



# Uniform Data System Reporting 2022 – Training Session for Health Centers

BPHC

*November 10, 2022*

**Jenny Lambert, Sawyer Lubold, and Reshmi Naveen**  
**Training Specialists and Business Analyst**  
**REI Systems**

**Vision: Healthy Communities, Healthy People**



# Agenda

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- 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

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- 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

Tasks Page

**HRSA Electronic Handbooks**

Home | **Tasks** | Organizations | Grants | Free Clinics | FQHC-LALs | Resources

You are here: Home » Tasks » Browse » All Entities [ ]

**ALL ENTITIES** <<

- All Entities
- Tasks
  - Pending Tasks**
  - Archived Tasks
- Free Clinics
- Requests
  - Applications
- FQHC-LALs
- Requests
  - Health Center CIS
  - Requests
  - Look-Alike Applications

### Pending Tasks - List

Not Completed | Recently Completed

Detailed View | Search | [ ]

Page size: 15 | Go | 12 items in 1 page

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Options
02/15/2023 11:59 PM (131 Days)	Grant Submissions	H80CS [ ]	Performance Reports	H80CS (Grant)	[ ]	Edit
02/15/2023 11:59 PM (131 Days)	Grant Submissions	H80CS [ ]	Performance Reports	H80CS (Grant)	[ ]	Start

Click to open report after it's been started

Find Performance Report Tasks

Click to open report for the first time



# UDS Navigation

File Options

Open Tables/ Reports

- All Functions <<
- Performance Reports ▾
- UDS Upload/Download
  - Download File
  - Upload File
  - Clear Data
- UDS Report Details
  - Status Overview
  - ✗ Contact Information
  - ✗ Table Patients by ZIP Code
  - ! Table 3A
  - ✗ Table 3B
  - ✗ Table 4
  - ✗ Table 5
  - ✗ Table 6A
  - ✗ Table 6B

You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar year UDS performance data at this time.

## Status Overview

### Note:


All sections including tables, HIT information, other data elements and data audit report must be in "Complete" status in order to submit your report.  
Tip: Prior to entering any data, save a copy of the blank excel template. The blank file can later be used for clearing the data if desired.

H80CS0000

 **02/15/2023** (11:59 PM Lo...)  
Due Date

Due Date Information

 **133**  
Days Left

Resources 

[UDS Manual](#) | [UDS Training and Technical Assistance](#) | [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](#)

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

## Forms Overview

Last Updated On: 10/05/2022 3:52 PM EST  
[Table 3A](#)

**16**

✗ Not Started


**1**

! In Progress

**0**

✓ Complete

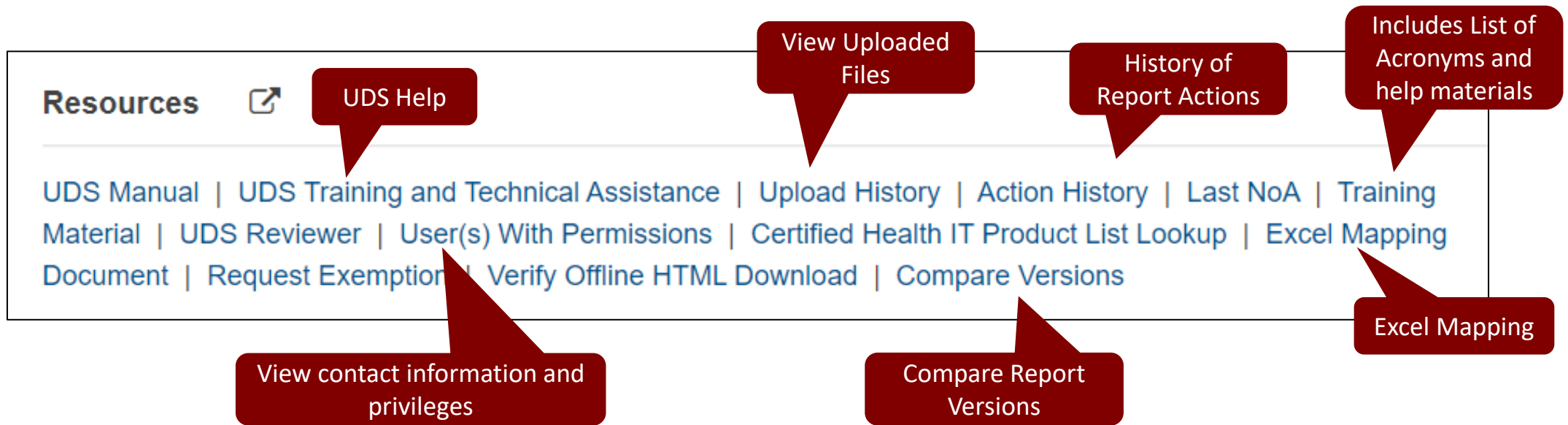
Status Tracker

Offline Excel Tool 

Helpful tip! The due date time is 11:59 your local time.



# UDS Navigation (continued)



# UDS Navigation (continued 2)

- ! Table 7
- ! Table 8A
- ! Table 9D
- ! Table 9E
- ! HIT Capabilities
- ! Other Data Elements
- ! Workforce
- ✗ Report Comments
- ✗ Data Audit Report
- Review
- Submit

UDS Report Status		
Sections	Status	Last Updated
<a href="#">Contact Information</a>	✗ Not Started	-
<a href="#">Table Patients by ZIP Code</a>	✓ Complete	10/07/2022 1:28 PM EST by [redacted]
<a href="#">Table 3A - Patients by Age and by Sex Assigned at Birth</a>	✓ Complete	10/07/2022 1:28 PM EST by [redacted]
<a href="#">Universal Report</a>	✓ Complete	-
<a href="#">Table 3B - Demographic Characteristics</a>	! In Progress	10/07/2022 1:27 PM EST by [redacted]
<a href="#">Universal Report</a>	✗ Incomplete	-
<a href="#">Table 4 - Selected Patient Characteristics</a>	! In Progress	10/07/2022 1:27 PM EST by [redacted]
<a href="#">Universal Report</a>	✗ Incomplete	-

Report Status and Links to Tables/Reports

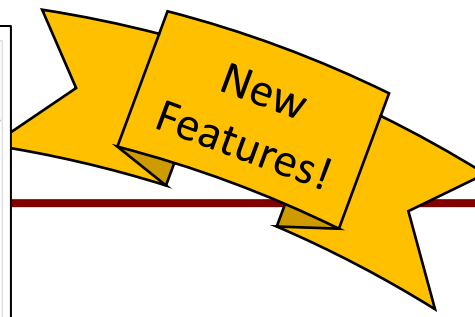
Review Report

Submit Report





# UDS Navigation - Widgets




Download Excel or HTML file with only specific tables


Download Excel file with no data


Download Excel file with data currently in UDS


Upload complete file back to UDS

Offline Excel Tool ⓘ

 **Download a Custom Template**  
The Download Custom Template option allows you to choose the UDS tables individually, in groups or all tables.

