



UDS Reporting Updates 2019 – Training Session

Presentation to Training Participants
November 13, 2019

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- **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

UDS Process Modernization – Refresher (contd. 2)

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

UDS Process Modernization – Refresher (contd. 3)

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 – Refresher (contd. 4)

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

UDS Process Modernization – Refresher (contd. 5)

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

UDS Process 2019 New Features (contd.)

Import PBZC in Excel

- 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

UDS Process 2019 New Features (contd. 2)

Downloaded Excel Template

- 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.

UDS Process 2019 New Features (contd. 3)

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**

UDS Process 2019 New Features (contd. 4)

Upload File Success Message

- 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

UDS Process 2019 New Features (contd. 5)

Upload History Columns

- 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

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
- 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

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
- 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

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

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

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.)
- 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**

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

Quiz #3



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

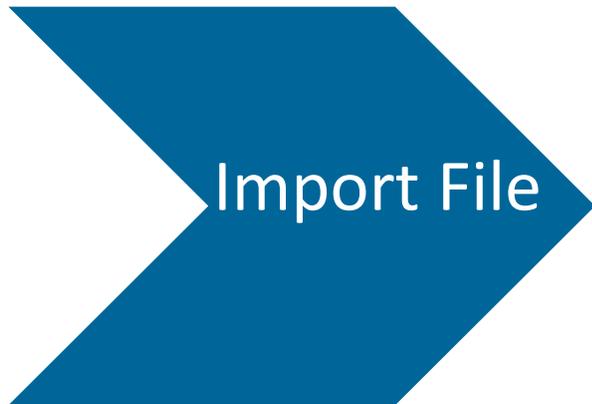
Offline HTML Feature – Data Entry



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.
- Exported Excel files will not match the formatting applied in the excel template

Clear Data Feature – Interesting Facts

Clear Data

- This new feature is location 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](#)

