## Bureau of Primary Health Care (BPHC)

## Uniform Data System (UDS) Submissions in the HRSA Electronic Handbooks (EHBs)

## User Guide for Health Center Program Grantees and Look-Alikes

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This user guide is designed to provide quick help for Health Center Program grantees and look-alikes. It covers accessing UDS Reports in the HRSA Electronic Handbooks (EHBs), preparing and submitting UDS Reports, revising and resubmitting UDS Reports, and accessing reports and data related to your UDS Report.

## How to Find Your UDS Reports in the HRSA EHBs (Grantees)

Whether you're preparing your initial filing, resubmitting a previously-filed report, or coming to the HRSA EHBs to find reports based on data collected through UDS, your first step is to navigate to your UDS reports (the current one or any you've submitted through the HRSA EHBs in previous years). There are several ways to do this, but the following steps will work in all cases.

1. Log in to the HRSA EHBs.
2. In the Top Navigation panel (Figure 1), click the Grants tab.

Figure 1: Grants Tab in Top Navigation Panel

3. The My Grant Portfolio - List page opens (Figure 2), displaying your grants in a list. Find the Health Center Cluster grant (grant number begins with "H80") and click Grant Folder.

Figure 2: My Grant Portfolio - List Page

4. The folder for the grant opens to the Grant Home page (Figure 3). In the Grants section of the page, under Submissions, click Performance Report.

Figure 3: Grant Home Page

5. The Submissions - All page opens (Figure 4), displaying all performance reports related to the grant.

Figure 4: Submissions - All Page

6. To display only UDS reports, you can enter search parameters under Search Filters at the top of the page. For example, you can enter "UDS" in the Submission Name Like field, and then click Search. The list will display only UDS reports (Figure 5).

Figure 5: Submissions - All Page Showing Only UDS Reports


If you've come here to find your current UDS Report, note that it'll be the one with "Start" or "Edit" in the Options column (last column on the right). The remaining listings (the ones with "Performance Report" in the Options column) are reports you submitted in previous reporting periods.

## How to Find Your UDS Reports in the HRSA EHBs (Look-Alikes)

Whether you're preparing your initial filing, resubmitting a previously-filed report, or coming to the HRSA EHBs to find reports based on data collected through UDS, your first step is to navigate to your UDS reports (the current one or any you've submitted in previous years). There are several ways to do this, but the following steps will work in all cases.

1. Log in to the HRSA EHBs.
2. In the Top Navigation panel (Figure 6), click the FQHC-LALs tab.

Figure 6: FQHC-LALs Tab in Top Navigation Panel

3. The My FQHC-LAL Portfolio - List page opens (Figure 7), displaying information related to any active LAL portfolios. To access the Look-Alike Home page, click the Look-Alike Folder link in the Options column.

Figure 7: My FQHC-LAL Portfolio List Page

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| * | Tasks | Organization |  | Grants | Free Cinics | FOHC-LALS | Dastbeards | Resources |  |  |  |  |  |  | ล |
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4. From the Look-Alike Home page (Figure 8), click the Work on Performance Report link in the Submissions section.

Figure 8: Look-Alike Home Page

5. The Submissions - All page opens, displaying all performance reports related to the LAL. To display only UDS reports, you can enter search parameters under Search Filters at the top of the page. For example, you can enter "UDS" in the Submission Name Like field, and then click Search (Figure 9).

Figure 9: Submissions - All Page

6. The list will display only UDS reports (Figure 10).

Figure 10: Submission - All Page Showing Only UDS Reports


## Preparing and Submitting a UDS Report (Grantees and Look-Alikes)

Preparing and submitting your UDS is a matter of entering the data, running the required audit checks, and then submitting your report. On-line resources are available if you require assistance with completing your submission.

1. Users new to the EHBs or UDS should view the Web-Based Uniform Data System (UDS) Overview presentation at https://bphc.hrsa.gov/data-reporting/uds-training-and-technical-assistance.
2. For help with completing and submitting your report, see Completing, Submitting, and Accessing Your Report - Overview for Health Center Awardees and Look-Alikes, an article in the Electronic Handbooks Help and Knowledge Base.
3. If you still have questions, see the UDS-related Frequently Asked Questions (FAQ).

