



Successful Submission Strategies Uniform Data System (UDS) Reporting

November 13, 2024, 2:00 p.m.–3:30 p.m. ET

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Some slides contain URLs in the notes.

Vision: Healthy Communities, Healthy People



Opening Remarks

Jonjelyn Gamble
Data and Evaluation
Office of Quality Improvement
Bureau of Primary Health Care
Health Resources and Services Administration



Objectives of the Webinar

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

- Understand the importance of Uniform Data System (UDS) data collection and reporting.
- Identify at least three data checks to conduct before submitting a UDS Report.
- Describe at least one Electronic Handbooks (EHBs) report and tool that can assist with successful UDS submission.
- Describe one tip for working through a UDS review and/or working with your reviewer.



Agenda

- Review the importance of UDS data
- Identify steps to prepare for a successful UDS submission
- Learn how to navigate the EHBs and key EHBs tools
- Review steps to manage the UDS review process
- Questions and answers



Poll #1

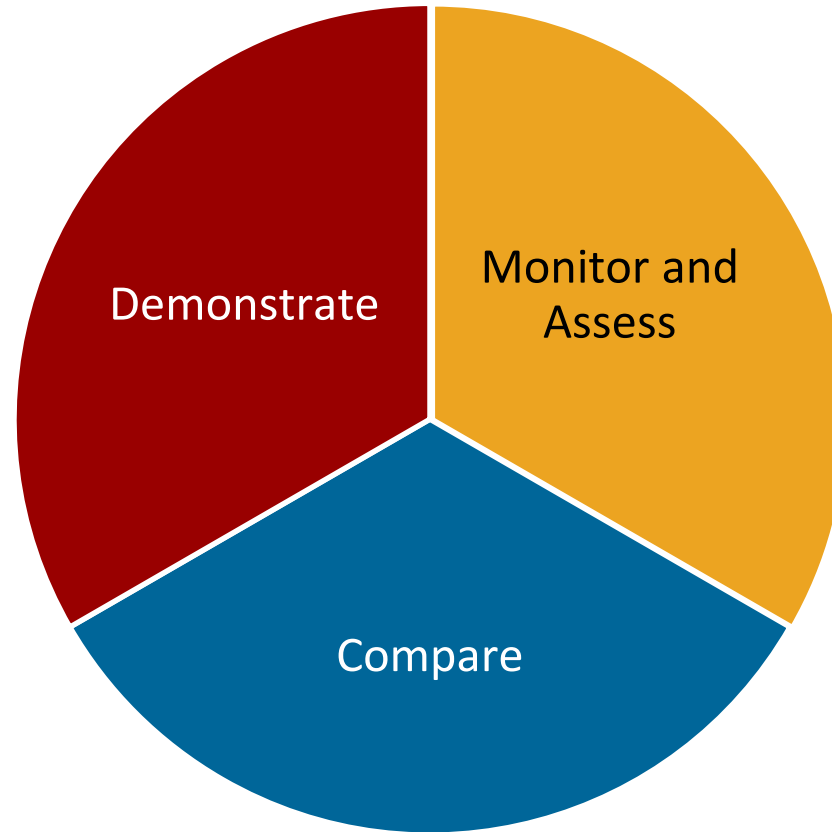
How does your health center use UDS data? (Select all that apply.)

- Share data with the Board of Directors
- Monitor year-to-year trends
- Include data in grant or funding reports and applications
- Share with stakeholders in our community
- Inform quality improvement efforts
- Compare data to state or national health center averages



Importance of UDS Reporting

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.



Monitor and assess your **patient population** and clinical, operational, and financial **performance**. Support continuous **quality improvement**.

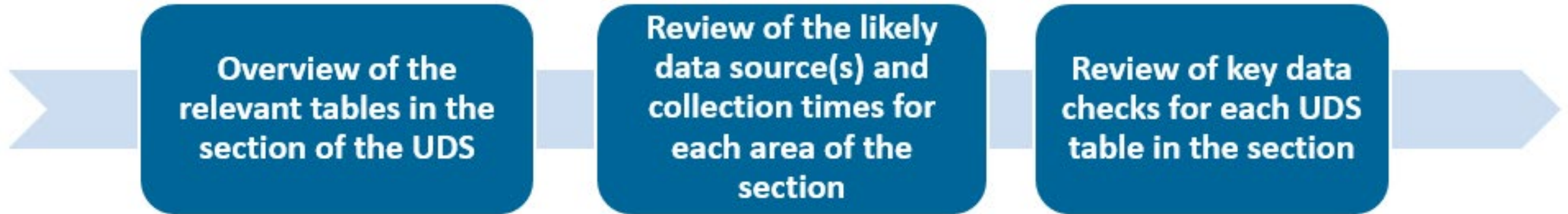
Compare your data with your peers **locally, within the state, or nationally.**

