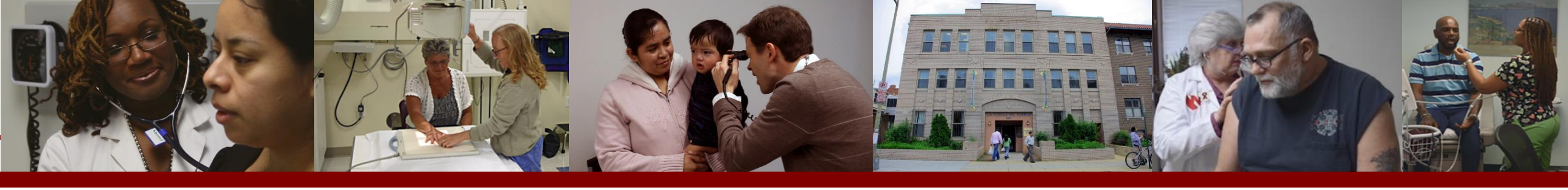


UDS Modernization 2018 – Training Session

Presentation to Training Participants

October 31, 2018

- **Shailee Sharma**
- **Senior Business Analyst**
- **REI Systems**

HRSA Health Center Program

Agenda

- Introduction
- Uniform Data System (UDS) Modernization Initiative
  - Content modernization
  - Process modernization
  - Why modernize process of UDS reporting?
- New Optional Reporting Features
  - Overview
  - Demonstration
  - Feature details
- Technical Support
- Appendices
- Questions

UDS Modernization Initiative

UDS Process Modernization – Why?

- Manual entry for large set of data points
- Fixed and short timeframe for data entry
- Large number of edits to validate data accuracy
- Requires user to be logged into Electronic Hand Books (EHBs)

HRSA Health Center Program

New Features

UDS Process Modernization – New Features

Forms Modernization

- New and modern look and feel of the UDS forms
- Ease of data entry
- Fewer clicks to enter and save data
- Immediate data validations and easy clearing of the edits

Preliminary Reporting Environment (PRE)

- System available to users, who wish to utilize it, prior to January 1st to prepare report for submission.
- Additional time to enter data and work on edits
- Improved data quality with extra time
- Early system availability provides opportunity to users to familiarize with UDS forms enhancements ahead of reporting time frame

UDS Process Modernization – New Features (contd.)

Offline Excel Feature

- Users can download **Offline Excel files** to facilitate offline data entry and transporting from other Excel files.
- **Offline Excel file matches the UDS forms structure** (row/column labels, auto-calculated fields)
- On completion of data entry user can **upload** the file into EHBs to populate data on the forms
- On **Successful upload, an error file** is generated to report on all applicable edits based on the data in the uploaded file.

Offline HTML Feature

- Users can **Download HTML package** to facilitate offline data entry
- Download can be for **entire report or selective tables**
- **Offline forms** are a mirror image of **UDS forms** in EHBs including the **edits**
- Users can use **Import** feature for data entry or **manually enter data** on the forms
- On completing data entry users can **Export** the data into Offline Excel file and **Upload** into EHBs

UDS Process Modernization – New Features (contd. 2)

Multiparty Reporting

- Users can download Offline Excel/ Offline HTML either at **entire report level or selective tables level**
- On Upload users can access **errors** reported only for the uploaded forms, if the data uploaded results in any edits.
- **Multiple people** from a health center can work independently on separate UDS forms simultaneously.

Excel Mapping Document

- Easily accessible and downloadable **Excel file**
- 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.

Demonstration of New Optional Features

New Features – Details

Modern Forms

Modern Forms

- Users will view the UDS forms with a **modernized interface**
- Users will see additional information in the **Status Overview** section
- Users will have **easy access** to most frequently used report actions
- Users will see data **edits/validations** on the form as they enter data, these validations will be cleared as users correct the data
- The system will automatically **mark the forms as complete** when edits are cleared, resulting in **fewer clicks** by eliminating mark as complete action

Offline Excel Feature – Download

Excel File Download

- Users will be able to download an **Offline Excel** file from the EHBs
- Users can save the downloaded file onto their local system and **enter data offline**
- Users can **select tables** or **entire report** to download
- Downloaded file will have a **system generated filename** and **dynamic funding stream tabs for selected tables**

Offline Excel Feature – Upload

Excel File Upload

- Users will be able to **upload** 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

Offline Excel Feature – Error File

Error File

- On successful upload the EHBs generates an **Error file**, listing errors specific to data in the uploaded file
- The Error file is displayed in the **error summary section** with a **system assigned name** which includes the **BHCMISID** and **Version Number**
- The **Error Summary section** also displays a **count of edits** reported in the **error file**
- All **page level validations** for each table will be fired first to avoid uploading data that is not acceptable