Since this material is readily available and quite comprehensive, we won't reproduce any of its content here.

## Revising and Resubmitting a UDS Report (Grantees and Look-Alikes)

If your reviewer returns your UDS Report to you with a request for corrections or changes, you'll receive notification, usually by email. The email may contain the date the report is due back. It will contain a list of issues which will require action from you. Take the following steps:

1. Open Your UDS Report. Follow the steps given under "How to Find Your UDS Reports" above to find your UDS reports. Click Edit to open the report for changes.
2. Review the Reviewer's Comments. The comments may be included in an email sent to you or using the EHBs system through the "Change Request Email" link (accessed from the Status Overview page). The reviewer will let you know what items need revision.
3. Run the Data Audit Report. Run the data audit report to get the most recent list of edits since some edits may have been reprogrammed or added since submission or need to be corrected as indicated by the reviewer. For help with running the Data Audit Report, see Executing the Data Audit Report and Clearing an Edit.
4. Address the Reviewer's Findings. Carefully review each problem identified by the reviewer. Correct the data or provide an explanation. Changes you make to the data entered into one table may make it necessary to change data entered into another.
5. Run the Data Audit Report Again. Validation rules apply as they did when you first prepared the report. You must run the Data Audit report to check for errors or exceptions. Just as when you first submitted your UDS, it must be free of errors, and exceptions must be explained.
6. Resubmit the Report, as detailed in the following paragraphs.

Once you have addressed all the edits (if any) from Data Audit Report, you can click on Continue To Next Page button to open the Review page. (You can also access the Review page by clicking Review on the Left Navigation panel.)

From the Review page, you may review any section of the report. You may also print the report.

When you're ready to proceed with submission, click the Continue To Next Page button at the bottom of the Review page to open the Submit. (You can also access the Submit page by clicking Submit in the Left Navigation panel.)

From the Submit page, you may be able to proceed with submission of the report.

- If your report is not ready to be submitted, you will see a note on top of the Submit page and the Submit button will not be available.
- If your report is ready to be submitted, you will see a Submit button at the bottom right corner of the Submit page.

Follow the directions under HRSA Confidential Data Pre-disclosure Summary and UDS Certification ("I Agree" is not case-sensitive), and then click the Submit Report button.

On submission of the report, you'll receive a confirmation email. The reviewer will be notified by the EHB system when your report has been resubmitted.

## How to Find Reports Based on UDS Data ("Standard UDS Reports") (Grantees)

Each year, HRSA issues a series of reports based on data collected through UDS. The reports are listed and described in this section. You can access them through your UDS report. To do this, follow the steps given under "How to Find Your UDS Reports in the HRSA EHBs" to find your UDS reports. Then:

1. Choose a Reporting Period. For the UDS report submitted for that Reporting Period, click Performance Reports (Figure 11).

Figure 11: Performance Reports Link on Submissions - All Page

2. The page that will open after clicking Performance Reports link on the Submission - All
2.1. For reports submitted before the 2018 reporting period, the page that will open after clicking the Performance Reports link on the Submission - All page will be titled Review (Figure 12). Use the link in the note under the header Reports to open the Report page (Figure 13). Use the View link to open a report.

Figure 12: Review Page


Figure 13: UDS Report Page

| 8 UDS Report |  |  |
| :---: | :---: | :---: |
| - H 80 CS | Due Date: 2/15/2015 11:59 PM |  |
| REPORTS |  |  |
| Report Name | Description | Action |
| UDS Data File in XML | Submitted Raw UDS Data File in XML format. | Download/Email |
| UDS Health Center, State, National Summary Report | The Summary Report is a 'dashboard report intended to describe each health center in a statistical manner. Calculations of key measures are derived from their own organization's current reporting on the UDS. The measures are broken out into two main categories: 1) Demographic and Clinical Data (Patients, Visits, Stafting and Clinical Information) and 2) Fiscal information (Costs and Revenues) and provide an overall picture of the health center's performance in each of these areas. <br> Formula Guide: UDS Summary Report | View |
| UDS National and State Rollups | The Rollup Reports compile annual data reported by Health Center Program (HCP) health centers. Summary HCP data are provided for patient demographics, socioeconomic characteristics, staffing, patient diagnoses and services rendered, quality of care, health outcomes and disparities, financial costs, and revenues. The UDS Standard Rollup Reports provide the values and measures for universal and grant specific data at the National and State level. <br> Formula Guide: UDS Rollup Report | View |

