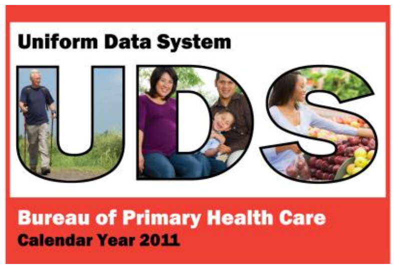

Using the EHB to Complete the UDS Report

JSI

HRSA
Health Resources and Services Administration

Slide 1: Using the EHB to Complete your UDS Report

Welcome to the Bureau of Primary Health Care's series of online training modules. This module will teach you how to access and use the Electronic Handbook System to enter and submit your UDS report. If you have any further questions about technical or system issues after viewing this module, you can contact the HRSA Call Center at 301-998-7373 or toll free at 877-Go4-HRSA. You can also contact the Call Center via email at callcenter@hrsa.gov.

Slide 2: Presentation Overview

In this module, we will cover the following areas. Entering the Electronic Handbook system, Accessing the UDS report through the Electronic Handbook, Entering UDS data, Validating data, Submitting your UDS report, and Revising data after submission.

Slide 3: Logging in to the EHB

We will begin with learning how to log in to the Electronic Handbook system.

Slide 4: Logging in, continued

To log in to the system, type the following into the address bar of your web browser: https://grants.hrsa.gov/webexternal/Login.asp. This address is shown on the slide. You will see a login screen requesting your Username and Password. Use the grantee login and password that has been provided to you. Each time you want to access the EHB system, you will need to follow the login procedure. If you have forgotten your password, click the link that says 'Forgot your password?' or call 1-877-Go4-HRSA for assistance.

Slide 5: EHB Account Creation

If you do not yet have a HRSA EHB system account, you can create one by going to the site shown on this screen. The web address is https://grants.hrsa.gov/webexternal/RegistrationWizard.asp.

Slide 6: User Privileges

People who will be using the Electronic Handbook system must be assigned different privileges depending on what their role will be in entering and submitting the UDS report. The chart on this slide shows what each of the various privileges means in terms of level of access.

Those who are given the 'View Performance Report Deliverable' privilege will be able to access the read-only version of the entire report, and will be able to access the submitted read-only version of the entire report for all previous years. As of 2010, it is possible to view prior year reports that are submitted through the EHB.

Those who are given the 'Edit Performance Report Deliverable' privilege will have all access associated with the 'View' privilege, and in addition will have the ability to enter and save the data in the electronic forms for all of the report tables. They will also have the ability to perform edit checks on the data and to validate data in the report and to view the UDS reviewer change requests and comments.

Those who are given the 'Submit Performance Report Deliverable' privilege will have all of the access associated with both 'View' and 'Edit' privileges and in addition will have the ability to submit the report once the data has been entered and validated.

The project director automatically has all privileges associated with the grant, including the privilege to view, edit, and submit UDS reports. He or She may grant these privileges to any user who needs them.

Slide 7: Accessing the UDS Report

Next we will discuss accessing the UDS Report once you are logged into the EHB system.

Slide 8: View Portfolio

Once you have logged into the EHB system, you will be brought to a screen that looks like the one posted on this slide. On the side menu, under 'Grants Portfolio', you will need to click on the link that says 'View Portfolio'.

Slide 9: Health Center Cluster

You will be directed to a screen that lists your grants. Locate your Health Center Cluster grant in the grants list, and then click on the link to 'Open Grant Handbook'.

Slide 10: Performance Reports

Once you have clicked on 'Open Grant Handbook', you will see a Grant Menu on the lefthand side of the screen. Click on the link for 'Performance Reports'.

Slide 11: UDS Report Status

On the performance reports menu, you will note that there is a field labeled 'Schedule Status' in the upper right hand corner. This status field will be updated throughout the various stages of completing the UDS report. When logging in for the first time, you will see that the status is 'Not Started'. Once you begin working on the report, the status will remain as 'In Progress' until you have submitted the report. Once the status is 'Submitted', the grantee will no longer have access to change data unless a UDS reviewer sets the status back to 'Change Requested'.

Slide 12: Accessing the UDS Report, continued

To begin entering data in your UDS report, click on 'Start Report'. For future logins, after data has already been entered in the UDS report, the 'Start Report' link will change to 'Edit Report'.

Slide 13: The UDS Report Window

The UDS report will open in a new window.