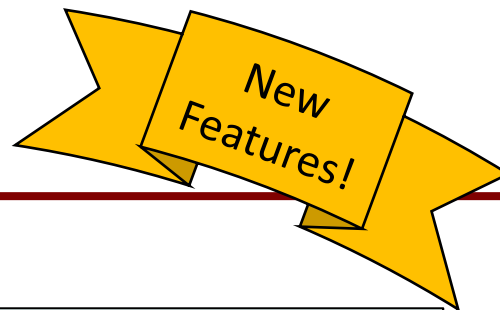
 **Download a Blank Template**  
The Download Blank Template option downloads ALL UDS Tables with no data included.

 **Download a Template with Data**  
The Download Template with Data option includes ALL UDS tables with information already entered into the tables.

 **Upload a File**  
Once you have completed your data entry in excel, click here to upload your file.



# UDS Navigation – Widgets cont.



**Compare Versions** ⓘ

Reference Year/Version:

Compare to Year/Version:

[Next](#)

Compare data on two UDS Report versions

Click when you are ready to Submit the Report

**Report Details**

BHCMIS ID:

Last Submitted By: N/A

Report BHCMI ID and Recently Submitted information

**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](#)

Navigate to the Compare feature

Print UDS Report



# Demo #1

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## UDS Navigation Demo



# Preliminary Reporting Environment (PRE) and Comparing Report Versions



# Preliminary Reporting Environment

## Preliminary Reporting Environment (PRE)

System available **as of November 4<sup>th</sup>** to prepare report for submission

You are **not able to submit** the report at this time, only prepare the report

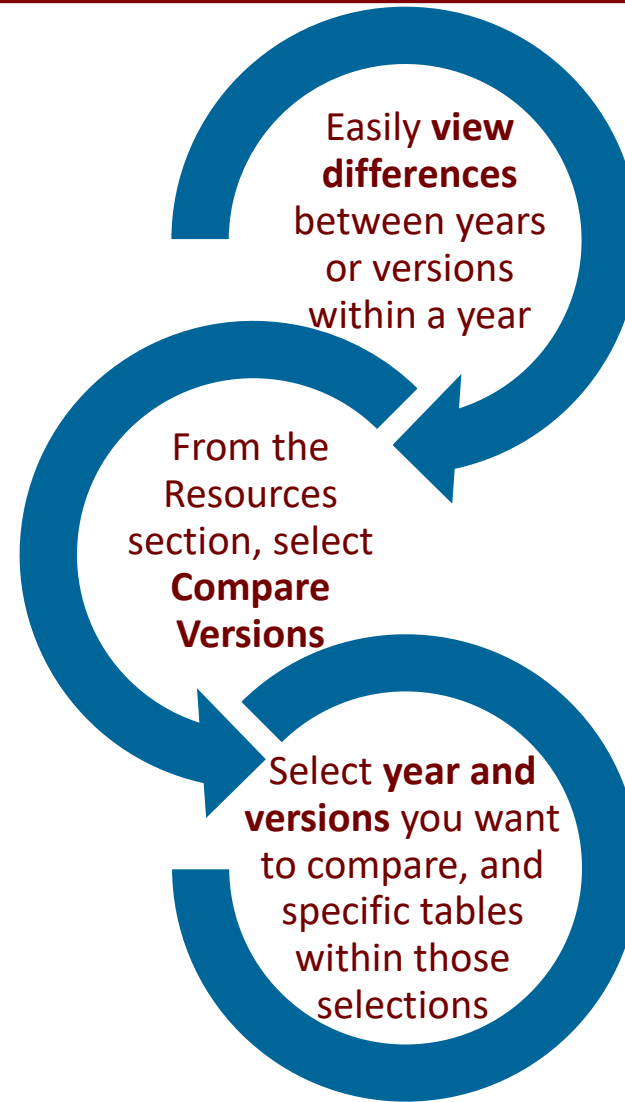
**Additional time** to enter data and edit

**Improved data quality** with extra time

Opportunity to **familiarize** yourself with UDS forms updates ahead of reporting time frame



# Compare Versions



# Compare Versions – Select Version

**Compare Versions - Select Version**

▶ H80CS00 [redacted] : [redacted]

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

**Select Versions to be Compared**

Reference Year/Version	2021 Version 4	Compare To Year/Version	2022 Version 1*
------------------------	----------------	-------------------------	-----------------

Close Next

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 Table

**Compare Versions - Select Table**

▶ H80CS00 : [REDACTED]

**Note:**  
Tables and Funding Streams shown below belong to the Reference Year/Version.

**Selected Versions to Compare**

Reference Year/Version: 2021 Version 4      Compare To Year/Version: 2022 Version 1\*

Tables/Sections	<input checked="" type="checkbox"/> Select All <input type="checkbox"/> Unselect All	Change Status
Table Patients by ZIP Code	<input checked="" type="checkbox"/>	Changed
Table 3A - Patients by Age and by Sex Assigned at Birth	<input checked="" type="checkbox"/>	Changed
Table 3B - Demographic Characteristics	<input checked="" type="checkbox"/>	Changed

Go Back to Previous Page      [Close](#)   [Compare](#)

*Annotations:*  
- Red callout: "Select tables to compare" points to the table checkboxes.  
- Red callout: "Click Compare after selecting tables" points to the Compare button.





