

Sharing data with

Healthwatch England

How you can share information with us, quickly and easily as part of your statutory obligations

About this resource

Our purpose is to find out what matters to people when it comes to health and social care and make sure their views shape the support they need. As part of our strategy, we want over one million people to share their views of seek information from the Healthwatch network each year by 2023.

The more feedback we receive, the better we are able to spot trends across the country, on a regional and national level. This helps us have a better understanding of people's experiences of care, building our evidence base and enabling us to have impact on a larger scale.

Local Healthwatch have a legal responsibility to share data with us so that we can achieve our statutory obligations.

This guidance explains how local Healthwatch can quickly and easily share people's experiences with us by using the import function via the Healthwatch England CRM.

Accessing and using the import function

Setting up your account and logging in

- Contact Digital@healthwatch.co.uk who will create your account
- You will need to complete and sign a DPA agreement, to be distributed by the Healthwatch England team.
- You will be given an account to use the Healthwatch England CRM, which gives you a specific role. This 'Import Activities' role enables you to import data only.
- Your username will be confirmed by the digital team at Healthwatch England
- Go to the Healthwatch England CRM <http://england.healthwatchcrm.co.uk> and login.

Formatting your data

We use a taxonomy that has been developed with the Healthwatch network. This puts our data into a set of searchable categories.

To import data into the CRM, your data must match the fields in our CRM. If you are not already using the Healthwatch taxonomy, there may be some formatting you need to do to your data before you upload it.

You can access a template CSV by clicking on the '> [Click here to download a template CSV file](#)' link when you login to the CRM.

CSV File Format

Here is an overview of the expected columns and select options in the spreadsheet (order does not matter). The column labels 'Activity Date', 'Subject', 'Services Involved' and 'Select feedback or information type' (highlighted in colour, with asterisks *) are required. For more information, see our [guidance on importing spreadsheets](#). When ready to import your spreadsheet, please use the 'Begin import' button at the bottom of this page.

SOURCE NAME	ACTIVITY DATE *	SUBJECT *	ACTIVITY DETAILS	NAME OF SERVICE PROVIDER	SERVICES INVOLVED *	SENTIMENT OF THE INFORMATION	IS THIS A SAFEGUARDING ISSUE?	SELECT FEEDBACK OR INFORMATION TYPE *	DID YOU PROVIDE SIGNPOSTING INFORMATION?	WHAT INFORMATION DID YOU PROVIDE?
CiviCRM contact ID or Unique Contact Name	Date format – mm/dd/yyyy hh:mm:ss or dd-mm-yyyy hh:mm:ss	Text	Text	CiviCRM contact ID or Unique Contact Name	Primary Care Baby Clinic Pharmacy Community pharmacy Dentist (non-hospital) Diagnostic and/or screening service – single handed sessional providers GP practice Health Visitor Mobile doctors service Optometry services Out of Hours Secondary Care Acute Care Acute services with overnight beds Acute services without overnight beds / listed acute services with or without overnight beds	Neutral Mixed Unclear Positive Negative	No Yes Not Applicable Not Known	Telephone Email Website Feedback Meeting Outreach Event Social Media Post Research Other Third Party Visit to provider Not known Engagement Event Guidance / Advice	Yes No	Text

There are 11 potential columns that you may need to populate. If you do not have data for each column, then this is ok. However, the more fields you use, the more useful the data becomes.

Four columns are mandatory, these must be completed before you're able to import data. These are:

- Activity date
- Subject
- Services involved
- Select feedback or Information type

Through our testing we found that most Healthwatch collect data that fits into these columns, but the headings used may be slightly different.

Once you think your spreadsheet is formatted correctly save it as a csv file.

Importing your data

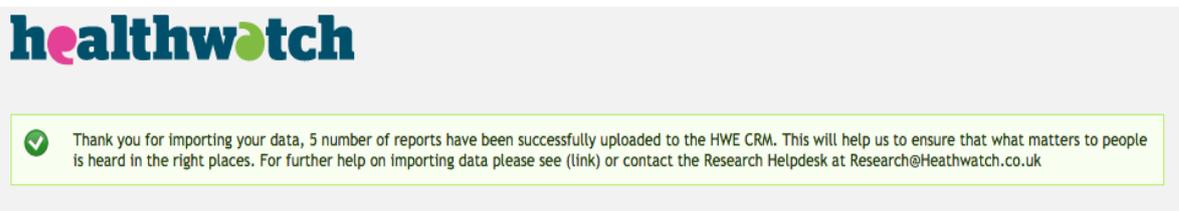
- When you are logged in to the Healthwatch England CRM, click on the 'Import Data' link in the left-column menu



- Follow the link to 'Import spreadsheet' and check the overview of column headings needed to import data (<https://england.healthwatchcrm.co.uk/admin/import-activities>)

- Scroll to the bottom of that webpage and find your formatted .csv file by using the Browse option
- Select the right file
- Click the button 'Begin Import'
(see screenshot below entitled 'Three steps to upload spreadsheet')

Once you have done this, you will see a confirmation box. This will thank you for sharing the data and tell you how many records were successfully shared.

The screenshot shows the Healthwatch logo at the top. Below it is a green-bordered box containing a green checkmark icon and a message: "Thank you for importing your data, 5 number of reports have been successfully uploaded to the HWE CRM. This will help us to ensure that what matters to people is heard in the right places. For further help on importing data please see (link) or contact the Research Helpdesk at Research@Healthwatch.co.uk".

Thank you for importing your data, 5 number of reports have been successfully uploaded to the HWE CRM. This will help us to ensure that what matters to people is heard in the right places. For further help on importing data please see (link) or contact the Research Helpdesk at Research@Healthwatch.co.uk

- Please note that any errors need to be reported to the digital team at Digital@Healthwatch.co.uk

If your data has not successfully uploaded, then it is likely that this is due to formatting with a significant mismatch in column headers.

There will be a link to the Healthwatch taxonomy to assist so that you can help improve data quality, consistency and sharing.

Top tips when using the import function

- Only data that has been inputted into columns with labels that match those within the template provided will be imported.
- If the column headers do not match exactly, the column of data will be ignored.
- Columns can be missing; it is ok to import less data if the Activity Date and Subject are populated as a minimum.
- The data within the columns needs to ideally match the dropdown data within the Healthwatch taxonomy. Where it does not, it will be pushed to the Healthwatch England team to review which we need to limit.
- If you need reminders, review the online guidance page that explains the import process (<https://england.healthwatchcrm.co.uk/guidance-importing-spreadsheets>)