2.2. For UDS Reports submitted in 2018 and later reporting period, the link will open in a separate Review and Report list page. The page lists all the Reports on top of the page and Tables on the second half of the page (Figure 14). Click the View link adjacent to each of the reports to access the reports.

Figure 14: Review and Report List Page

| Review and Report List Page |  |  |
| :---: | :---: | :---: |
| - H80CS $\quad \square$ |  |  |
| Reports |  |  |
| Report Name | Description | Action |
| UDS Data File in XML | Submitted Raw UDS Data File in XML format | Download |
| UDS Data File - Excel Format | Download a copy of your health centers' submitted UDS Performance Report in an excel format including data in all tables and forms. | Download |
| UDS Health Center, State, National Summary Report | The Summary Report is a 'dashboard' report intended to describe each health center in a statistical manner. Calculations of key measures are derived from their own organization's current reporting on the UDS. The measures are broken out into two main categories: 1) Demographic and Clinical Data (Patients, Visits, Staffing and Clinical Information) and 2) Fiscal Information (Costs and Revenues) and provide an overall picture of the health center's performance in each of these areas. <br> Formula Guide: UDS Summary Report | Viow |
| UDS National and State Rollup | The Rollup Reports compile annual data reported by Health Center Program (HCP) health centers. <br>  |  |

## UDS Data file in XML

Provides the submitted raw UDS data file in XML format. The file can be downloaded. This will be available to the Health Center after they have submitted their UDS report at least once to HRSA for review.

## UDS Summary Report

Provides the summary and analysis on the health center's current UDS data using measures across various Tables of the UDS report. Once all the reports for the current reporting cycle have been processed, the final version of this report will be available which will have Health Center, State and National views.

## UDS National and State Rollups

This report compiles annual data reported by Health Center Program (HCP) Health Centers. Summary HCP data are provided for patient demographics, socioeconomic characteristics, staffing, patient diagnoses and services rendered quality of care, health outcomes and disparities, financial costs, and revenues. This will be available after all the reports for the current reporting cycle have been processed.

## UDS Health Center Trend Report

This report compares the health center's performance for key performance measures (in three categories: Access, Quality of Care/Health Outcomes, and Financial Cost/Viability) with national and state averages over a 3 year period. This will be available after all the reports for the current reporting cycle have been processed.

## UDS Health Center Performance Comparison Report

Provides the summary and analysis on the health center's latest UDS data giving details at Health Center, State, National, Urban and Rural level with trend comparisons and percentiles. This will be available after all the reports for the current reporting cycle have been processed.

## How to Find Reports Based on UDS Data ("Standard UDS Reports") (LookAlikes)

Each year, HRSA issues a series of reports based on data collected through UDS. The reports are listed and described in this section. You can access them through your UDS report. To do this, follow the steps given under "How to Find Your UDS Reports in the HRSA EHBs" to find your UDS reports. Then:

1. Choose a Reporting Period. For the UDS report submitted for that Reporting Period, click Performance Reports (Figure 15).