# Compare Versions - Results

## Compare Versions - Result Page

▶ H80CS0 [redacted] 1: [redacted]

### 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

BHCMIS ID: 05E00015 - [redacted]

Date Requested: 10/05/2022 4:25 PM EST

Program Name: Health Center 330

Submission Status: Data Entry In Progress, Version 1

### UDS Report - 2022

Reference – 2021 Version 3; Compare To - 2022 Version 1\* (Values indicated in Parenthesis)

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

#### Universal

Line	Age Groups	Male Patients (a)	Female Patients (b)
1	Under age 1	138 (—) •	113 (—) •
2	Age 1	77 (—) •	64 (—) •
3	Age 2	72 (—) •	69 (—) •

Click Print to print a version of the comparison

Print

Fields marked with blue circle are different between versions



# Demo #2

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## 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 1<sup>st</sup>
- D. Submit the report prior to January 1<sup>st</sup>



# Quiz Question #1 Answer

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**What does the Preliminary Reporting Environment (PRE) allow users to do?**

**Answer: (C) Enter data in the report prior to January 1<sup>st</sup>**



# 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



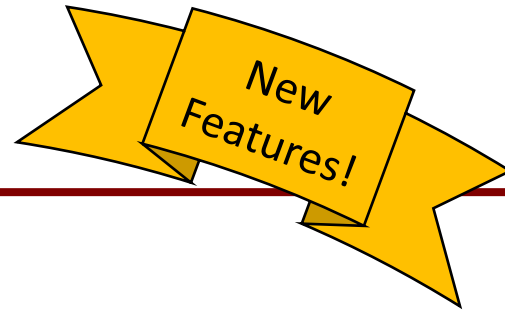
4. After uploading, you can view the Edit Summary File

# Offline Excel Download Overview

## Excel File 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







**All Functions** <<

- Performance Reports ▾
- UDS Upload/Download
- Download File**
- Upload File
- Clear Data

Select one of the download options to download an offline Excel or offline HTML file

**Offline Excel Tool** ⓘ

-  **Download a Custom Template**  
The Download Custom Template option allows you to choose the UDS tables individually, in groups or all tables.
-  **Download a Blank Template**  
The Download Blank Template option downloads ALL UDS Tables with no data included.
-  **Download a Template with Data**  
The Download Template with Data option includes ALL UDS tables with information already entered into the tables.
-  **Upload a File**  
Once you have completed your data entry in excel, click here to upload your file.





# Offline Excel Download File

**Download File**

▶ H80CS0000

▶ Resources

**Instructions**

To enter UDS data offline, select either the Excel file (spreadsheet format) or the Offline HTML file (forms-based format). Then select whether you want a blank form or to include any existing data. Once you have made all of your selections, click the Download button to complete your request.

With either file you can download specific tables or all the tables required for the UDS report. Please note that each time you download a file, it will be populated with any data that is in the EHBs.

Enter or change data in the file you have chosen. Once finished, upload your completed file to the EHBs.

**Excel File:** Upload your completed file to the EHBs.  
**HTML File:** Export an Excel file from the HTML file then upload the completed Excel file to the EHBs.

**Download Template**

Select Format  Offline Excel  Offline HTML [Download](#)

**Excel Template**

Select Data Level  Excel with Data  Blank Excel

Select Table

<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Table 5	<input checked="" type="checkbox"/> Table 9D
<input checked="" type="checkbox"/> Table Patients by ZIP Code	<input checked="" type="checkbox"/> Table 6A	<input checked="" type="checkbox"/> Table 9E
<input checked="" type="checkbox"/> Table 3A	<input checked="" type="checkbox"/> Table 6B	<input checked="" type="checkbox"/> Table HIT
<input checked="" type="checkbox"/> Table 3B	<input checked="" type="checkbox"/> Table 7	<input checked="" type="checkbox"/> Other Data Elements
<input checked="" type="checkbox"/> Table 4	<input checked="" type="checkbox"/> Table 8A	<input checked="" type="checkbox"/> Workforce

Patients by ZIP Code with Prior year ZIP Codes  
(This option will append the zip codes reported last year to any data already entered for this year. If you have already entered zip code information for this year, be certain to check that none of the zip codes have been entered twice, since this option does not include a duplicated entry check.)

[Go To Status Overview Page](#) [Continue to Upload Page](#)

1. Select to download Offline Excel

2. Select with Data

3. Select All or Individual tables to download

5. Click Download after making all selections

4. Option to include prior zip codes



# Table Patients by ZIP Code

## Import PBZC in Excel

- 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 **Table Patients by ZIP Code (PBZC)**
- Provides for **easy data entry** for this table and saves time in searching for zip codes

# Offline Excel File

Notes about data entry type

Unique file name and version

The screenshot shows an Excel spreadsheet with the following data:

Line	Age Groups	Male Patients (a)	Female Patients (b)
1	Under age 1		1
2	Age 1		
3	Age 2		
4	Age 3		
5	Age 4		
6	Age 5		
7	Age 6		
8	Age 7		
9	Age 8		
10	Age 9		
11	Age 10		
12	Age 11		
13	Age 12		
14	Age 13		
15	Age 14		
16	Age 15		
17	Age 16		
18	Age 17		
19	Age 18		
20	Age 19		
21	Age 20		
22	Age 21		
23	Age 22		
24	Age 23		
25	Age 24		
26	Age 25		
27	Age 26		
28	Age 27		
29	Age 28		
30	Age 29		
31	Age 30		
32	Age 31		
33	Age 32		
34	Age 33		
35	Age 34		
36	Age 35		
37	Age 36		
38	Age 37		
39	Age 38		
40	Age 39		
41	Age 40		
42	Age 41		
43	Age 42		
44	Age 43		
45	Age 44		
46	Age 45		
47	Age 46		
48	Age 47		
49	Age 48		
50	Age 49		
51	Age 50		
52	Age 51		
53	Age 52		
54	Age 53		
55	Age 54		
56	Age 55		
57	Age 56		
58	Age 57		
59	Age 58		
60	Age 59		
61	Age 60		
62	Age 61		
63	Age 62		
64	Age 63		
65	Age 64		
66	Age 65		
67	Age 66		
68	Age 67		
69	Age 68		
70	Age 69		
71	Age 70		
72	Age 71		
73	Age 72		
74	Age 73		
75	Age 74		
76	Age 75		
77	Age 76		
78	Age 77		
79	Age 78		
80	Age 79		
81	Age 80		
82	Age 81		
83	Age 82		
84	Age 83		
85	Age 84		
86	Age 85		
87	Age 86		
88	Age 87		
89	Age 88		
90	Age 89		
91	Age 90		
92	Age 91		
93	Age 92		
94	Age 93		
95	Age 94		
96	Age 95		
97	Age 96		
98	Age 97		
99	Age 98		
100	Age 99		
101	Age 100		

Select table to work on



# 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

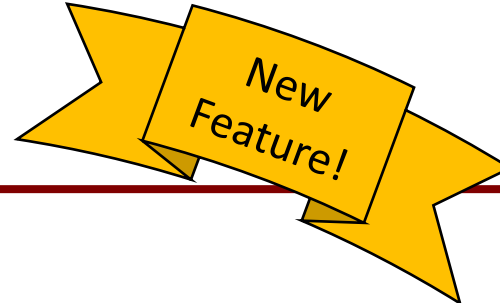


# Offline Excel Upload Overview

## Excel File 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 Upload



**All Functions** <<

- Performance Reports ▾
- UDS Upload/Download
  - Download File
  - Upload File**
  - Clear Data

Select to Upload Excel File

**Offline Excel Tool** ⓘ

- Download a Custom Template**  
The Download Custom Template option allows you to choose the UDS tables individually, in groups or all tables.
- Download a Blank Template**  
The Download Blank Template option downloads ALL UDS Tables with no data included.
- Download a Template with Data**  
The Download Template with Data option includes ALL UDS tables with information already entered into the tables.
- Upload a File**  
Once you have completed your data entry in excel, click here to upload your file.