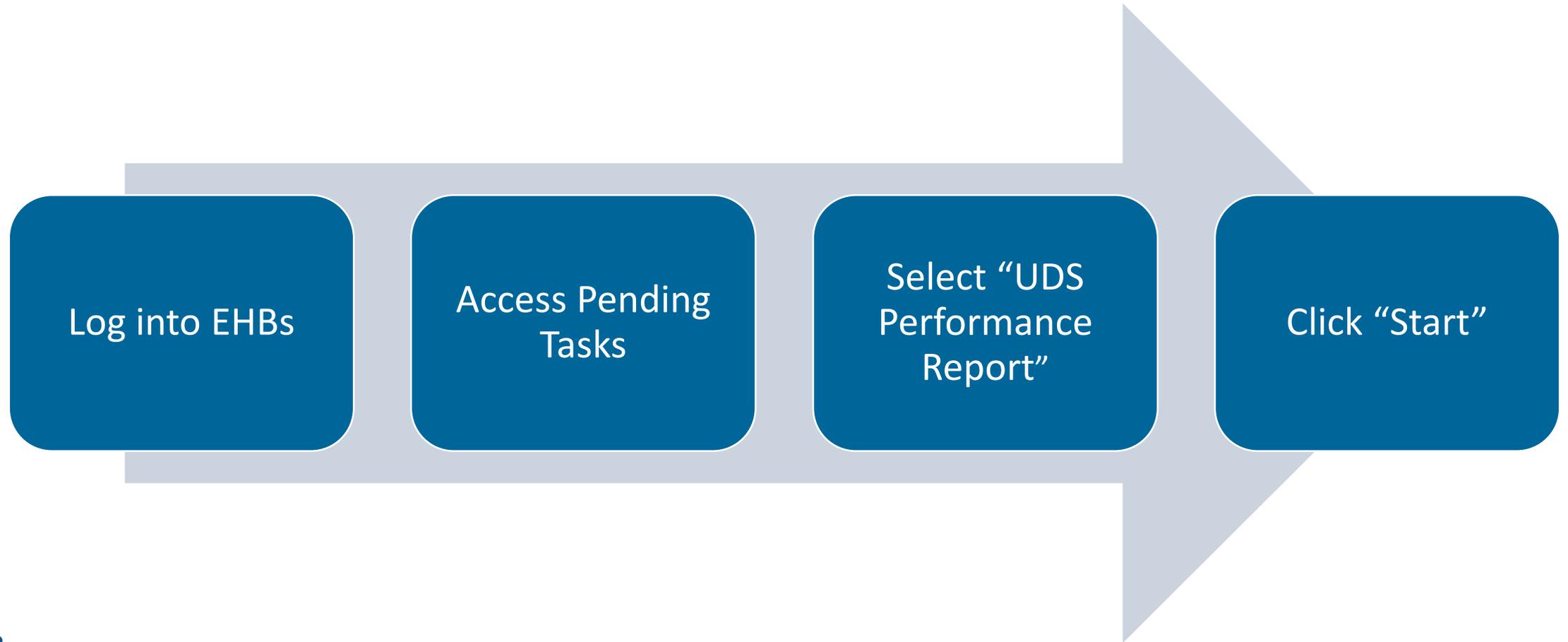


Resources (contd.)

- 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)



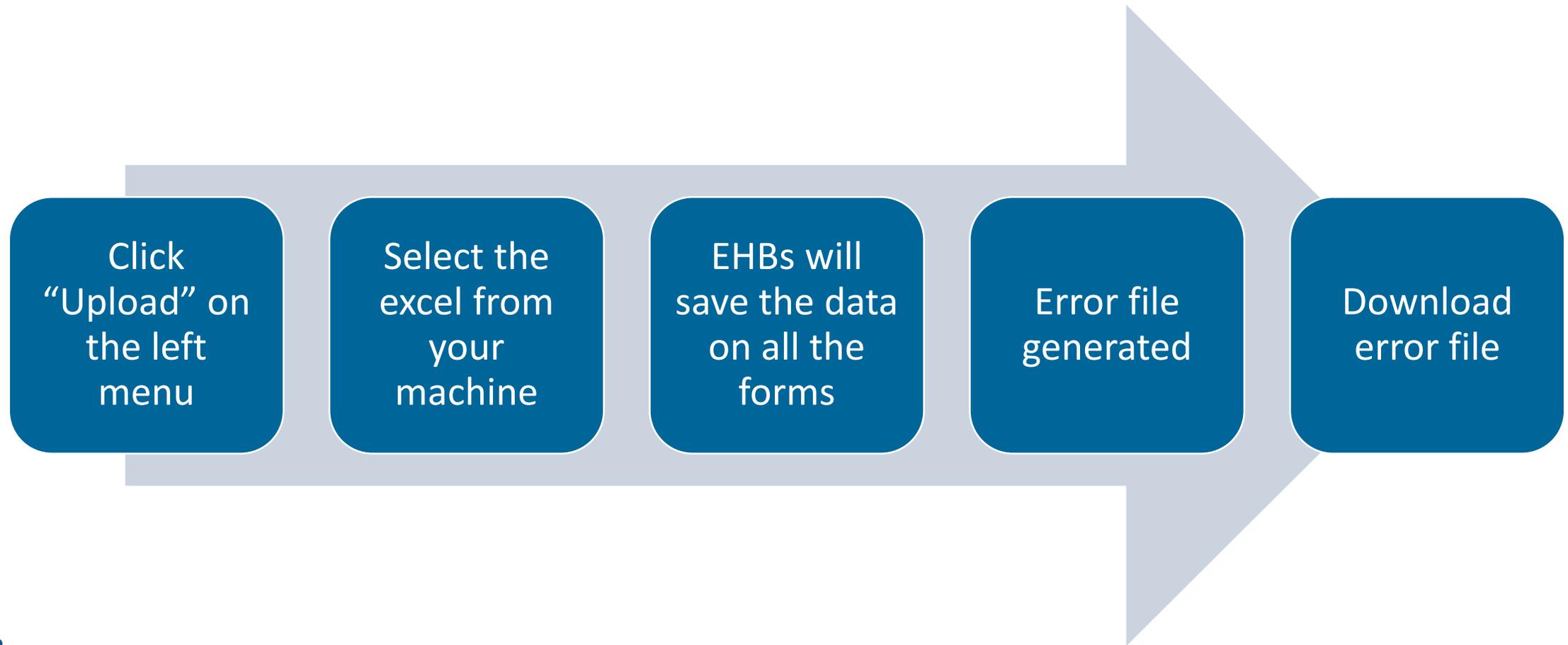
Appendix A – Early Data Collection With Excel Download/Upload Feature