Preparing for a Successful Submission

Key Data Checks for UDS Submission



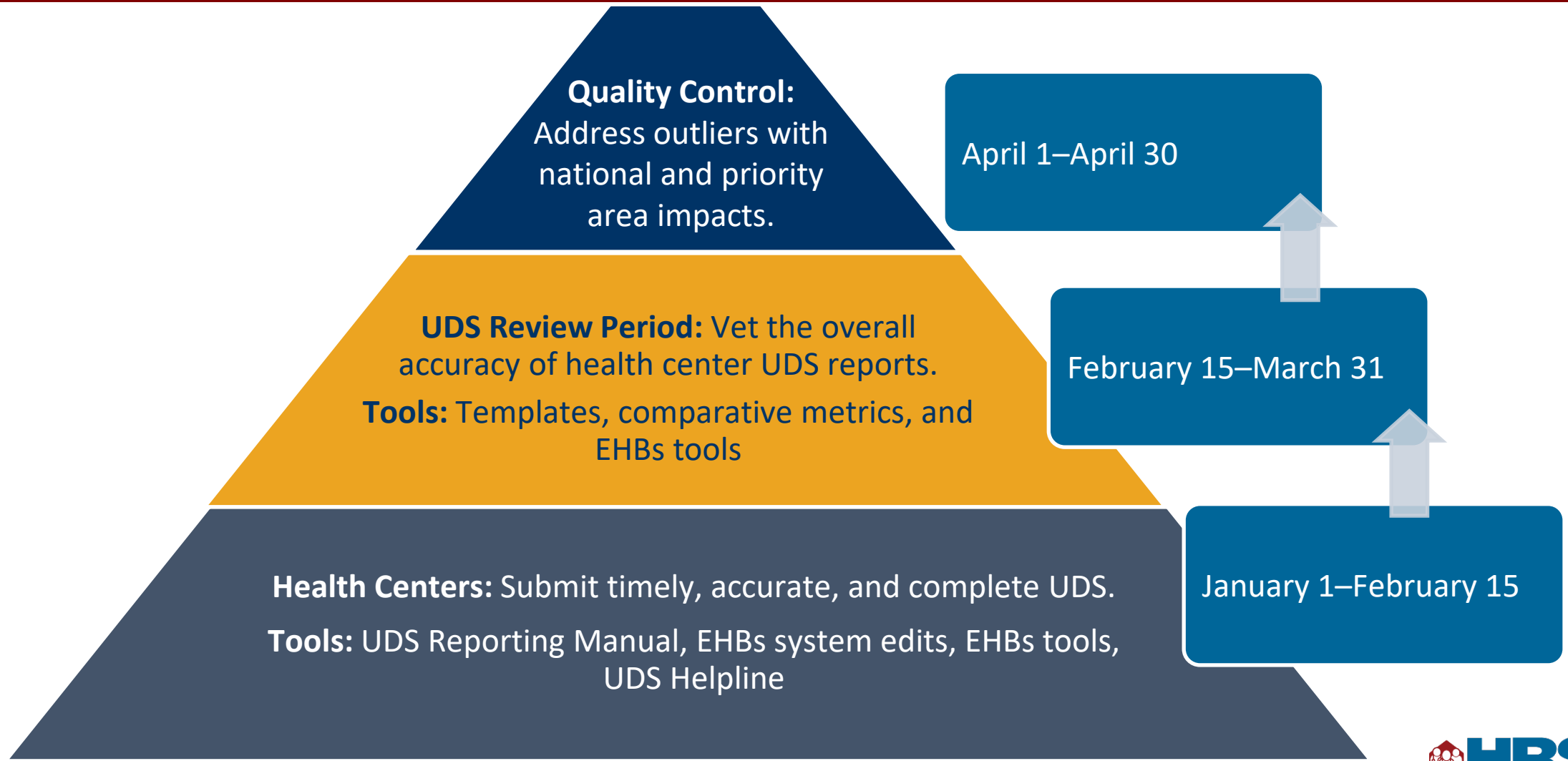
Success Strategies for UDS Sections



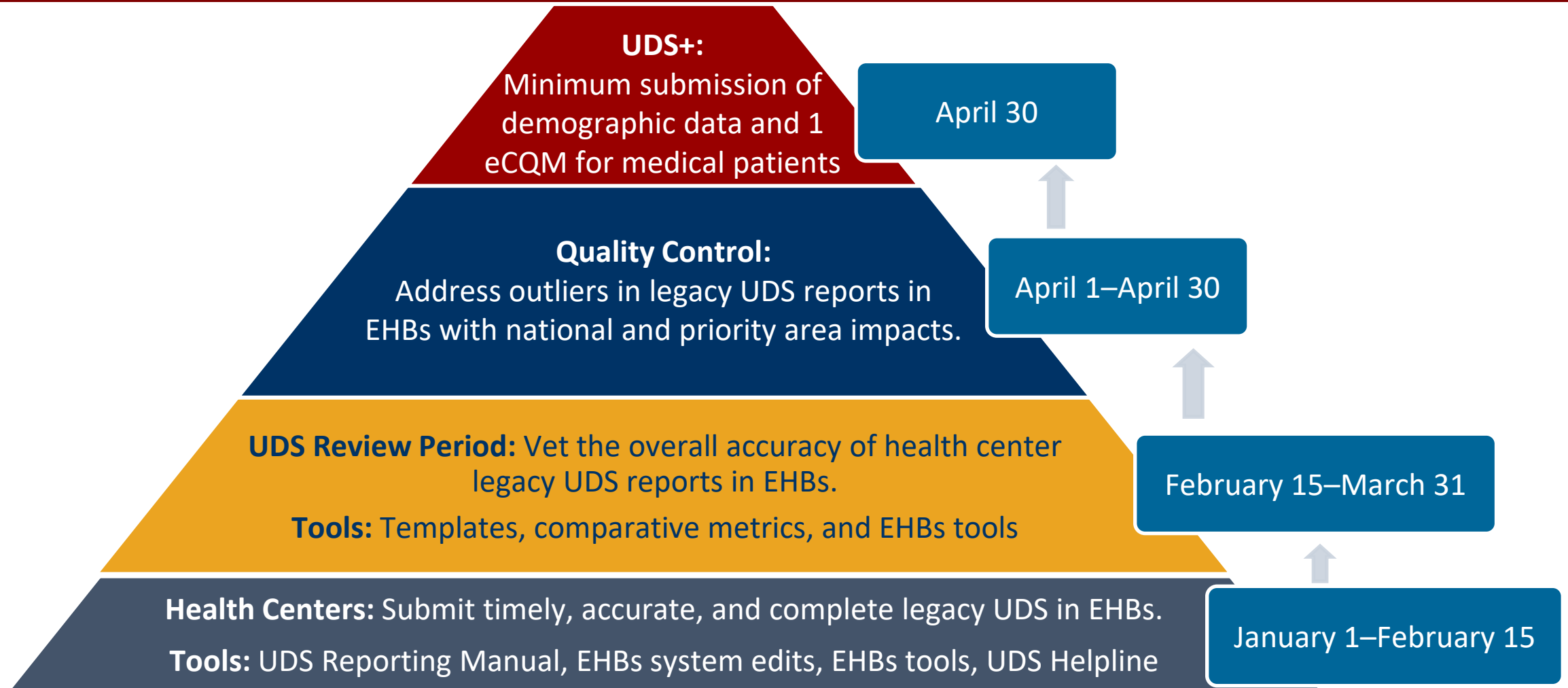
Sections and their tables include

Patient Demographics	Staffing and Utilization	Clinical Services and Performance	Operational and Financial	Forms
ZIP Code; Tables 3A, 3B, and 4	Table 5	Tables 6A, 6B, and 7	Tables 8A, 9D, and 9E	Appendices D, E, and F

Accurate UDS Reports: Legacy UDS Report in EHBs



Accurate UDS Reports: Addition of UDS+



Patient Demographic Tables

ZIP Code, 3A, 3B, and 4

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



Table 4: Selected Patient Characteristics Data Collection

Section of Table 4	Data Sources		When Data Are Collected		
	Electronic Health Record (EHR) or Internal System	Other Sources (e.g., Payers)	Patient Registration	Payer Enrollment Data	Visit
Income as a Percent of Poverty Guideline	✓		✓		
Primary Medical Insurance	✓		✓	✓	Confirm at each visit
Managed Care Utilization		✓		✓	
Special Populations	✓		✓		Confirm at each visit



Key Data Checks for Patient Demographic Tables

ZIP Table

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

Confirm that patients who have Medicaid, Children's Health Insurance Program (CHIP), or Other Public are a combined count (vs. Table 4, where they are reported separately).

Table 3B

Race and Ethnicity: It is unlikely that more patients would self-report that they were of Other Asian, Other Pacific Islander, or Another Hispanic, Latino/a, or Spanish Origin than the options available for the subcategory.

SOGI: It is not typical for *all* patients to be reported as Male or Female. There are likely patients for whom the data are not collected, who choose not to disclose, who are transgender, or who select something else.

Table 4

CHIP: If more than 10% of patients with CHIP are adults age 18+, review the age breakdowns and age caps for CHIP enrollment in your state/territory.

Special Populations: Confirm public housing is reported based on site, not based on patient characteristics. Confirm that school-based service site patients are only reported when there is an in-scope school-based service site.