# Offline Excel Upload File

Click to select file to upload

### Upload File

▶ H80CS00 [redacted] : [redacted]

▶ Resources

#### Instructions

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.

#### Upload File

No file chosen

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

#### Error Summary

Number of Edits Verified	Number of Edits Failed	Download
		-





# Offline Excel Upload Results

**✓ 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

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

**Error Summary**

Number of Edits Verified	Number of Edits Failed	Download
5800	0	<a href="#">UDS2022ErrorFile033620Version2</a>

Success message listing updated tables

Click Process File to upload file into EHBs

Unique file and version name. Click to view file

File information



# Uploaded File Summary

## Uploaded File

- 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**

# Upload History

## Upload History

- 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**

# Offline Excel Tips



## 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 #3

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## 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 Answer

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**True or False: When downloading the Offline Excel File, you must download all tables.**

**Answer: (B) False**



# Offline HTML





# Offline HTML Overview

## Offline HTML Overview

**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

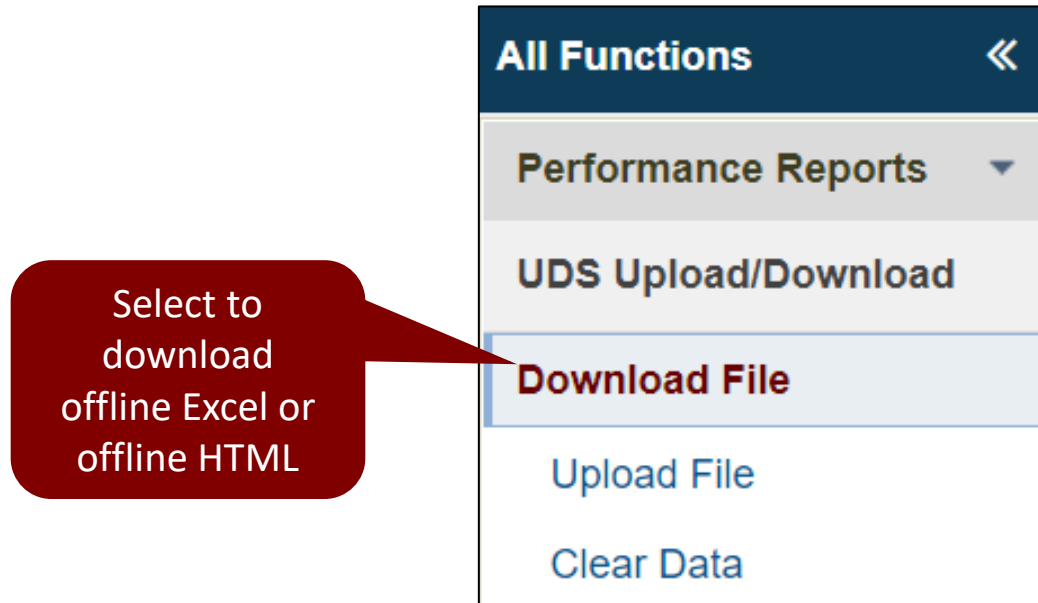
Don't Forget!

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



# Offline HTML Download (continued)

**Download File**

▶ H80CS0000

▶ Resources

**Instructions**

To enter UDS data offline, select either the Excel file (spreadsheet format) or the Offline HTML file (forms-based format). Then select whether you want a blank form or to include any existing data. Once you have made all of your selections, click the Download button to complete your request.

With either file you can download specific tables or all the tables required for the UDS report. Please note that each time you download a file, it will be populated with any data that is in the EHBs.

Enter or change data in the file you have chosen. Once finished, upload your completed file to the EHBs.

**Excel File:** Upload your completed file to the EHBs.  
**HTML File:** Export an Excel file from the HTML file then upload the completed Excel file to the EHBs.

**Download Template**

Select Format  Offline Excel **i**  Offline HTML **i** [Download](#)

Select Table

<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Table 5	<input checked="" type="checkbox"/> Table 9D
<input checked="" type="checkbox"/> Table Patients by ZIP Code	<input checked="" type="checkbox"/> Table 6A	<input checked="" type="checkbox"/> Table 9E
<input checked="" type="checkbox"/> Table 3A	<input checked="" type="checkbox"/> Table 6B	<input checked="" type="checkbox"/> Table HIT
<input checked="" type="checkbox"/> Table 3B	<input checked="" type="checkbox"/> Table 7	<input checked="" type="checkbox"/> Other Data Elements
<input checked="" type="checkbox"/> Table 4	<input checked="" type="checkbox"/> Table 8A	<input checked="" type="checkbox"/> Workforce

[Go To Status Overview Page](#) [Continue to Upload Page](#)

Select to open Offline HTML

Click Download after making selections

Select All or Individual tables to download

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



# Offline HTML Download (continued 2)

## Offline Package 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.

**Table Patients by ZIP Code**

**Note:**  
You are currently working in HRSA offline HTML tool Version 1.0.0. It was downloaded 10/07/2022 3:45 PM EST. You do not need to be connected to the Internet to enter data in to your UDS forms.

H80CS000C

**Resources**  
UDS Manual

Status: **Not Started**

+ Add Multiple ZIP Codes Download Patients by ZIP Code

1 of 1 Page size 15 0 items in 1 page(s)

ZIP Code (a)	None/Uninsured (b)	Medicaid/CHIP/Other Public (c)	Medicare (d)	Private (e)	Total Patients (f)	Action
+ Add Row						

Reminder you are working in the Offline HTML view, not UDS Environment



# Offline HTML Data Entry

Offline HTML forms will have the **same look and feel** as the UDS forms in the EHBs

