# Online Sample Checking Platform - User Guide and FAQs

Example images provided within this guide reflect a variety of surveys that use this platform. The steps are consistent across each survey, so the images will likely be representative of your specific survey.

Login

You can log in to the Online Sample Checker at https://samplechecker.picker.org/. Your login details will be in the email you received from Picker.

Welcome page
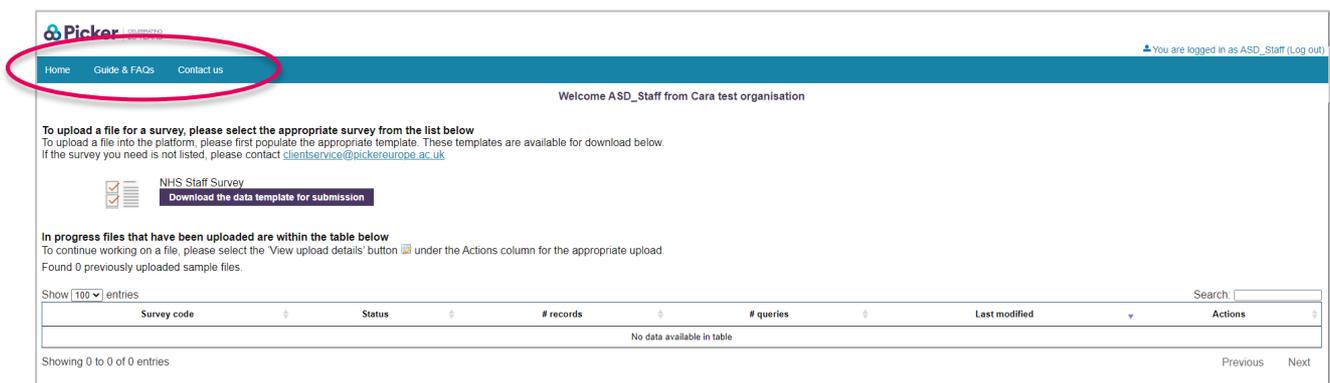
The control menu is the blue bar at the top of the page:

- Home: Returns you to this page
- Guide & FAQs: Opens an online version of this document
- Contact us: Sends a pre-populated email to clientservice@pickereurope.ac.uk using your default email application.
  - *Please note:* This email address will adjust after an individual survey has been accessed. For example, once the National Cancer Patient Experience Survey is accessed the email address will change to: cpes@pickereurope.ac.uk. If the National Neonatal Care Experience Survey is selected, the email will change to neonatal.survey@pickereurope.ac.uk , and so on.

Uploading a file

A copy of the **submission template** will have been sent to your organisation already. You can also click **'Download the data template for submission'** for a copy.

All files must be uploaded using this template without password protection: all other formats will be rejected by the platform.

Once your sample is ready for submission and on the **submission template**, it can be uploaded by clicking on the icon or survey name itself:

This opens the upload page. Click 'Choose file' and select your file. Please also note the advice given on this page:

Once a file has been uploaded, the home page will update with information about sample status and progress.

The upload table on the home page will provide a summary of your file's status:

- **Survey code:** Will be for the survey file you have uploaded e.g. NSS20 or UEC20
- **Status:** Indicates the next step for your file – in the above example, queries from the uploaded file need to be resolved before it can be submitted to Picker
- **# records:** The number of records in the uploaded file
- **# queries:** The number of each type of query *(see Query Summary below)* and how many remain open
- **Last modified:** The date and time the upload was last modified
- **Actions:** Clicking the notebook icon will take you to the Query resolution page

Query resolution page

Once your file has been uploaded, you will automatically be direct to the query resolution page. You can also access this by clicking the notebook icon under actions in the sample status table on the homepage.

This page provides an overall summary of the status of the file, as well as options to upload a revised file, or download a copy of the most recently uploaded file. It also includes summary information on how to resolve the three query types.

The option will only be present for surveys which require this validation type.

Below this summary information is the table that includes the outcome of the verification run on the uploaded file.