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

Table 5 and Selected Service Detail Addendum Staffing and Utilization

Section of Table 5	Data Sources			When Data Are Collected	
	EHR	Other System (Internal)	External Providers, Labs, etc.	Visit, Encounter	Year-End Admin/ Financial Data
Staffing and Utilization					
FTEs		✓			✓
Clinic Visits and Virtual Visits	✓	✓	✓	✓	
Patients	✓	✓	✓	✓	
Selected Service Addendum					
Personnel		✓			✓
Clinic Visits and Virtual Visits	✓			✓	
Patients	✓			✓	



Key Data Checks for Staffing and Utilization

Table 5

Productivity (defined as visits per 1.0 full-time equivalent [FTE]) may vary year over year, but rarely exceeds 3,500 per provider.

Hourly personnel with no or reduced benefits who work more than full-time (i.e., overtime) will have an FTE greater than 1.00.

Virtual visits: If you have visits reported on Table 5 in Column B2 (virtual visits), you will report “yes” on Question 2 in the Appendix E: Other Data Elements form.

Table 5 Addendum

Mental health visits on the addendum *cannot exceed* medical visits on the main section of Table 5. The sum of mental health visits on the addendum and mental health visits on the main part of Table 5 (Line 20) should not exceed mental health visits on Table 6A.

Substance use disorder (SUD) visits on the addendum *cannot exceed* total medical and mental health visits on the main section of Table 5. The sum of SUD visits on the addendum and SUD visits on the main part of Table 5 (Line 21) should not exceed total SUD visits on Table 6A.

Clinical Services and Quality of Care Indicators

Tables 6A, 6B, and 7

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



Table 6A: Selected Diagnoses and Services Rendered Data Collection

Section of Table 6A	Data Sources		When Data Are Collected	
	EHR	External Providers*, Labs, etc.	Visit, Encounter	Year-End Admin/Financial Data
Visits	✓	✓	✓	
Patients	✓	✓	✓	

*External providers includes services paid for by health center and/or results returned to the health center to read and follow up with the patient.

Key Data Checks for Services Rendered

Table 6A

All reporting on Table 6A is specific to **health center patients**.

- Patient must have a countable UDS visit on Table 5 and be included on demographic tables to be counted on Table 6A.
- UDS reporting does not include mass testing/screening, tests done for the community, etc., unless the mass testing/screening was done (and recorded) on a health center patient with a countable visit during the year.

Typically, **visits per patient** for each service line on Table 6A will not exceed 2.0, with some exceptions.

Total medical visits on Table 6A average 50% of total medical visits on Table 5.

Total dental visits on Table 6A tend to exceed dental visits on Table 5.

Value sets have been included, where available. Be sure this doesn't result in double counting. It is not expected that value sets will notably change reporting from prior year.



Tables 6B and 7

Clinical Services and Performance Data Collection

Section of Tables 6B and 7	Data Sources		When Data Are Collected	
	EHR	External Providers, Labs, etc.	Patient Registration	Visit, Encounter
Table 6B: Quality of Care Measures				
Prenatal Patient Age and Entry into Care	✓	✓	✓	✓
Clinical Quality Measures	✓	✓	✓	✓
Table 7: Health Outcomes & Disparities				
Deliveries and Birthweights	✓	✓	✓	✓
Hypertension and Diabetes	✓	✓	✓	✓



Key Data Checks for Clinical Quality Measures

Table 6B

To be eligible for inclusion, a person must have had a **countable UDS visit** (so reported on Table 5) **and meets the denominator criteria** as specified by the measure steward.

The portion of patients who meet performance, known as the **numerator**, may vary year over year. These variations may be due to changes in your services or sites and/or changes to the measure by the measurement steward.

Table 7

The **race and ethnicity subcategories** for each of the three measures align with race and ethnicity categories in Table 3B.

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 denominators of the **hypertension and diabetes** reporting on this table. The numbers should not be the same on the two tables because they have different parameters.

Reminders about Clinical Quality Measures

For all Tables 6B and 7 measures that are electronically specified clinical quality measures (eCQMs) (which is most!), it is critically important to refer to the measure specifications in the Electronic Clinical Quality Improvement (eCQI) Resource Center and the value sets, which define eligible codes, in the Value Set Authority Center (VSAC).

Tables 6B and 7 sections of the [UDS Manual](#) summarize clinical measure information and provide UDS-specific insight.

Materials available on the [HRSA UDS Training and Technical Assistance \(TTA\) site](#) clarify components of UDS-reported elements.

[eCQI Resource Center](#) is the national, central repository for clinical measure specifications, as defined by measure stewards.

Each eCQM in the eCQI Resource Center lays out in clinical quality language (CQL) how the measure works and with what data elements (e.g., value sets).

The [VSAC](#), which requires a login, is where the details of each value set, including what codes they are comprised of, can be found.

View this video: [Accessing and Reading Electronic Clinical Quality Measures \(eCQMs\) for UDS](#)



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

Tables 8A, 9D, and 9E	Data Sources				When Data Are Collected			
	EHR	Pharmacy	Other Systems (Internal)	Other Sources (e.g., Payers)	Patient Registration	Payer Enrollment Data	Visit, Encounter	Year-End Admin, Financial Data
8A: Financial Costs		✓	✓					✓
9D: Patient Service Revenue	✓	✓	✓	✓	✓	✓	✓	✓
9E: Other Revenue			✓					✓

Key Data Checks for Operational and Finance Tables

Table 8A

Review Table 8A and Table 5 together to verify they are reported consistently.

Notable changes on Table 5, such as significant decreases in FTEs or visits, are likely to appear on Table 8A as well.

Report non-cash donations on Line 18.

Table 9D

Confirm **charges** (Column A) are reported based on fee schedule for services provided not based on reimbursement or contracted rates.

An **increase in visits** on Table 5 often results in an **increase in charges** on Table 9D, and vice versa.

Table 9E

Be sure to report money **drawn down in 2024 only**, by the entity from which the health center received the money.

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

Grant revenue received from **BPHC are reported on Lines 1a–1q**. All other federal grant revenue are reported on Lines 2–3b.

Other Forms in the UDS

Form

Appendix D: Health Information Technology (Health IT) Capabilities Form

Appendix E: Other Data Elements Form

Appendix F: Workforce Form



Key Data Checks for Appendix Forms



Many questions on this form can be answered **sooner rather than later** (except for social determinants of health screening).

If you are doing **social risk screening**, select “Yes,” (Question 11). Identify the screener (Question 12). Report the count of total patients who were screened and total who screen positive in each category (Questions 11a and 12a).



Telemedicine reporting on this form includes all **services provided via telehealth** in the calendar year; no need to limit to those that generated countable visits.

