



# Strategies for Successful Uniform Data System (UDS) Reporting

*October 20, 2021, 1:00–2:30 p.m. ET*

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Bureau of Primary Health Care (BPHC)

**Vision: Healthy Communities, Healthy People**



# Opening Remarks

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**Team Lead, Data Production, Data and Evaluation Division**

**Office of Quality Improvement**

**Bureau of Primary Health Care (BPHC)**

**Health Resources and Services Administration (HRSA)**



# Agenda

- Importance of UDS Data
- Preparing for a Successful Submission
- Navigating the Electronic Handbooks (EHBs) Successfully
- Key EHBs Tools
- Managing the Review Process
- Questions and Answers



# Objectives of the Webinar

By the end of this webinar, participants will be able to:

- Understand the importance of UDS data collection and reporting.
- Identify three or more key data checks to conduct before submitting their UDS Report.
- Describe one or more available EHBs reports and tools that can assist with successful submission.
- Describe one tip for working through a review and/or working with your reviewer.
- Identify one or more ways to access reporting support.



# Why Is Health Center UDS Reporting Important?

## It represents your work!

- Enables you to **demonstrate** the patients served by your health center, the services they received, outcomes they had, and the costs and revenues supporting those patients and services
- Enables you to **monitor and assess** your patient population and clinical, operational, and financial performance
- Enables you to **compare your data** with your peers locally, within the state, or nationally
- Supports continuous quality improvement efforts



# Let's Hear from You

## Chat in:

- How do you use your health center's UDS data?
- Why is your UDS data important?

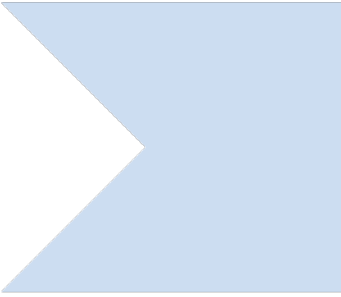


# Preparing for a Successful Submission

Key Data Checks for UDS Submission Due February 15, 2022



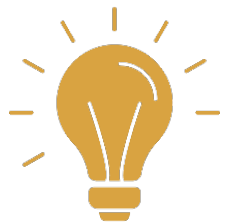
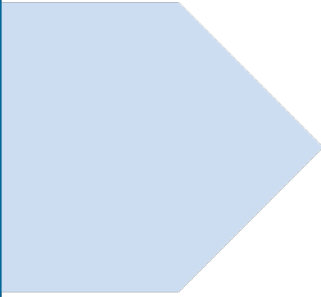
# Success Strategies for Each Section of the UDS



**Overview of the relevant tables in the section of the UDS**

**Review of the likely data source(s) and collection times for each area of the section**

**Review of key data checks for each UDS table in the section**



## **Sections include:**

- Patient demographics (Tables 3A, 3B, and 4).
- Staffing and utilization (Tables 5 and 6A).
- Clinical services and performance (Tables 6B and 7).
- Operational and financial tables (Tables 8A, 9D, and 9E).



# Patient Demographic Tables

## ZIP Code, 3A, 3B, and 4



Table	Description
ZIP Code	Patients by ZIP Code and Insurance
3A	Patients by Age and Sex at Birth
3B	Patients by Race, Ethnicity, Language, and Sexual Orientation and Gender Identity (SOGI)
4	Patients by Income, Insurance, Managed Care Enrollment, and Special Population Status

## Table 4: Selected Patient Characteristics Data Collection

Section of Table 4	Income as a % of Poverty Guideline	Principal 3 <sup>rd</sup> Party Medical Insurance	Managed Care Utilization	Special Populations
<b>Data Source</b>				
EHR or Other Internal System	✓	✓		✓
Other Sources (e.g., Payers)			✓	
External Providers/Labs/Hospitals, etc.				
<b>When Collected</b>				
Patient Registration	✓	✓		✓
Ongoing – Payer Enrollment Data		✓	✓	
Visit/Encounter		Confirmed at visit		Confirmed at visit
Year-End Admin/Financial Data				

# Key Data Checks: Patient Demographic Tables



## ZIP Code

**Unknown ZIP code:** If there is a large increase in unknown ZIP codes year over year, review data to be sure only health center patients who have gone through the registration/intake process and have a countable visit during the calendar year are included.



## Table 3B

**Unknown race/ethnicity:** Should be handled similar to unknown ZIP code.

**SOGI:** Generally, the Unknown lines (new for 2020 reporting) will be larger than Other and Don't know lines. It is not expected that all patients will be reported as Male or Female gender identity, as there are likely some patients for whom the data is not collected, who choose not to disclose, are transgender, or select something else.



## Table 4

**CHIP:** Adults 18+ >10% of CHIP should be reviewed and explained.

**Special Populations:** Confirm that school-based health center patients are only reported if you have an in-scope school-based health center. Confirm public housing is reported based on site, not based on individual patient characteristics.

# Staffing and Utilization

## Table 5 and Selected Service Detail Addendum



Table	Description
5	Staffing, Visits, and Patients by Service Category
Addendum	Integrated Behavioral Health Services

# Staffing and Utilization

## Table 5 and Selected Service Detail Addendum Data Collection

Table 5	Staffing and Utilization			Selected Service Addendum		
	FTEs	Clinic Visits and Virtual Visits	Patients	Personnel	Clinic Visits and Virtual Visits	Patients
<b>Data Source</b>						
EHR		✓	✓		✓	✓
Other Systems (Internal)	HR/Payroll	✓		HR/Payroll		
Other Sources (e.g., Payers)						
External Providers/Labs/Hospitals, etc.		✓	✓			
<b>When Collected</b>						
Patient Registration						
Ongoing – Payer Enrollment Data						
Visit/Encounter		✓	✓		✓	✓
Year-End Admin/Financial Data	✓			✓		

# Key Data Checks: Staffing and Utilization



**Table 5**

Likely to see at least some **virtual visits**, though likely not an increase over 2020 virtual visits unless a new program or service line has been added.

**Productivity** (defined as visits per 1.0 FTE) likely to change compared to prior year given the pandemic, but still not generally greater than 3,500 for any given provider.



**Table 5 Addendum**

**Mental health visits on the addendum** cannot be more than medical visits on main part of Table 5 and, when added with mental health visits on the main part of Table 5 (Line 20c), should not be larger than mental health visits on Table 6A.

Similarly, **substance use disorder (SUD) visits on the addendum** cannot be larger than total medical and mental health visits on the main part of Table 5 and, when added with SUD visits on the main part of Table 5 (Line 21), should not be larger than total SUD visits on Table 6A.

Compare **personnel** on addendum to FTEs.

