



# Uniform Data System Reporting 2021 – Training Session for Health Centers

**BPHC** 

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Vision: Healthy Communities, Healthy People



# Agenda

- Objectives
- Uniform Data System (UDS) Navigation
- Preliminary Reporting Environment (PRE) and Compare Data
- Offline Excel Feature
- Offline HTML Feature
- Clear Data
- Data Audit Report, Review, and Submit
- Resources
- Question and Answers





# **Objectives for Health Centers**

- Be able to access and navigate the UDS Reporting pages.
- Understand the data entry options, including how to automate data entry through offline Excel and HTML options.
- Know how to review and submit your UDS Reports through the EHBs.



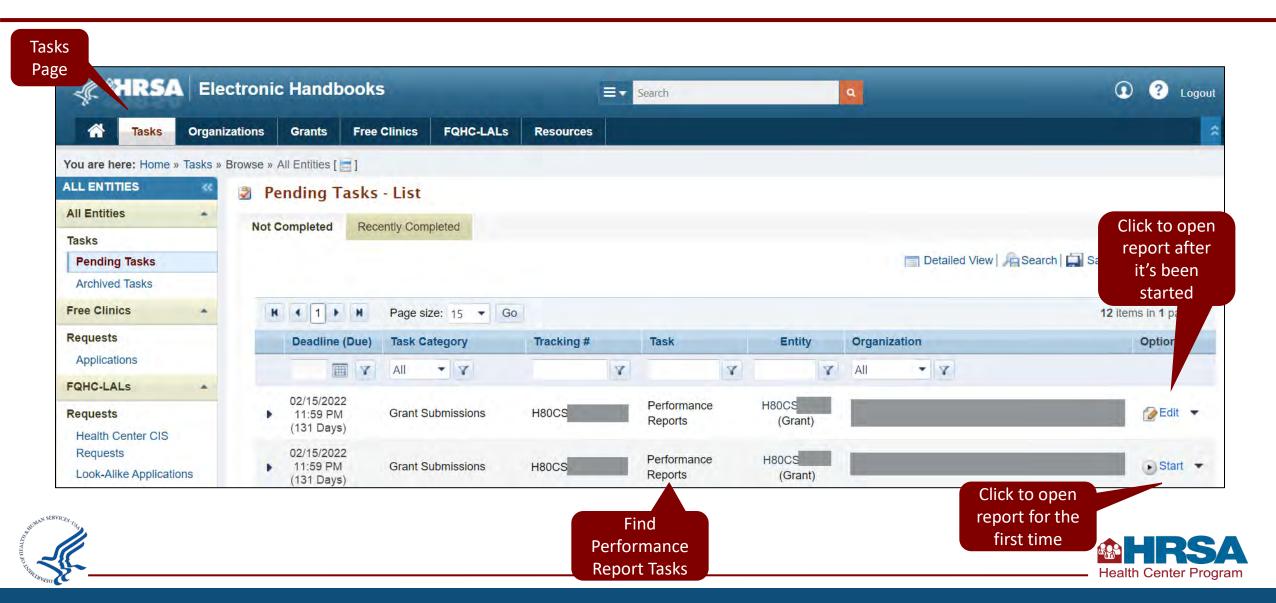


# **Navigating the Uniform Data System**

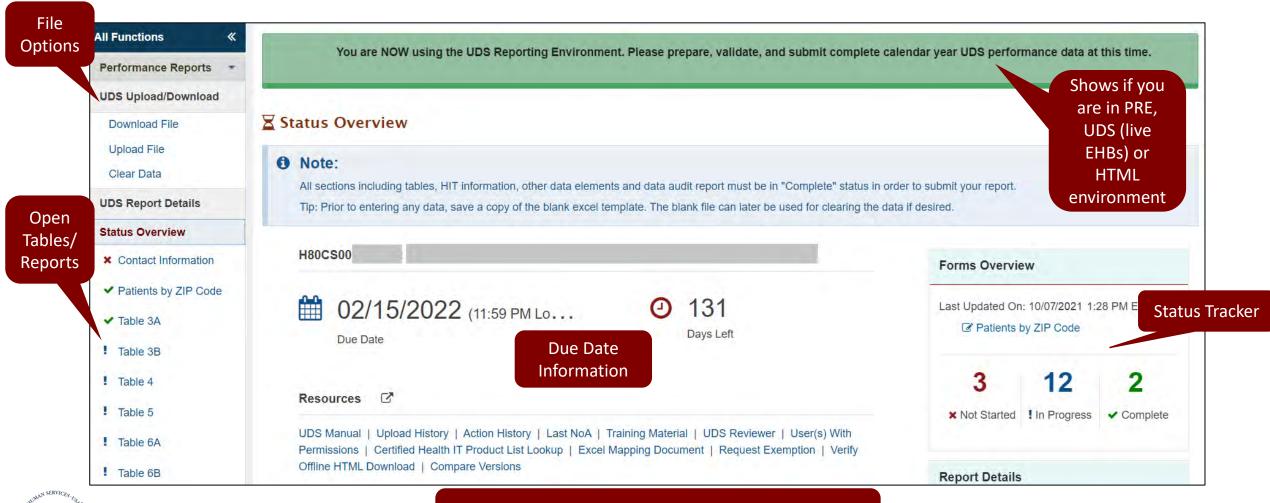




# **Navigate to UDS Reports**



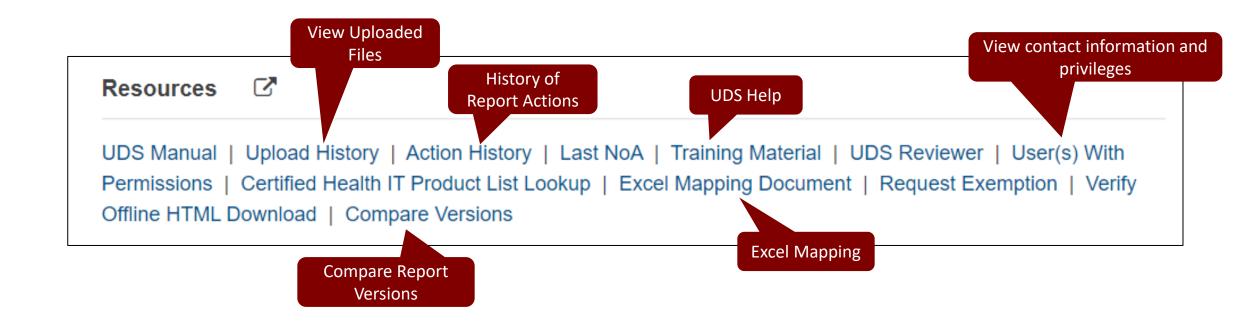
# **UDS Navigation**



Helpful tip! The due date time is 11:59 your local time.