Slide 14: Steps for Completing the UDS Report

There are 3 steps to completing the UDS report. They are 1) Complete and Validate Tables, 2) Resolve Data Audit Report Checks, and 3) Review and Submit Report. The bar at the top of the screen highlights the 3 steps and shows your progress on each step. Gray means the step has not yet been started. Blue means that the step is in progress, and Green means that the step has been completed.

Slide 15: UDS Report Navigation

The UDS Report menu on the side of the screen can be used to navigate to the various tables that are part of the UDS report. It can also be used to navigate to the Status Overview Page. By clicking on the 'Status' link in the UDS Reports Menu or by clicking 'Proceed to Status Overview', you will be brought to the Status Overview Page.

Slide 16: Status Overview Page

This page shows the completion status of the various sections of the UDS report.

Slide 17: UDS Report Status Table

There are 4 possible statuses for each of the UDS Tables. All of the reports will initially be listed as 'Not Started'. This indicates that data entry has not yet begun. The next status is 'In Progress' indicating that data has been entered and saved, but is not yet marked as complete. Once you have entered all data within a page, saved and marked the table as complete, and have successfully cleared all table level errors, the status will change to 'Completed' or 'Validated'. For grantees who have more than one grant (including Migrant, Homeless, and Public Housing), tables 3A, 3B, 4, 5, and 6A will have a grant specific reporting requirement. 'Completed' will only appear in instances where only portions of these grant specific reports are completed with no table level errors. In this instance and for grantees with only one grant, when all portions of the table are marked as complete with no errors, the status will change to 'Validated'.

Slide 18: Entering Data into the UDS Report

We will now discuss how to actually enter your UDS data.

Slide 19: Entering Data into the UDS Report, continued

To enter UDS data, you can access the tables in a couple of different ways. From the Status Overview page, you can click on the 'Update' links for the various tables. Or, from the UDS Reports Menu, you can use the links on the left hand side to navigate to the table that you wish to work on. Now that we've talked about how to get into the EHB system and into the various tables of the UDS Report, we will discuss how to enter data. We will go over some examples on the next few slides.

Slide 20: Active Tables

Once you have clicked on a table to access it, the form will clearly indicate the active portion being worked on. In this example, the active table is 3A. On the left hand side, there is a tab indicating that the active report is the Universal Report. If you receive multiple funding streams including Migrant, Homeless, and Public Housing funding, you will need to complete a Universal Report and a grant report for each specific funding stream for tables 3A, 3B, 4, 5, and 6A. To navigate between the Universal and grant specific reports for data entry, highlight the report that you wish to work on in the drop down menu on the right hand side of the screen and click on the 'Go' button.

Slide 21: Save and Continue

On each table screen, there will be 'Save' buttons positioned at various points throughout the table. At the bottom of each table screen, you will see buttons to 'Save', 'Save and Continue', and 'Mark as

Complete. When you click on one of the buttons labeled either ‘Save’ or ‘Save and Continue’, the status of the form will show ‘In Progress’, regardless of what the status of the form previously was. To mark the table as complete, you will need to click on the ‘Mark as Complete’ button. Clicking on the ‘Mark as Complete’ button will save the data and will run validations on the data that has been completed. If some of the fields are left empty, you’ll be taken to a summary page with a display of all empty fields. Once you continue from the summary page, the table will progress to ‘Complete’ or ‘Validated’ state. If none of the fields are left blank, then clicking on ‘Mark as Complete’ will not take the user to the summary page, but will go to the next page directly. If the entire table is left blank, then on the summary page, you will be required to enter a reason that no data was reported.

Slide 22: Edits

Throughout the data entry process, you will notice Edits that appear as you save data. In addition to these table level edits, there are cross table edits that will appear in the Data Audit Report.

Slide 23: Page and Field Level Edits

Edits or Errors are designed to provide guidance so that data can be reported correctly. Edits or errors that were caused during earlier data entry will show on each subsequent visit to a table until they are resolved. As new data is entered and saved, edits may be cleared, and new edits may arise. While working on the various tables, you will receive ‘page level errors’ or edits and ‘field level errors’ or edits. ‘Page level edits’ are indications of errors such as math errors and ‘Field level edits’ are errors such as entering in an alpha character where a number is needed. Field level edits must be corrected before you will be allowed to save the table. Both types of edits are shown here on this slide.