Figure 15: Performance Report Link on Submissions - All Page

| 7 Submissions - All |  |  |  |  |  |  |  |  |  |  |
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|  | Submitted | Submission Name | Submission <br> Type |  |  |  |  |  |  | Options |
| All | - 8 | 7 | Al $* 7$ | All * 7 | 7 | 7 |  | 啢 | All $\quad \mathrm{V}$ |  |
| 4 Submitted On: in more tran 30 Dajs ago (7) |  |  |  |  |  |  |  |  |  |  |
| - 84 Days Ago |  | FOHCLook-Alike Annual UDS Report | Performance Reports |  | LLCS | LalCs | $\begin{aligned} & \text { 01/01/2022 } \\ & 1231 / 2022 \end{aligned}$ | 03/15/2023 | Submitted | Pefformance Reports |
| - 448 D | 448 Days A00 | FOHC Look-Alike Annual UDS Report | Performance Reports |  | LALCS | LALCS | 0101/2021 <br> 1231/2021 | 03/16/2022 | Submitted | Performance Reports * |
| - 807 D | 807 Days Ago | FQHC Look-Alike <br> Annual UDS <br> Report | Peformance Reports | anconane | LalCS | LALCS | 01/01/2020 <br> 12/31/2020 | 03/222021 | Submitted | Performance Reports * |
| * 1193 D | 1193 Days Ago | FOHC Look-Alike Annual UDS Report | Performance Reports |  | LALCS | LALCS | $\begin{aligned} & 01 / 01 / 2019 \\ & 12 / 312019 \end{aligned}$ | 0301/2020 | Submited | Pefformance Reports * |
| , 1533 D | 1533 Dajs Ago | FQHC Look-Alike Annual UDS Report | Pefformance Reports | $\qquad$ | LaLCS | Lalcs | 01/01/2018 <br> 12/31/2018 | 03/2712019 | Submitted | Performance Reports * |
| * 1907 | 1907 Dajs Ago | FQHC Look-Alike <br> Annual UDS <br> Report | Performance Reports |  | Lalcs | LALCS | 01/01/2017 <br> 1231/2017 | 03/18/2018 | Submitted | Performance Reports * |
| * 22610 | 2261 Dajs Ago | FQHC Look-Alike Annual UDS Report | Performance Reports | $\qquad$ | LALCS | LALCS | $\begin{aligned} & 01 / 01 / 2016 \\ & 12 / 31 / 2016 \end{aligned}$ | 03/29/2017 | Submitted | Pefformance Reports * |
| ( 1 | 1 Pa | ge sice: 15 - | Go |  |  |  |  |  |  | 7 tams in 1 page(s) |

2. The page that will open after clicking Performance Reports link on the Submission - All
2.1. For reports submitted prior to 2018 reporting period, page titled Review (Figure 16) will open. Use the Access reports and data related to your UDS submission link to open a report. The UDS Report page will open (Figure 17). Use the View link to open a report.

Figure 16: "Access Reports" Link in UDS Report (Look-Alikes)


Figure 17: UDS Report Page

| 3 UDS Report |  |  |
| :---: | :---: | :---: |
| - Lalcs | E | Due Date: 2/15/2017 11:59 PM |
| REPORTS |  |  |
| Report Name | Description | Action |
| UDS Health Center, State, National Summary Report | The Summary Report is a dashboard report intended to describe each health center in a statistical manner. Calculations of key measures are defived from their own organization's current reporting on the UDS. The measures are broken out into two main categories: 1) Demographic and Clinical Data (Patients, Visits, Staffing and Clinical Information) and 2) Fiscal Information (Costs and Revenues) and provide an overall picture of the health centers performance in each of these areas. <br> Formula Guide: UOS Summary Report | View |
| UDS National and State Rollups | The Rollup Reports compile annual data reported by Health Center Program (HCP) health centers. Summary HCP data are provided for patient demographics, socioeconomic characteristics, stating. patient diagnoses and services rendered, quality of care, health outcomes and disparities, financial costs, and revenues. The UOS Standard Rollup Reports provide the values and measures for universal and grant specific data at the National and State level. <br> Formula Guide: UDS Rollup Report | View |
| UDS Health Center Trend Report | The Health Center Trend Report, introduced in 2008, reports on the key performance measures. The report compares the health center's performance for these measures with national and state averages over a 3 year period. The measures describe health center performance in three categories: Access, Quality of Care/Health Outcomes, and Financial CostViability and provide an overall picture of the health center's performance in each of these areas. <br> Formula Guide: UDS Health Center Trend Report | Vew |
| UDS Health Center Performance Comparison Report | The Health Center Performance Comparison Report for individual health centers provides calculations of key measures at different levels, i.e. Health Center, State, National. Urban, Rural, National Percentiles ( $25 \mathrm{th}, 50 \mathrm{th}$, and 75 th. The report categories are Quality of CareiHeaith Outcomes, Costs per Patent, and Costs per Visit <br> Formula Guide: | View |

2.2. For UDS Reports submitted in 2018 and later reporting period, the link will open in a separate Review and Report list page. The page lists all the Reports on top of the page and Tables on the second half of the page (Figure 18). Click the View link adjacent to each of the reports to access the reports.