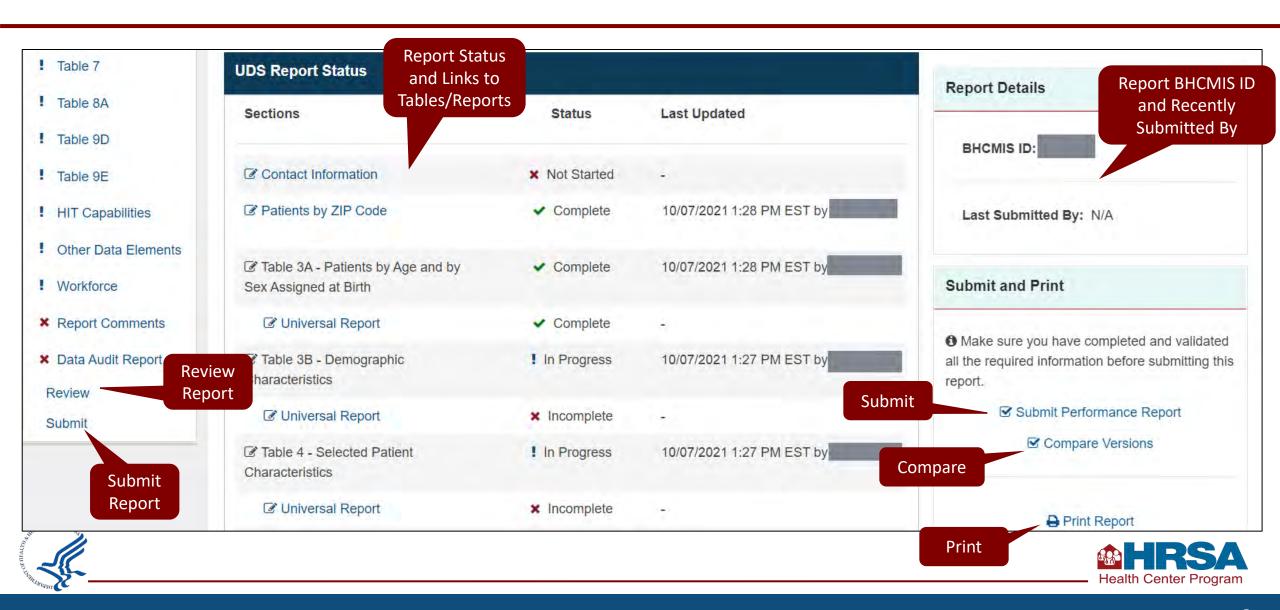
# **UDS Navigation (continued)**







# **UDS Navigation (continued 2)**



#### Demo

# **UDS Navigation Demo**





# Preliminary Reporting Environment (PRE) and Comparing Report Versions





# **Preliminary Reporting Environment**

#### Preliminary Reporting Environment (PRE)

System available **as of October 29**<sup>th</sup> to prepare report for submission

You are **not able to submit** the report at this time, only prepare the report

Additional time to enter data and edit

**Improved data quality** with extra time

Opportunity to **familiarize** yourself with UDS forms updates ahead of reporting time frame





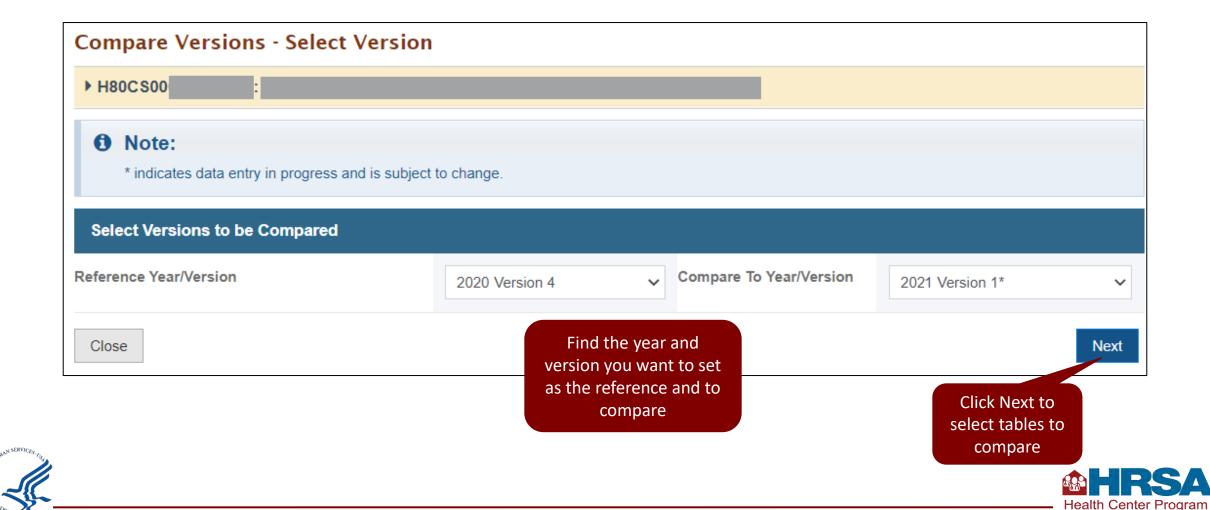
Easily view
differences
between years
or versions
within a year