# Clinical Services and Quality of Care Indicators Tables

## 6A, 6B, and 7



Table	Description
6A	Diagnoses and Services
6B	Quality of Care Measures
7	Health Outcomes and Disparities

# Table 6A

## Selected Diagnoses and Services Data Collection

Table 6A: Selected Diagnoses and Services Rendered	Visits	Patients
<b>Data Source</b>		
EHR	✓	✓
Other Systems (Internal)		
Other Sources (e.g., Payers)		
External Providers/Labs/Hospitals, etc.	✓	✓
<b>When Collected</b>		
Patient Registration		
Ongoing – Payer Enrollment Data		
Visit/Encounter	✓	✓
Year-End Admin/Financial Data		



# Key Data Checks: Services Rendered



## Table 6A

Generally, **visits per patient** for each line on Table 6A won't exceed 4.0, with some exceptions.

Total **medical visits** on Table 6A average ~50% of total medical visits on Table 5. All health centers are likely to report some COVID testing and vaccination; be sure this is only health center patients.

Total **dental visits** on Table 6A average greater than 100% of dental visits on Table 5. If your data is notably different than this, briefly explain how it's been verified (as with all sections).

Note that all reporting on Table 6A is specific to **health center patients**.

Reporting on Table 6A (and all of the UDS) does not include mass testing/screening, tests done for the community, etc.

Patient must have a *countable visit* on Table 5 and be included in unduplicated patients on demographic tables in order to be counted anywhere on Table 6A.

# Tables 6B and 7

## Clinical Services and Performance Data Collection

Table	Table 6B: Quality of Care Measures		Table 7: Health Outcomes & Disparities	
Section	Prenatal Patient Age and Entry into Care	Clinical Quality Measures	Deliveries and Birthweights: Section A	Hypertension and Diabetes
<b>Data Source</b>				
EHR	✓	✓	✓	✓
Other Systems (Internal)	✓	✓	✓	✓
Other Sources (e.g., Payers)				
External Providers/Labs/Hospitals, etc.	✓	✓	✓	✓
<b>When Collected</b>				
Patient Registration	✓ (age)	✓	✓	✓
Ongoing – Payer Enrollment Data				
Visit/Encounter	✓	✓	✓	✓
Year-End Admin/Financial Data				



# Key Data Checks: Clinical Quality Measures



**Table 6B**

**Denominators** may have been smaller last year than typical (both numerically and as a % of estimated medical patients), so some change year over year may be reasonable. Explain exclusions or exceptions for large changes.

The **portion of patients who meet the measure standard** (Column C) may vary from 2020 given the pandemic and any recovery. For very large changes, explain changes to your services or how the data reported has been validated.

Compliance may change more substantially for measures with changes (Cervical Cancer Screening and Tobacco Cessation).



**Table 7**

As with prior years, **deliveries and birth outcomes** for prenatal patients must be reported, whether those were provided in-house or by referral.

Consider the number of hypertension and diabetes diagnoses on Table 6A compared to the denominator of the **hypertension and diabetes** reporting on this table. The numbers should not be the same on the two tables (different parameters) but should make sense in light of each other.

# Operational and Financial Tables

## Tables 8A, 9D, and 9E



Table	Description
8A	Financial Costs
9D	Patient Service Revenue
9E	Other Revenue

# Operational Costs and Revenue Data Collection

Table	8A: Financial Costs	9D: Patient-Service Revenue	9E: Other Revenue
Data Source			
EHR		✓	
Pharmacy	✓	✓	
Other Systems (Internal)	HR/Payroll/Finance	✓	Finance
Other Sources ( e.g., Payers)		✓	
Other Providers/Labs/Hospitals, etc.			
When Collected			
Patient Registration		✓	
Ongoing – Payer Enrollment Data		✓	
Visit/Encounter		✓	
Year-End Admin/Financial Data	✓	✓	✓

# Key Data Checks: Operational Finance Tables



**Table 8A**

**Review Table 8A and Table 5 together** to be sure they are reported consistently. Notable changes on Table 5 (such as significant decrease in FTEs or visits) are likely to appear on Table 8A as well. Value and report donations on Line 18.



**Table 9D**

Confirm **charges** in Column A are reported based on fee schedule for services provided (e.g., CPT codes), not based on reimbursement.

Be sure that Line 8c, **HRSA COVID uninsured reimbursement**, is ONLY used for those patient services reimbursed by the HRSA program, not all uninsured or reimbursed by other programs (e.g., state programs).



**Table 9E**

Generally, health centers should be reporting **COVID supplemental funding from BPHC** (Lines 1l–1o). LALs may only have LAL ECT and American Rescue Plan funding on Lines 1n and 1o, respectively.

Be sure to only report money drawn down in 2021.

Confirm that **no loans or 340B pharmacy revenue** are reported on this table.

# Other Forms in the UDS



## Form

**Appendix D: Health Information Technology (HIT) Form**

**Appendix E: Other Data Elements Form**

**Appendix F: Workforce Form**

# Key Data Checks: Forms



## Health Information Technology

Consider completing most of the questions on this form **sooner rather than later**, as you likely have the answers (with the exception of SDoH screening).

Be sure that if you are doing [social risk screening](#), you select “Yes,” then identify the screener, and report the count of patients who screen positive in each category



## Other Data Elements

Physicians, certified nurse practitioners, physician assistants, and certified nurse midwives who have a DATA Waiver to treat opioid use disorder are reported in the **MAT section**.

Telehealth reporting should include **all services provided via telehealth** in the calendar year.