Figure 18: Review and Report List Page

| 1 Review and Report List Page |  |  |
| :---: | :---: | :---: |
|  |  |  |
| Reports |  |  |
| Report Name | Description | Action |
| UDS Data File in XML | Submitted Raw UDS Data File in XOL. format. | Download |
| UDS Data File - Excel Format | Download a copy of your health centers' submitted UDS Performance Report in an excel format including data in all tables and forms. | Download |
| UDS Health Center, State, National Summary Report | The Summary Report is a 'dashboard report intended to describe each health center in a statistical manner. Calculations of key measures are derived from their own organization's current reporting on the UDS. The measures are broken out into two main categories: 1) Demographic and Clinical Data (Patients, Visits, Stafling and Clinical Information) and 2) Fiscal information (Costs and Revenues) and provide an overall picture of the health center's performance in each of these areas. <br> Formula Guide: UDS Summary Report | View |
| UDS National and State Rollups | The Rollup Reports compile annual data reported by Health Center Program (HCP) health centers. Summary HCP data are provided for patient demographics, socioeconomic characteristics, staffing, patient diagnoses and services rendered, quality of care, health outcomes and disparities, financial costs, and revenues. The UDS Standard Rollup Reports provide the values and measures for universal and grant specific data at the National and State level. <br> Formula Guide: UDS Rollup Report | View |
| UDS Health Center Trend Report | The Health Center Trend Report, introduced in 2008, reports on the key performance measures. The report compares the health center's performance for these measures with national and state averages over a 3 year period. The measures describe health center performance in three categories: Access, Quality of CareiHealth Outcomes, and Financial CostViability and provide an overall picture of the health center's performance in each of these areas. | View |

## UDS National Rollups

This report compiles annual data reported by FQHC-LALs. Summary data are provided for patient demographics, socioeconomic characteristics, staffing, patient diagnoses and services rendered quality of care, health outcomes and disparities, financial costs, and revenues. This will be available after all the reports for the current reporting cycle have been processed.

## For Help and Support

To access additional EHBs-related resources and training materials, once logged into EHBs, please click the Support (EHBs Help) icon located in the toolbar at the lower right of the screen. System navigation, UDS reporting acronyms, quick reference sheets for accessing reports, submission and review process, and other useful training materials and resources can be accessed here.

## Health Center Program or EHBs questions: BPHC Contact Form

BPHC Contact Form or 877-464-4772 (877-Go4-HRSA)

Monday through Friday (except federal holidays) 7:00 AM to 8:00 PM (ET)

## UDS reporting questions: UDS Help Desk

udshelp330@bphcdata.net or 866-837-4357 (866-UDS-HELP)

Monday through Friday (except federal holidays) 8:30 AM to 5:30 PM (ET)

- For additional guidance on viewing UDS standard reports, go to the BPHC Contact Form and select Uniform Data System (UDS), UDS Reporting, Accessing UDS Reports in EHBs.
- For technical issues with the HRSA Electronic Handbooks, go to the BPHC Contact Form select EHBs Tasks/EHBs Technical Issues.


## Software Requirements and Section 508 Compliance Statement

## Software Requirements

The developed functionality will be compatible with the browser(s) recommended within the Browser Requirements section of the HRSA EHBs portal. The information can be found at
https://grants3.hrsa.gov/2010/WebEPSExternal/Interface/common/BrowserSettings.aspx

## Section 508 Compliance Statement

Section 508 compliance testing was done to ensure that the UDS is in compliance with requirements that users with disabilities have equivalent access to the system developed.

## Supported Document Types

The following document types are supported in the HRSA EHBs:
.DOC or .DOCX - Microsoft Word
.RTF - Rich Text Format
.TXT - Text
.WPD - Word Perfect Document
.PDF - Adobe Portable Document Format
.XLS or .XLSX - Microsoft Excel

