UDS Modernization 2018 – Training Session

Presentation to Training Participants

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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)
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
• 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.

• 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

• 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

- 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

- 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.
• 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

- 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.
• 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

- 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
• 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

- **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
• 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

1. Log into EHBs
2. Access Pending Tasks
3. Select “UDS Performance Report”
4. Click “Start”
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 2

1. Click “Download” on the left menu
2. Select “Excel”
3. Select “All” or “Tables”
4. Click “Download”
5. Work on data entry offline
Click “Upload” on the left menu. Select the excel from your machine. EHBs will save the data on all the forms. Error file generated. Download error file.
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 4

1. Browse forms from left menu
2. View “Status Overview”
3. Edit/View data on the forms
4. Run “DAR”
5. Review
6. Submit
Appendix B- Early Data Collection With Offline HTML Feature

1. Log into EHBs
2. Access Pending Tasks
3. Select “UDS Performance Report”
4. Click “Start”
Appendix B- Early Data Collection With Offline HTML Feature, Part 2

1. Click "Download" on the left menu
2. Select "Offline HTML"
3. Select "All" or "Tables"
4. Click "Download"
5. Save package locally and unzip the folder
Appendix B- Early Data Collection With Offline HTML Feature, Part 3

- Click HTML file from the package in Chrome
- Work on data entry offline
- Import “Excel” file for data population on forms
- Update/Save data on forms
- View/Clear validations
Appendix B- Early Data Collection With Offline HTML Feature, Part 4

1. Export “Excel” file with data
2. Save file locally
3. Log in to the EHBs
4. Access pending Tasks
5. Select “UDS Performance Report”
6. Click “Start”
Click “Upload” on the left menu
Select local Excel file and click “Process File”
Browse forms from left menu
Edit/View data on the forms
Run “DAR”
Review and Submit Report
Questions & Feedback