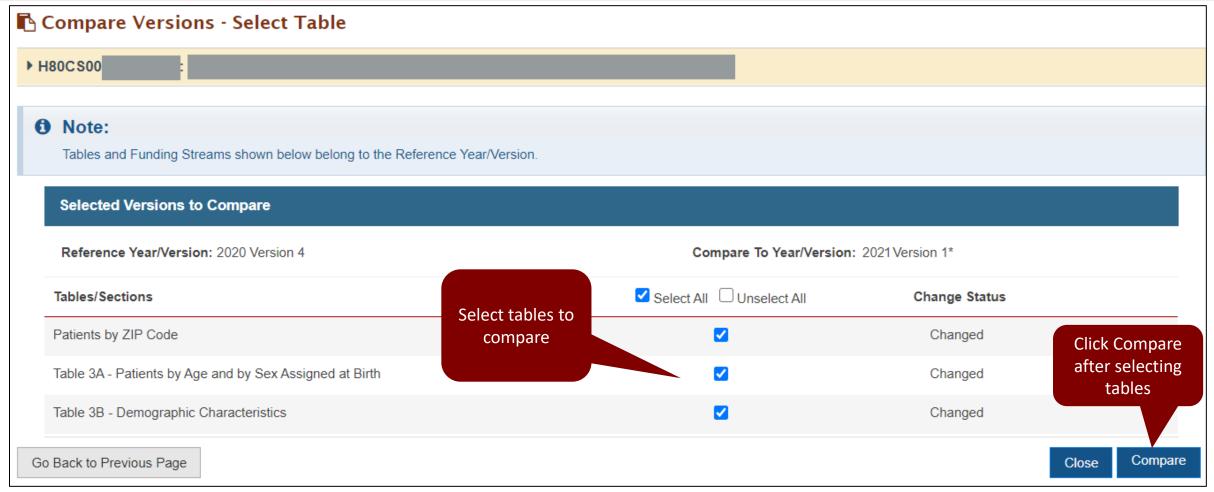
From the Resources section, select Compare Versions

Select year and versions you want to compare, and specific tables within those selections



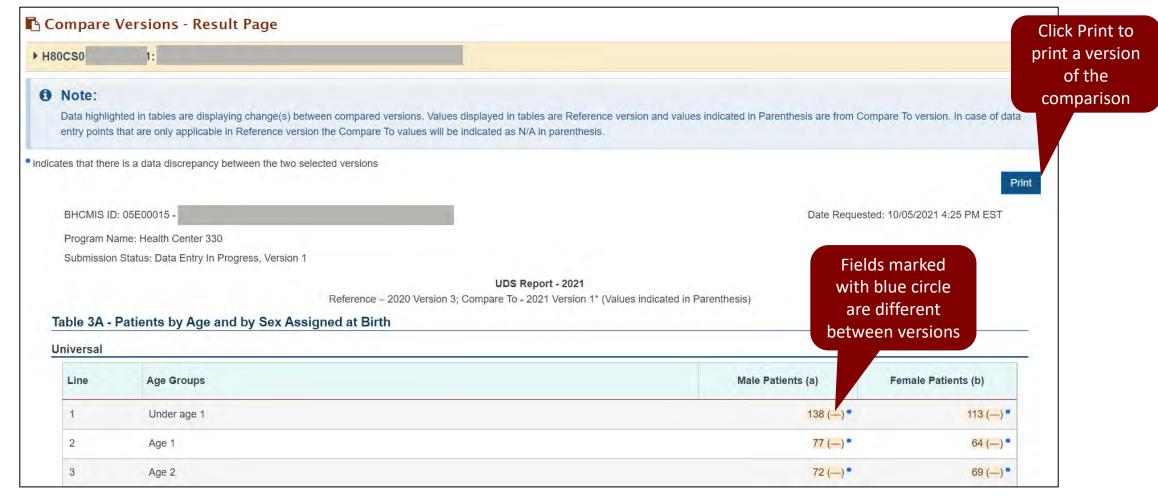
















#### Demo

# **UDS Compare Versions Demo**





### **Quiz Question #1**

# What does the Preliminary Reporting Environment (PRE) allow users to do?

- A. Enter test data that is not saved in the report
- B. View the report and tables, but not enter any data
- C. Enter data in the report prior to January 1st
- D. Submit the report prior to January 1st





## **Quiz Question #1**

What does the Preliminary Reporting Environment (PRE) allow users to do?

Answer: (C) Enter data in the report prior to January 1st





# **Offline Excel**





#### **Offline Excel Process Overview**

1. **Download** offline Excel files to enter data or transport data from other Excel Files



3. On completion of data entry, <u>upload</u> the file into UDS to populate data on the forms

4. After uploading, you can view the Edit Summary File





#### **Offline Excel Download**

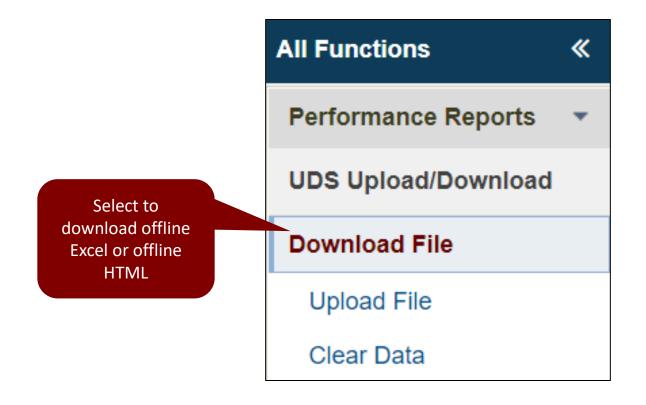
Excel File Download

- You can download an Excel file with data currently in UDS or with no data
- Select to download individual tables or the entire report
- The downloaded file will have a system generated filename and dynamic funding stream tabs for selected tables
- You can change the file name to easily identify the file when you save the downloaded file to your local system and enter data offline