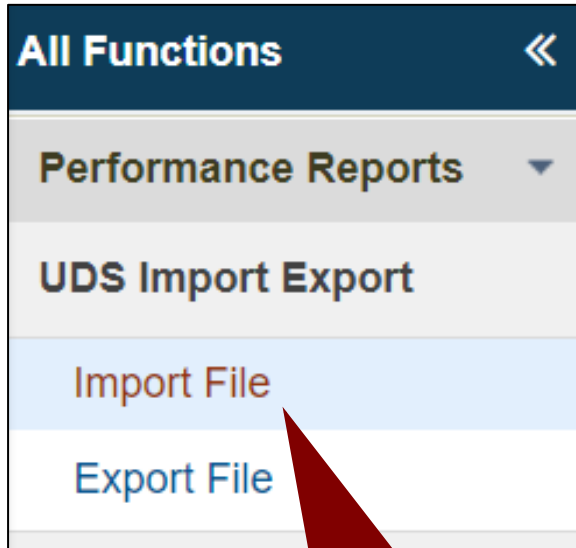
Users will be able to **navigate** to different forms using the left navigation menu

## Data Entry

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



All Functions <<

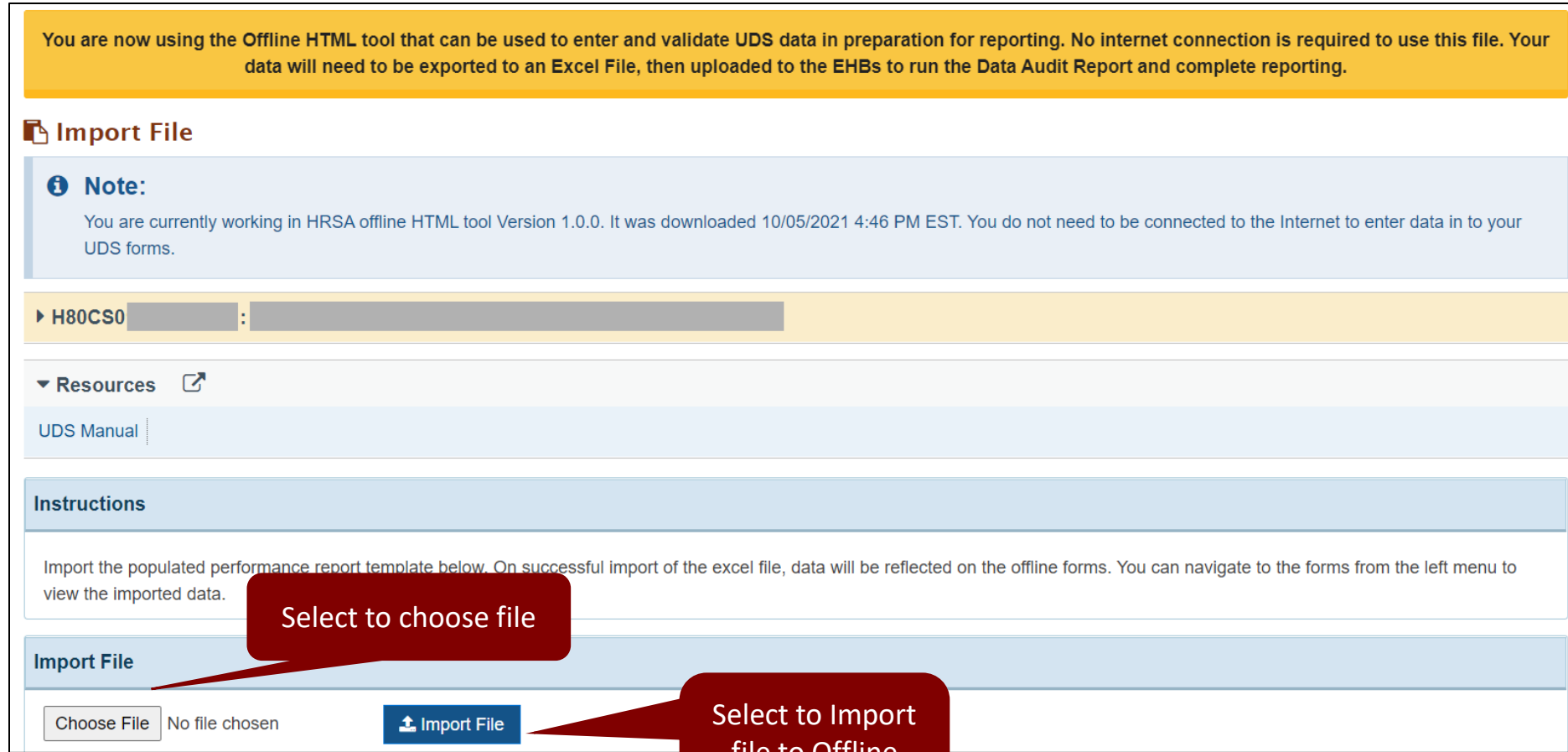
Performance Reports ▾

UDS Import Export

Import File

Export File

Click to import data from an excel file to the Offline HTML form




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 to your UDS forms.

▶ H80CS0 : [redacted]