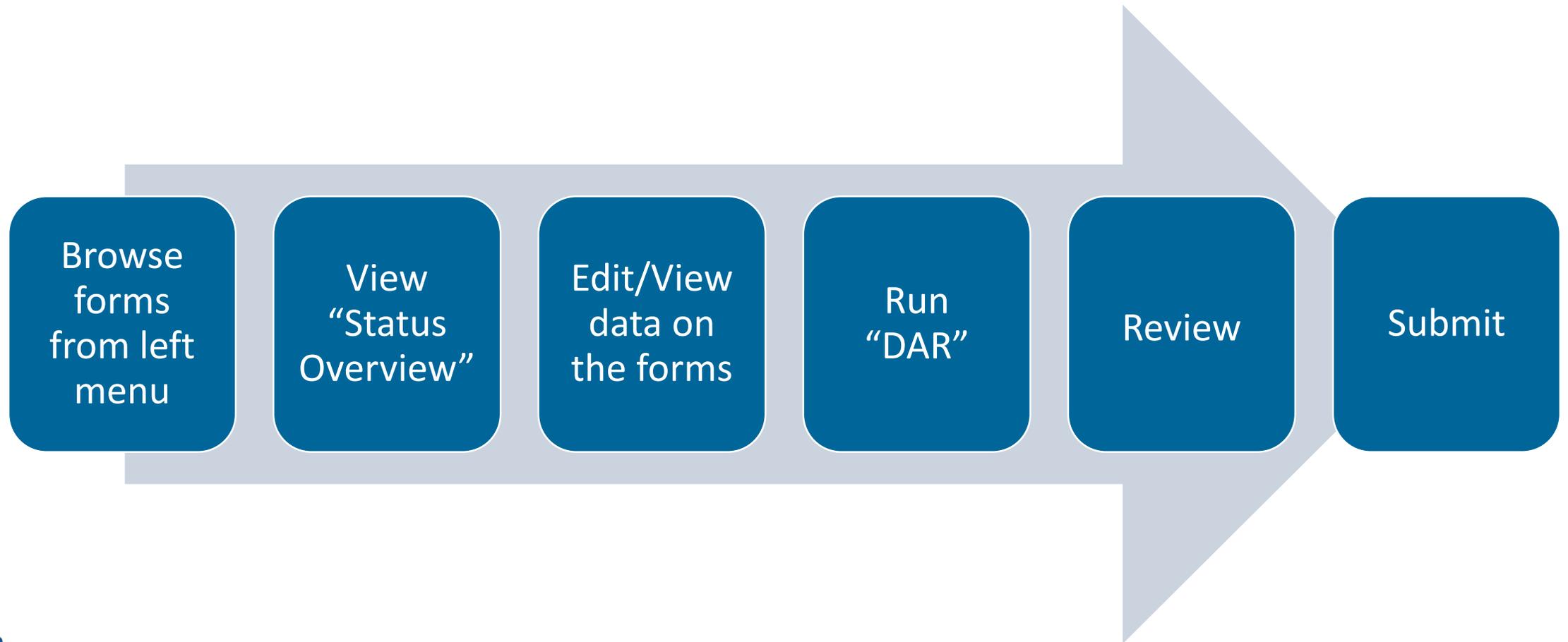
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 2