**COVID vaccines** are now reported on Table 6A, rather than here.

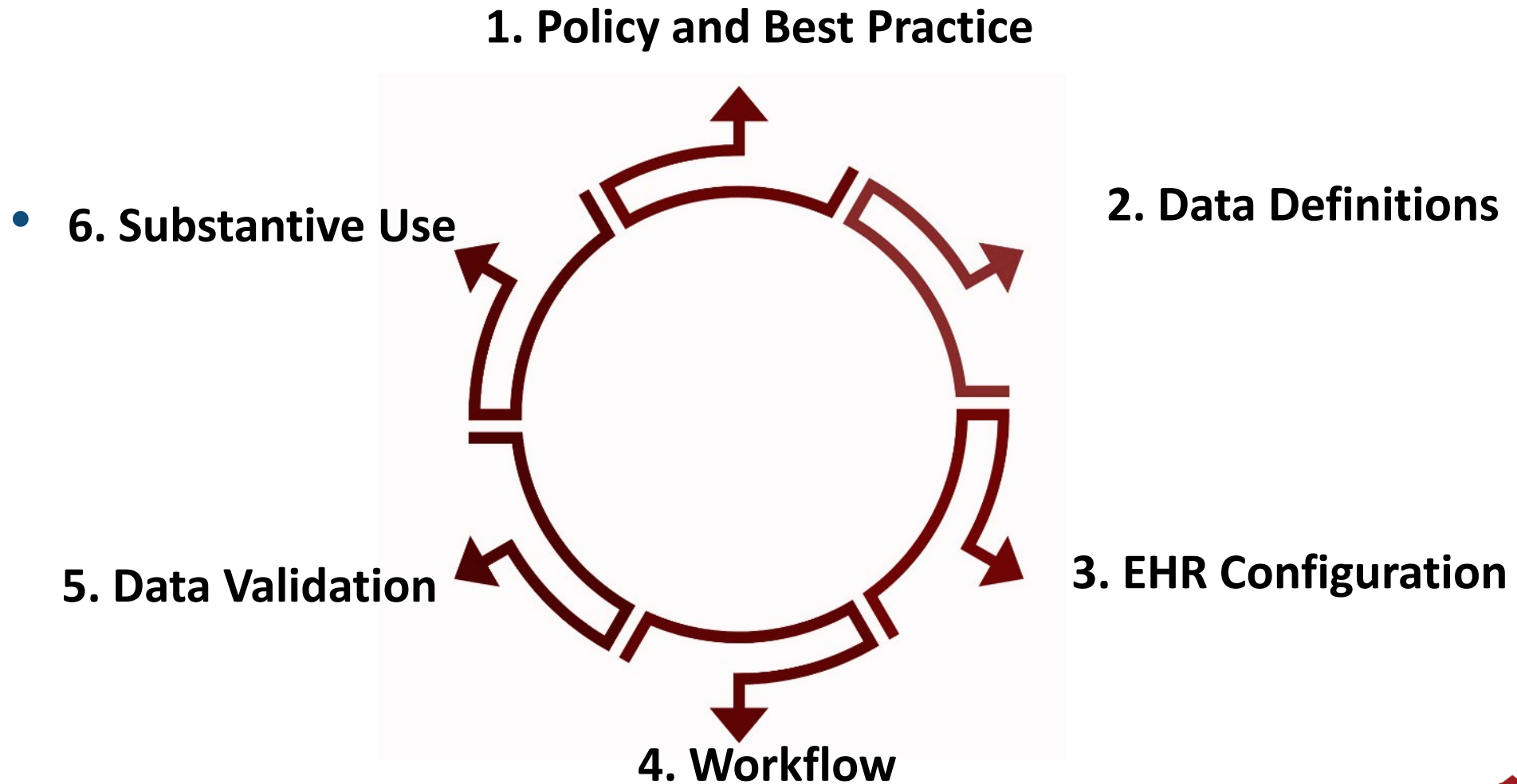


## Workforce

Do not report professional development, continuing medical education (CME), or other internal training for current personnel here. Staff satisfaction survey reported here refers to the frequency of surveys of the **satisfaction of health center personnel**, not patient satisfaction.



# Overview of Data Life Cycle



# Table 3B: Demographic Characteristics: Sexual Orientation and Gender Identity (SOGI) Reporting

<b>Policy and Best Practices</b>	<ul style="list-style-type: none"><li>✓ Is there a policy or written procedure for the collection of SOGI information from patients?</li><li>✓ Are frontline personnel routinely trained on how to collect this data?</li></ul>
<b>Data Definition</b>	<ul style="list-style-type: none"><li>✓ Have you applied the UDS Manual definitions?</li><li>✓ Do the personnel collecting SOGI data understand the data requirements of the categories that define SOGI within the UDS?</li></ul>
<b>EHR Configuration</b>	<ul style="list-style-type: none"><li>✓ Are all UDS selection options for SOGI available in the patient registration system/tablets/kiosks/etc.?</li><li>✓ Do you consult with your vendor to ensure data is captured in EHR in a usable format for later retrieval?</li><li>✓ Are missing responses captured as Unknown in reports used for UDS?</li></ul>

# Table 3B: Demographic Characteristics: Sexual Orientation and Gender Identity (SOGI) Reporting *(cont.)*

<b>Workflow</b>	<ul style="list-style-type: none"><li>✓ Are you collecting this data on paper, tablet, kiosk or is it entered in the EHR directly?</li><li>✓ Is it being recorded as structured data?</li><li>✓ Do you have a written process, and are personnel trained to provide help if a patient needs assistance?</li></ul>
<b>Data Validation</b>	<ul style="list-style-type: none"><li>✓ Do you run a SOGI report on a regular basis?</li><li>✓ Do you look for trends and anomalies?</li><li>✓ Do you compare your data to state or national data?</li></ul>
<b>Substantive Use</b>	<ul style="list-style-type: none"><li>✓ Are these data being used to improve patient services and outcomes for planning?</li></ul>

# Clinical Quality Measure: Deliveries and Birth Weights

<b>Policy and Best Practices</b>	<ul style="list-style-type: none"><li>✓ Is there a written policy covering the collection of this data, and does it document roles and responsibilities?</li><li>✓ If the health center provides prenatal care by referral, is there a contractual relationship with the referral provider that includes the sharing of patient birth outcomes, including birth weights?</li><li>✓ Is the referral loop tracked to closure?</li><li>✓ Is there a process to follow up on missing data?</li></ul>
<b>Data Definition</b>	<ul style="list-style-type: none"><li>✓ Have you applied the UDS Manual definitions?</li><li>✓ Do the referral sources record race, ethnicity, and weight of babies?</li></ul>
<b>EHR Configuration</b>	<ul style="list-style-type: none"><li>✓ Is the EHR configured to record birth weight in grams?</li><li>✓ How are miscarriages, stillbirths, multiple births, etc. tracked?</li></ul>



# Clinical Quality Measure: Deliveries and Birth Weights (cont.)

<b>Workflow</b>	<ul style="list-style-type: none"><li>✓ Have the workflows been clearly articulated and documented?<ul style="list-style-type: none"><li>○ Ex. Is there a clear process for getting delivery outcomes from the hospital or outside providers? How is that information brought into the EHR?</li></ul></li><li>✓ Have personnel been appropriately trained to input the data?</li></ul>
<b>Data Validation</b>	<ul style="list-style-type: none"><li>✓ Is the data compared with local, state, or national data?</li><li>✓ Is delivery data normally consistent, and can anomalies be easily identified?</li><li>✓ Are patients in a prenatal program in the previous year who gave birth in the current year included in the prenatal care count and delivery?</li></ul>
<b>Substantive Use</b>	<ul style="list-style-type: none"><li>✓ Is the data used proactively to reach out to new mothers to offer access to the appropriate services to mother and baby?</li></ul>

# Navigating the EHBs Successfully

Live Demonstration of Key EHBs Features and Tools



The screenshot shows the HRSA Electronic Handbooks website. At the top, there is a navigation bar with the HRSA logo and the text "Electronic Handbooks". On the right side of the navigation bar, there are links for "Support" and "Login". Below the navigation bar, there is a secondary navigation bar with links for "Welcome", "New User Registration", "Funding Opportunity", and "What's New". The date and time "Monday 12<sup>th</sup> August 2019 02:58:39 P.M." are displayed on the right side of this bar.