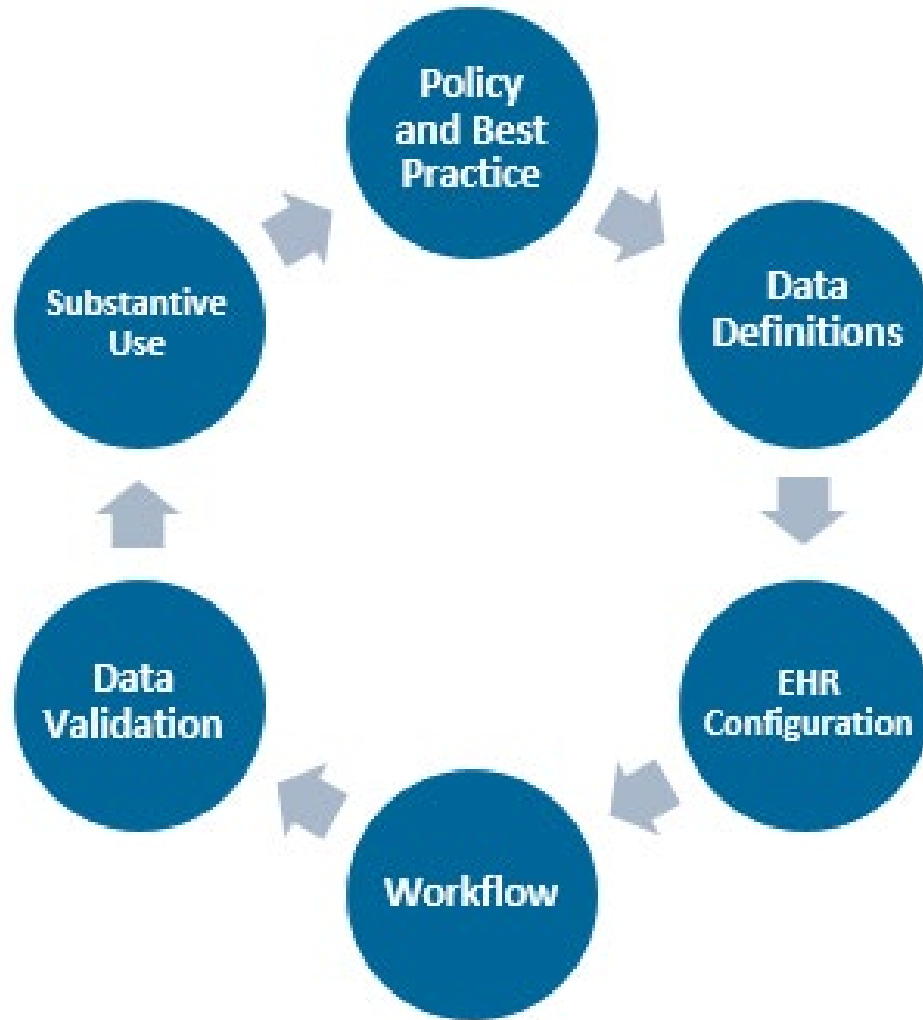
Family planning needs: A new question captures the total number of patients screened for family planning needs using a standardized screener. There is no specified age or gender requirement in the UDS for screening for family planning.



Only report **health professional development education/training**. This means internal professional development—continuing medical education or staff training—are not included.

The final questions on this form are asking about **satisfaction of personnel**, *not* patient satisfaction surveys.

Overview of Data Life Cycle



Accurate and complete UDS reporting is an **outcome** of a well-executed and well-maintained data life cycle within each health center.

Poll #2

Which part of the data life cycle is the most challenging in your UDS reporting process?

- Policy and best practice
- Data definitions
- EHR configurations
- Workflow
- Data validation
- Substantive use



Navigating the EHBs Successfully

Demonstration of EHBs Features and Tools



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

The screenshot displays the HRSA Electronic Handbooks website. At the top, the HRSA logo and 'Electronic Handbooks' are visible, along with 'Support' and 'Login' links. A navigation bar includes 'Welcome', 'New User Registration', 'Funding Opportunity', and 'What's New'. The date and time 'Monday 12th August 2019 02:58:39 P.M.' are shown in the top right. The main content area is divided into several sections:

- Existing Users:** A login form with fields for 'Username (Email)' and 'Password', a 'Login' button, and a 'Forgot Password?' link. This section is highlighted with a yellow border.
- New Users:** A section with a 'Create an Account' button and a link 'Click here to get started'.
- Contact Us:** 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', and a 'Link to contact us: click here'.
- What's New:** A section with a blue header containing 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](#)A 'View All' link is located at the bottom right of this section.
- Learn About:** A section with three links: 'Grant Program', 'Free Clinic Program', and 'FQHC-LAL Program'.
- Other Links:** A section with four links: 'Browser Requirements', 'Funding Opportunities', 'Track Grant Application', and 'Help'.



EHBs Landing Page

- At the **top** are tabs you will use to navigate.
- On the **left side**, you'll see your tasks.
- On the **right side**, you can change permissions and roles (provided you have a role, such as CEO or Project Director, that permits this).

This is where you will change login permissions.

Category	Submitted Tasks	Submitted	Status
Grant Application	Fiscal Year 2024 Behavioral Health Service Expansion (HRSA-24-078)	06/19/2024	Technical Review
Grant Application	FY 2023 Bridge Access Program (HRSA-23-136)	08/18/2023	Application Receipt
Grant Application	Health Center Program School-Based Service Expansion (HRSA-23-097)	05/01/2023	Application Receipt
Grant Application	Service Area Competition (HRSA-23-023)	12/07/2022	Application Receipt
Grant Application	FY 2023 Expanding COVID-19 Vaccination (ECV) (HRSA-23-107)	11/28/2022	Application Receipt



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 or UK for BHW awardees).
- Click **Edit** to go to your UDS Report.

The screenshot shows the HRSA Electronic Handbooks interface. The main content area displays a 'Pending Tasks - List' table. The table has columns for Deadline (Due), Task Category, Tracking #, Task, Entity, and Organization. The first row is highlighted with an orange box, and an orange arrow points to the 'Edit' button in the 'Actions' column for that row.

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Actions
02/15/2025 11:59 PM (136 Days)	Grant Submissions	H80CS007392024	Performance Reports	H80CS00739 (Grant)	WOOLF CABLELINX COUNTY TECHNICAL INSTITUTE	Edit
PM (35 Days)	Grant Submissions	SCPV039291	Other Submissions	H80CS00759 (Grant)	LA CLINCA DEL VALLE FAMILY HEALTH CENTER INC	Start
10/02/2024 06:16 AM (Late by 0 Days)	Annual Review	OPR-0000065416	Organization Annual Review	N/A	WOOLF CABLELINX COUNTY TECHNICAL INSTITUTE	Start
02/06/2012 11:59 PM (Late by 4622 Days)	Grant Submissions	00108540	Other Submissions	H80CS00759 (Grant)	LA CLINCA DEL VALLE FAMILY HEALTH CARE CENTER INC	Edit
11/29/2011 11:59 PM	Grant Submissions	SCPV002038	Other Submissions	H80CS00759 (Grant)	LA CLINCA DEL VALLE FAMILY HEALTH CARE CENTER INC	Edit

Preliminary Reporting Environment

- Health centers can access the UDS reporting module in the EHBs each fall.
- The system opens in late October as the Preliminary Reporting Environment (PRE).
- Follow the same steps to access either the PRE (before January 1) or the “live” UDS Report (after January 1).
 - Submission is only possible after January 1, in the live environment.
- Recording and slide deck from the November 6 webinar on the PRE is available on the [UDS Training and Technical Assistance Website](#).



UDS Report Home Page

- The left navigation panel includes **tools, tables, and forms**.
- 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 Jan. 1); it is green in the live environment (after Jan. 1).

HRSA Electronic Handbooks

Tasks Organization Grants Free Clinics

You are here: Home » Tasks

All Functions

Search

Performance Reports

UDS Upload/Download

- Download File
- Upload File
- Clear Data

UDS Report Details

Status Overview

- Contact Information
- Table Patients by ZIP Code
- Table 3A
- Table 3B
- Table 4
- Table 5
- Table 6A
- Table 6B
- Table 7
- Table 8A
- Table 9D
- Table 9E

Status Overview

Note:
All sections including tables, HIT information, other data elements and data audit report must be in "Complete" status in order to submit your report.
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.