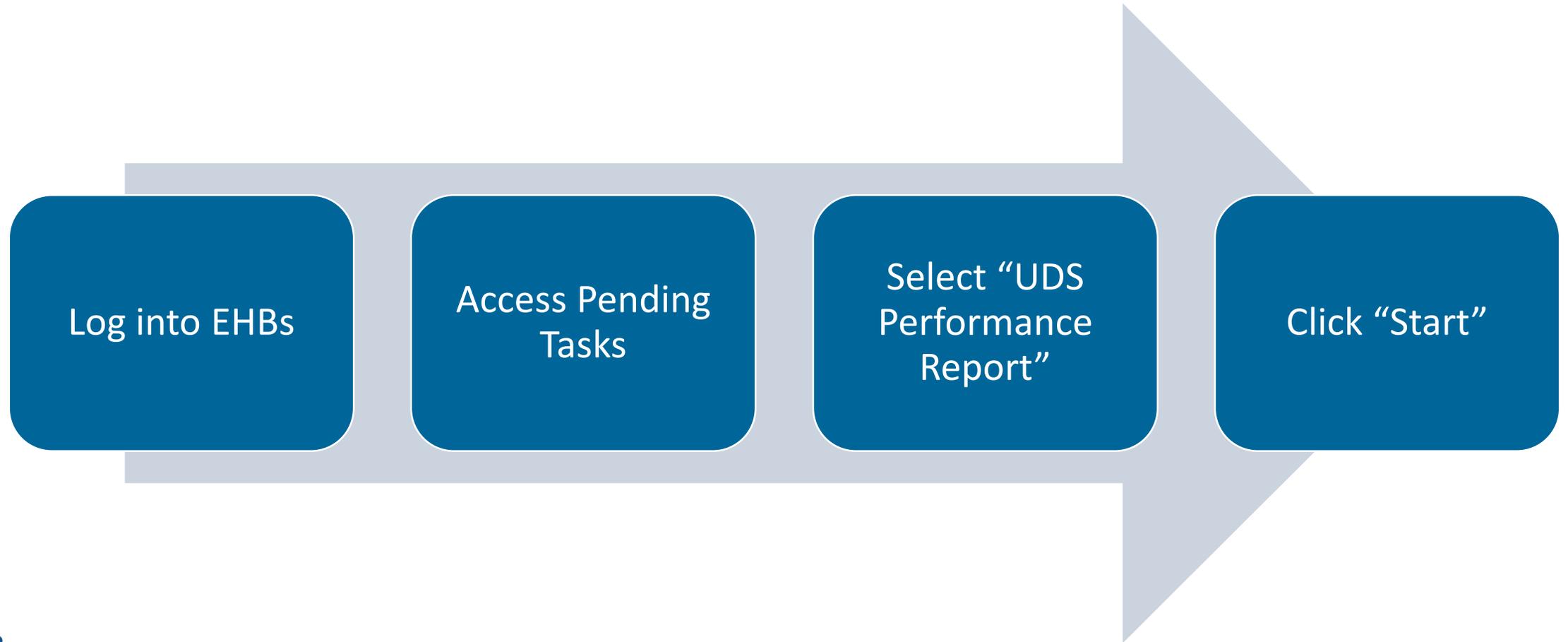
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 3