Offline Excel Feature – Upload History

Upload History

- Users can access the **upload history** page from the resource section
- All previously uploaded files will be listed as **newest to oldest**, only for **current reporting year**
- Users can download these files by clicking on filenames displayed as **hyperlinks**

Offline Excel Features – Interesting Facts

Interesting Facts

- 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.)
- The EHBs will maintain only **one error file** at a time**,** generated on last successful upload

Offline Excel Feature – Excel Mapping Document

Excel Mapping Document

- Users will be able to **download** an Excel document
- Users will see **details** referring to worksheet **name** and **cell address**
- The **additional details** for providing clarity are associated with **UDS form's row number, row name, column name**
- Users can use the **cell address** mapping to automate the data population in Excel template

Offline HTML Feature - Download

Offline Package Download

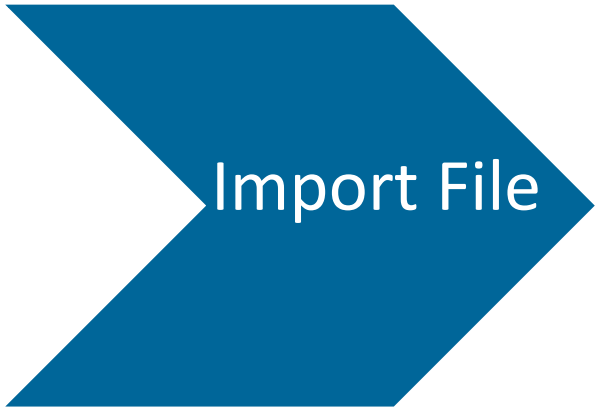
- Users will be able to download an **Offline HTML** package from the EHBs
- User can **select tables** or **entire report** to download **in HTML format**
- Users can **save** the package onto their local system and then **extract** files to work with them
- The downloaded package will have multiple files, user should click on **UDS-Submission** HTML files to access the offline forms

Offline HTML Feature – Data Entry

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

Offline HTML Feature – Import File



- Users have an alternate way to enter data in the offline forms using the **import** function
- Users can import an Excel file which is **populated with data**
- On successful import of the Excel file all data from the file overwrites the existing data in the offline forms

Offline HTML Feature – Export File

- Once data entry is complete users can **export** the UDS forms into an **Offline Excel file**
- All data entered in the forms would be **exported** onto the **Offline Excel file**
- Users can use the **exported Excel file** for different purposes such as to **upload** back into the EHBs or for internal review or for report consolidation

