



# Aliados Health

Access | Equity | Advocacy | Innovation

## 2024 UDS Preparation: The Early Start

Data Workgroup Presentation

September 10, 2024

By Ben Fouts, Data Analyst, Aliados Health

# Agenda

- Available 2024 Resources
- Early Start: Things to do Now
  - Inspect Data Using the Visit Calendar and Data Explorer
  - Inspect Data Using the Relevant UDS Module
- Ideas for Epic Transitioners



# Available 2024 Resources



# Uniform Data System (UDS) Training and Technical Assistance Website

<https://bphc.hrsa.gov/data-reporting/uds-training-and-technical-assistance>

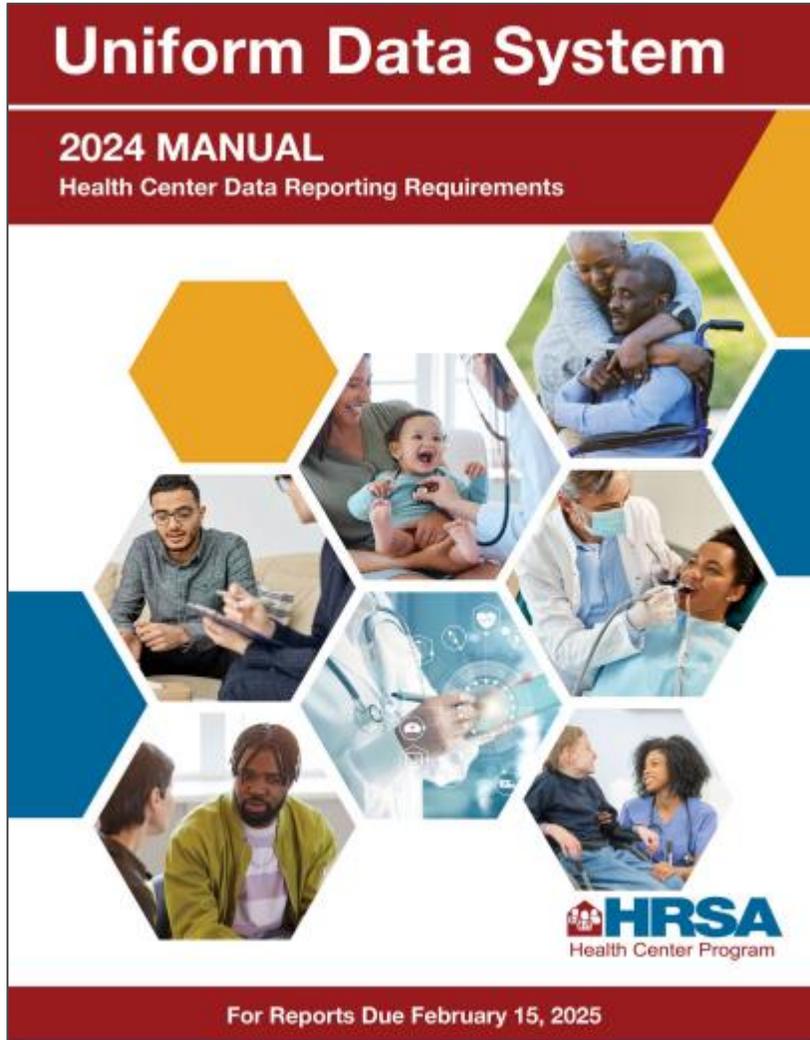
## Featured resources

- [2024 UDS Final Program Assistance Letter \(PAL\)](#) (PDF - 202 KB)  
An overview of final updates to CY 2024 UDS reporting
- [2024 UDS Manual](#) (PDF - 2 MB)  
Provides health centers with detailed reporting instructions and example data tables that support calendar year 2024 UDS reporting
- **2024 UDS Tables** [PDF](#) (PDF - 1 MB) and [Excel](#) (XLSX - 393 KB)  
Resources to help health centers prepare UDS submissions in advance with an organized, standard structure



# 2024 UDS Manual

# 2024 UDS Tables - Excel



**Table 5: Staffing and Utilization**

<BHCNIS ID - Grant Number: Health Center Name, City, State>

Line	Personnel by Major Service Category	FTEs (a)	Clinic Visits (b)	Virtual Visits (b2)	Patients (c)
1	Family Physicians				
2	General Practitioners				
3	Internists				
4	Obstetrician/Gynecologists				
5	Pediatricians				
7	Other Specialty Physicians				
8	<b>Total Physicians (Sum lines 1-7)</b>	<b>0</b>	<b>0</b>	<b>0</b>	
9a	Nurse Practitioners				
9b	Physician Assistants				
10	Certified Nurse Midwives				
10a	<b>Total NP, PA, and CNMs (Sum lines 9a - 10)</b>	<b>0</b>	<b>0</b>	<b>0</b>	
11	Nurses				
12	Other Medical Personnel				
13	Laboratory Personnel				
14	X-Ray Personnel				
15	<b>Total Medical Care Services (Sum lines 8+10a-14)</b>	<b>0</b>	<b>0</b>	<b>0</b>	