▼ 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

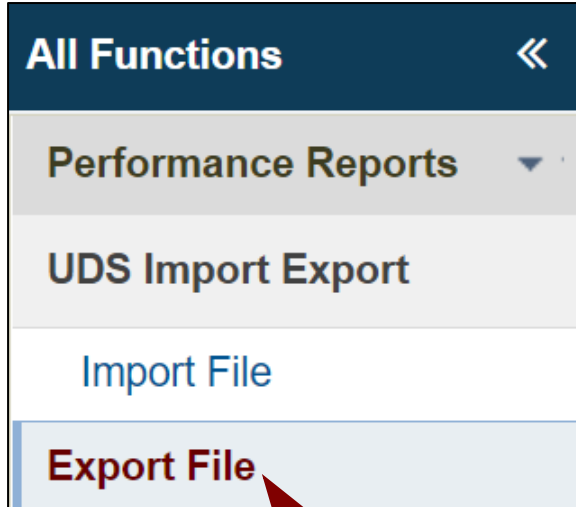
Choose File No file chosen

Select to choose file

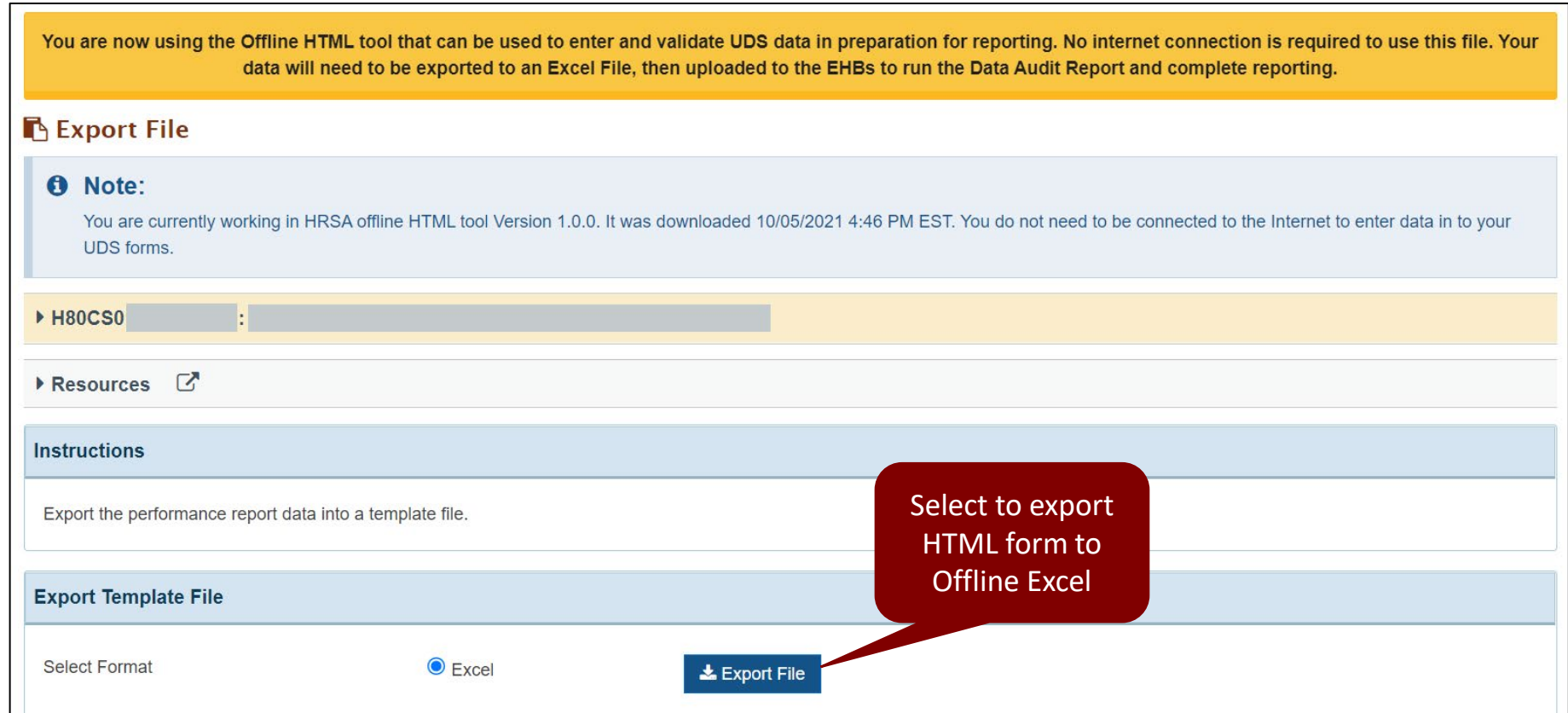
Select to Import file to Offline HTML view



# 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



## Helpful 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 #4

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## UDS Offline HTML Demo



# Clear Data, Data Audit Report, Review and Submit Report



# Clear Data Overview

## Clear Data Feature

- 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

**All Functions** <<

Performance Reports ▾

UDS Upload/Download

Download File

Upload File

Clear Data

Select to delete data on tables

**Clear Data**

▶ H80CS0000

▶ Resources ↗

**Instructions**

Caution: Tables selected will be cleared of any existing data in the EHBs (uploaded or entered online). Deleted data will be permanently lost. Please note that selecting a table would cause data to be cleared for all associated funding streams.

Select Table

<input type="checkbox"/> All	<input type="checkbox"/> Table 5	<input type="checkbox"/> Table 9D
<input type="checkbox"/> Table Patients by ZIP Code	<input type="checkbox"/> Table 6A	<input type="checkbox"/> Table 9E
<input type="checkbox"/> Table 3A	<input type="checkbox"/> Table 6B	<input type="checkbox"/> HIT Capabilities
<input type="checkbox"/> Table 3B	<input type="checkbox"/> Table 7	<input type="checkbox"/> Other Data Elements
<input type="checkbox"/> Table 4	<input type="checkbox"/> Table 8A	<input type="checkbox"/> Workforce

Go To Status Overview Page

Continue To Next Page

Clear Data

Select tables to clear

Click Clear Data after making selection



# Data Audit Report (DAR) Details

## DAR

- 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

- All Functions <<
- Performance Reports ▾
- UDS Upload/Download
  - Download File
  - Upload File
  - Clear Data
- UDS Report Details
  - Status Overview
  - ✗ Contact Information
  - ✓ Patients by ZIP Code
  - ✓ Table 3A
  - ✗ Report Comments
  - ✗ **Data Audit Report**
  - Review
  - Submit

Click run DAR

## Data Audit Report

The Data Audit Report (DAR) must be run when changes are made and saved on a Table. Do this by clicking the 'Run Data Audit Report' button below. The ... [Show more](#)

**Warning:**  
Report can take between 2 to 4 minutes to generate, please be patient.

▶ H80CS00 : [REDACTED]

▶ Resources

Status ✗ Not Started

Date of Last Report Refreshed: 09/22/2022 11:50 AM EST [Run Data Audit Report](#)

Table	Edit Type	Flag Status	Edit	Status	Action
All	All	All		All	

No records found.

Date of Last Report Refreshed: 09/22/2022 11:50 AM EST [Run Data Audit Report](#)

[Continue To Next Page](#)

Click run report



# Data Audit Report Process (continued)

**Data Audit Report**

The Data Audit Report (DAR) must be run when changes are made and saved on a Table. Do this by clicking the 'Run Data Audit Report' button below. The ... [Show more](#)

**Warning:**  
Report can take between 2 to 4 minutes to generate, please be patient.

H80CS00 [REDACTED]

Resources

Status: **In Progress**

Date of Last Report Refreshed: 09/22/2022 11:50 AM EST [Run Data Audit Report](#)

Table	Edit Type	Flag Status	Edit	Status	Action
All	All	All		All	
Patients by ZIP Code	Explainable Error	Not Flagged	Edit 3390: Patients by Zip Code in Question	Pending	Fix Patients by ZIP Code
<p><b>Description:</b>All center patients are being reported under one zip code. Please correct or explain.</p>					
Table 3A	Explainable Error	Not Flagged	Edit 3855: Total Patients in Question	Pending	Fix Table 3A
<p><b>Description:</b>The number of total patients (26754) reported on Table 3A is the same as last year. Verify that the numbers have not changed and correct or explain.</p>					

Date of Last Report Refreshed: 09/22/2022 11:50 AM EST [Run Data Audit Report](#)

