UDS Reporting Updates 2019 – Training Session

Presentation to Training Participants

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• Shailee Sharma
• Principal Business Analyst
• Vendor Support Personnel
Agenda

• Introduction

• Uniform Data System (UDS) Modernization Initiative
  ▪ Process modernization
  ▪ Why modernize process of UDS reporting?

• New Optional Reporting Features
  ▪ Overview
  ▪ Demonstration
  ▪ Feature details

• Technical Support
• Step by Step Guide
• 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 – Refresher

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
UDS Process Modernization – Refresher (contd.)

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
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
Quiz #1
UDS Process 2019 New Features

Blank Excel Template

- Users can download a blank Offline Excel template either at **entire report level or selective tables level**
- Provides users the option to upload a blank Excel file to **reset or clear data** previously entered on the table or report
- Allows users to easily **complete the report or tables** using multiparty reporting
• When downloading the Excel Template with data, users 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.
The Note at the top of each worksheet provides details of what kind of information should be entered.

A new tab for HIT form and one for the newly added Workforce form have been added.
Clear Data

• Users can easily clear all information entered for the entire report level or selective tables level
• Allows users to clear data that may have been entered, either on the forms in EHBs or uploaded using Excel template, as a test or needs to be updated
• Before clearing data, a warning message is provided for users to confirm they are aware all data for selected tables will be deleted permanently
• After a file is uploaded through the Process File button, a success message populates to alert users which tables were uploaded successfully.
• Provides users with a quick reference to the action they just completed.
• Several new columns are included on the Upload History page to provide **clarity and quick reference links**
• New Table(s) column lists the tables that have been uploaded to the report, allowing users to easily **view the tables they have uploaded with each upload action**
• New Error File column provides a **hyperlink to the error file associated with that upload**, allowing multiple error files to be maintained and tied to an uploaded file for downloading from EHBS
• New Upload File Name column allows users to see their **original/locally saved document name** instead of only the system generated file name
Quiz #2
Demonstration of New Optional Features
New Features – Details
• 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
• New feature! When downloading the excel file, users can select ‘Excel with Data’ or ‘Blank Excel’ template
• 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.
- New feature! If a user uploads a blank Excel template it will clear all data that was previously entered.
- New feature! Upon upload, users will see a listing of the tables that were uploaded as part of the success message.
Offline Excel Feature – 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.
- New Feature! The Error file is also displayed on the Upload History page to easily tie the Error file to the uploaded file.
- 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
- New feature! Three new columns are included to provide additional information on uploads: Table(s), Error File, and Upload File Name
- New feature! Two columns displaying Version number and File format have been removed to reduce redundant information
• 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.)
• New feature! Previously, the EHBs only maintained one Error file based on the last successful upload. With the new updates, an **Error file is generated and maintained for each upload**
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** 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

- 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.
- Exported Excel files will not match the formatting applied in the excel template.
Clear Data Feature – Interesting Facts

This new feature is located under the UDS Upload/Download section.

There are several warnings to remind users that all data will be cleared from the table - including in the Instructions and a verification after selecting the table(s) and clicking Clear Data.

After clicking the final Confirm button, the cleared data will be permanently lost.
Quiz #4
Resources

- Local Trainings: HRSA UDS Training Website
- Technical assistance materials available online
  - HRSA Website
  - UDS Training Website
  - Modernization Initiative Website
Resources (contd.)

- Year-round telephone and email support line for UDS reporting questions and use of UDS data: 866-837-4357
- HRSA Call Center for EHBs account access and roles: 877-464-4772, Option 3
- Health Center Program Support for EHBs system issues: 877-464-4772, Option 1
- UDS Report and preliminary reporting environment access (in EHBs)
- ONC Issue Tracking System (OITS) JIRA project eCQM Issue Tracker
  - OITS account sign up
  - Post Questions in the eCQM Issue Tracker
- Technical Support from your UDS reviewer during the review period (only)
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 with Data" or "Blank Excel"
3. Select "All" or "Tables"
4. Click "Download"
5. Work on data entry offline
Appendix A – Early Data Collection With Excel
Download/Upload Feature, Part 3

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

- Browse forms from left menu
- View “Status Overview”
- Edit/View data on the forms
- Run “DAR”
- Review
- 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

Click “Download” on the left menu

Select “Offline HTML”

Select “All” or “Tables”

Click “Download”

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

1. Click "Upload" on the left menu
2. Select local Excel file and click "Process File"
3. Browse forms from left menu
4. Edit/View data on the forms
5. Run "DAR"
6. Review and Submit Report
Questions & Feedback