# 2024 UDS Final Program Assistance Letter (PAL)

An overview of final updates to CY 2024 UDS reporting



## PROGRAM ASSISTANCE LETTER

DOCUMENT NUMBER: 2024-06

DOCUMENT TITLE: Final Uniform Data System  
Changes for Calendar Year 2024

DATE: April 2, 2024—Updated from December 11, 2023

*The major changes are discussed on the next two slides (with reference to this document)*



# Page 3: Table of Changes to Measures

2024 UDS ECQM CHANGES COMPARISON CHART

2024 UDS eCQM	2024 eCQI Version	2023 to 2024 Performance Period Changes
Preventive Care and Screening: Tobacco Use: Screening and Cessation Intervention	<a href="#">CMS138v12</a>	<ul style="list-style-type: none"> <li>v11 updated to v12</li> <li>Denominator Initial Population age for screening changed from '18 years and older' to '12 years and older'</li> </ul>
Statin Therapy for the Prevention and Treatment of Cardiovascular Disease	<a href="#">CMS347v7</a>	<ul style="list-style-type: none"> <li>V6 updated to v7</li> <li>Denominator age range for LDL-C <math>\geq</math> 190 mg/dL or diagnosis of familial hypercholesterolemia changed from '&gt;=20' to '20 to 75' years of age</li> <li>Denominator changed from 'active diagnosis of ASCVD' to 'previously diagnosed with or currently have a diagnosis of ASCVD'</li> <li>New population added to denominator for 'patients aged 40 to 75 at the beginning of the measurement period with a 10-year ASCVD risk score of <math>\geq</math> 20% during the measurement period'</li> </ul>
Preventive Care and Screening: Screening for Depression and Follow-Up Plan	<a href="#">CMS2v13</a>	<ul style="list-style-type: none"> <li>V12 updated to v13</li> <li>Diagnosis of depression removed from Denominator Exclusions</li> <li>Denominator Exception language updated from 'Patient refuses to participate' to 'Patient refuses to participate in or complete the depression screening'</li> </ul>

*Expect relatively large changes to the denominators of these three measures in 2024 compared to 2023*



# Page 4: New Question in Appendix E

## UPDATE TO APPENDIX E: OTHER DATA ELEMENTS (ODE)

A fourth question is being added to Appendix E: Other Data Elements to capture the total number of patients screened for family planning needs.

### Excerpt of Appendix E: Other Data Elements

4. How many health center patients were screened for family planning needs, including contraceptive methods, using a standardized screener during the calendar year? \_\_\_\_\_



# Also on the HRSA Website

## Reporting Training Schedule

In this section:

- [Upcoming webinars](#)
- [Recent webinars](#)
- [Primary care associations and community-based training](#)



### UDS Clinical Quality Measures Deep Dive

Thursday, September 26, 2024, 2 pm – 3:30pm ET

### UDS Clinical Tables Part 1: Screening and Preventive Care Measures

Wednesday, October 2, 2024, 2 pm – 3:30 pm ET

### UDS Clinical Tables Part 2: Maternal Care and Children's Health

Wednesday, October 9, 2024, 2 pm – 3:30 pm ET

### UDS Clinical Tables Part 3: Chronic Disease Management

Wednesday, October 23, 2024, 2 pm – 3:30 pm, ET

# Also on the HRSA Website

## Reporting Training Schedule

### In this section:

- [Upcoming webinars](#)
- [Recent webinars](#)
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### 2024 UDS Changes Technical Assistance Webinar, June 5, 2024

[2024 UDS Changes Technical Assistance Webinar Presentation](#) (PDF - 3 MB) | [2024 UDS Changes Technical Assistance Webinar On-Demand Recording](#) 

This webinar provides a detailed overview of essential changes in the calendar year 2024 UDS reporting requirements.