[Go to Previous Page](#) [Continue To Next Page](#)

Error description

Actions to fix or explain error





# Review Report

**All Functions** <<

Performance Reports ▾

UDS Upload/Download

Download File

Upload File

Clear Data

**UDS Report Details**

Status Overview

✘ Contact Information

✘ Table Patients by ZIP Code

! Table 3A

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✘ Data Audit Report

**Review**

Submit

Click Review to select tables to open

**Review**

▶ H80CS000

▶ Resources ↗

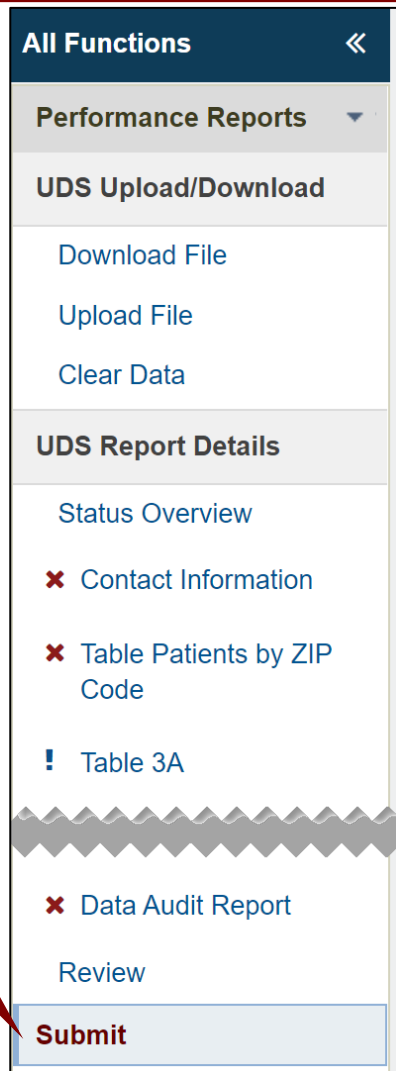
Print All Forms

Review	
Table	Action
Contact Information	View ↗
Table Patients by ZIP Code	View ↗
Table 3A - Patients by Age and by Sex Assigned at Birth	View ↗
Table 3B - Demographic Characteristics	View ↗
Table 4 - Selected Patients Characteristics	View ↗

Click View to open tables and review data



# Submit Report

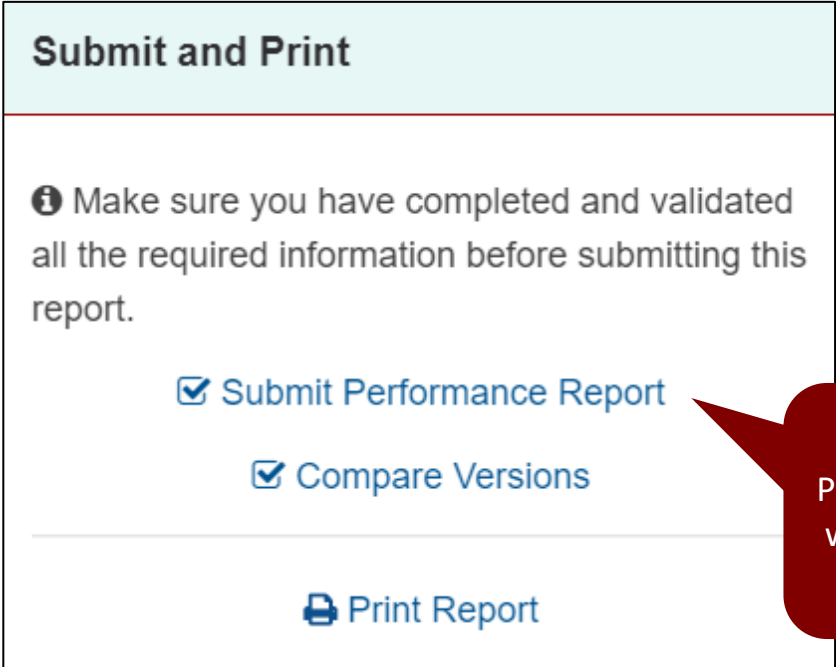


The screenshot shows a sidebar menu with the following items:

- All Functions <<
- Performance Reports ▾
- UDS Upload/Download
  - Download File
  - Upload File
  - Clear Data
- UDS Report Details
  - Status Overview
  - ✗ Contact Information
  - ✗ Table Patients by ZIP Code
  - ! Table 3A
  - ✗ Data Audit Report
  - Review
  - Submit**

Click Submit when finished with the report

OR




The 'Submit and Print' panel contains the following content:

- Information icon: 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 [redacted] : [redacted]

▶ Resources 

Fields with ★ are required

**★ UDS CERTIFICATION**

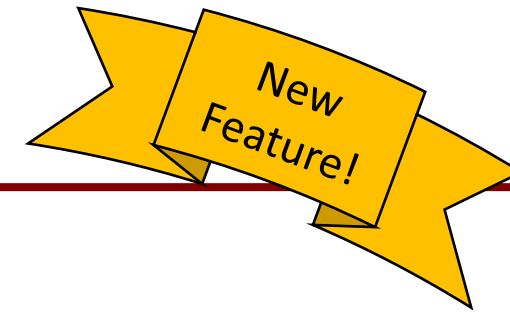
I certify to the best of my knowledge and belief that this UDS Report is true and correct.

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

Complete Certification



# View Submitted Report



**Submissions - All**

Not Completed | Recently Completed | All

[Export To Excel](#) [Detailed View](#) | [Search](#) | [Saved Searches](#) ▼

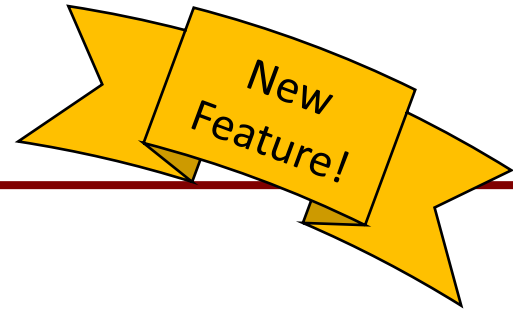
Page size: 15 | Go 4 items in 1 page(s)

Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Submitted Date	Status	Options
UDS Performance Report	Performance Reports		H80CS00	H80CS3	01/01/2021 - 12/31/2021	03/23/2022	03/22/2022	Submitted	<a href="#">Performance Reports</a> ▼

Click to view submitted Performance Report



# Submitted Report Data



**HRSA**

You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar year UDS performance data at this time.