H80CS007392024: WOOLF CABLELINX COUNTY TECHNICAL INSTITUTE, HANDLEY, OR

02/15/2025 (11:59 PM Local Time) Due Date

136 Days Left

Resources

UDS Manual | UDS Training and Technical Assistance | 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

Sections	Status	Last Updated
Contact Information	Not Started	-
Table Patients by ZIP Code	Not Started	-
Table 3A - Patients by Age and by Sex Assigned at Birth	Not Started	-

Forms Overview

Last Updated On: 09/27/2024 8:16 PM EST

Data Audit Report

12 Not Started | 1 In Progress | 4 Complete

Offline Excel Tool

Download a Custom Template
The Download Custom Template option allows you to choose the UDS tables individually, in groups or all tables.

Download a Blank Template
The Download Blank Template option downloads ALL UDS Tables with no data included.



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 do not see this menu, click the arrows next to "All Functions" in the upper left corner.

The screenshot shows the 'All Functions' menu in the upper left corner, which is highlighted with a yellow box. The menu includes a search bar, 'Performance Reports' dropdown, and a 'UDS Upload/Download' section with options for 'Download File', 'Upload File', and 'Clear Data'. Below this is the 'UDS Report Details' section, with 'Status Overview' selected. The 'Status Overview' section shows a list of tables with status indicators: Contact Information (red X), Table Patients by ZIP Code (red X), Table 3A (red X), Table 3B (red X), Table 4 (green checkmark), and Table 5 (red X). The main content area features a yellow banner stating 'You are now using the UDS Preliminary Reporting Environment (PRE). It is available to...'. Below this is a 'Status Overview' section with a 'Note' box containing instructions: 'All sections including tables, HIT information, other data elements and data audit report must be... Tip: Prior to entering any data, save a copy of the blank excel template. The blank file can later be...'. The main content area also displays 'H80CS007392024: WOOLF CABLELINX COUNTY TECHNICAL INSTITUTE, HANDL' and a 'Due Date' of '02/15/2025 (11:59 PM Local Time)'. At the bottom, there is a 'Resources' section with a list of links: 'UDS Manual | UDS Training and Technical Assistance | Upload History | Action History | Last Product List Lookup | Excel Mapping Document | Request Exemption | Verify Offline HTML D'.



UDS Upload/Download: Download File

All Functions <<

Search

Performance Reports ▾

UDS Upload/Download

Download File

Upload File

Clear Data

UDS Report Details

Status Overview

- ✗ Contact Information
- ✗ Table Patients by ZIP Code
- ✗ Table 3A
- ✗ Table 3B
- ✓ Table 4
- ✗ Table 5

HRSA Electronic Handbooks

Tasks Organization Grants Free Clinics FQHC-LALs Dashboards Resources

You are here: Home > Tasks

You are now using the UDS Preliminary Reporting Environment (PRE). It is available to enter and validate partial UDS data prior to Jan

Download File

H80CS007392024/v1: WOOLF CABLELINX COUNTY TECHNICAL INSTITUTE, HANDLEY, OR

BHCMIS ID: 100790 Funding Stream(s): CHC, HCH, MHC, PHPC

Reporting Period: 01/01/2024 - 12/31/2024 Started By: Dwayne Schiffner on 09/16/2024 09:31 AM ET

Resources

UDS Manual | UDS Training and Technical Assistance | Upload History | Action History | Last NoA | Training Material | UDS Reviewer | User(s) With Permissions | Certified Health IT Product List Lookup | Excel

Instructions

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

With either file you can download specific tables or all the tables required for the UDS report. Please note that each time you download a file, it will be populated with any data that is in the EHBs.

Enter or change data in the file you have chosen. Once finished, upload your completed file to the EHBs.

Excel File: Upload your completed file to the EHBs.
HTML File: Export an Excel file from the HTML file then upload the completed Excel file to the EHBs.

Download Template

Select Format

Offline Excel *i* Offline HTML *i* **Download**

Excel Template



UDS Upload/Download: Download File (continued)

Three decisions to make:

1. Do you want to use Excel or HTML format?
2. Do you want the file to include data already added to the calendar year UDS by the health center?
3. Do you want to do all tables at once or just a selected set?
4. If downloading the ZIP table, do you want to include prior-year ZIP codes?

Download Template		
Select Format	<input checked="" type="radio"/> Offline Excel ⓘ	<input type="radio"/> Offline HTML ⓘ
		Download
Excel Template		
Select Data Level	<input checked="" type="radio"/> Excel with Data	<input type="radio"/> Blank Excel
Select Table	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Table Patients by ZIP Code <input checked="" type="checkbox"/> Table 3A <input checked="" type="checkbox"/> Table 3B <input checked="" type="checkbox"/> Table 4	<input checked="" type="checkbox"/> Table 5 <input checked="" type="checkbox"/> Table 6A <input checked="" type="checkbox"/> Table 6B <input checked="" type="checkbox"/> Table 7 <input checked="" type="checkbox"/> Table 8A <input checked="" type="checkbox"/> Table 9D <input checked="" type="checkbox"/> Table 9E <input checked="" type="checkbox"/> Table HIT <input checked="" type="checkbox"/> Other Data Elements <input checked="" type="checkbox"/> Workforce
<input type="checkbox"/> Patients by ZIP Code with Prior year ZIP Codes <small>(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.)</small>		



Considerations when Downloading Offline Files

Excel vs. HTML?

Excel format may feel more familiar if you have used it before, but it's important to know that users should be **careful not to modify the structure of the Excel file**. If modified, it cannot be uploaded. **HTML looks like the UDS tables** and does not allow structure modification.

Including Data or Not?

If no data or only test data have been entered, then blank is better.
If complete data are present, include these data in the EHBs so data are available.

All Tables or a Select Set?

Typically, you should **select just the set of tables you are currently working on**. If you download all tables and do not use all of them, you risk uploading blank tables over existing data.

Downloading Offline Templates

Download Template

Select Format Offline Excel Offline HTML

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

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.