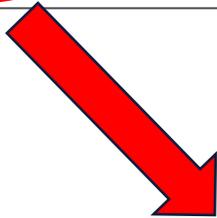


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## Reporting Training Schedule

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### Calendar Year (CY) 2023 Uniform Data System (UDS) In-Person and Webinar Training Opportunities Annual State-Based Primary Care Association (PCA) Trainings

State/Territory	PCA	Training mode	Training date(s)	Training contact	Contact email
CA	California Primary Care Association	Webinar series	12/04/2024 12/06/2024	Tiffany Ruvalcaba	<a href="mailto:truvalcaba@cpc.org">truvalcaba@cpc.org</a>



## Uniform Data System (UDS) Training and Technical Assistance

Introduction

Reporting Training Schedule

### Reporting Guidance

Resources

Training

UDS support center

Electronic Handbooks (EHBs)

Patient Characteristics

Staffing and Utilization

Clinical Care

Financials

Appendices

Additional Reporting Topics

Technical Assistance Contacts

UDS Data

Archived Resources

# Other Resources on HRSA Technical Assistance Website

**NEW** [General Information Fact Sheet](#) (PDF - 279 KB) provides an introduction to UDS reporting, outlines major changes from prior year reporting, and explains the Who, What, When, Where, and Why of the UDS. This fact sheet also showcases the overall structure and data elements captured within each of the UDS tables and forms.

**NEW** [UDS Family Planning Needs Screening Resource](#) (PDF - 149 KB) Information on how to report patients screened for family planning needs, including contraceptive methods, based on responses to standardized social risk screener questions including examples of commonly used tools.

[UDS Beginner Resources](#) (PDF - 107 KB) directs new UDS reporters to suggested UDS reporting trainings and resources. These resources are recommended for staff reporting UDS data for the first time.

[UDS Advanced Resources](#) (PDF - 98 KB) provides UDS reporting trainings and resources that build on the beginner knowledge base. This guide is recommended for staff who are familiar with the UDS data and reporting processes.

[UDS Submission Checklist](#) (PDF - 77 KB) is a reference tool to help ensure a complete, accurate, and on-time UDS submission.



# Early Start: Things to do Now

Inspect Data Using the Visit Calendar and Data Explorer



# Things to do Now

- As we are approaching the end of the year, now is a good time to make sure that at the very least, the UDS visit universe and other visit sub-sets are completely and accurately mapped
- This improves data reporting in all areas of Relevant
- There may be new providers this year who are not yet mapped
- There may be errors or incomplete fields in the providers records in the EHR that are causing improper mapping
- Transitioning health centers: make sure that “new” mapping is correct



# Check Relevant Visit Calendar

- The Relevant Visit Calendar shows the most basic system visit mapping
- It counts UDS visits, UDS medical visits, etc. and which providers by name are contributing to those totals
- Looking at the Calendar can show some common types of improper mapping without a sophisticated analysis or running a report
- SQL can also be used to check the mapping. However, let's look at some easy ways to check

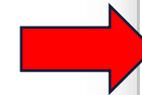
Operations



Productivity

Panel Explorer

Visit Calendar

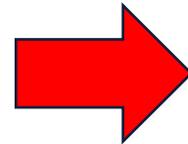


# Using the Visit Calendar to Identify Issues

- First, make sure the date range is 2024 (year to date)
- Then, go through each of the UDS visit sub-sets to look for providers who do not belong in the sub-set