Slide 24: Data Audit Report

Step 2 of working on the UDS report is to resolve data audit report checks. Once one or all of the tables are in ‘Validated’ status, you can run the Data Audit Report. The Data Audit Report is a list of errors that exist between the different tables in the report and exceptions that exist either in a particular page or between multiple pages of the report. Collectively, these errors and exceptions are referred to as edits.

Slide 25: Data Audit Report, continued

When you first log into your Data Audit Report, all of the existing edits will show a status of ‘Pending Review’. As discussed on the previous slide, there are 2 types of edits, on this slide you will see one of each. The first edit is an exception, exceptions denote either a discrepancy or inconsistency in the data entered in the reports that either need to be corrected by revising data or explained. In this case, the number of contraceptive management patients reported on table 6A is high compared to the number of female patients between the ages of 15 and 44 reported on table 3A.

The bottom edit on this screen is a Regular Error and can only be cleared by correcting data within the tables in question. In this case, the total number of patients reported in the service area information table does not match the total number of patients reported on table 3A. Since data must be consistent throughout the UDS report, one of these tables must be revised.

To return to a table to revise data, or to provide an explanation, use the links that are shown under each edit. Even after you have provided an explanation for an exception or revised data to resolve an error, the edits will remain on the audit report until you re-run it. Re-running the audit report will refresh the list so that edits that have been cleared by revising data or those that have been explained will no longer show as pending review. Any new edits that have resulted from revising the data will appear on the audit report. The edits that have been explained can be reviewed at any time by clicking 'Reviewed-Explained' or 'Show All' in the upper left.

Slide 26: Reviewing and Submitting the UDS Report

The third and final step in the initial phase of working on your UDS report is to review and submit the report. When all of the tables are in 'Validated' status and running the Data Audit Report results in no more errors or exceptions, the report is ready to be submitted.

Slide 27: Review and Submit

Prior to submitting, it's a good idea review the data that you've entered. To review the report, click on the link on the left hand side of the screen that says 'Review'. You will be brought to a page that looks like the one shown on this slide with a Table of Contents of the various UDS tables listed. From this page, you can either view the various tables, or you can print the report. If you select the 'print' button, the table of contents and listing of reports will print. If you select 'Print All HTML Forms', your UDS report will print out in HTML format. When you are done reviewing your data, you can click the back button on your browser to return to the Process Information Page.

Slide 28: Submission

When you have reviewed the data and are comfortable with it's accuracy, you can click on the link to 'Submit' your report. You will be brought to the 'Status Overview' page. From this page, you can either further review data using the links to view various tables, or click 'Proceed to Submit'.

Slide 29: Electronic Signature

Upon clicking 'Proceed to Submit', you will be brought to a certification page. In order to submit, you will need to certify that the data that you have entered is true and correct. You will be required to type "I agree" and can then click on 'Submit Report'. The EHB system will send an email confirmation to you after submission. Please note, this email notification may take time to generate.

Slide 30: After Submission of the UDS Report

After initial submission, the reviewer(s) of your UDS Report may find it necessary to return your submission to you if it determined that changes are needed. In such a case, you will be notified via email by the reviewer with a summary of the requested changes or questions for clarification. When you are notified, you can log into the handbook as you initially did to access your UDS report. The report status will show as 'Change Requested' and you will be required to perform the changes on your report as directed in the email from your reviewer. The summary of requested changes will also be available in the report status page and in addition, you will be able to view your reviewer's comments. You can edit data in the same way that you initially entered it. Data entry and Audit Report review works in the same way during this phase as in the initial entry phase. After appropriate revisions have been made, you can re-submit your UDS report following the steps on the previous slides.

Slide 31: Additional Resources

Additional resources are available to assist you in both completing the UDS and in using the Electronic Handbook System to enter and submit UDS data. In order to access these resources through the EHB, you can click on the link for 'Related Documents' on the "Process Information' screen. You will be brought to a page with links for the following resources: the UDS Quick Reference Guide, the Grantee Handbook User Guide, a TA Presentation for Grantees, the UDS Report Manual, and the BPHC Online Training Modules. Additionally, you can access resources for assistance at the following address: http://www.bphcdata.net/html/bphctraining.html.

Slide 32: For Further Assistance

Thank you for taking the time to review this module. If you have any further questions about technical or system issues relating to the HRSA Electronic Handbook system, you can contact the HRSA Call Center at 301-998-7373 or toll free at 877-Go4-HRSA. You can also contact the Call Center via email at callcenter@hrsa.gov.