Offline HTML Feature – Interesting Facts

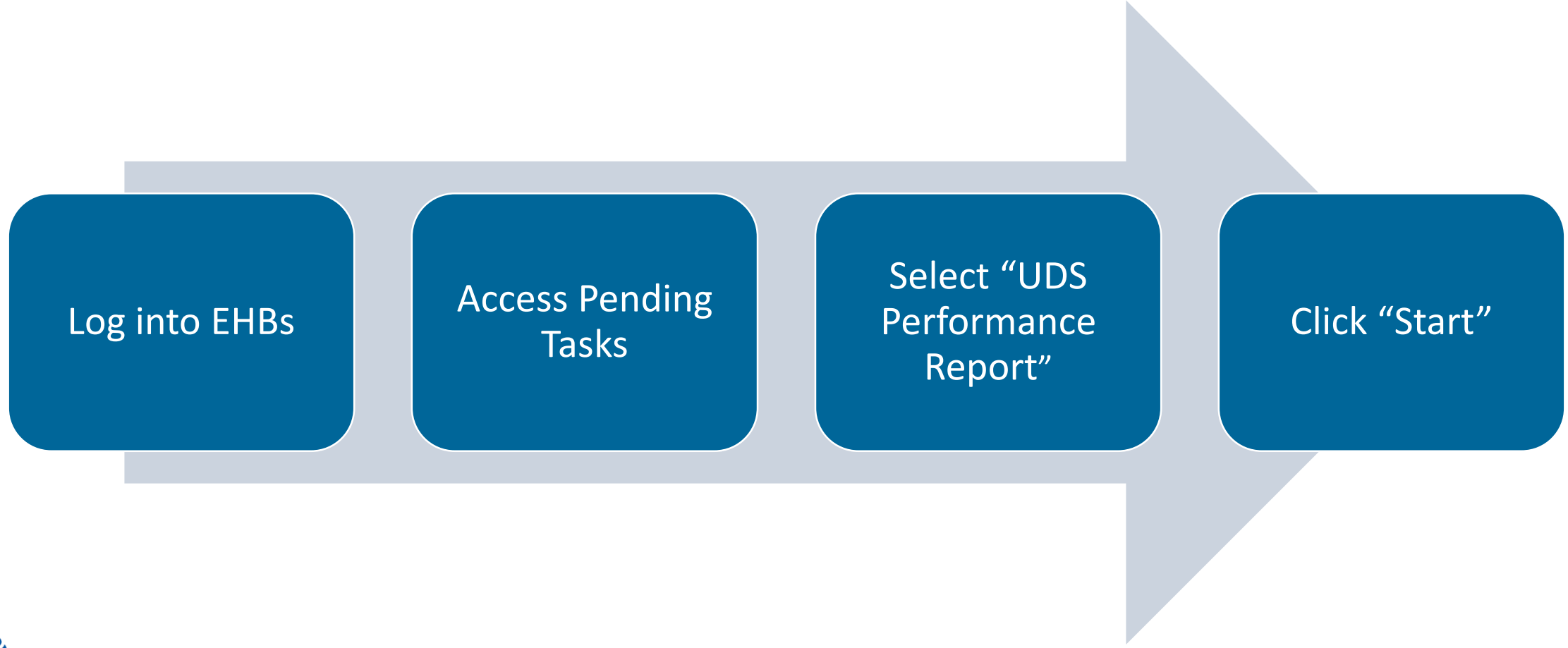
Interesting Facts

- 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

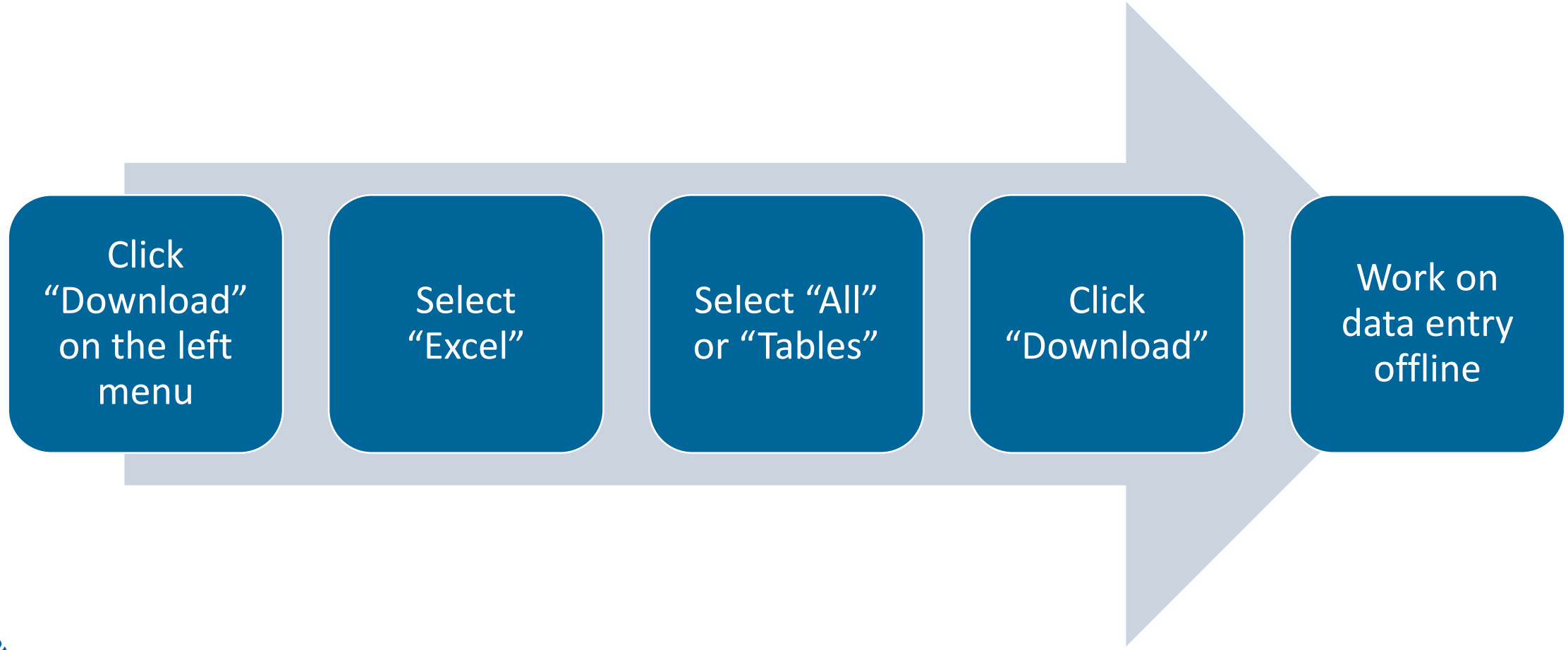
Technical Support

- Any technical questions can be directed to the Support line through:
  - Email to uds-support@reisystems.com

