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

- Click to open report after it's been started
- Click to open report for the first time
- Find Performance Report Tasks
UDS Navigation

File Options
Open Tables/Reports
Status Tracker

Shows if you are in PRE, UDS (live EHBs) or HTML environment

Due Date Information

Helpful tip! The due date time is 11:59 your local time.
UDS Navigation (continued)

Resources

- View Uploaded Files
- History of Report Actions
- UDS Help
- View contact information and privileges
- Compare Report Versions
- Excel Mapping

- 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

<table>
<thead>
<tr>
<th>Sections</th>
<th>Status</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Information</td>
<td>Not Started</td>
<td>-</td>
</tr>
<tr>
<td>Patients by ZIP Code</td>
<td>Complete</td>
<td>10/07/2021 1:28 PM EST by [Name]</td>
</tr>
<tr>
<td>Table 3A - Patients by Age and by Sex Assigned at Birth</td>
<td>Complete</td>
<td>10/07/2021 1:28 PM EST by [Name]</td>
</tr>
<tr>
<td>Universal Report</td>
<td>Complete</td>
<td>-</td>
</tr>
<tr>
<td>Table 3B - Demographic characteristics</td>
<td>In Progress</td>
<td>10/07/2021 1:27 PM EST by [Name]</td>
</tr>
<tr>
<td>Universal Report</td>
<td>Incomplete</td>
<td>-</td>
</tr>
<tr>
<td>Table 4 - Selected Patient Characteristics</td>
<td>In Progress</td>
<td>10/07/2021 1:27 PM EST by [Name]</td>
</tr>
<tr>
<td>Universal Report</td>
<td>Incomplete</td>
<td>-</td>
</tr>
</tbody>
</table>

#### Report Details

- **BHCMIS ID:** [Enter BHCMIS ID]
- **Last Submitted By:** N/A

#### Submit and Print

- **Submit Performance Report**
- **Compare Versions**
- **Print Report**

#### Additional Features

- **Submit Report**
- **Print**
- **Compare**
- **Review Report**
- **Report Status and Links to Tables/Reports**
- **Submit BHCMIS ID and Recently Submitted By**
Demo

UDS Navigation Demo
Preliminary Reporting Environment (PRE) and Comparing Report Versions
Preliminary Reporting Environment

Preliminary Reporting Environment (PRE)

- System available **as of October 29th** 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
Compare Versions

- 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
Compare Versions

Compare Versions - Select Version

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

Select Versions to be Compared

Reference Year/Version: 2020 Version 4
Compare To Year/Version: 2021 Version 1

Find the year and version you want to set as the reference and to compare.
Click Next to select tables to compare.
Compare Versions

Select tables to compare

Click Compare after selecting tables
Compare Versions

**Note:**
Data highlighted in tables are displaying change(s) between compared versions. Values displayed in tables are Reference version and values indicated in Parenthesis are from Compare To version. In case of data entry points that are only applicable in Reference version the Compare To values will be indicated as N/A in parenthesis.

Indicates that there is a data discrepancy between the two selected versions.

BHCMS ID: 05E00015 - 
Program Name: Health Center 330
Submission Status: Data Entry In Progress, Version 1

Date Requested: 10/05/2021 4:25 PM EST

UDS Report - 2021
Reference – 2020 Version 3; Compare To – 2021 Version 1” (Values Indicated in Parenthesis)

**Table 3A - Patients by Age and by Sex Assigned at Birth**

<table>
<thead>
<tr>
<th>Line</th>
<th>Age Groups</th>
<th>Male Patients (a)</th>
<th>Female Patients (b)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Under age 1</td>
<td>138 (*)</td>
<td>113 (*)</td>
</tr>
<tr>
<td>2</td>
<td>Age 1</td>
<td>77 (*)</td>
<td>64 (*)</td>
</tr>
<tr>
<td>3</td>
<td>Age 2</td>
<td>72 (*)</td>
<td>69 (*)</td>
</tr>
</tbody>
</table>

Click Print to print a version of the comparison

Fields marked with blue circle are different between versions
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

2. Enter data in Excel file. Note: File contains all UDS fields (row/column labels)

3. On completion of data entry, **upload** the file into UDS to populate data on the forms

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

Select to download offline Excel or offline HTML
1. Select to download Offline Excel
2. Select with Data
3. Select All or Individual tables to download
4. Option to include prior zip codes
5. Click Download after making all selections
• 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

Select table to work on

Unique file name and version

Notes about data entry type
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

Health Center Data → Excel Mapping Document → UDS Excel Template → UDS Report in EHBs
Offline Excel Upload

- Be sure 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.
- 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

Select to Upload Excel File
Offline Excel Upload

Click to select file to upload

Upload your UDS data in the Offline Excel Template. You can upload an Excel Template that contains all UDS tables or a subset of tables. Once your file has been successfully processed, you can view any errors for the last uploaded data by accessing the error file in the Error Summary section below.