Status	Type	Data field	# Issues	Explanation	Details
Trust	Error	Organisation Name - Organisation code doesn't match expected code ASD	3975		⚙
Trust	Error	Ethnicity - Invalid value(s) found. Valid values are single letters.	2		⚙
Trust	Error	Maternity - Invalid value(s) found. Valid values are 0 or 1.	3975		⚙
Trust	Check	Ethnicity - Information only - Extended ethnicity code(s) / description(s) found. Automatically adjusted to first letter ethnicity code(s).	3920		⚙
Trust	Check	Job Title - Please confirm that these staff have a substantive role and are on the organisation's payroll.	3		⚙
Trust	Check	Job Title - Please confirm that these staff either were a Student Nurse and on the organisation's payroll as of the 1st September OR are NOT a student Nurse AND have a substantive role and are on the organisation's payroll.	1		⚙
Trust	Error	Post room - Record(s) with an 'Paper' 'Survey Mode', but do not have a post room listed. Paper surveys can only be delivered when post rooms are provided (home address should have this populated with 'Z/DEFAULT HOME').	122		⚙
Trust	Check	Maternity - No values of 1 found. Please confirm that there are no staff currently on parental leave.	1		⚙
Trust	Check	Locality - Locality 1: (Blank) - 2 has fewer than 11 records. Please revise in line with your organisation's reporting needs, or these will be automatically grouped together as an 'Other' locality group. Please confirm if you wish to proceed.	1		⚙

You can use the grey arrows ⬍ to sort any columns in ascending or descending order.

Show: Use this to toggle the number of entries that are displayed on screen

Search: Use this to search for a particular query or category e.g. Job Title, Student

Status: This indicates where the query is in the checking process.

- Trust – indicates that your organisation needs to give resolve or provide a response to this query
- Closed – indicates that this query is accepted and/or the query is for information purposes only and requires no response
- Picker – indicates that Picker has provided a response

Type: There are four types of query the checker will find:

- Error – These need to be corrected through a revised file being uploaded
- Check – These may or may not be an error. Can either be resolved through a revised file being uploaded OR an explanation being provided through the ⚙ icon in the **Details** column.
- Historic – A comparison with your data from previous years, which may or may not indicate an error. Can either be resolved through a revised file being uploaded OR an explanation being provided through the ⚙ icon in the **Details** column
- Notice – For your information only and does not need comment

Data field: A short explanation of the query and how it may be resolved.

- The platform uses exception reporting and will only display queries where a potential issue has been located. It will not list all possible queries.

 # Issues: This lists the number of records that the query applies to.

Explanation: This is where you can write your response to the query.

Details: Click this icon ⚙ to see more detail about the query – for example, which records or cells are affected by the issue raised.

Completing query verification

As noted above, queries can be resolved in two different ways, depending on the query type:

- Error – These need to be corrected through a revised file being uploaded
- Check or Historic – These may or may not be an error. Can either be resolved through a revised file being uploaded OR an explanation being provided through the ⚙ icon in the **Details** column

In addition to the detail provided in the Data field column, additional details on which values have triggered the query can be found either by:

- Hovering your cursor over the query itself
    - This is most useful when a query affects a small number of records
- Clicking the ⚙ icon in the **Details** column

Check	Job Title - Please confirm that these staff are NOT a non-executive director AND have a substantive role and are on the organisation's payroll.	1	⚙
Check	Job Title - Please _Value: Chairman_ ese staff have a substantive role and are on the organisation's payroll.	34	⚙

The detailed popup for each query contains both the value(s) that have triggered the query as well as the cell reference for where this value can be located in the most recently uploaded file:

- The first part of the value is the Excel cell reference i.e. O3171 is Column O, Row 3171
- The second part of the value prefixed by 'RN:' is the record number for the affected record
    - This is typically a PRN, URN or Staff ID, depending on the submission template

This information is to allow for the quick identification or where query triggers are occurring and their resolution.

Queries for Check on Job Title ✕

Explanation
[Can confirm they are eligibl] ✓ Update ✓ Update and next

Show 25 ⌄ entries   Search: [   ]

Additional detail	Value	Cell
	Student Technician	O3171 RN: ▮▮▮▮
	Student Technician	O4317 RN: ▮▮▮▮
	Student Technician	O4318 RN: ▮▮▮▮
	Student Technician	O5650 RN: ▮▮▮▮
	Student Technician	O7252 RN: ▮▮▮▮
	Student Technician	O7253 RN: ▮▮▮▮
	Student Technician	O7254 RN: ▮▮▮▮

Showing 1 to 7 of 7 entries   Previous 1 Next

se and on the organisation's payroll as of the 1st September OR are NOT a student Nurse AND have a substantive role and are on the organisa

Downloading detailed historic comparison tables

This option will only be present for surveys which require this validation type.

To support the resolution of any detailed historic queries, a CSV export of the comparison tables can be downloaded. This provides a multi-year comparison of your current file's data versus previous year's data and includes a flag where the variation threshold for query has been crossed (typically 5%).