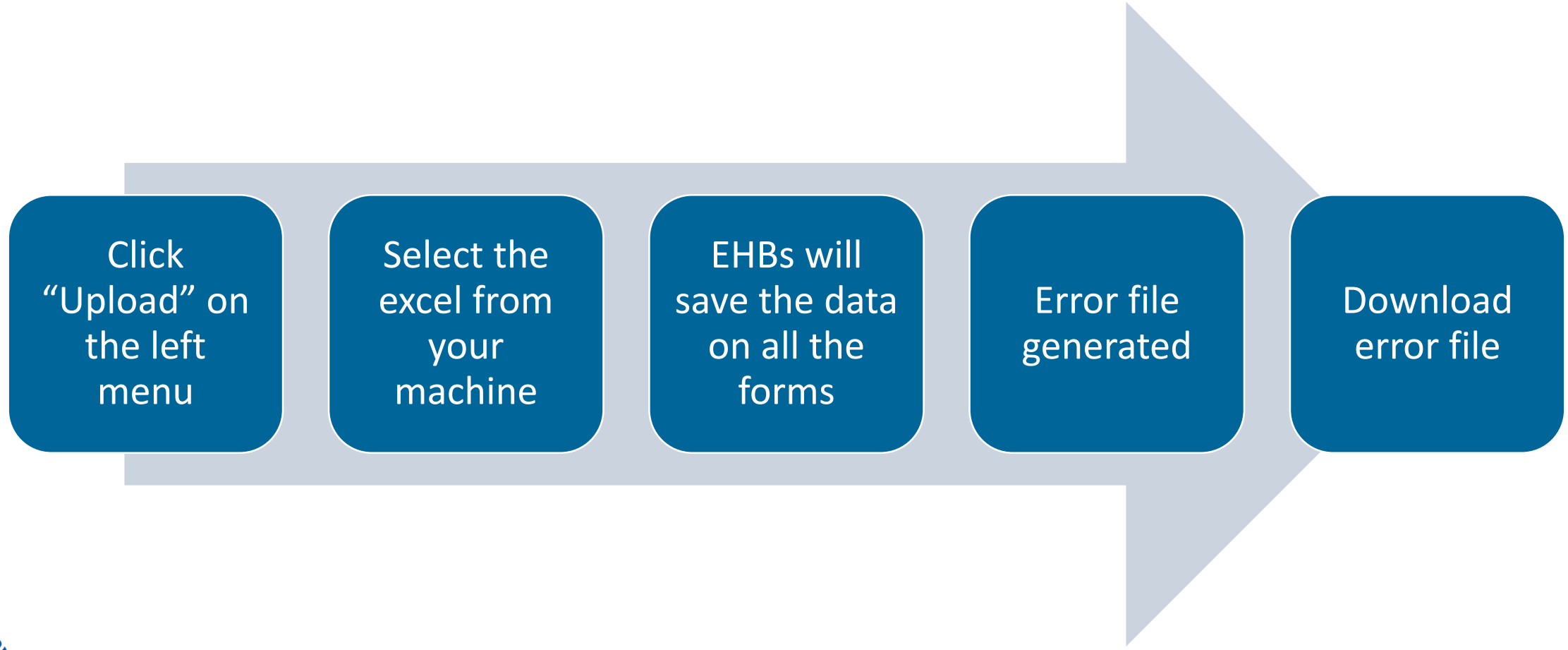
Appendix A – Early Data Collection With Excel Download/Upload Feature