#### **Offline Excel Download**

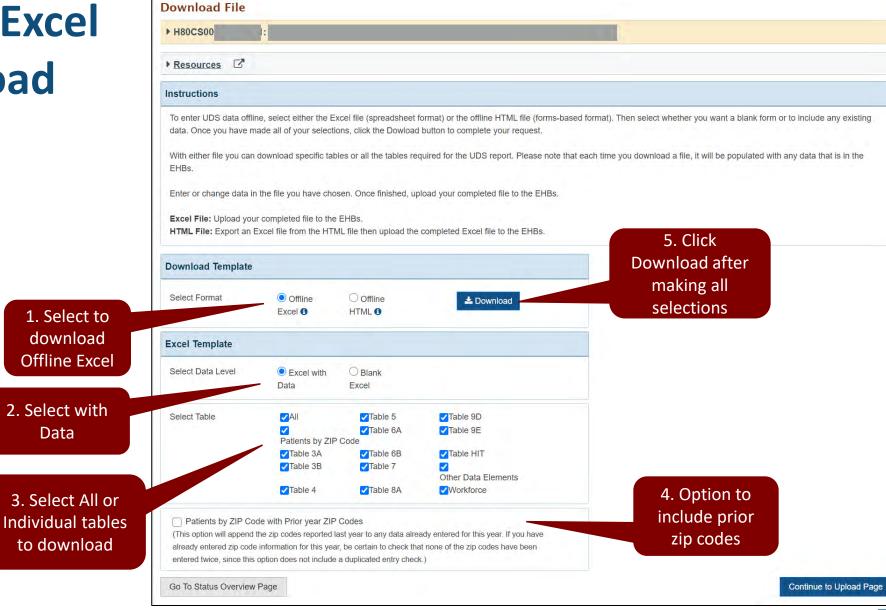






# **Offline Excel Download**

Data







# **Patient by Zip Code**

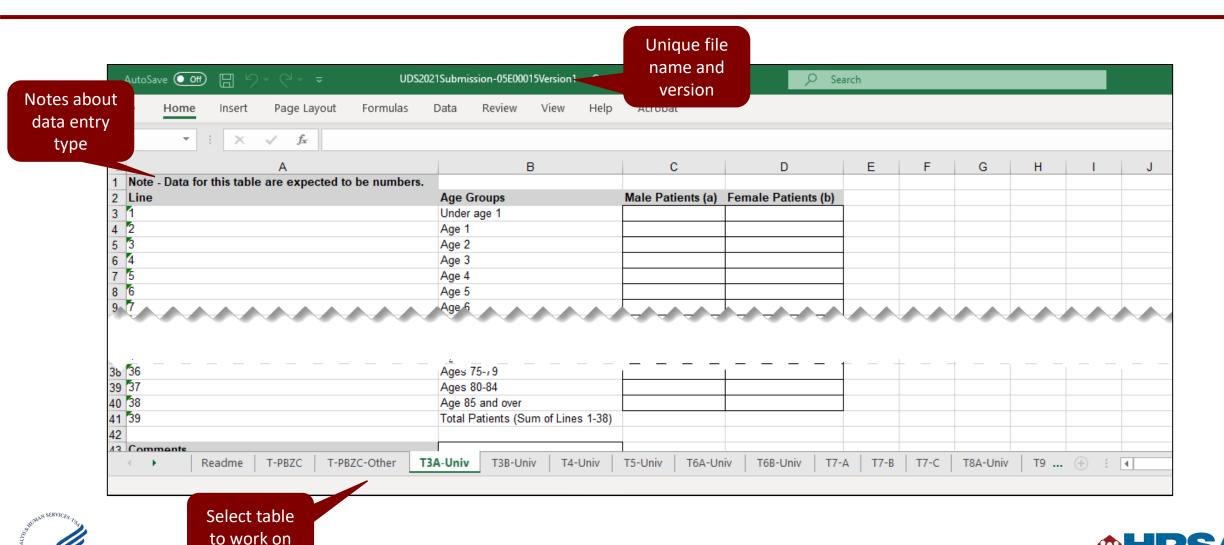
# Import PBZC in Excel

- When downloading the Excel template with data, you can choose to include zip codes from the previous year on the table
- This feature is only available when downloading the Patients by Zip Code (PBZC) table
- Provides for **easy data entry** for this table and saves time in searching for zip codes





#### **Offline Excel**



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# **Excel Mapping Tool**

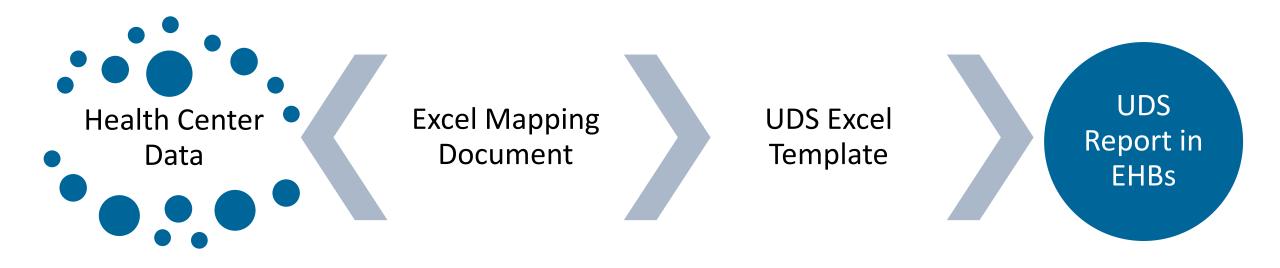


- Provides easy mapping to forms/rows/columns/cell address in downloadable Excel file
- To support health centers with automating data population in downloaded Excel file
- Use the **cell address** mapping to automate the data population in Excel template





# **Excel Mapping Tool – Data Transfer Flow**







# **Offline Excel Upload**

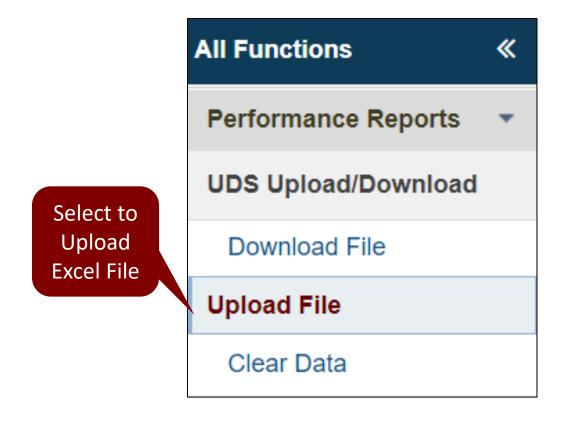


- Be sure to <u>upload</u> the file! The EHBs will verify the file format, tabs, and structures before accepting the file
- The EHBs will assign a unique filename on upload. This will have the Bureau of Primary Health Care's Health Center Management Information System Identification Number (BHCMISID) and Version Number
- On **successful upload**, the UDS forms will be populated with the data from the file
- If you upload a blank Excel template it will **clear all data** that was previously entered
- Upon upload, you will see a listing of the tables that were uploaded as part of the **success message**