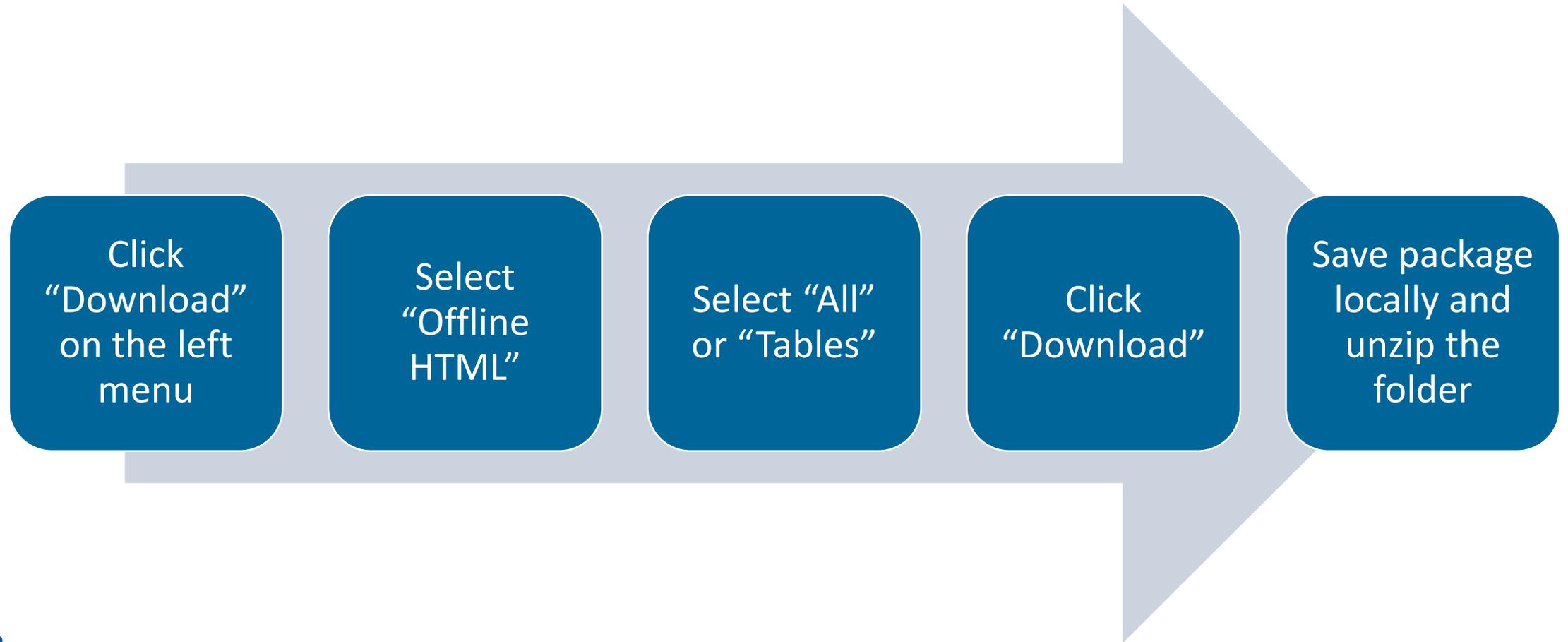
Appendix A – Early Data Collection With Excel Download/Upload Feature, Part 4



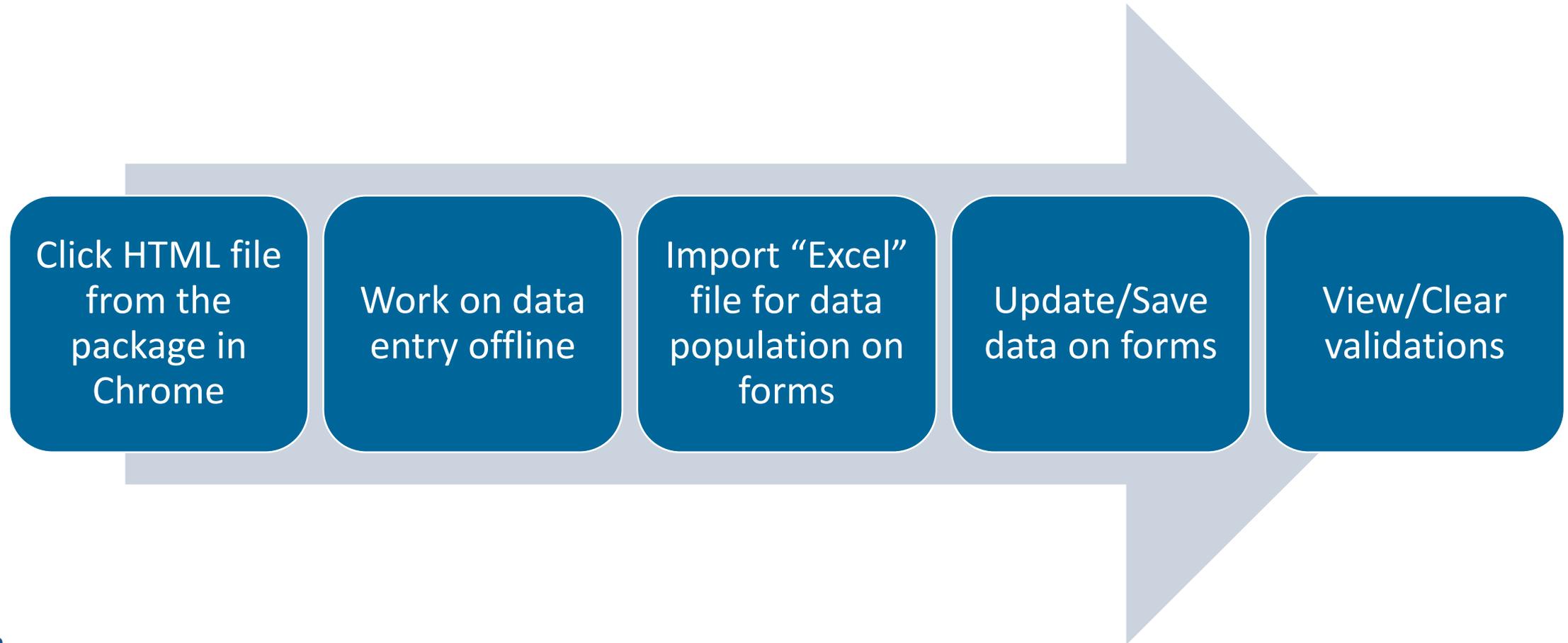
Appendix B- Early Data Collection With Offline HTML Feature