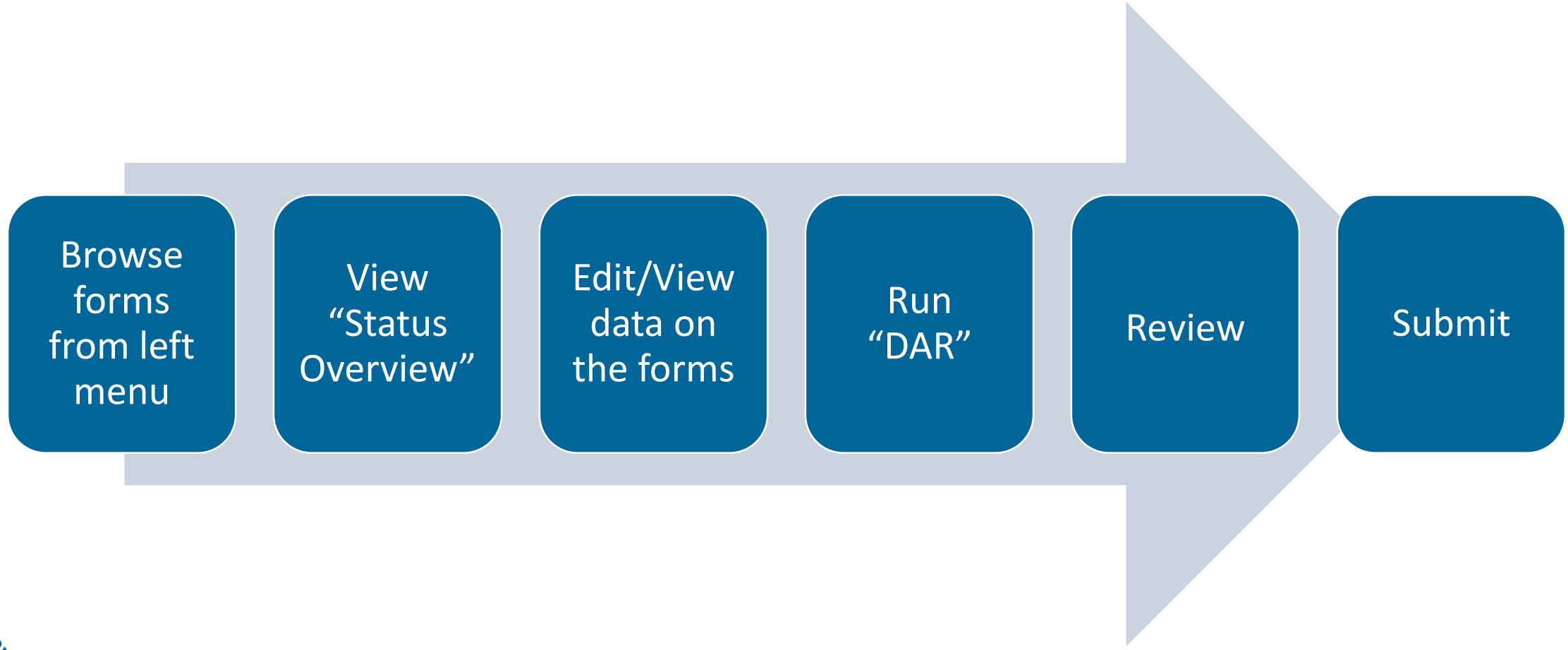
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 2



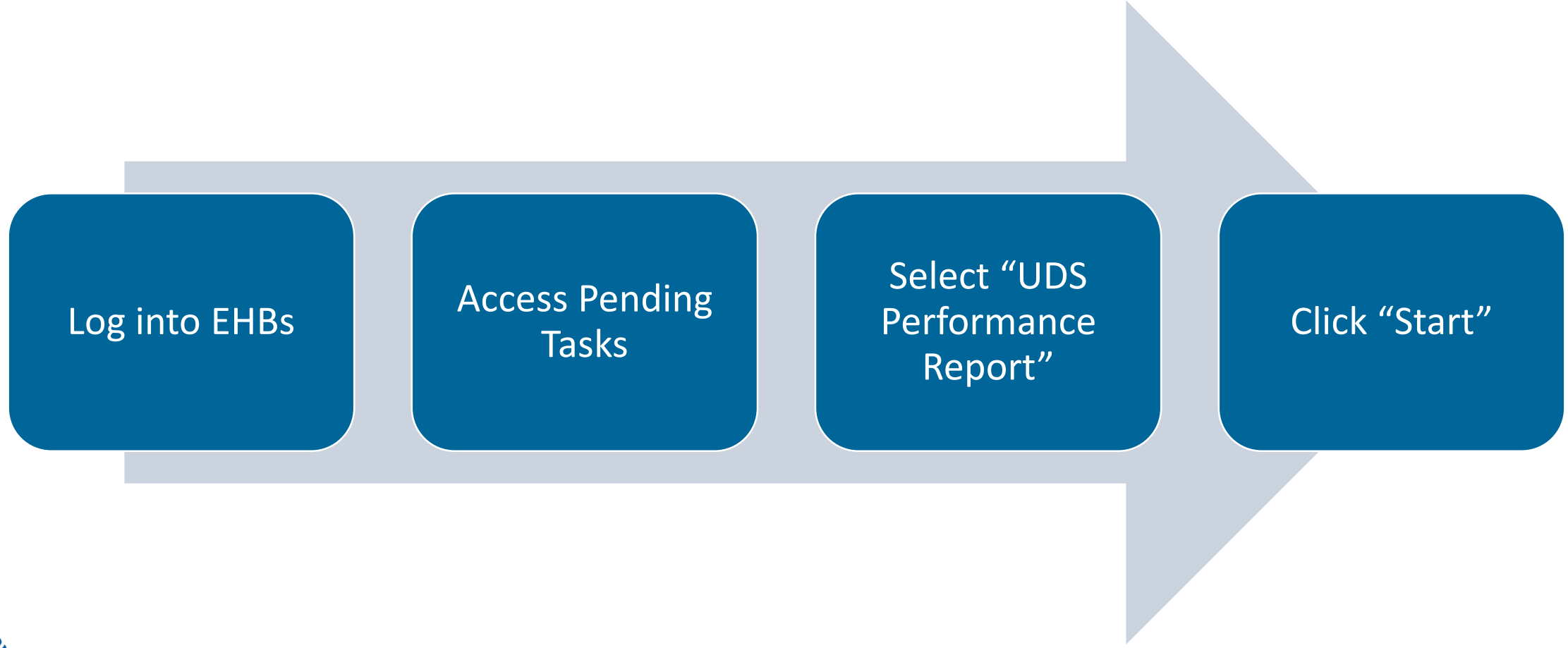
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 3