In this example for Time of Attendance, there are no differences over the threshold of 5%:

Time of Attendance for DEPARTMENT TYPE 1							
	2016	2018	2020	Difference	+/-5% to 2	Difference	+/-5% to 2018?
00:00 - 05:59	12.80%	16.60%	16.60%	3.80%		0.00%	
06:00 - 11:59	24.40%	26.20%	26.20%	1.80%		0.00%	
12:00 - 17:59	34.10%	29.30%	29.30%	-4.80%		0.00%	
18:00 - 23:59	28.70%	27.90%	27.90%	-0.80%		0.00%	

However in this example for Time of Attendance, there are differences over the threshold of 5%.

Time of Attendance for DEPARTMENT TYPE 3							
	2016	2018	2020	Difference	+/-5% to 2	Difference	+/-5% to 2018?
00:00 - 05:59	0.50%	7.70%	1.70%	1.20%		-6.10%	YES
06:00 - 11:59	35.30%	36.00%	35.10%	-0.20%		-0.80%	
12:00 - 17:59	42.20%	32.00%	38.90%	-3.20%		6.90%	YES
18:00 - 23:59	22.10%	24.30%	24.30%	2.20%		0.00%	
CHECK: differences of more than 5% found compared with 2018							

Where a particular validation is run on different sub sections of the file, such as for different department types or ages groups, the same query for each sub section will be shown in turn. The example above shows the same query, but for two different department types.

Resolving detailed historic queries:

In order to satisfy queries from the Coordination Centre, explanations for historic differences are required. Depending on the query type, these could take many forms:

- Improvements in the recording of patient ethnicity
- Changes in the way a PAS records information
- Opening, closing or movement of particular services

However, both Picker and the Coordination Centre recognise that obtaining the causal reason behind a historic change is not always possible. As such, where *reasonable effort* has been made to locate the cause behind a change; a confirmation that **the file has been drawn in line with the guidance AND that the data within the provided file reflects the data within the organisation's system** is an acceptable explanation.

Uploading a revised file

To upload a revised file select the Upload button and you will be presented with the same upload file screen displayed originally:

> Any `Error` type queries will need resolving through a revised file being uploaded.
> Any `Check` or `Historic` type queries can either be resolved through a revised file being uploaded OR an explanation being provided through the ⚙ icon in the **Details** column.
> Once all queries are resolved, the submission to Picker option will become available.

⊠ Upload To upload a revised file

▌ Download To download a copy of the latest file that has been uploaded

Providing an explanation for a query

To provide an explanation for a Check or Historic query type, clicking on the ⚙ icon in the **Details** column will provide a text box for the entry of an explanation. Once an explanation has been entered:

- The **Update** button will save the explanation and close the detailed window for that query
- The **Update and next** will save the explanation and progress to the next query that potentially needs an explanation providing

If you have overarching explanations or commentary, this can be entered within the below box.

If you wish to provide Picker with any overarching commentary alongside the submission of your file, please enter this into the box below:

✓ Save explanation updates

Explanation text that has not been saved will show highlighted in <mark>pink</mark> on the query resolution page. The explanations can be saved at any time by clicking **Save explanation updates**.

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Submission of the file to Picker

Once there are no remaining errors on the query resolution page and all outstanding Check or Historic query types have a saved explanation, you can submit your file to Picker by clicking **Submit to Picker for acceptance**.

Please note,

- All explanatory text will be reviewed by Picker upon submission
- Once the submission to Picker has been made, no further revisions to the file can be made until either:
  - Picker has reviewed the upload and has follow up queries
  - Or, a request is made to Picker via:
    - cpes@pickereurope.ac.uk for the National Cancer Patient Experience Survey, or to
    - neonatal.survey@pickereurope.ac.uk for the National Neonatal Care Experience Survey, or to
    - clientservice@pickereurope.ac.uk for all other surveys.

Review of uploaded file by Picker

Once an upload has been submitted to Picker, it will be reviewed along with an explanatory notes included as part of the submission.

Depending on the content of the upload or the explanatory notes provided, Picker will either accept your responses, or seek further clarification. We will be in touch via email where additional clarification is required. Either a revised file upload, or updated explanations will be made available on the platform, as appropriate, at that point.

Once all queries have been resolved and the file has been accepted the Welcome page will display an **Accepted by Picker** status.

The file will then be passed on to the Coordination Centre for final approval ahead of fieldwork launch.

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