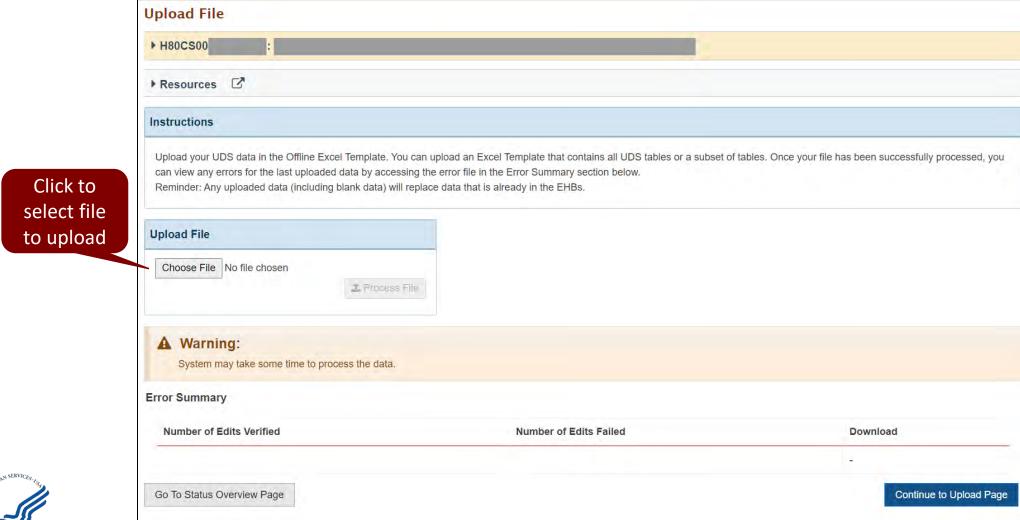
#### **Offline Excel**







# **Offline Excel Upload**

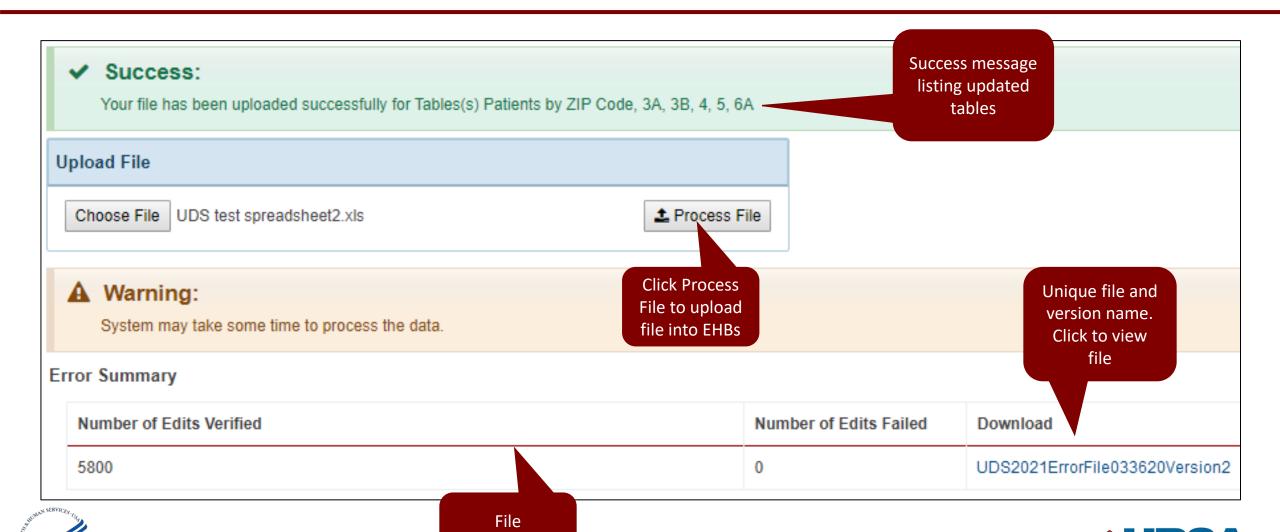






# Offline Excel Upload (continued)

information



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# **Uploaded File Summary**

# Uploaded File

- Be sure to <u>upload</u> the file! The EHBs will verify the file format, tabs, and structures before accepting the file
- On **successful upload**, the UDS forms will be populated with the data from the file
- The EHBs will assign a **unique filename** on upload. This will have the Bureau of Primary Health Care's Health Center Management Information System Identification Number (BHCMISID) and Version Number
- If you upload a blank Excel template it will **clear all data** that was previously entered
- Upon upload, you will see a listing of the tables that were uploaded as part of the success message





# **Upload History**



- In Resources section, select **Upload History**
- All previously uploaded files will be listed as **newest to oldest**, only for **current reporting year**
- Download these files by clicking on filenames displayed as hyperlinks



# **Offline Excel Tips**



- There is **no restriction** on the number of times a file can be uploaded or downloaded.
- An Uploaded file and associated Error file will always have the same version number
- Version number is increased by 1 with each successful upload (e.g. v1, v2, etc.)





#### Demo

#### **UDS Offline Excel Demo**





## **Quiz Question #2**

True or False: When downloading the Offline Excel File, you must download <u>all</u> tables.

A. True

B. False







### **Quiz Question #2**

True or False: When downloading the Offline Excel File, you must download all tables.

**Answer:** (B) False





## **Offline HTML**





#### **Offline HTML Overview**

#### Offline HTML Overview

**Download HTML package** to facilitate offline data entry

Download can be for entire report or select tables

Mirror image of **UDS forms** in EHBs including the validation checks for **edits** 

Use **Import** feature for data entry or **manually enter data** on the forms

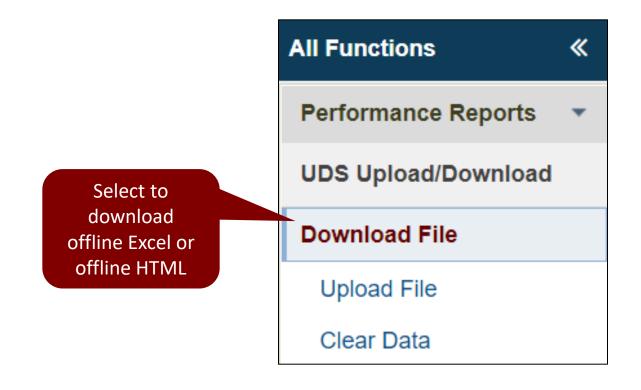
After completing data entry, **Export** the data into Offline Excel file and **Upload** into EHBs