Reminder: Any uploaded data (including blank data) will replace data that is already in the EHBs.

Warning:
System may take some time to process the data.

Error Summary

<table>
<thead>
<tr>
<th>Number of Edits Verified</th>
<th>Number of Edits Failed</th>
<th>Download</th>
</tr>
</thead>
</table>

Go To Status Overview Page

Continue to Upload Page
Offline Excel Upload (continued)

**Success:**
Your file has been uploaded successfully for Tables(s) Patients by ZIP Code, 3A, 3B, 4, 5, 6A

- **Upload File**
  - Choose File: UDS test spreadsheet2.xls
  - Process File

- **Warning:**
  System may take some time to process the data.

**Error Summary**

<table>
<thead>
<tr>
<th>Number of Edits Verified</th>
<th>Number of Edits Failed</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>5800</td>
<td>0</td>
<td>UDS2021ErrorFile033620Version2</td>
</tr>
</tbody>
</table>

- Click Process File to upload file into EHBs
- Unique file and version name. Click to view file
- Success message listing updated tables

File information
Be sure to **upload** 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**.
• 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**
Helpful 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 all 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
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

Select to download offline Excel or offline HTML
Offline HTML Download (continued)

Important Note: Before clicking Download, have your tracking number available to open the file.

Select to open Offline HTML

Click Download after making selections

Select All or Individual tables to 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

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.

Patients by ZIP Code

Note:
You are currently working in HRSA offline HTML tool Version 1.0.0. It was downloaded 10/05/2021 4:49 PM EST. You do not need to be connected to the Internet to enter data in to your UDS forms.

Resources
UDS Manual

Status: Not Started

Add ZIP Codes

ZIP Codes

Add Row
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.

**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

Select to choose file

Select to Import file to Offline HTML view

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.

Import File

Note:
You are currently working in HRSA offline HTML tool Version 1.0.0. It was downloaded 10/05/2021 4:46 PM EST. You do not need to be connected to the Internet to enter data in your UDS forms.

H80CS0

Resources

UDS Manual

Instructions

Import the populated performance report template below. On successful import of the excel file, data will be reflected on the offline forms. You can navigate to the forms from the left menu to view the imported data.

Import File

Choose File | No file chosen | Import File
Offline HTML Export File

Click to export data from Offline HTML to Offline Excel

Select to export HTML form to Offline Excel

Required step if you want the data transferred to the EHBs! Once exported to Excel, you can upload the file into UDS.
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

• 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 all data for selected tables will be deleted permanently
Clear Data

Select to delete data on tables

Select tables to clear

Click Clear Data after making selection
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

Click run DAR

Click run report

Click run DAR
Data Audit Report Process (continued)

Error description

Actions to fix or explain error
**Review Report**

![Review Report Interface](image)

**Click Review to select tables to open**

**Click View to open tables and review data**

<table>
<thead>
<tr>
<th>Table</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Information</td>
<td>View</td>
</tr>
<tr>
<td>Patients by ZIP Code</td>
<td>View</td>
</tr>
<tr>
<td>Table 3A - Patients by Age and by Sex Assigned at Birth</td>
<td>View</td>
</tr>
<tr>
<td>Table 3B - Demographic Characteristics</td>
<td>View</td>
</tr>
<tr>
<td>Table 4 - Selected Patients Characteristics</td>
<td>View</td>
</tr>
</tbody>
</table>
Submit Report

Click Submit when finished with the 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
- Print Report

Click Submit Performance Report when finished with the report
Submit Report (continued)

Submit

H80CS00

Resources

Fields with ★ are required

UDS CERTIFICATION

I certify to the best of my knowledge and belief that this UDS Report is true and correct.

Type "I Agree" in the text box to the electronically sign the UDS Report

Submit
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

Wiki Help Pages
Quick Reference Guides
User Guides
HRSA Help Desk
Questions and Answers
Thank You!

UDS Help Desk

udshelp330@bphcdata.net
866-837-4357

EHBs Customer Support

Fill out our contact form
877-464-4772

Health Center Program Support

http://www.hrsa.gov/about/contact/bphc.aspx
877-464-4772

bphc.hrsa.gov

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