish to add data for a **different ward,** and there is no data present for that word then you will have to add a new ward. To do this, use the 'Add Before' or 'Add After' buttons in the Ward section:



A new ward will now be created. The ward details can now be completed. This can be repeated for each new ward:

To navigate between different wards at the same hospital, use the drop down option by clicking in the first box of the Ward section:



**Notes on Multiple Users**

Each Hospital may have multiple users, each completing data for their own ward. If this is the case there are several things to bear in mind:

- Only the first person accessing the hospital record and creating data will need to select the 'Location'. Subsequent users will only need to select or create 'Wards'.
- only one person can be in 'Edit' at any one time, so make sure a colleague from another ward is not trying to enter data at the same time, or the person who went in second will lose all of their data.
- Remember to save the form regularly when you are updating information, but **do not** click 'save and submit for review' (see section on **submitting data** below) until you are confident that everybody else from every other ward in your Hospital has finished inputting their information.

**Data Quality Checking prior to submission**

Validation errors – You can check the quality of the data in two ways:

Validation screen – Navigate Menu / Data Returns / Validation Errors, select the data collection using the dropdowns and then any errors will be displayed as shown below.



To address any listed - click on "Select" (as shown above) which will then provide a table of validation errors. You can then click on "Edit" which will take you straight to the error with a red box around the field. With you being in "Edit" mode, you can now update the field and then click on Save. You will need to do this for each error.



Tip: If you are a Heath Board, you can filter your errors by individual hospital. To do this, tick the "Advanced Search" and begin typing the name of the hospital (e.g. Ail…) in the 'Organisation' box, as follows:

The system will bring up a suggestion based on what you are typing, as above. Click on this to filter errors by the desired location.

**Managing bulk errors**

It is recommended that you go back to your source data to enter/amend the data. For example, make corrections within the template and then repeat the process for uploading data. Remember that each data upload will overwrite all the previous data, but you can upload as many times as you wish.

The second way to quality assure your data is to run the summary level reports built within the system. There are approximately 10 such tables for the bed census and just one for the patients outwith collection. It is recommended that you run these reports in order to check the overall number of patients that you are reported on within the system before you submit.

Reports – navigate Menu / Reports / View Reports.  Use the drop downs to select the report you wish to run.



These reports  can be exported to help you share this information locally. Click on the icon as circled below and select the format you wish.

**Part 1: Summary reports for the 'Mental Health and Learning Disability Bed Census'**

Table 1: All Patients in health board of treatment: age group by gender
between 1 April 2016 - 31 March 2017

| Health Board in Treatment | Gender | Age Group Unknown | Total |
|---|---|---|---|
| NHS Ayrshire & Arran | Not Known | 3 | 3 |
| | Total Patients | 3 | 3 |
| Not Known | Not Known | 2 | 2 |
| | Total Patients | 2 | 2 |
| Health Board Total | | 5 | 5 |

**Submitting Data** – If you are entering data at 'Hospital' level, when you are satisfied that you have entered all of your data and addressed any validation errors, you will have the option to 'Submit for Review'. This lets your health board know that you have finished submitting your data and gives them the chance to review the data before final submission to the Scottish Government. Once your data is 'submitted for review' you will be unable to perform any further edits (as will other users assigned to your hospital), unless it is released back to you.

Now that you have checked the quality of your data and you are satisfied and ready to submit, you can either click on the top toolbar next to save (when you are in edit mode) – there is a button named "save and submit for review". Alternatively, if you click on Menu, Data Returns, Manage Data returns – you should get a screen as shown below. You may need to click on "unlock" first to have the 'submit for review' button made available to you for selection.

Locked – Select Unlock

**Manage Data Returns**

| Parent Organisation | NHS Ayrshire & Arran |
| Advanced Search | ☐ |
| Data Collection Type | Mental Health 2017 ▼ |
| Data Collection | MHBC 2017 ▼ |

Data Returns

| Collection Name | Data Collection | Organisation | Status | Comments | Action |
|---|---|---|---|---|---|
| MHBC 2017 | Mental Health 2017 | NHS Ayrshire & Arran | InProgress | | Select  Download Xsd  View Errors |

Data Return Detail

| Collection Name | Data Collection | Organisation | Status | Comments | Progress |
|---|---|---|---|---|---|
| MHBC 2017 | Mental Health 2017 | NHS Ayrshire & Arran | InProgress | | 4/5 |

Data Return Status Change Log

| Status | Status Change Date | User Changing Status |
|---|---|---|
| Initialised | 10/03/2017 09:26:03 | Stewart McIntosh |
| InProgress | 03/04/2017 18:14:36 | Colin Gallacher |

Data Return Components

| | Data Collection | Collection Name | Organisation | Population Status | Submission Status | Comments | End Date | Data Return Comments | Locked By | When | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | Mental Health 2017 | MHBC 2017 | Ailsa Hospital | Populated | Rejected | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | Arrol Park Resource Centre | Populated | Rejected | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | Ayrshire Central Hospital | Populated | SubmittedForReview | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Approve  Reject |
| ☐ | Mental Health 2017 | MHBC 2017 | Crosshouse Hospital | Populated | Pending | | 31/03/2017 | | Colin Gallacher | 04/04/2017 15:46 | Upload  View  Edit  Download Xml  Unlock  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | East Ayrshire Community Hospital | Initialised | Pending | | 31/03/2017 | | | | Upload  Edit |

Batch Submit for Review    Batch Approve    Batch Reject

Unlock button

/ Submit for Review Button

Submit for Review Button:

**Manage Data Returns** v8.2

Parent Organisation: NHS Ayrshire & Arran
Advanced Search: ☐

Data Collection Type: Mental Health 2017
Data Collection: MHBC 2017

Data Returns

| Collection Name | Data Collection | Organisation | Status | Comments | Action |
|---|---|---|---|---|---|
| MHBC 2017 | Mental Health 2017 | NHS Ayrshire & Arran | InProgress | | Select  Download Xsd  View Errors |

Data Return Detail

| Collection Name | Data Collection | Organisation | Status | Comments | Progress |
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An example of the Submit For Review button

Data Return Components

| | Data Collection | Collection Name | Organisation | Population Status | Submission Status | Comments | End Date | Data Return Comments | Locked By | When | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | Mental Health 2017 | MHBC 2017 | Ailsa Hospital | Populated | Rejected | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | Arrol Park Resource Centre | Populated | Rejected | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | Ayrshire Central Hospital | Populated | SubmittedForReview | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Approve  Reject |
| ☐ | Mental Health 2017 | MHBC 2017 | Crosshouse Hospital | Populated | Pending | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | East Ayrshire Community Hospital | Initialised | Pending | | 31/03/2017 | | | | Upload  Edit |

Batch Submit for Review    Batch Approve    Batch Reject

## Submitting the Entire Return (Health Board Level)

For a Health Board to submit the Mental Health Bed Census Return, all of the individual data return components (Hospitals) **must** first have been submitted. Also any components that are 'locked' **must** be 'unlocked' as detailed above.

If you are unsatisfied with any of the returns that have been submitted then you have the option to 'reject' them back to the user. To do this, select the 'data component' (Hospital) you wish to return and press 'reject' as below. You will then be prompted to complete a dialogue box stating your reasons for rejecting the return. It is important to complete this box as this will be emailed to the user who submitted the return as the reason for the rejection.

Parent Organisation: NHS Ayrshire & Arran
Advanced Search: ☐

Data Collection Type: Mental Health 2017
Data Collection: MHBC 2017

Data Returns

| Collection Name | Data Collection | Organisation | Status | Comments | Action |
|---|---|---|---|---|---|
| MHBC 2017 | Mental Health 2017 | NHS Ayrshire & Arran | InProgress | | Select  Download Xsd  View Errors |

Data Return Detail

| Collection Name | Data Collection | Organisation | Status | Comments | Progress |
|---|---|---|---|---|---|
| MHBC 2017 | Mental Health 2017 | NHS Ayrshire & Arran | InProgress | | 4/5 |

Data Return Status Change Log

| Status | Status Change Date | User Changing Status |
|---|---|---|
| Initialised | 10/03/2017 09:26:03 | Stewart McIntosh |
| InProgress | 03/04/2017 18:14:36 | Colin Gallacher |

Data Return Components

| | Data Collection | Collection Name | Organisation | Population Status | Submission Status | Comments | End Date | Data Return Comments | Locked By | When | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | Mental Health 2017 | MHBC 2017 | Ailsa Hospital | Populated | Rejected | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | Arrol Park Resource Centre | Populated | Rejected | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | Ayrshire Central Hospital | Populated | SubmittedForReview | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Approve  Reject |
| ☐ | Mental Health 2017 | MHBC 2017 | Crosshouse Hospital | Populated | Pending | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Submit For Review |
| ☐ | Mental Health 2017 | MHBC 2017 | East Ayrshire Community Hospital | Initialised | Pending | | 31/03/2017 | | | | Upload  Edit |

Batch Submit for Review    Batch Approve    Batch Reject

Example of Reject button

Once all of the returns have been submitted, the submit button will become available. Click on this to submit your return to the Scottish Government

**Manage Data Returns**

Parent Organisation: NHS Ayrshire & Arran
Advanced Search: ☐

Data Collection Type: Mental Health 2017
Data Collection: MHBC 2017

Once all hospitals' returns are SubmittedForReview and Approved, this Submit button becomes available, if content please then use the button to Submit the whole return to Scottish Government. You need to click it twice, second time to confirm.

Data Returns

| Collection Name | Data Collection | Organisation | Status | Comments | Action |
|---|---|---|---|---|---|
| MHBC 2017 | Mental Health 2017 | NHS Ayrshire & Arran | InProgress | | Select  Submit  Download Xsd  View Errors |

Batch Submit

Data Return Detail

| Collection Name | Data Collection | Organisation | Status | Comments | Progress |
|---|---|---|---|---|---|
| MHBC 2017 | Mental Health 2017 | NHS Ayrshire & Arran | InProgress | | 5/5 |

Data Return Status Change Log

| Status | Status Change Date | User Changing Status |
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Data Return Components

| | Data Collection | Collection Name | Organisation | Population Status | Submission Status | Comments | End Date | Data Return Comments | Locked By | When | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | Mental Health 2017 | MHBC 2017 | Ailsa Hospital | Populated | Approved | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Un Approve |
| ☐ | Mental Health 2017 | MHBC 2017 | Arrol Park Resource Centre | Populated | Approved | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Un Approve |
| ☐ | Mental Health 2017 | MHBC 2017 | Ayrshire Central Hospital | Populated | Approved | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Un Approve |
| ☐ | Mental Health 2017 | MHBC 2017 | Crosshouse Hospital | Populated | Approved | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Un Approve |
| ☐ | Mental Health 2017 | MHBC 2017 | East Ayrshire Community Hospital | Populated | Approved | | 31/03/2017 | | | | Upload  View  Edit  Download Xml  Un Approve |

Batch Un Approve

**SUPPORT**

Please do not hesitate to get in touch with us should you encounter any difficulties:

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