The main content area is divided into several sections:

- Existing Users:** This section is highlighted with a yellow border. It contains a login form with fields for "Username (Email)" and "Password". Below the fields are a "Login" button and a "Forgot Password?" link.
- New Users:** This section contains a "Create an Account" button and a link "Click here to get started" with an external link icon.
- Contact Us:** This section provides contact information:
  - Time:** 8:00 a.m. to 8:00 p.m. Eastern Time (ET) Monday through Friday
  - Phone:** 877-Go4-HRSA/877-464-4772
  - Link to contact us:** click here
- What's New:** This section contains two news items:
  - 03/16/2018 - Optimized Home Page and a New Help Video!** Thanks to your feedback, starting March 16th, you will see a modernized Home Page with new quick links in the Tracking Widget, a streamlined Help Widget, and an overall improved la...[Learn More](#)
  - 01/18/2018 - New features to help you manage your workload, and easily download and print your Grant documents!** Starting January 19th, the EHBs has two new features that were added to address your feedback! **Archive Tasks:** Declutter your Pending Tasks and Grant ...[Learn More](#)
- Learn About:** This section contains three links:
  - Grant Program
  - Free Clinic Program
  - FQHC-LAL Program
- Other Links:** This section contains four links:
  - Browser Requirements
  - Funding Opportunities
  - Track Grant Application
  - Help

**Everyone working on the UDS needs an EHBs login!**



# EHBs Landing Page

- This is the page you will land on when you log into the EHBs.
- On the **left side**, you'll see your tasks.
- On the **right side**, you can change permissions and roles (assuming you have a role that permits that— e.g., CEO and Project Director).
- At the **top** are tabs you will use to navigate.

HRSA | Electronic Handbooks

Tasks Organizations Grants Free Clinics FQHC-LALs Dashboards Resources

Attention, all HRSA recipients. Please note that HRSA will not accept FFR submissions through EHBs, after September 25, 2020. Starting October 1, 2020, the FFR report will be available in PMS for review. Visit the [PMS Website](#) for instructions on how to request access to or update general questions about this transition, PMS system access, or technical issues related to PMSFFRSsupport@psc.hhs.gov. Please visit the [Manage Your Grant: Training](#) page on the HRSA transition.

Welcome, Emilio Hunziger

**My Tasks**

- 7 All
- 0 Late
- 1 Due Within 30 Days

**Help**

How to Request a Submission Deadline Extension

**Smart Assist**

- > Change Project Director (PD)
- > Remove user from an organization
- > Remove user permissions for a grant
- > Request a submission deadline extension

**Resources**

- > What's New
- > HRSA Contacts
- > FAQs
- > View All Videos



# Navigate to Your UDS Report

- The UDS is the *Performance Report* for your H80 grant.
- Click on *Tasks*, then find the *performance report* with Tracking # and Entity that starts with H80 (or LAL for Look-Alikes).
- Click *Edit*; this will take you to the UDS Report.

you are here: Home » Tasks » Browse » All Entities [ ]

LL ENTITIES <<

All Entities

Tasks

Pending Tasks

Archived Tasks

Free Clinics

Requests

Applications

QHC-LALs

Requests

Health Center CIS Requests

Look-Alike Applications

Submissions

Submissions

Grants

Requests

Health Center CIS Requests

Grant Applications

Prior Approvals

Submissions

Pending Tasks - List

Not Completed Recently Completed

Detailed View | Search | Saved Searches

Page size: 15 Go 7 items in 1 page(s)

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Options
07/29/2021 11:59 PM (248 Days)	Grant Submissions	00266430	Other Submissions	H8EC0338600 (Grant)	Community Health Centers of The Central Coast, Inc.	Start
06/29/2021 11:59 PM (218 Days)	Grant Submissions	00259800	Other Submissions	H8DC0335618 (Grant)	Community Health Centers of The Central Coast, Inc.	Start
06/12/2021 11:59 PM (201 Days)	Grant Submissions	00257192	Other Submissions	H8CC0334054 (Grant)	Community Health Centers of The Central Coast, Inc.	Edit
01/08/2021 05:00 PM (46 Days)	Grant Submissions	182820	Noncompeting Continuations	H80C0301239 (Grant)	BENSON RUPARELIA UNIVERSITY	Start
11/27/2020 11:59 PM (4 Days)	Grant Submissions	H80CS012392020	Performance Reports	H80C0301239 (Grant)	BENSON RUPARELIA UNIVERSITY	Edit
N/A	CIS Applications	CIS00095585	New/Existing	H80C0300621	COMMUNITY HLTH CNTRS/CENTRAL	Edit

# Access Your Report in the Fall Using the Preliminary Reporting Environment!

- A few years back, it was not possible to access the UDS until January 1.
- This year, as with the past couple years, the system opens in late October as the Preliminary Reporting Environment (PRE).
- There are no additional steps required—the same steps apply to accessing the PRE as the “live” UDS Report.



# UDS Report Home Page

- You'll be taken to a page that shows tools and tables in the *left-hand navigation panel*.
- The rest of the page will show status, progress, and other report details.
- There are links to a number of resources in the middle of the page.

The bar at the top of the screen will be yellow if you are in the PRE (prior to January 1).

**You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar year UDS performance data at this time.**

**Status Overview**

**Note:**  
All sections including  
Tip: Prior to entering any data, save a copy of the blank excel template. The blank file can later be used for clearing the data if desired.

H80CS012392020: BENSON RUPARELIA UNIVERSITY, LAKE PANASOFFKE...

11/27/2020 (11:59 P...)  
Due Date

4  
Days Left

**Resources**

UDS Manual | Upload History | Action History | Last NoA | Training Material | UDS Reviewer | User(s) With Permissions | Certified Health IT Product List Lookup | Excel Mapping Document | Request Exemption | Verify Offline HTML Download | Compare Versions

**UDS Report Status**

Sections	Status	Last Updated
Contact Information	Complete	11/15/2020 4:52 PM EST by Rosaleen Skowronek

**Forms Overview**

Last Updated On: 11/18/2020 3:57 PM EST

Table 5

0 Not Started | 0 In Progress | 17 Complete

**Report Details**

BHCMIS ID: 090710

Last Submitted By: Emilio Hunziger on 11/18/2020 3:57 PM EST



# Key EHBs Tools for Successful Reporting

Upload/Download File

Offline Templates

Comparison Report

Accessing Prior Year Reports

Other Helpful Reports



# UDS Report Home Page: Tools

- Let's look at the tools available in the upper left corner.
- Note: if you don't see this, look for the little arrows in the upper left, next to "All Functions," and click that and it should pop back out.