**Downloaded offline forms** open in **Chrome** browser only





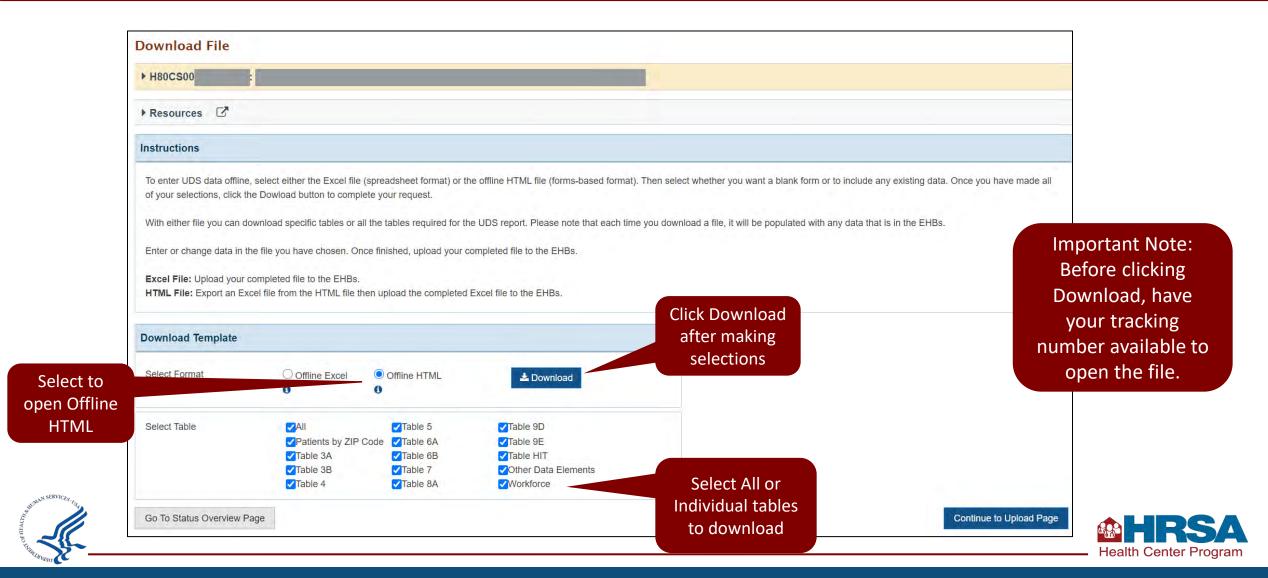
#### **Offline HTML Download**







## Offline HTML Download (continued)



## Offline HTML Download (continued 2)

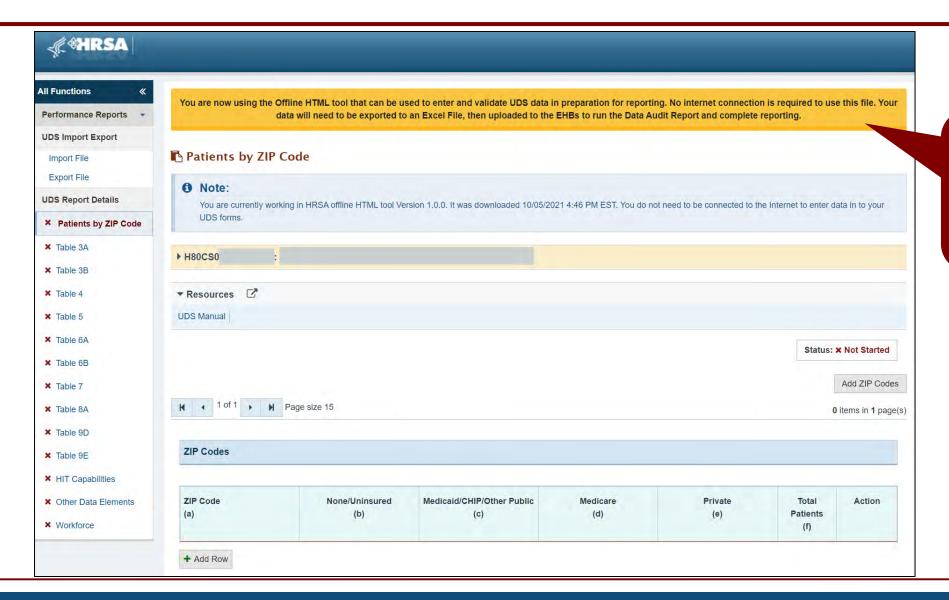
Offline Package Download

- Select Extract All and then enter the tracking number as the password to extract and open the files
- The downloaded package will have multiple files, click on UDSSubmission HTML files to access the offline forms





#### **Offline HTML View**



Reminder you are working in the Offline HTML view, not UDS Environment





## **Offline HTML Data Entry**

Offline HTML forms will have the same look and feel as the UDS forms in the EHBs

Users will be able to **navigate** to different forms using the left navigation menu

### Data Entry

Data entered will result in data edits appearing on the forms, similar to EHBs forms

Important! For the data to be in the EHBs, you must export the HTML forms to Excel and then upload the Excel file to the EHBs

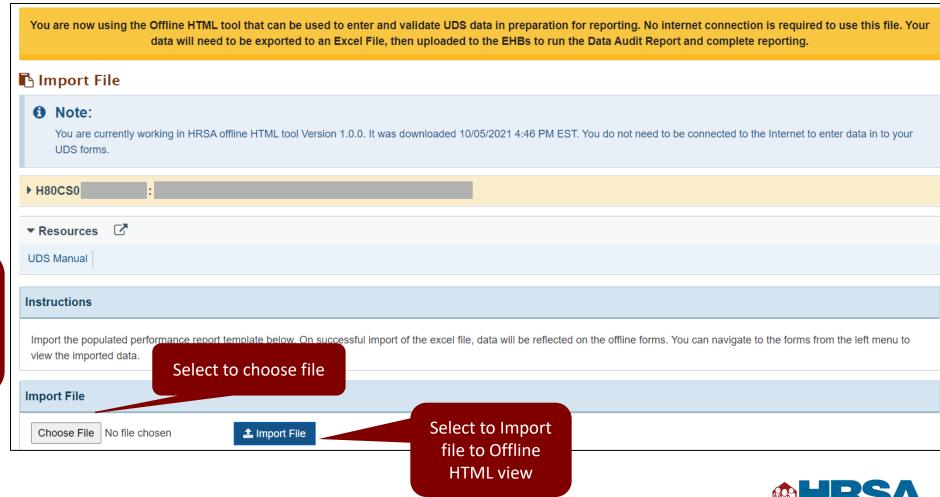




## **Offline HTML Import File**



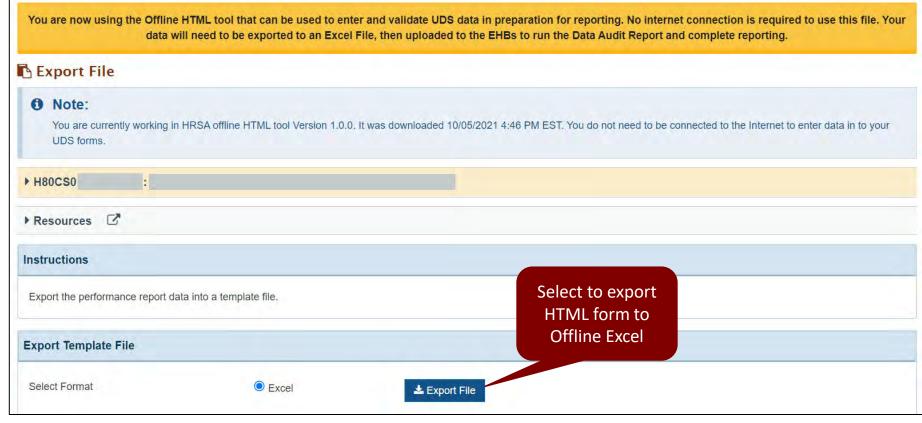
Click to import data from an excel file to the Offline HTML form