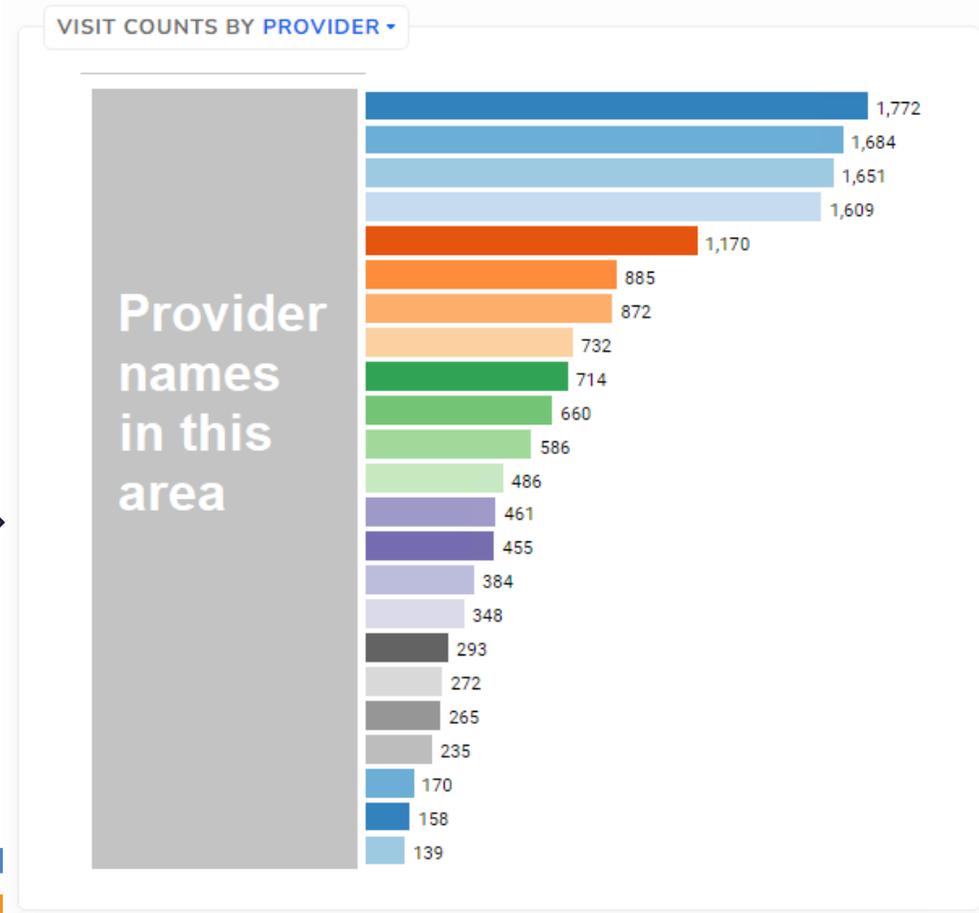
UDS visits



DATES

Start date

End date



# Visit Sub-Sets

- Look for providers in the wrong sub-set (e.g., a dental provider in the UDS medical visit sub-set)
- It is harder to identify providers not on the sub-set list from memory. So, get a separate list of expected providers from your human resources department or clinical leadership for comparison.
- Refer to Appendix A: Listing of Personnel (page 178 of the 2024 UDS Instruction Manual) for list of specialists or provider types in each Table 5 category



Look at the provider list for all of the sub-sets

- UDS medical visits → Line 15
- UDS dental visits → Line 19
- UDS mental health visits → Line 20
- UDS substance use disorder visits → Line 21
- UDS vision visits → Line 22d

TABLE 5: STAFFING AND UTILIZATION

Calendar Year: January 1, 2024, through December 31, 2024

Line	Personnel by Major Service Category
1	Family Physicians
2	General Practitioners
3	Internists
4	Obstetrician/Gynecologists
5	Pediatricians
7	Other Specialty Physicians
8	<b>Total Physicians (Lines 1–7)</b>
9a	Nurse Practitioners
9b	Physician Assistants
10	Certified Nurse Midwives
10a	<b>Total NPs, PAs, and CNMs (Lines 9a–10)</b>
11	Nurses
12	Other Medical Personnel
13	Laboratory Personnel
14	X-ray Personnel
15	<b>Total Medical Care Services (Lines 8 + 10a–14)</b>
16	Dentists
17	Dental Hygienists
17a	Dental Therapists
18	Other Dental Personnel
19	<b>Total Dental Services (Lines 16–18)</b>
20a	Psychiatrists
20a1	Licensed Clinical Psychologists
20a2	Licensed Clinical Social Workers
20b	Other Licensed Mental Health Providers
20c	Other Mental Health Personnel
20	<b>Total Mental Health Services (Lines 20a–c)</b>
21	<b>Substance Use Disorder Services</b>
22	<b>Other Professional Services (specify ___)</b>
22a	Ophthalmologists
22b	Optometrists
22c	Other Vision Care Personnel
22d	<b>Total Vision Services (Lines 22a–c)</b>

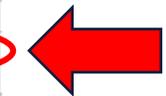


- Note that not all lines on Table 5 have a separate visit calendar sub-set
- Specifically, Line 22: Other Professional Services
- These are Chiropractors, Podiatrists, Acupuncturists, Registered Dieticians, etc. (see list on page 179 of UDS instruction manual)