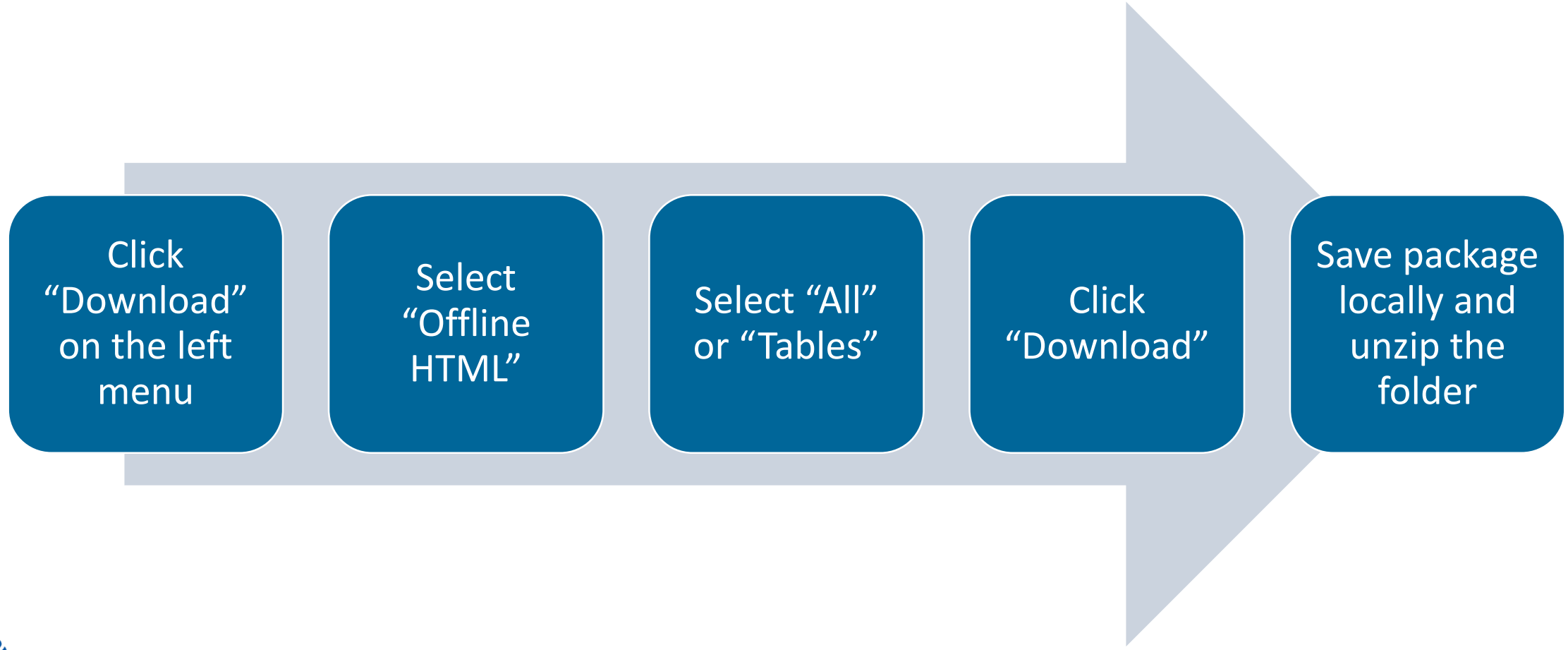
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 4