## **Offline HTML Export File**









## **Offline HTML Tips**



- There is **no restriction** on the number of times a package can be **downloaded**
- Downloaded offline forms open in Chrome browser only
- There is no restriction on the number of times Excel files can be imported or exported
- Exported **Excel files** will match the offline package structure, such as entire report or a select few tables.





#### Demo

#### **UDS Offline HTML Demo**





# Clear Data, Data Audit Report, Review and Submit Report





#### **Clear Data Overview**

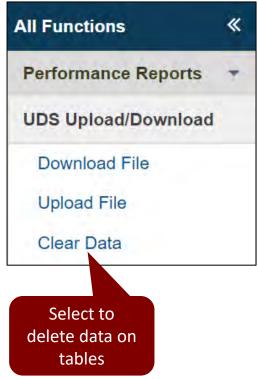
## Clear Data Feature

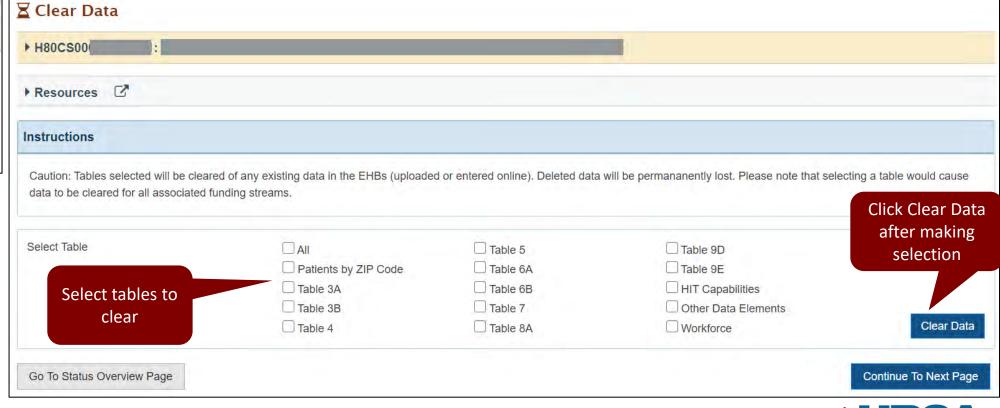
- Easily clear all information entered for the entire report or select tables
- You can clear data entered directly in EHBs or uploaded using the Excel template
- Before clearing data, a warning message is provided for users to confirm they are aware <u>all</u> <u>data for selected tables will be deleted</u> <u>permanently</u>





#### **Clear Data**









## **Data Audit Report (DAR) Details**

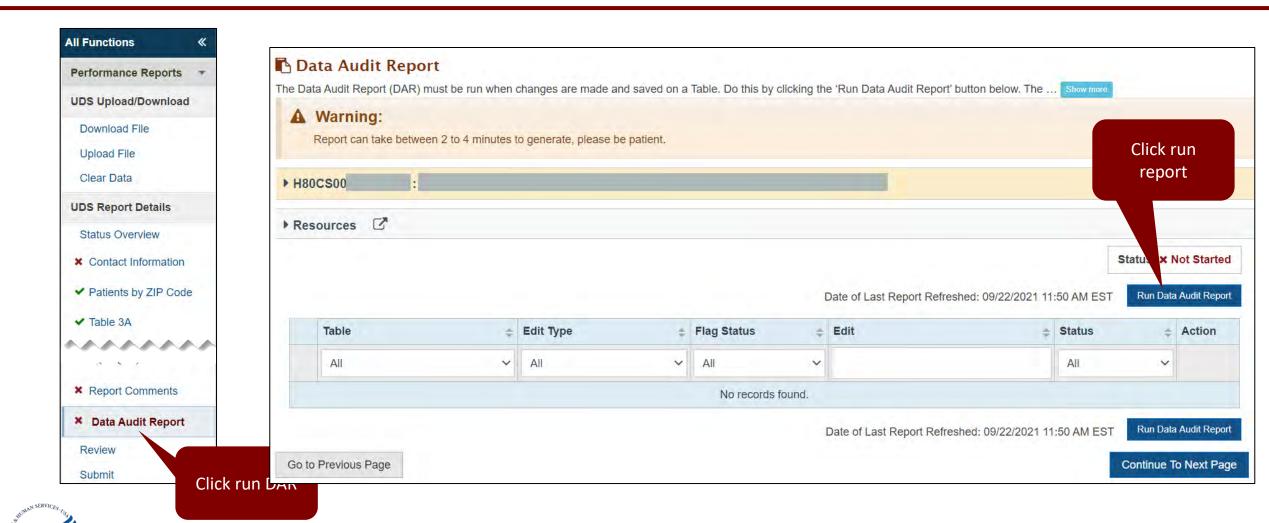


- Run the DAR after completing table(s) to verify data consistency
- **Before submitting** the report, you must complete all forms, run the DAR, and fix or explain each edit