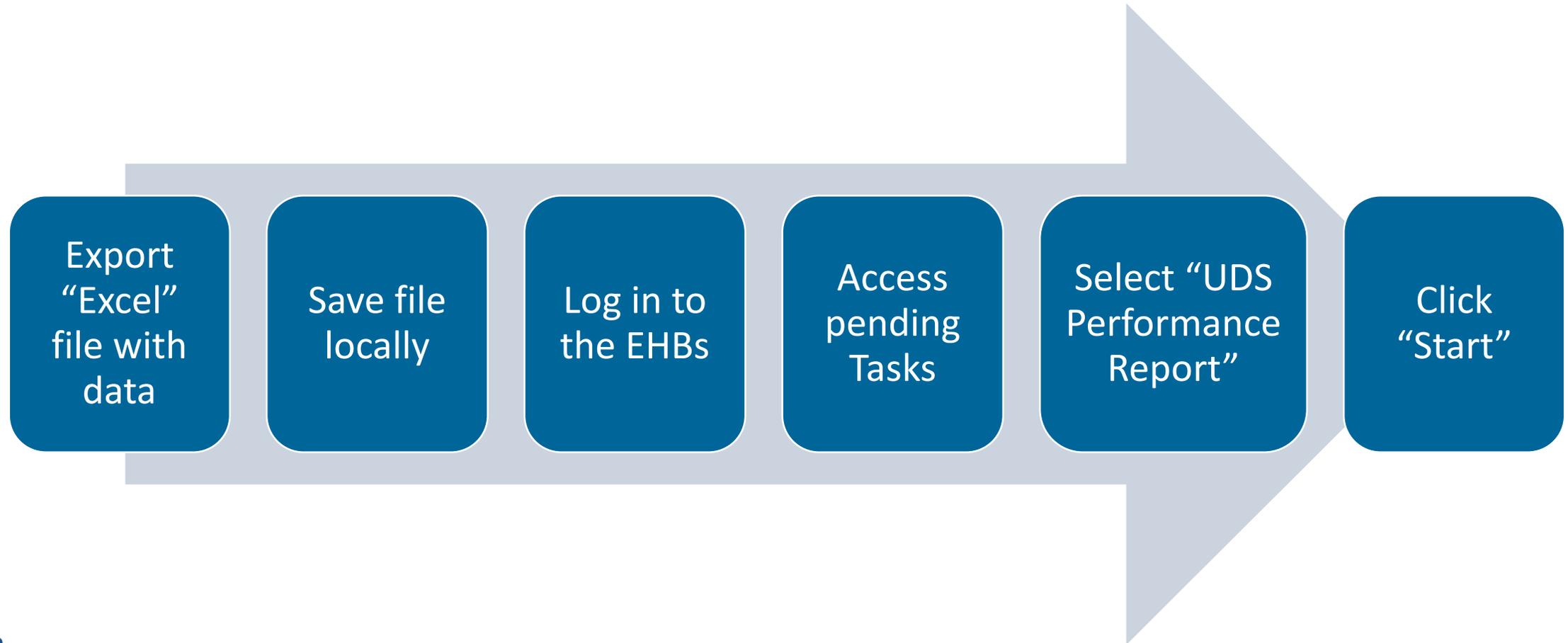
Appendix B- Early Data Collection With Offline HTML Feature, Part 2