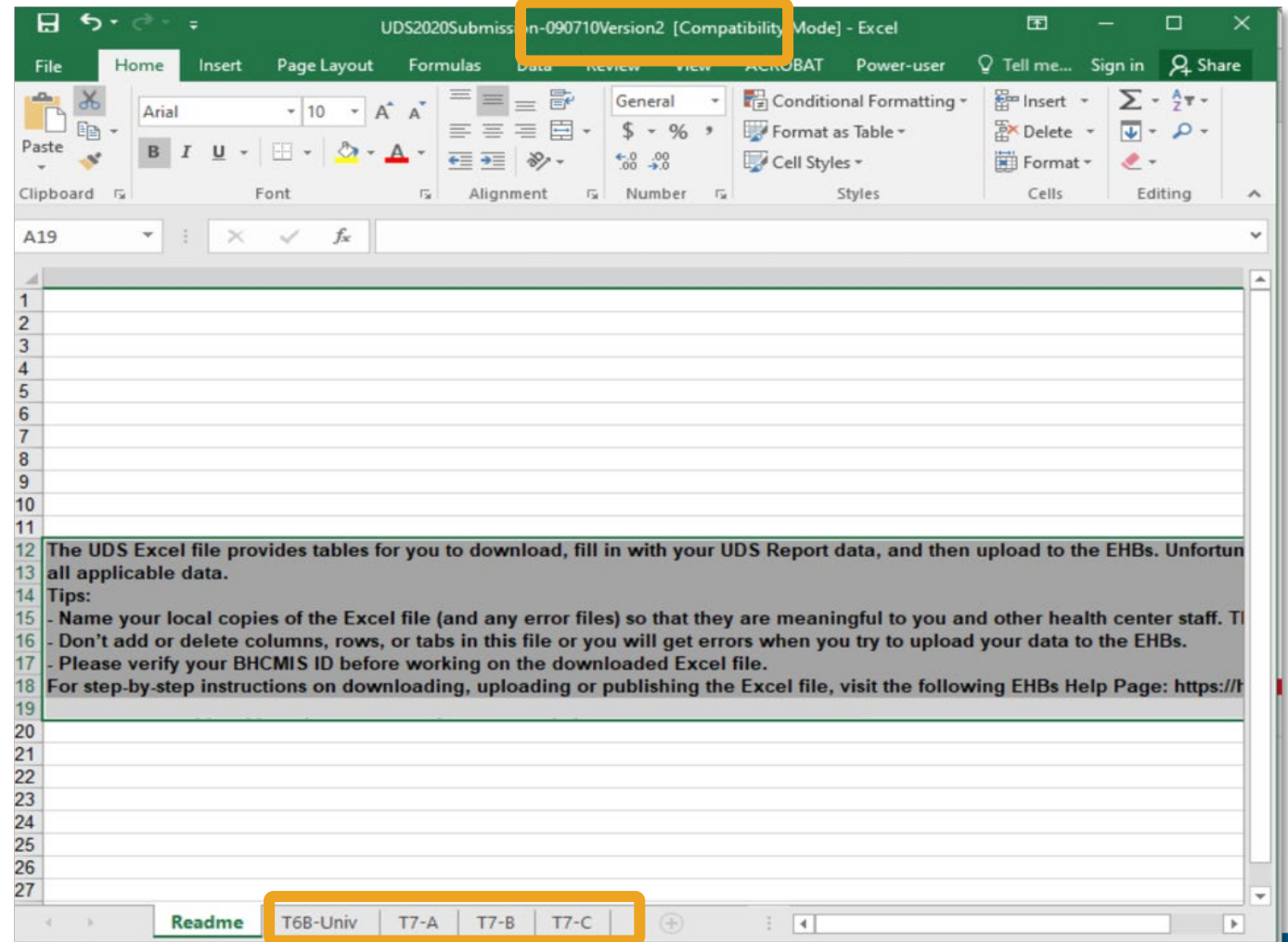
Please read the instructions carefully for a successful Offline HTML download.

- 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.



Using Offline Excel

- **The first tab has tips for success.**
 - When it says to verify your Bureau of Primary Health Care Health Center Management Information System (BHCMIS) ID, it means to verify that in the filename. Your BCHMIS ID does *not* start with H80 (It may be 6 numbers or 6–7 numbers with an E in it).
- **Table 7:** Each section/measure has its own tab.
- Only data elements with numeric responses can be updated in offline Excel; non-numeric information (like specify fields or form responses) must be updated directly in EHBs.



Using Offline HTML

Benefits include:

- Save and validate data without internet connection or EHBs access.
- Same look and feel of the EHBs.
- Saved and validated the same way it's done in the EHBs.

You are now using the Offline HTML tool that can be used to enter and validate UDS data in preparation for reporting. No internet connection is required to use this file. Your data will need to be exported to an Excel File, then uploaded to the EHBs to run the Data Audit Report and complete reporting.

Table Patients by ZIP Code

Note:
You are currently working in HRSA offline HTML tool Version 1.0.0. It was downloaded 09/25/2023 5:43 PM EST. You do not need to be connected to the Internet to enter data in to your UDS forms.

H80C.S000662023/v1: SOUP SCHUMAG VOLUNTEER RESCUE SQUAD, CARLE PLACE, OH

Resources: UDS Manual

Status: **In Progress**

+ Add Multiple ZIP Codes

1 of 1 Page size 15 1 items in 1 page(s)

ZIP Code (a)	None/Uninsured (b)	Medicaid/CHIP/Other Public (c)	Medicare (d)	Private (e)	Total Patients (f)	Action
22033	7229	8524	1321	9680	26754	Delete


+ Add Row


Other ZIP Codes

Accessing a Comparison Report

- From the UDS Home Page or Status Overview Page, you can access your Comparison Report.
- The comparison tool allows you to view last year's and this year's UDS reports side by side.

<input checked="" type="checkbox"/> Homeless Report	✓ Complete	-
<input checked="" type="checkbox"/> Migrant Report	✓ Complete	-
<input checked="" type="checkbox"/> Public Housing Report	✓ Complete	-
<input checked="" type="checkbox"/> Table 5 - Staffing and Utilization	✗ Not Started	-
<input checked="" type="checkbox"/> Universal Report	✗ Incomplete	-
<input checked="" type="checkbox"/> Homeless Report	✗ Incomplete	-
<input checked="" type="checkbox"/> Migrant Report	✗ Incomplete	-
<input checked="" type="checkbox"/> Public Housing Report	✗ Incomplete	-
<input checked="" type="checkbox"/> Table 6A - Selected Diagnoses and Services Rendered	✓ Complete	09/27/2024 7:45 PM EST by Dwayne Schiffrer
<input checked="" type="checkbox"/> Universal Report	✓ Complete	-
<input checked="" type="checkbox"/> Homeless Report	✓ Complete	-
<input checked="" type="checkbox"/> Migrant Report	✓ Complete	-
<input checked="" type="checkbox"/> Public Housing Report	✓ Complete	-
<input checked="" type="checkbox"/> Table 6B - Quality of Care Measures	✗ Not Started	-
<input checked="" type="checkbox"/> Table 7 - Health Outcomes and Disparities	✗ Not Started	-
<input checked="" type="checkbox"/> Deliveries and Birth Weight	✗ Incomplete	-
<input checked="" type="checkbox"/> Controlling High Blood Pressure	✗ Incomplete	-
<input checked="" type="checkbox"/> Diabetes: Hemoglobin A1c Poor Control	✗ Incomplete	-
<input checked="" type="checkbox"/> Table 8A - Financial Costs	✗ Not Started	-
<input checked="" type="checkbox"/> Table 9D - Patient Service Revenue	✗ Not Started	-
<input checked="" type="checkbox"/> Table 9E - Other Revenues	✗ Not Started	-
<input checked="" type="checkbox"/> Health Center Health Information Technology (Health IT) Capabilities	✓ Complete	09/27/2024 7:49 PM EST by Dwayne Schiffrer

 **Download a Template with Data**
The Download Template with Data option includes ALL UDS tables with information already entered into the tables.