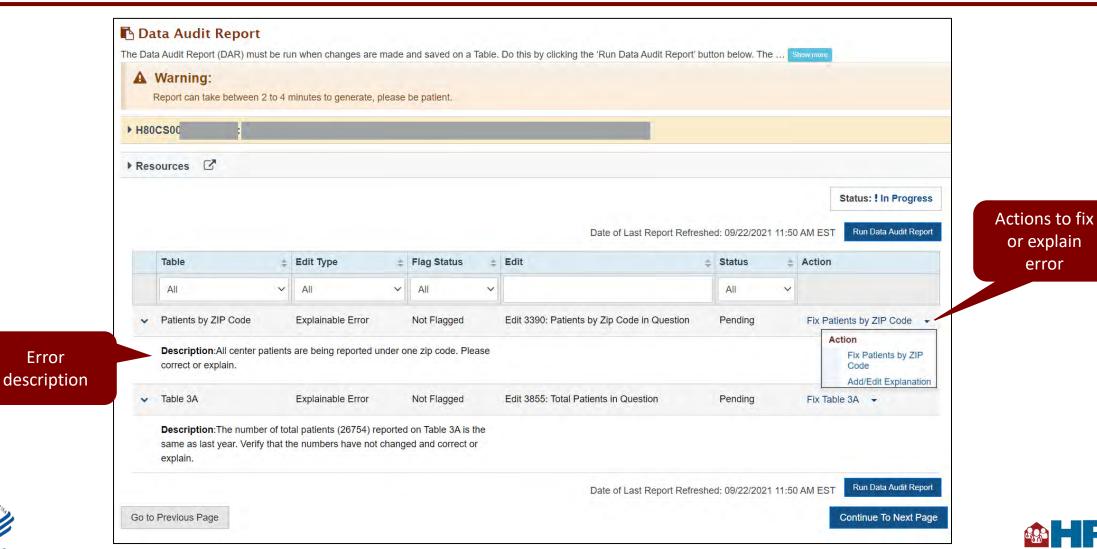


## **Data Audit Report Process**



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## **Data Audit Report Process (continued)**



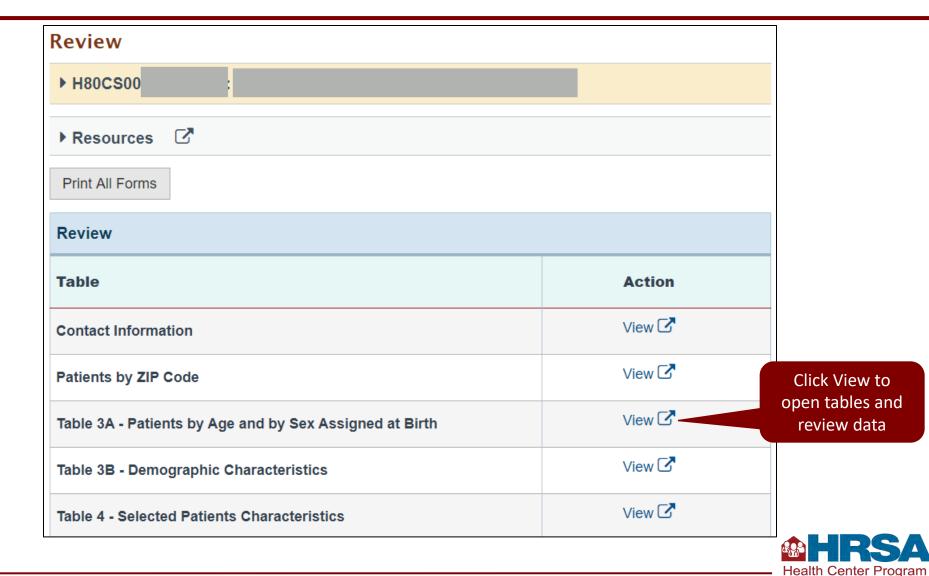


Error

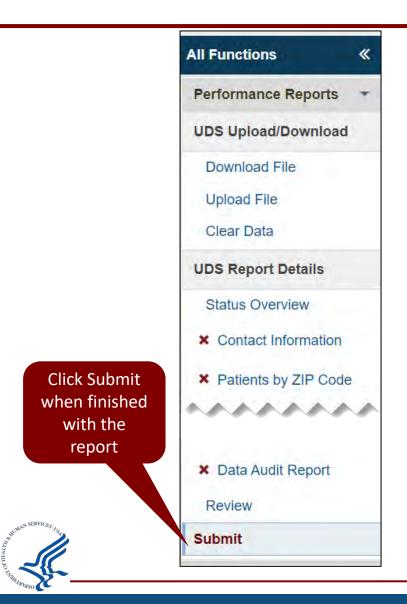


## **Review Report**





## **Submit Report**

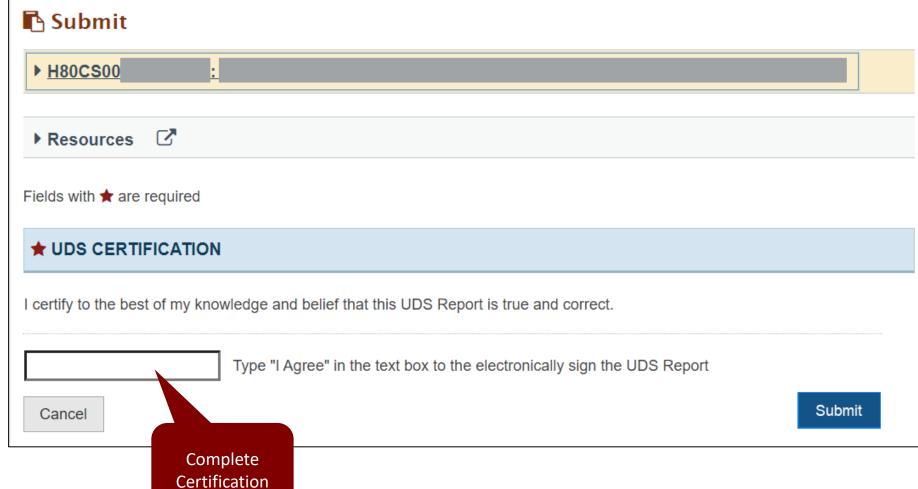


OR

Submit and Print Make sure you have completed and validated all the required information before submitting this report. Submit Performance Report ☑ Compare Versions **Click Submit** Performance Report when finished with the report Print Report



## **Submit Report (continued)**







#### Demo

UDS Other Features, DAR, Review, and Submit Demo





### **Quiz Question #3**

#### What does the Clear Data feature do?

- A. Permanently deletes all data for selected tables
- B. Deletes entire tables from the report
- C. Changes the font to white







## **Quiz Question #3**

#### What does the Clear Data feature do?

Answer: (A) Permanently deletes all data for selected

tables





#### Resources





## **Questions and Answers**







#### **Thank You!**

#### **UDS Help Desk**





udshelp330@bphcdata.net



Fill out our contact form



866-837-4357



877-464-4772

#### **Health Center Program Support**



http://www.hrsa.gov/about/contact/bphc.aspx



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