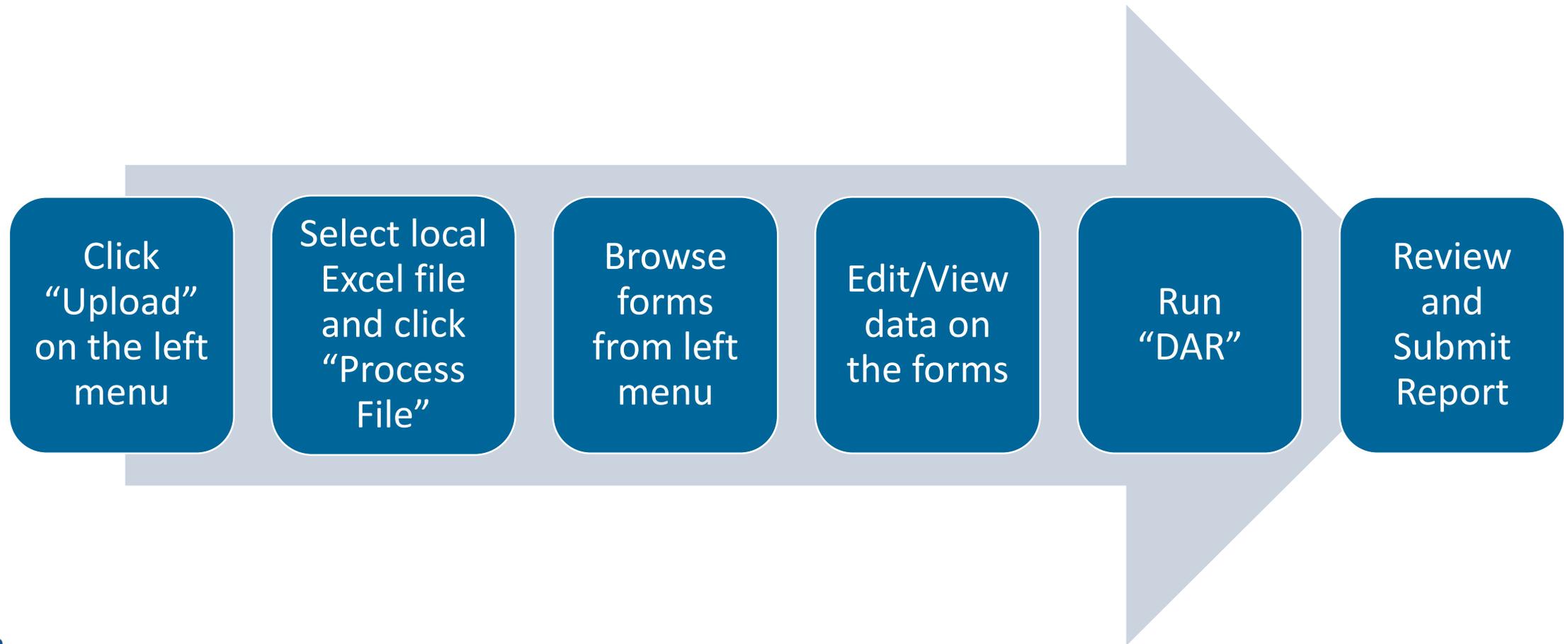
Appendix B- Early Data Collection With Offline HTML Feature, Part 3



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



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



Questions & Feedback