 **Upload a File**
Once you have completed your data entry in excel, click here to upload your file.

Compare Versions

Reference Year/Version:

Compare to Year/Version:


[Next](#)

Report Details

BHCMIS ID: 100790

Last Submitted By: N/A

Submit and Print

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

[Submit Performance Report](#)

[Compare Versions](#)



Running the Comparison Report

- Select your **reference** and **comparison** year.
- You can compare different versions of your report to see notable changes.
- Changes between versions are highlighted in yellow in resulting comparison.
- Once the UDS report is submitted, the comparison tool becomes disabled (unavailable).

You are now using the UDS Preliminary Reporting Environment (PRE). It is available to enter and validate partial UDS data prior to January 1. Actions to clear partial data and submit a complete calendar year of UDS performance data will ONLY be available starting January 1.

Compare Versions - Select Version

▶ H80CS007392024/v1: WOOLF CABLELINX COUNTY TECHNICAL INSTITUTE, HANDLEY, OR

Note:

* indicates data entry in progress and is subject to change.

Select Versions to be Compared

Reference Year/Version

2024 Version 1*

Compare To Year/Version

2023 Version 2

Close

Next



Poll #3

What changes can you identify from the Comparison Report? (Select all that apply.)

- Staffing
- Insurance mix
- Special populations served
- Clinical quality measure outcomes
- Revenue related to non-patient-service receipts



Poll #3: Answer

What changes can you identify from the Comparison Report? (Select all that apply.)

- ✓ Staffing
- ✓ Insurance mix
- ✓ Special populations served
- ✓ Clinical quality measure outcomes
- ✓ Revenue related to non-patient-service receipts

Accessing Prior UDS Reports

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

The screenshot displays the HRSA Electronic Handbooks web application. The top navigation bar includes a search box and a menu with the following items: Home, Tasks, Organization, Grants (highlighted with a yellow box), Free Clinics, FQHC-LALs, Dashboards, and Resources. Below the navigation bar, the breadcrumb trail reads "You are here: Home » Grants » Browse". The main content area is titled "My Grant Portfolio - List" and features a table with columns for "Grant Number" and "Organization". The table lists two grants: H80CS00061 and H76HA00053, both from HANDLOO CORPORA. A dropdown menu is open over the "Grants" tab, showing three main sections: "Submissions", "Requests", and "Portfolio". Under "Submissions", the option "Work on Performance Report" is highlighted with a yellow box. Other options in the "Submissions" section include "Work on Progress Report", "Work on Noncompeting Progress Reports", and "Work on Other Submissions". The "Requests" section includes "Work on existing Prior Approval", "Request New Prior Approval", "Work on Existing Health Center H80 CIS", "Request New Health Center H80 CIS", and "Manage HCCN PHCs". The "Portfolio" section includes "Add a Grant to My Portfolio", "Work on a Grant in My Portfolio", and "View My Access Requests". At the bottom of the page, there are icons for a star, a download arrow, and a user profile icon.



Managing the Review Process

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



Reporting Timeline for Legacy UDS Reports

OCT. 1

New program funding or designation cutoff date.



JAN. 1

EHBs reporting environment opens, providing access to your live UDS Report.



MAR. 31

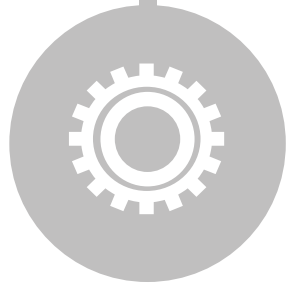
Review period ends, report closeout deadline.

SUBMISSION PERIOD

REVIEW PERIOD

FALL

Preliminary Reporting Environment (PRE) opens, allowing preliminary access to your UDS Report.



FEB. 15

UDS Report due in the EHBs by 11:59 p.m. local time.



Managing the Review Process

Start now

Submit by Feb. 15

Expect to hear no later than March 3

Communicate!

- Confirm that users have access to EHBs. Establish a timeline and workflow to complete your UDS Report.
- Information can be entered as soon as the PRE opens! Some information can be entered on the **Health IT, Other Data Elements, and Workforce forms**. You can **download offline data tools** now to practice. Remember, some information is not complete until the **end of the calendar year**; don't start entering data into tables yet.

- Submit your report through the EHBs by **February 15**. Be sure to allow time to address edits!
- When addressing edits, provide detailed responses on the edits in the Data Audit Report.

- If you have not heard from your reviewer by Monday, March 3, with an update on the status of the review, review questions or a notification that your report has been accepted, email them!
- Your reviewer will send a **review letter** with any questions or needed clarifications about your UDS report.
- **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.

- Your reviewer may ask for explanation for some data or request the data be corrected. 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!
- 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).



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

Resources, Questions, and Answers



UDS Training and Technical Assistance Resources

Now available: [UDS reporting resources](#) on the BPHC website

- Introduction
- Reporting Training Schedule
- Reporting Guidance
- Patient Characteristics
- Staffing and Utilization
- Clinical Care
- Financials
- Appendices
- Additional Reporting Topics
- Technical Assistance Contacts
- UDS Data
- Archived Resources

Uniform Data System (UDS) Training and Technical Assistance
Last updated: August 9, 2024

Announcement
NEW [2023 UDS Data Now Available](#)
View the 2023 UDS data on the HRSA Data Warehouse

UDS test cooperative stakeholder group
Health centers, Primary Care Associations (PCAs), Health Center-Controlled Networks (HCCNs), and health information technology (IT) vendors are welcome to join the [UDS Test Cooperative](#) (UTC) stakeholder group. To join, contact us through the [BPHC Contact Form](#) and select Uniform Data System (UDS), UDS Modernization, next How to join the UDS Test Cooperative.

Featured resources

- **NEW** [2023 UDS Trends Data Brief](#) (PDF - 303 KB)
View the data brief for a summary of important 2023 UDS data
- [2024 UDS Final Program Assistance Letter \(P&L\)](#) (PDF - 202 KB)
An overview of final updates to CY 2024 UDS reporting
- [2024 UDS Manual](#) (PDF - 2 MB)
Provides health centers with detailed reporting instructions and example data tables that support calendar year 2024 UDS reporting
- [2024 UDS Tables](#) (PDF - 1 MB) and [Excel](#) (XLSX - 303 KB)
Resources to help health centers prepare UDS submissions in advance with an organized, standard structure

Search Book:
Keywords:

Contents

Introduction	Financials
Reporting Training Schedule	Appendices
Reporting Guidance	Additional Reporting Topics
Patient Characteristics	Technical Assistance Contacts
Staffing and Utilization	UDS Data
Clinical Care	Archived Resources

Date Last Reviewed: August 2024

Scan the QR code to go directly to the Training and Technical Assistance page!



Resources for the Electronic Handbooks

- [EHBs Overview Video](#) explains the importance of UDS reporting and the permissions required to access the UDS report and provides an overview of UDS tables and appendices.
- [HRSA EHBs Knowledge Base](#) is a wiki that introduces the electronic submission system, EHBs, PRE, and [system enhancement resources](#).