The screenshot displays the UDS Reporting Environment interface. At the top left, a breadcrumb trail reads "You are here: Home". Below it, a dark blue menu titled "All Functions" is highlighted with a yellow box. This menu includes a left-pointing arrow, "Performance Reports" (with a dropdown arrow), "UDS Upload/Download", "Download File", "Upload File", and "Clear Data". Below the menu is the "UDS Report Details" section, which includes a "Status Overview" sub-section with a list of items: Contact Information, Patients by ZIP Code, Table 3A, Table 3B, Table 4, Table 5, and Table 6A, each preceded by a green checkmark. To the right of the menu, a green banner states: "You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar data by 11:59 P.M. on 1/27/2020." Below this is the "Status Overview" section, which contains a "Note" box with information about data completeness and a tip to save a blank excel template. A calendar icon shows the due date as 1/27/2020 at 11:59 P.M., with a clock icon indicating 4 days left. At the bottom, a "Resources" section lists various links: UDS Manual, Upload History, Action History, Last NoA, Training Material, UDS Reviewer, User(s) With Permissions, Certified Health IT Product List Lookup, and Excel Mapping Document.



# UDS Upload/Download: Download File

The screenshot displays the UDS Reporting Environment interface. On the left, a navigation menu is visible with a yellow box highlighting the 'UDS Upload/Download' section, which includes 'Download File', 'Upload File', and 'Clear Data'. The main content area features a green banner at the top stating: 'You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar year UDS performance data at this time.'

Below the banner, the site information for 'H80CS012392020/v2: BENSON RUPARELIA UNIVERSITY, LAKE PANASOFFKEE, CA' is shown. Key details include: BHCMS ID: 090710, Funding Stream(s): CHC, HCH, MHC, PHPC, Submission Status: Change Requested, Reporting Period: 01/01/2020 - 12/31/2020, and Started By: Rosaleen Skowronek on 11/15/2020 04:44 PM ET.

A 'Resources' section provides links to various documents and tools, such as the UDS Manual, Upload History, Action History, Last NoA, Training Material, UDS Reviewer, User(s) With Permissions, Certified Health IT Product List Lookup, Excel Mapping Document, Request Exemption, Verify Offline HTML Download, and Compare Versions.

The 'Instructions' section explains the process: 'To enter UDS data offline, select either the Excel file (spreadsheet format) or the offline HTML file (forms-based format). Then select whether you want a blank form or to include any existing data. Once you have made all of your selections, click the Download button to complete your request.' It also notes that each download will be populated with data from the EHBs and provides instructions for uploading the completed file.

The 'Download Template' section allows users to select the format: 'Offline Excel' (selected) or 'Offline HTML'. A 'Download' button is available for both options.

The 'Excel Template' section is partially visible at the bottom of the interface.



# UDS Upload/Download: Download File (cont.)

Three decisions to make:

1. Do you want to use Excel or HTML format?
2. Do you want the file to include data currently in the UDS?
3. Do you want to do all tables at once or just a selected set?

### Download Template

Select Format  Offline Excel  Offline HTML [Download](#)

### Excel Template

Select Data Level  Excel with Data  Blank Excel

Select Table

<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Table 5	<input checked="" type="checkbox"/> Table 9D
<input checked="" type="checkbox"/> Patients by ZIP Code	<input checked="" type="checkbox"/> Table 6A	<input checked="" type="checkbox"/> Table 9E
<input checked="" type="checkbox"/> Table 3A	<input checked="" type="checkbox"/> Table 6B	<input checked="" type="checkbox"/> Table HIT
<input checked="" type="checkbox"/> Table 3B	<input checked="" type="checkbox"/> Table 7	<input checked="" type="checkbox"/> Other Data Elements
<input checked="" type="checkbox"/> Table 4	<input checked="" type="checkbox"/> Table 8A	<input checked="" type="checkbox"/> Workforce

Patients by ZIP Code with Prior year ZIP Codes  
(This option will append the zip codes reported last year to any data already entered for this year. If you have already entered zip code information for this year, be certain to check that none of the zip codes have been entered twice, since this option does not include a duplicated entry check.)

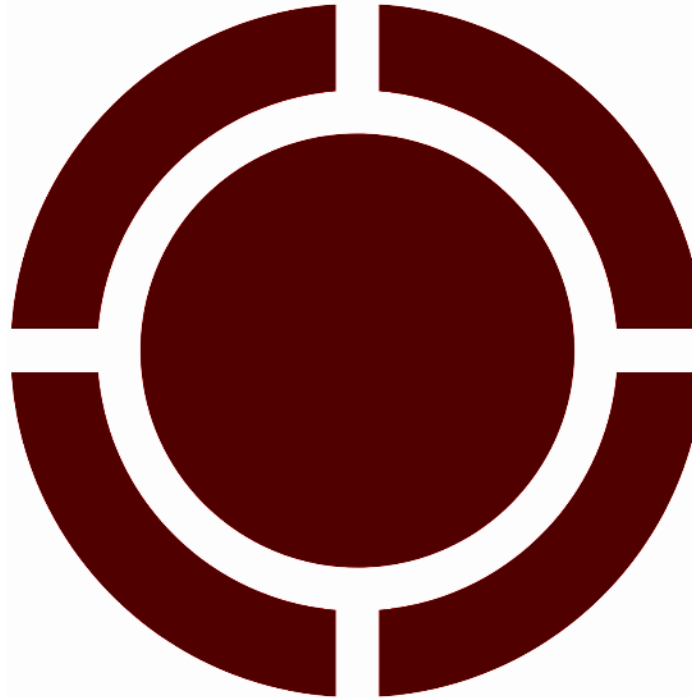
# Considerations

## Excel vs. HTML

Excel format may feel more familiar, but it's important to know that the Excel file cannot be modified structurally. It will not be able to be uploaded if modified. HTML looks like the UDS tables and doesn't provide the opening to modify.

## Test It Out This Fall!

Rather than making these decisions in February, when the pressure is on, try out these various options this fall to see how they work for you.



## Including Data or Not Including Data

If no data or only test data has been entered, then blank is better. If there is currently data present, even if that data will be changed, it probably makes sense to include that, so you don't have to go into the EHBs the initial data that is being changed.

