Data Transfer Meeting Worksheet

Overview

Thank you for agreeing to share your data with the U.S. Census Bureau!

We follow a routine process for receiving data and preparing the data for access by the approved individuals. Discussing some details about your files and the delivery methods beforehand allows us to explain how we will handle your data once we receive it and minimize the effort on your part in providing your data to us.

Once your data arrive at the U.S. Census Bureau, we will check record counts and compare your data to the layout you provide us. During these checks, we create SAS datasets from your files, as they are needed in SAS for both our record linkage processing as well as the data warehouse where your data will be securely stored. Only individuals with research projects that fall within the usage agreement may access your data in the data warehouse.

Please ensure that the person responsible for providing your data to the U.S. Census Bureau is available to attend. If this person cannot attend, please let us know so that we can reschedule. If you do not know who will be preparing your data, please invite the person within your organization who has a strong, technical understanding of your database.

Organization Name	
Provider Type	Federal, Commercial, State
Program/Project	
State	
Lower Geography	
Agreement Number	
Agreement Period of Performance	

Date/Time:

Attendees:

Who to Contact

Contact Name	Phone Number	Email Address
Data Provider Point of Contact		
Data Provider Technical Point of Contact		
If you have questions about the data agreement or the data's usage, please contact…		
If you have questions about research reports or table packages using your data, please contact…		
If you have questions about what to send, how to prepare your files, how to send your data, or if you run into problems trying to transfer your data, please contact…		
Dave Sheppard	301-763-2095	erd.all.dqb.list@census.gov

Key Data Elements

At the data transfer meeting, the U.S. Census Bureau and data provider will identify key pieces of information that are needed and discuss the way the data provides the information. This information may also be available in the agreement or one of its attachments. If this information is available to you, please review the agreement for the list of required data elements prior to the meeting and come prepared with questions.

What to Send: Data Format

The U.S. Census Bureau accepts data in several formats. The following data formats are preferred, and each data format is paired with a list of the required documentation. The documentation is essential both for proper data handling as well as for correct interpretation by the end users of the data. Formats are listed in order of preference.

Preference	Data Format	Data Documentation
1	SAS Dataset	Proc Contents using varnum option Data Dictionary, Codebook, and/or any other information required so an analyst can understand the data delivery
2	Non-delimited, fixed length text file	Record count Record length File layout Start and end position of each data field Data Dictionary, Codebook, and/or any other information required so an analyst can understand the data delivery
3	Delimited text file Note: Select a delimiter that is not present inside any data field. If that is not possible, apply quotation marks around each data field.	Record count File layout Maximum length of each data field Data Dictionary, Codebook, and/or any other information required so an analyst can understand the data delivery

Additional Information on the Data Documentation

Documentation Format
When you send information about your data, such as a record layout or data dictionary, we prefer a Microsoft Excel file, Microsoft Word file, or a flat text file. However, we will take whatever you provide.

Code Lists, Data Dictionaries, or Codebooks
If you have any categorical or discrete variables, we need the list of the codes used in the data and their meanings. Often this is found in a data dictionary or a codebook.

Send Documentation Prior to the Data Delivery
If possible, we would like you to email us whatever documentation you have on hand before your first data delivery so that we can get a head-start on processing your data. It will help us to spot problems sooner.

File Information

File Zipping
To the extent possible, we encourage zipping or compressing your files to reduce transmission time and the number of files being sent. If you do this, please let us know what method you used to zip or compress your files.
Number of Files
If you have multiple data tables in your data base, you may merge them into a single file or submit as individual files. If you submit individual files, we will need to discuss the key data elements in each file.
Naming the Files
We can receive many files at the same time, so the name of the files is important for us to identify where the files have come from and what data is stored within each file you send. We will work with you to recommend a common name for your files.   <program>_<state abbreviation>_vintage_modifier.ext   Where vintage is the year(s) representing the data, modifier is a short description of the data (if sending more than one file), and ext is the extension of the file (for example *.sas7bdat, *.txt, *.csv).
What environment will the data be created?
Is it created in Windows, Unix, or Mac?

How to send: Frequency of the Data Delivery

The frequency of data deliveries is typically specified in the agreement or implied to be a single, one-time submission when the agreement does not entail recurring deliveries to the U.S. Census Bureau.

Except for one-time deliveries, the U.S. Census Bureau processes recurring data deliveries annually, waiting until we have received a full year of data. If your records include data collected over time, make sure to either include a time variable or group records into files by time. For example, monthly benefits data may be combined into a single file that includes a variable for month or sent in 12 separate files with file names that indicates the month.

Test Files   If a data provider will be sending multiple files to the U.S. Census, we will request a test file to ensure our systems can read your data without issue. This test file can be production data and if we can read it in correctly it will not need to be resubmitted. If a data provider is only sending one file, a test file is usually not necessary.
Historical Data   If the agreement covers years of data prior to the current year, you can start by sending the historical data. Occasionally we may request the most current year first if there is a time sensitive need for the most current data and the data is ready to be sent.
Future Data Deliveries   Given the frequency of your data and the vintages of data requested in the agreement, when should the U.S. Census Bureau expect to receive files?
Estimate time of first data delivery

How to Send: Transfer Method

Transfer Method   The U.S. Census Bureau has a secure, web-based portal called Managed File Transfer (MFT) where you can upload files. This newly implemented secure file transfer protocol (SFTP) method enhances security and automatically encrypts all data transfers. This is the method we strongly prefer for ease of use and for the security of your data. In rare instances where we are not able to use MFT we do have alternative data transfer methods we can consider and discuss during the data transfer meeting.   After the data transfer meeting we will provide detailed instructions on how to access the MFT user guide, which will give you detailed instruction on everything from setting up your account to submitting your data.