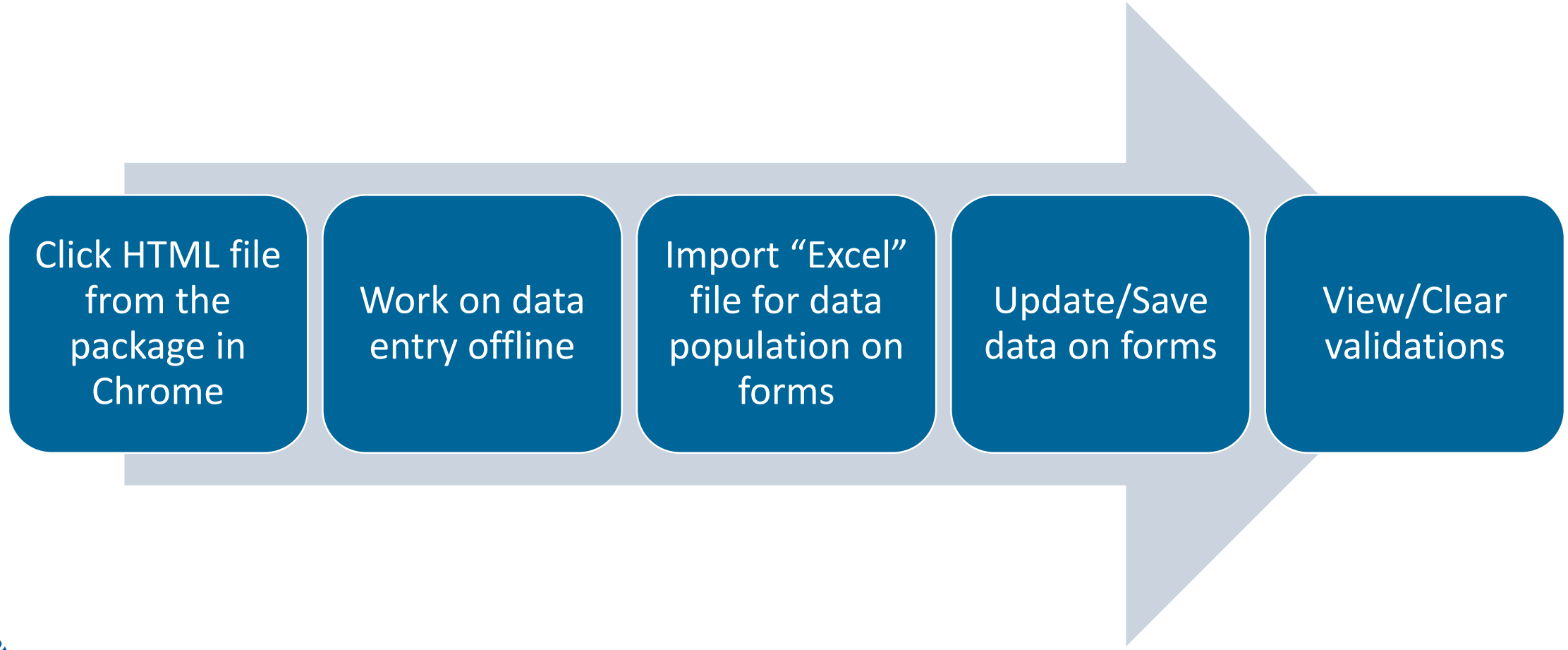
Appendix B- Early Data Collection With Offline HTML Feature



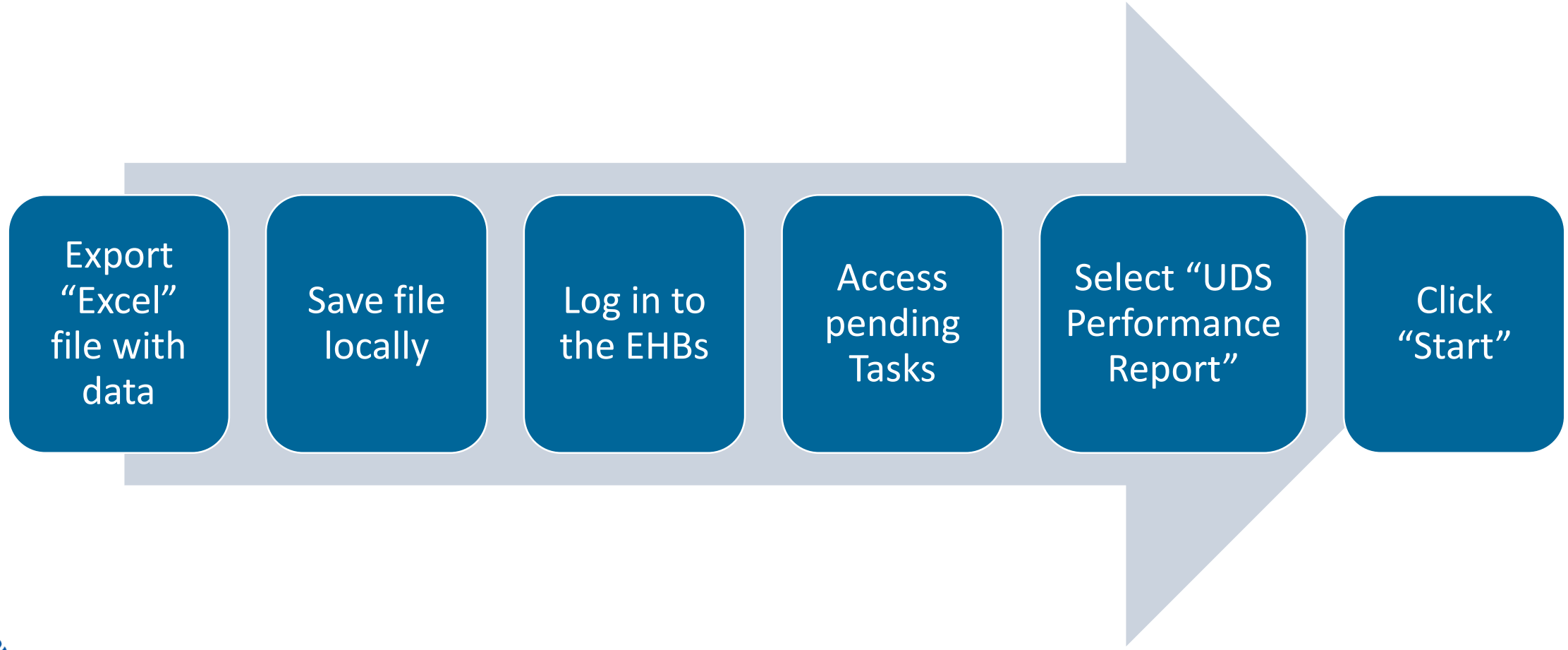
Appendix B- Early Data Collection With Offline HTML Feature, Part 2