## All Tables or Just a Select Set?

Typically selecting just a certain set of tables makes more sense, whatever you are currently working on. If you download them all and then don't use all, you run the risk of uploading blank tables over existing data.



# Downloading Offline Templates

**Download Template**

Select Format  Offline Excel  Offline HTML Download

**Excel Template**

Select Data Level  Excel with Data  Blank Excel

Select Table

<input type="checkbox"/> All	<input type="checkbox"/> Table 5	<input type="checkbox"/> Table 9D
<input type="checkbox"/> Patients by ZIP Code	<input type="checkbox"/> Table 6A	<input type="checkbox"/> Table 9E
<input type="checkbox"/> Table 3A	<input checked="" type="checkbox"/> Table 6B	<input type="checkbox"/> Table HIT
<input type="checkbox"/> Table 3B	<input checked="" type="checkbox"/> Table 7	<input type="checkbox"/> Other Data Elements
<input type="checkbox"/> Table 4	<input type="checkbox"/> Table 8A	<input type="checkbox"/> Workforce

Go To Status Overview Page

Once you click “Download,” you will get this disclaimer/instructions about the HTML form, even if you selected Excel. *Click OK!*

**Disclaimer and Instructions**

The user acknowledges that electronic communications, databases and websites are subject to errors, malfunctions, tampering, and break-ins. The user must not misuse or subject the offline code provided by Health Resources and Services Administration (HRSA) to tampering or misuse that results in damages to the user's systems or operations. The Department of Health and Human Services (DHHS), or HRSA, or their software vendors, are not responsible for damages that result from such misuse or tampering of the code.

**Offline Html Instructions:**

Once the offline HTML package is downloaded, you will have to extract/unzip the downloaded package. To extract/unzip, you will need to enter a password. Your Tracking Number (All Capitalized) is the password. Click 'OK' to proceed with the download.

Please read the instructions carefully for a successful Offline HTML download.

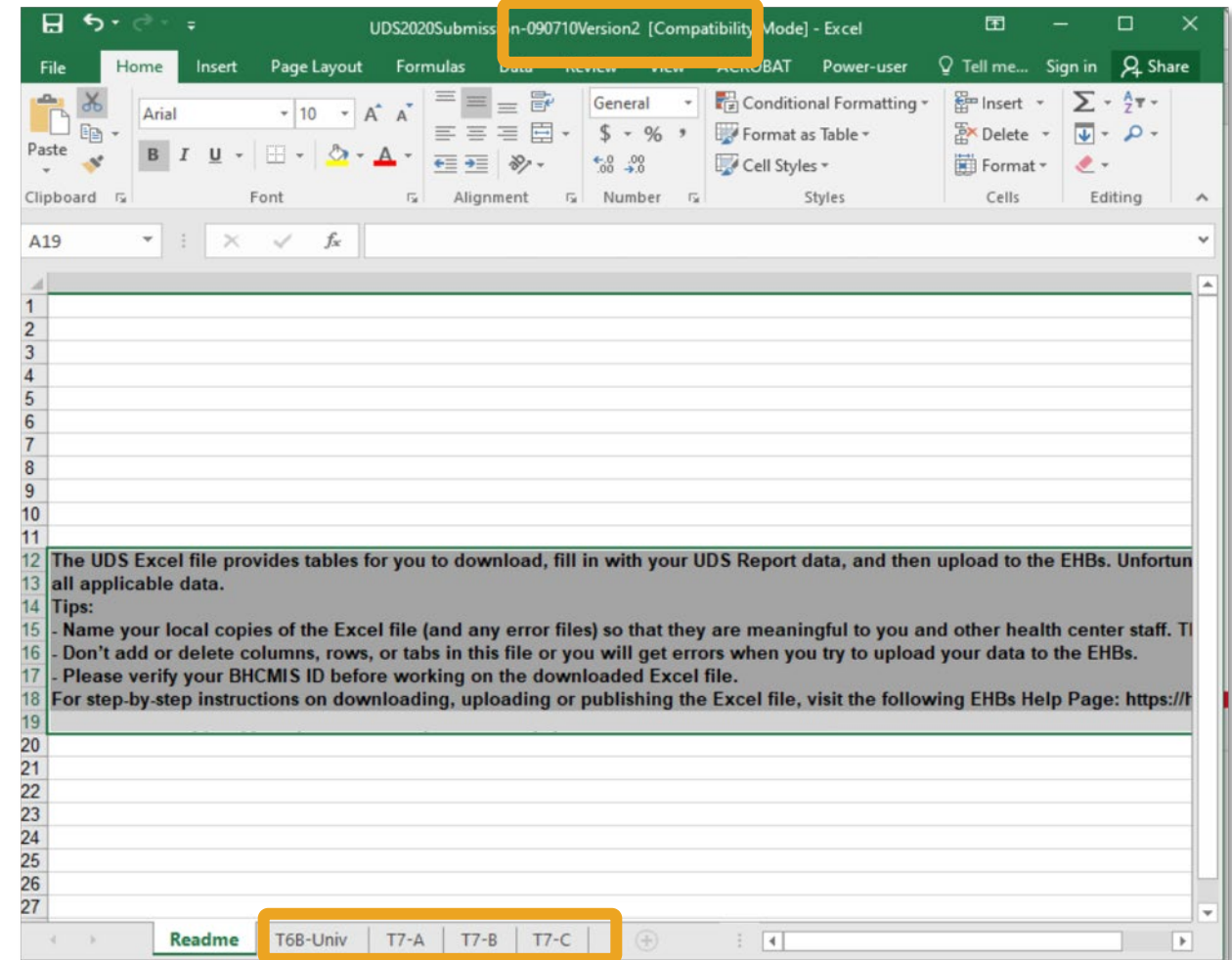
- Save only one copy of the downloaded file on your local machine, at a given point of time.
- Do not alter the contents or tamper with the file.
- Do not rename the file before verification as once renamed verification is not possible.
- Check with your IT department, if you would like to verify the validity of the zip file contents.
- To get step by step instructions on how to perform the verification refer to Verify Offline HTML download link from Resources Section OR HRSA Wiki pages.
- If you still need assistance reach out to EHBs Help Line.

Cancel OK



# Using Offline Excel

- **First tab has tips for success.**
  - When it says to verify your BHCMIS ID, it means to verify that in the filename. Your BHCMIS ID is also known as your grant number and does NOT start with H80 (it may be 6 numbers or 6–7 numbers with an E in it).
- Table 7: each section/ measure is its own tab.



# Accessing Comparison Report

- From the UDS Home Page or *Status Overview Page*, you can access your Comparison Report.
- This can show you last year and this year side by side.