**Review and Report List Page**

H80CS000

Report Name	Description	Action
UDS Data File in XML	Submitted Raw UDS Data File in XML format.	<a href="#">Download</a>
UDS Data File - Excel Format	Download a copy of your health centers' submitted UDS Performance Report in an excel format including data in all tables and forms.	<a href="#">Download</a>
UDS Health Center, State, National Summary Report	The Summary Report is a 'dashboard' report intended to describe each health center in a statistical manner. Calculations of key measures are derived from their own organization's current reporting on the UDS. The measures are broken out into two main categories: 1) Demographic and Clinical Data (Patients, Visits, Staffing and Clinical Information) and 2) Fiscal Information (Costs and Revenues) and provide an overall picture of the health center's performance in each of these areas.	<a href="#">View</a>
	Formula Guide: UDS Health Center Trend Report	
UDS Health Center Performance Comparison Report	The Health Center Performance Comparison Report for individual health centers provides calculations of key measures at different levels, i.e., Health Center, State, National, Urban, Rural, National Percentiles (25th, 50th, and 75th. The report categories are Quality of Care/Health Outcomes, Costs per Patient, and Costs per Visit.	<a href="#">View</a>
	Formula Guide: UDS Health Center Performance Comparison Report	

[Print All Forms](#)

Table	Action
Contact Information	<a href="#">View</a>
Table Patients by ZIP Code	<a href="#">View</a>
Table 3A - Patients by Age and by Sex Assigned at Birth	<a href="#">View</a>
Table 3B - Patients by Health Care Setting	<a href="#">View</a>
Data Audit Report	<a href="#">View</a>
All Comments	<a href="#">View</a>

[Continue To Next Page](#)

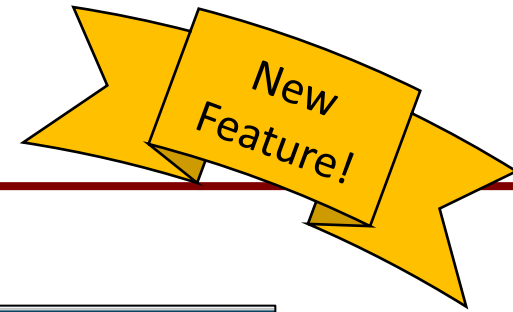
Click to Print Forms


Click to Download or View data submitted on report

Click to View Submit Confirmation page



# Submitted Report Confirmation



 HRSA

You are NOW using the UDS Reporting Environment. Please prepare, validate, and submit complete calendar year UDS performance data at this time.

**Submit Confirmation**

▼ H80CS0000 [redacted]

BHCMIS ID: [redacted]	Funding Stream(s): CHC	Submission Status: Accepted
Reporting Period: 01/01/2021 - 12/31/2021	Started By: [redacted]	on 12/22/2021 03:59 PM ET

✓ **Success:**  
UDS Report was successfully submitted and received by HRSA

**Performance Report Submission Tracking Number**

The tracking number for your submission is H80CS000[redacted]. Please keep record of the tracking number for future reference.

Your report will now be sent for review. During this process you may be contacted by the reviewer for additional questions related to your submission. All such questions will be directed to the contact person that you have specified in your report.

All UDS reporting questions should be directed to the UDS support line - 866-UDS-HELP (866-837-4357) or Email at [udshelp330@bphcdata.net](mailto:udshelp330@bphcdata.net)

All technical/system issues should be directed to BPHC help line - 1-877-974-BPHC or Email at [bphchelp@hrsa.gov](mailto:bphchelp@hrsa.gov)

[View Submission](#)



# Demo #5

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## 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





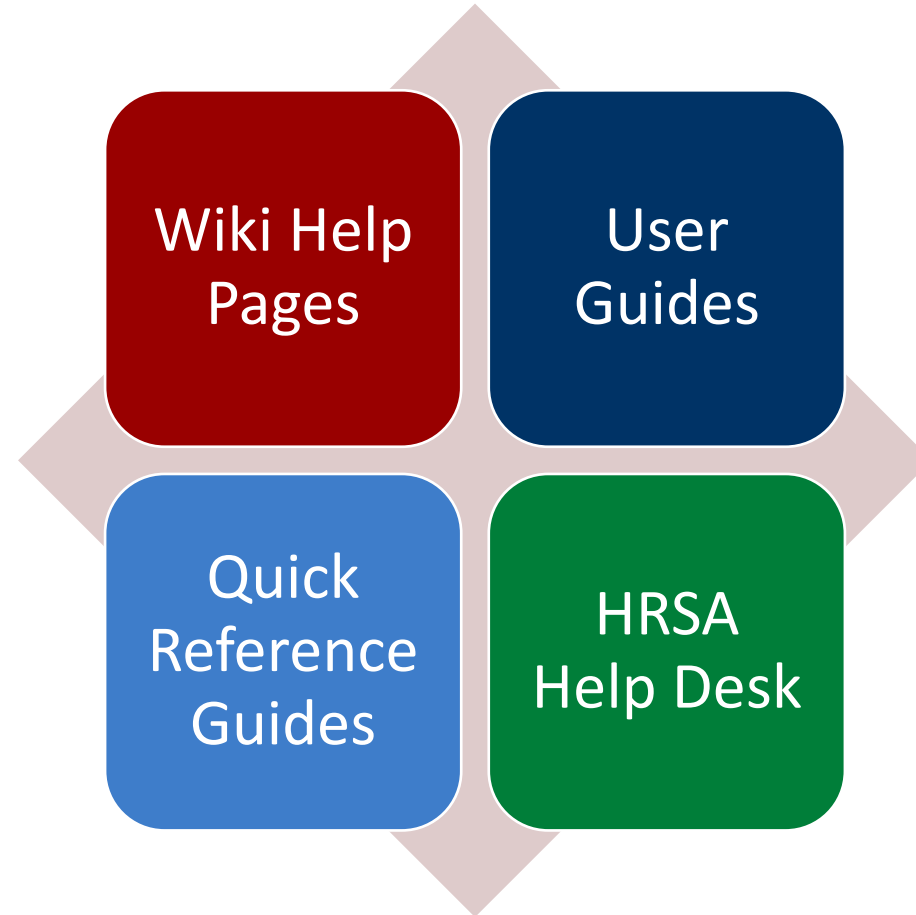
# Quiz Question #3 Answer

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**What does the Clear Data feature do?**

**Answer: (A) Permanently deletes all data for selected tables**

# Resources



# Questions and Answers

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# Thank You!

## UDS Help Desk



[udshelp330@bphcdata.net](mailto: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

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[bphc.hrsa.gov](http://bphc.hrsa.gov)



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