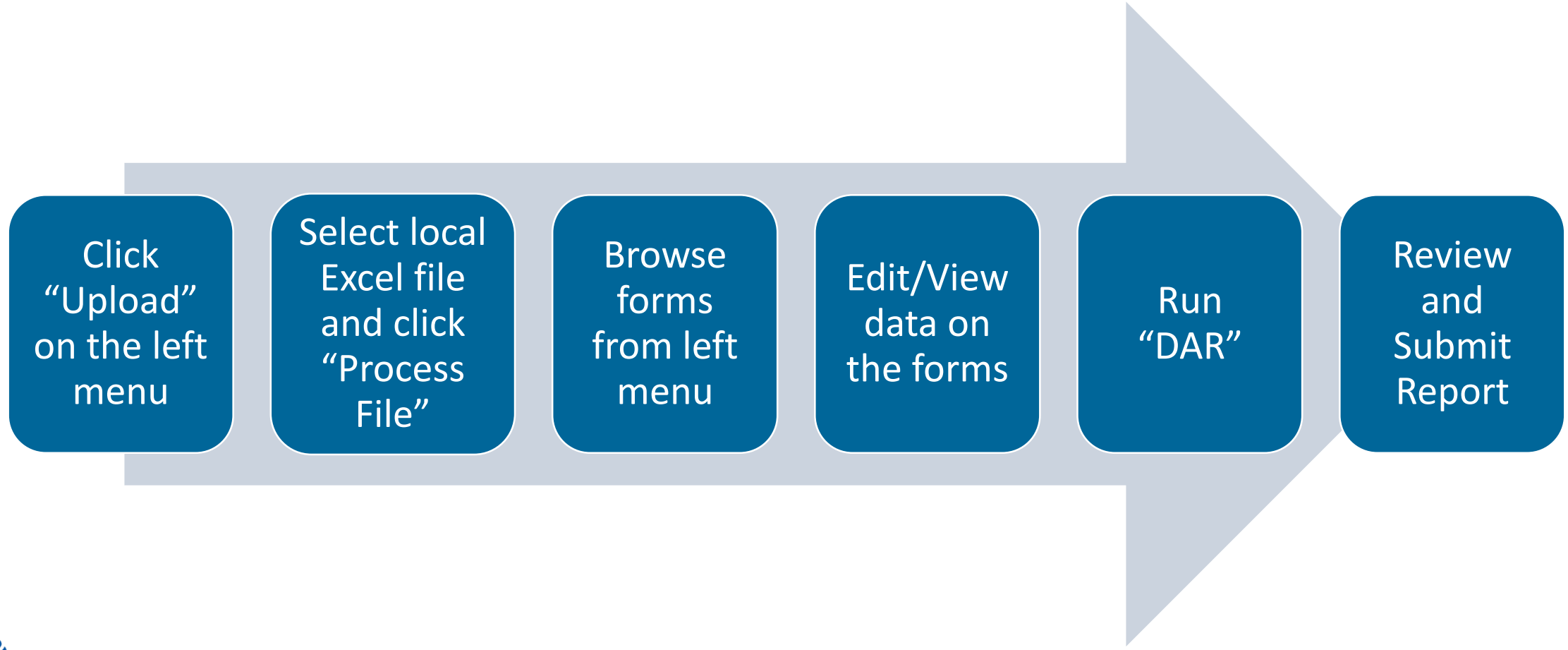
Appendix B- Early Data Collection With Offline HTML Feature, Part 3



Appendix B- Early Data Collection With Offline HTML Feature, Part 4



Appendix B- Early Data Collection With Offline HTML Feature, Part 5



Questions & Feedback