[Clear Data](#)

**UDS Report Details**

**Status Overview**

- ✓ Contact Information
- ✓ Patients by ZIP Code
- ✓ Table 3A
- ✓ Table 3B
- ✓ Table 4
- ✓ Table 5
- ✓ Table 6A
- ✓ Table 6B
- ✓ Table 7
- ✓ Table 8A
- ✓ Table 9D
- ✓ Table 9E
- ✓ HIT Capabilities
- ✓ Other Data Elements
- ✓ Workforce
- ✓ Report Comments
- ✓ Data Audit Report
- Review
- Submit

You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar year UDS performance data at this time.

H80CS012392020: BENSON RUPARELIA UNIVERSITY, LAKE PANASOFFKEE, CA

11/27/2020

(11:59 PM Local Time)

Due Date

4

Days Left

**Resources**

[UDS Manual](#) | [Upload History](#) | [Action History](#) | [Last NoA](#) | [Training Material](#) | [UDS Reviewer](#) | [User\(s\) With Permissions](#) | [Certified Health IT Product List Lookup](#) | [Excel Mapping Document](#) | [Request Exemption](#) | [Verify Offline HTML Download](#) | [Compare Versions](#)

**UDS Report Status**

Sections	Status	Last Updated
Contact Information	✓ Complete	11/15/2020 4:52 PM EST by Rosaleen Skowronek
Patients by ZIP Code	✓ Complete	11/18/2020 3:43 PM EST by Emilio Hunziger
Table 3A - Patients by Age and by Sex Assigned at Birth	✓ Complete	11/18/2020 3:40 PM EST by Emilio Hunziger
Universal Report	✓ Complete	-
Homeless Report	✓ Complete	-
Migrant Report	✓ Complete	-
Public Housing Report	✓ Complete	-
Table 3B - Demographic Characteristics	✓ Complete	11/18/2020 3:14 PM EST by Emilio Hunziger

Forms Overview

Last Updated On: 11/18/2020 3:57 PM EST

[Table 5](#)

0  
✗ Not Started

0  
! In Progress

17  
✓ Complete

Report Details

BHCNIS ID: 090710

Last Submitted By: Emilio Hunziger  
on 11/18/2020 3:57 PM EST

Submit and Print

Make sure you have completed and validated all the required information before submitting this report.

[Submit Performance Report](#)

[Compare Versions](#)

[Print Report](#)



# Running the Comparison Report

- You have to select your reference and comparison year.
- You can compare different versions of your report to see notable changes.

The screenshot shows a web browser window with the URL: `hrsautl11-is.amer.reisystems.com/UDSSubmission/comparisonselectversion?reportId=%2094c2aa46-608d-497e-972d-3039d3ff12c8`

A green notification banner at the top states: "You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar year UDS performance data at this time."

The main heading is "Compare Versions - Select Version". Below it, a yellow bar displays the selected report: "H80CS012392020/v2: BENSON RUPARELIA UNIVERSITY, LAKE PANASOFFKEE, CA".

A blue note box contains the text: "Note: \* indicates data entry in progress and is subject to change."

The section "Select Versions to be Compared" is highlighted with a yellow border. It contains two dropdown menus:

- Reference Year/Version: Select Year and Version
- Compare To Year/Version: Select Year and Version

At the bottom, there are "Close" and "Next" buttons.

# Let's Hear from You!

**Chat in: What insight might you gain from the Comparison Report?**



# Let's Hear from You! *(cont.)*

## What insight might you gain from the Comparison Report?

- ✓ Identifying changes in staffing (such as FTEs newly reported for calendar year 2021) and verifying those with HR
- ✓ Identifying changes in insurance mix and investigating surprisingly large changes spotted in calendar year 2021
- ✓ Checking staff tenure to be sure that aligns with expectations
- ✓ Identifying large changes in clinical quality measure outcomes to be investigated before finalizing reporting

# Accessing Prior UDS Reports

- The UDS is the *Performance Report* for your H80 grant.
- Click on *Grants* tab, then under *Submissions* click on *Work on Performance Report*.
- The next page will have a *Performance Report* for each year.

The screenshot displays the HRSA Electronic Handbooks web application. The browser address bar shows the URL: `hrsaut11-is.amer.reisystems.com/2010/Web2External/Interface/PostAward/GrantRegistration/ViewGrantPortfolio.aspx`. The page header includes the HRSA logo and the text "Electronic Handbooks". A navigation menu at the top contains tabs for "Tasks", "Organizations", "Grants", "Free Clinics", "FQHC-LALs", "Dashboards", and "Resources". The "Grants" tab is selected and highlighted with an orange box. Below the navigation menu, the breadcrumb trail reads "You are here: Home » Grants » Browse". The main content area is divided into three columns: "Submissions", "Requests", and "Portfolio". Under the "Submissions" column, the option "Work on Performance Report" is highlighted with an orange box. Other options in the "Submissions" column include "Work on Financial Report", "Work on Progress Report", "Work on Noncompeting Progress Reports", and "Work on Other Submissions". The "Requests" column includes options like "Work on existing Prior Approval", "Request New Prior Approval", "Work on Existing Health Center H80 CIS", and "Request New Health Center H80 CIS". The "Portfolio" column includes "Add a Grant to My Portfolio", "Work on a Grant in My Portfolio", and "View My Access Requests". Below the main content area, there are sections for "Users" (View Authorized Users, Authorize New Users, Approve Access Requests) and "Scope" (Manage Sites, Manage Services, Manage Other Activities and Locations). The "Applications" section includes "Validate Grants.gov Applications", "Allow Others to Work on My Applications", and "View My Applications". On the left side of the page, there is a "My Grant Portfolio - List" section with a table containing columns for "Grant Number" and "Organization". The table lists four grants: H80CS01239, H8ECS01337, H8DCS00961, and H8CCS01037, all associated with "BENSON RU".



# Using Available UDS Data and Reports

- Standard reports and publicly available UDS data:
  - Standard Reports in the EHBs: Health Center Trend Report (sample below), Summary Report, Health Center Performance Comparison Report, Rollup Reports
  - [Health Center Program Data](#) is available on HRSA's site, including rollup data, comparison data, and health center profile data.