Reporting Guidance Located on the EHBs

- [Accessing UDS Reporting Guidance Resources on the Electronic Handbooks](#) provides steps to find resources on the EHBs that help Health Center Program awardees and look-alikes (LALs) access UDS reports and the PRE.
 - UDS EHBs User Guide: A step-by-step guide of the process to access, prepare, submit, and revise UDS reports and access standard UDS reports in the EHBs.
 - Accessing Standard UDS Reports: Quick reference sheets that describe how to access standard UDS reports from the EHBs.
 - Offline Excel Mapping Tool: A companion file to the offline UDS data Excel template. This tool helps streamline reporting by providing mapped cell locations to data fields. The offline Excel and mapping documents should be used with an EHR or data system to help in automating the UDS Report.
- [2022 EHBs Reports Formula Reference Guide](#) explains the calculation formulas used for statistics included in standard UDS reports.



UDS Reporting Webinar Series

Archived webinars include:

- **UDS Basics:** Orientation to Terms and Resources
- **Clinical Quality Measures Deep Dive**
- **UDS Clinical Tables Part 1:** Screening and Preventive Care Measures
- **UDS Clinical Tables Part 2:** Maternal and Child Health Measures
- **UDS Clinical Tables Part 3:** Chronic Disease Management Measures
- **Reporting UDS Financial and Operational Tables**
- **Preliminary Reporting Environment (PRE)**



All webinars are archived on the [HRSA website](#); watch them anytime!



Support Available

Description	Contact	Email or Web Form	Phone
UDS reporting questions	UDS Support Center	udshelp330@bphcdata.net or BPHC Contact Form Select: Uniform Data System (UDS) > UDS Reporting > the most applicable subcategory	866-837-4357 (866-UDS-HELP)
EHBs account and user access questions	Health Center Program Support	BPHC Contact Form Select: Technical Support > EHBs Tasks/Technical Issues > EHBs Privileges	877-464-4772
EHBs technical issues with UDS Reports	Health Center Program Support	BPHC Contact Form Select: Technical Support > EHBs Tasks/Technical Issues > Other EHBs Submission Types	877-464-4772
UDS+ FHIR IG and API (UDS Modernization) technical support	Health Center Program Support	BPHC Contact Form Select: Uniform Data System (UDS) > UDS Modernization > Patient-level Submission (UDS+)	877-464-4772

FHIR IG = Fast Healthcare Interoperability Resources Implementation Guide; API = application programming interface





UDS Data Modernization and UDS Patient-Level Data (UDS+)

HRSA BPHC

Vision: Healthy Communities, Healthy People



Why Are We Modernizing UDS?

- Leverage developments in health IT over the last decade that allow us to advance health equity efforts while reducing reporting burden
- Standardize data collection using FHIR resources to automate and reduce the technical burden for health centers
- Improve the fidelity and integrity of data and enable more robust analyses to improve equitable access to high-quality, cost-effective care for our patients
- Drive quality improvement for vulnerable and historically underserved population groups
- Allow HRSA to better administer the Health Center Program and better serve its patients



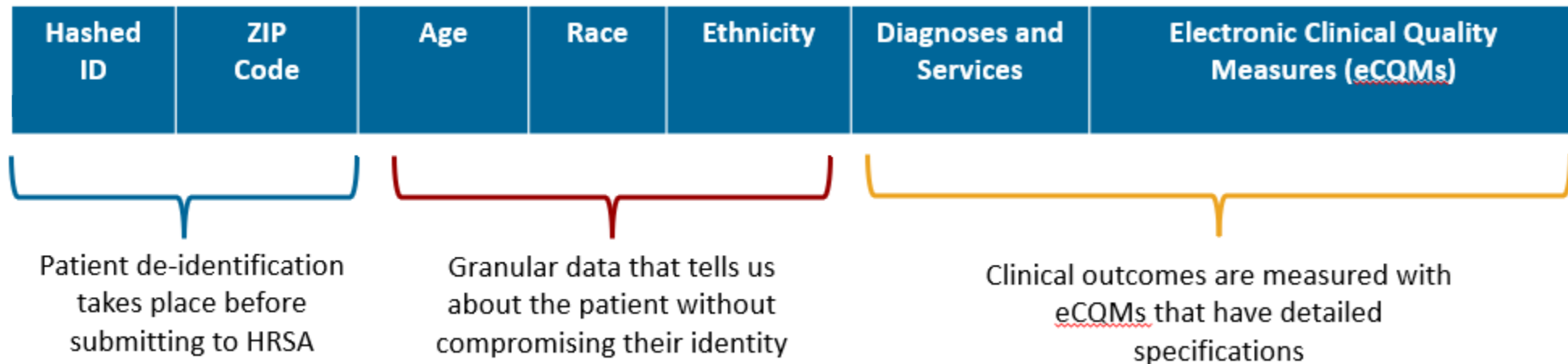
UDS Patient-Level Submission (UDS+)

UDS+ is...

- De-identified patient-level data
- Applicable to UDS Tables Patients By ZIP Code, 3A, 3B, 4, 6A, 6B, and 7
- Submitted via FHIR

UDS+ is not...

- Full copies of data directly from patients' electronic medical records



For more information, visit: [UDS Modernization Initiative](#)



UDS+ 2024 Reporting Year: Submission Requirements



2024 UDS+ Submissions
Due by April 30, 2025

1 Submit data for your *medical* patients.

2 Submit *all* the demographic tables data:

- **Table:** Patients by ZIP Code
- **Table 3A:** Patients by Age and by Sex Assigned at Birth
- **Table 3B:** Demographic Characteristics
- **Table 4:** Selected Patient Characteristics

(Managed Care Utilization lines are NOT required for UDS+ CY 2024 reporting)

3

Submit *one eCQM* from the measures listed below:

- **Table 6B:** Quality of Care Measures
 - Breast Cancer Screening
 - Cervical Cancer Screening
 - Colorectal Cancer Screening
- **Table 7:** Health Outcomes and Disparities
 - **Controlling High Blood Pressure***
 - Diabetes: Hemoglobin A1c (HbA1c) Poor Control (>9.0%)

** Recommended measure*



2024 Calendar Year: UDS and UDS+ Reporting

All health centers are **required** to submit **aggregated** UDS data by **February 15, 2025**.

All health centers will be required to submit a minimum amount of **patient-level data (UDS+)** by **April 30, 2025**.



- Submit aggregated UDS data through EHBs, using the traditional submission method.
- Include all UDS tables and appendices.
- This will be the official submission of record.



- Submit UDS+ data via FHIR.
- Include, at a minimum, only demographic data and one eCQM for medical patients.
- UDS+ submission supports system capacity building and progress toward full implementation.

EHBs will remain the submission of record.

How Can Health Centers Prepare for UDS+?



UDS TEST COOPERATIVE (UTC)

Join the [UTC](#) for continued UDS+ updates and resources.

HL7® FHIR®

Review:

HL7.org

[HL7® FHIR® resources page](#)

[UDS+ FHIR IG](#)

ENGAGEMENT

Visit the [UDS Modernization Initiative webpage](#) for up-to-date UDS+ information.

Encourage your health IT vendors to join the UTC and participate in UDS+ testing before 2025.



Submit questions through the [BPHC Contact Form](#) by selecting **Uniform Data System (UDS) > UDS Modernization > Patient-level Submission (UDS+)**.

Questions and Answers



Thank You!

Bureau of Primary Health Care (BPHC)

Health Resources and Services Administration (HRSA)

 udshelp330@bphcdata.net *or* [BPHC Contact Form](#)

 **1-866-837-4357**

bphc.hrsa.gov



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