UDS Health Center Trend Report - 2020  
1375 Health Centers - Universal

	2018	2019	2020	2019 - 2020		2018 - 2020	
				Change	%	Change	%
<b>Quality of Care Indicators/Health Outcomes</b>							
<b>Preventive Health Screenings and Services</b>							
Colorectal Cancer Screening	44.11%	45.56%	40.09%	-5.47%	-12.00%	-4.02%	-9.11%
Screening for Depression and Follow-up Plan	70.57%	71.61%	64.21%	-7.40%	-10.34%	-6.36%	-9.01%
Depression Remission at Twelve Months	-	-	13.69%	-	-	-	-
Cervical Cancer Screening	55.95%	56.53%	51.00%	-5.54%	-9.79%	-4.95%	-8.85%
Childhood Immunization Status	39.44%	39.75%	40.42%	0.67%	1.68%	0.98%	2.49%
Dental Sealants for Children between 6-9 Years	52.80%	56.80%	48.68%	-8.11%	-14.29%	-4.12%	-7.80%
Breast Cancer Screening	-	-	45.34%	-	-	-	-
HIV Screening	-	-	32.29%	-	-	-	-



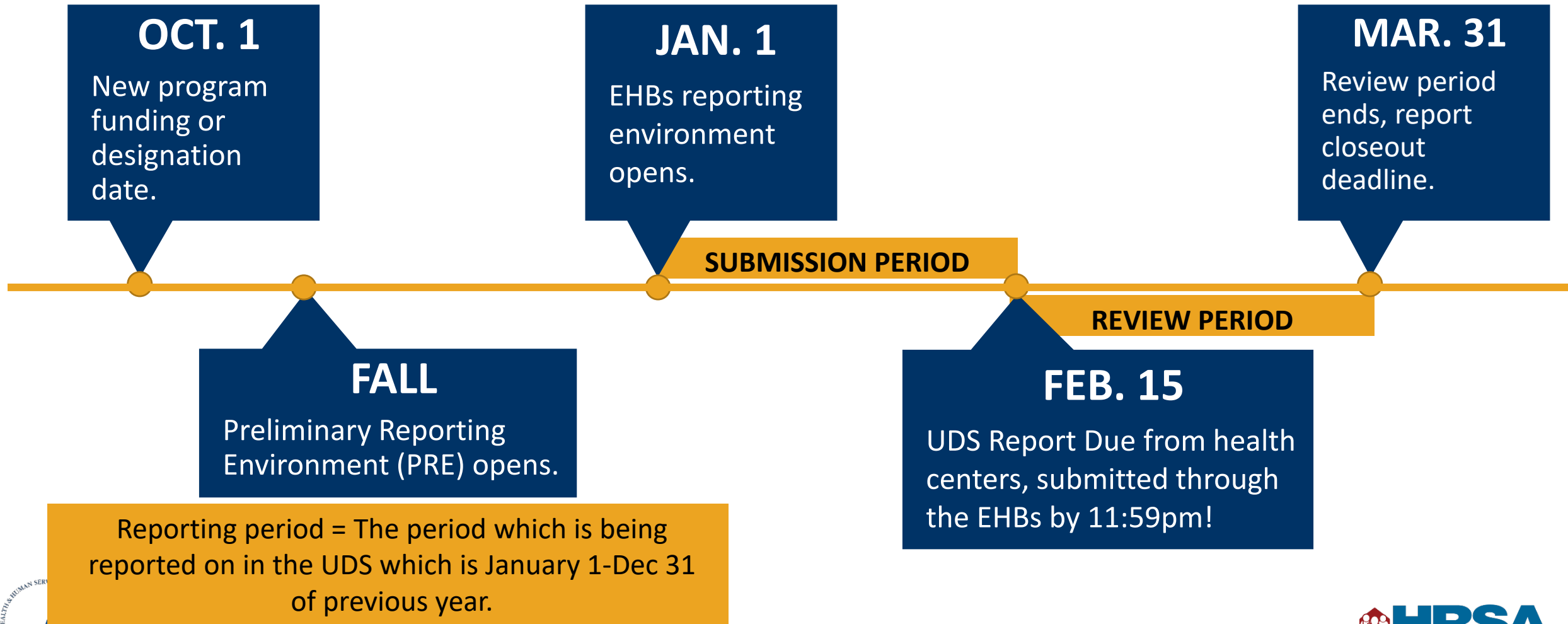


# Managing the Review Process

Remember, initial submission is not the end of the process!



# Reporting Timeline



# Managing the Review Process

Start Now

Submit by Feb. 15

Expect to hear by  
March 1

Communicate!

1

- Information is not complete until the end of the calendar year; don't start entering data into tables yet.
- Other information can be entered as soon as the PRE opens! Some information can be entered on the HIT, ODE, and Workforce forms. You can also download offline data tools now to practice or ensure your reporting is configured correctly.

2

- Submit your report through the EHBs by February 15. Be sure to allow time to address edits!
- When addressing edits, if you have put detailed notes on the tables, you can direct the reviewer to the table comments in your edit responses. Otherwise, provide detailed responses on the edits in the Data Audit Report.

3

- If you have not heard from your reviewer by March 1, either with review questions or that your report has been accepted, email them!
- Reviewers send emails through the EHBs, and sometimes those get caught in spam filters. You can also go into the EHBs to check the status.

4

- If you are not able to meet the dates set by your reviewer or have limitations that the reviewer needs to know about, let them know!



# Understanding Your Data and Responding to Edits

- Work together to understand and resolve edits and reviewer questions. The key data checks discussed earlier will set you up for success with this!
- Edits are an opportunity to consider your data from a broader perspective, resolve issues, revise data, or provide meaningful explanations.
- All personnel involved in UDS data collection and submission should be prepared to respond to edits and reviewer questions.



If you do not understand what an edit on the Data Audit Report is asking, **contact the UDS support line** (866-UDS-HELP or [udshelp330@bphcdata.net](mailto:udshelp330@bphcdata.net)).



Download the **Summary Report** to view national averages from the prior year that are often referenced by edits.

# Available Assistance

- Technical assistance materials, including local trainings, are available online:
  - [HRSA Health Center Program website](#)
- UDS Support Center for assistance with UDS reporting questions:
  - [udshelp330@bphcdata.net](mailto:udshelp330@bphcdata.net)
  - 866-UDS-HELP (866-837-4357)
- [Health Center Program support](#) for questions about the Health Center Program.
- EHBs support
  - UDS Report and preliminary reporting environment access (in [EHBs](#))
  - EHBs system issues: 877-464-4772, Option 1
  - EHBs account access and roles: 877-464-4772, Option 3
- [National Training and Technical Assistance Partners](#)



# Training Webinar Series for 2021 UDS Reporting

- Counting Visits in the UDS
- UDS Clinical Tables Part 1: Screening and Preventive Care
- UDS Clinical Tables Part 2: Maternal Care and Children's Health
- UDS Clinical Tables Part 3: Chronic Disease Management
- Reporting UDS Financial and Operational Tables
- Successful Submission Strategies TODAY!



# Questions and Answers



# Contact Information

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**Remember to call the UDS Support Line if you have additional content questions**

**1-866-UDS-HELP**

**or**

**1-866-837-4357**

**[udshelp330@bphcdata.net](mailto:udshelp330@bphcdata.net)**





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