TABLE 5: STAFFING AND UTILIZATION

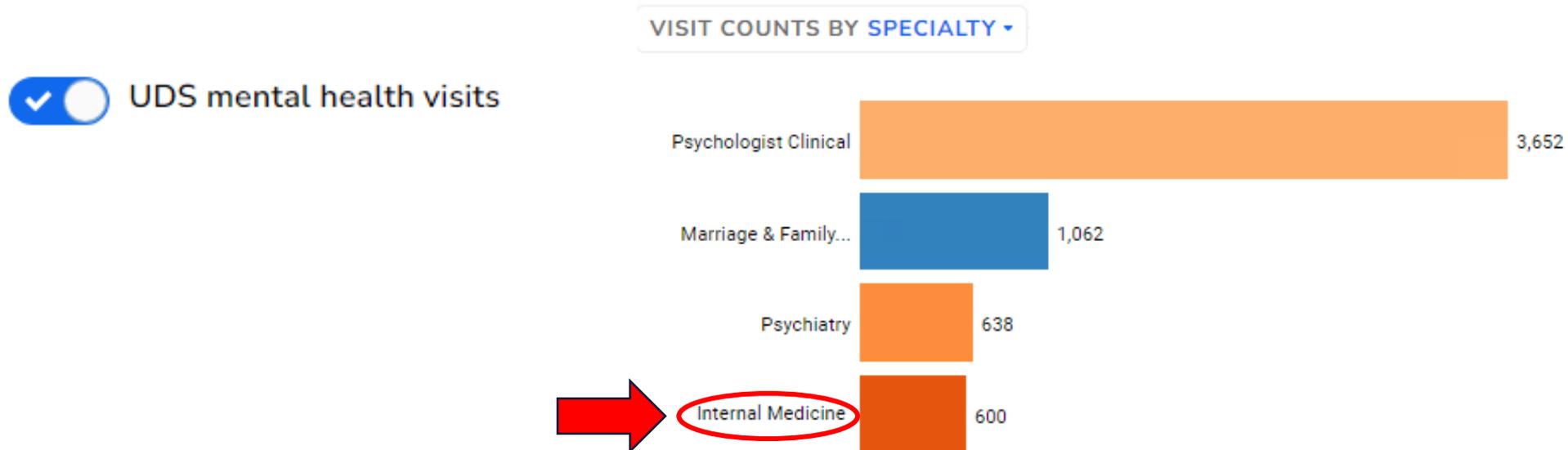
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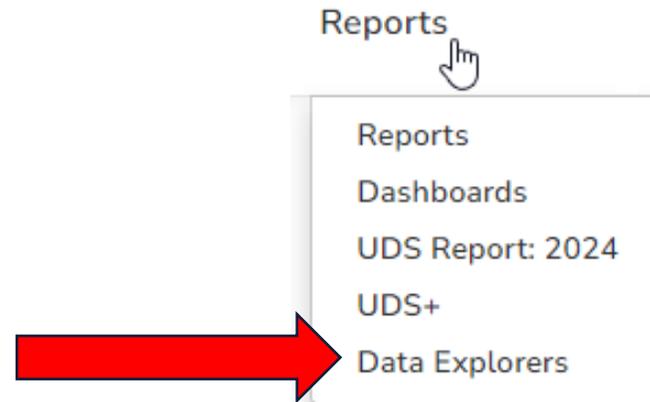
# Another Example

- Switch to Visit Counts by Specialty VISIT COUNTS BY SPECIALTY ▾
- Then go through the visit sub-sets to see if any are unexpected
- For example, while looking at mental health visits, you see...



# Data Explorer Can Also be Helpful

- You can use the Data Explorer to get more detail if something in the Visit Calendar looks unusual



- You can also surface mapping errors or incomplete mapping
- The first example (next slide) is to find providers who have UDS visits but not visits in the five sub-sets of visits in the visit calendar we just looked at



# Providers not Properly Mapped?

*Had UDS Visit but not in any of the five categories*

## BASE ELEMENT

This is the basis of your data explorer. You will see one row in the table for each record in this element

Visits

## FILTERS

Show a subset data from visits by adding filters to the table

Only include visits that meet **all** of the following criteria:

was in visit set UDS visits

was not in visit set

- UDS medical visits
- UDS dental visits
- UDS mental health visits
- UDS substance use disorder visits
- UDS vision visits

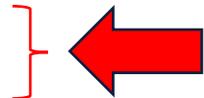
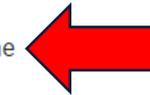
Add a filter on visits

## Base element

Check the boxes to add and remove columns in the table

### Visit information 6 selected

- Visit ID
- Location
- Provider name
- Program
- Visit date
- Visit type
- Visit subtype
- Visit groups
- Visit sets
- Is UDS visit?
- Is UDS medical visit?
- Is billable?
- Billing codes
- Diagnosis codes
- Primary payer group
- Provider credentials
- Provider specialty
- Primary payer
- Secondary payer
- Tertiary payer



🔍 Visits  
2 filters [Edit](#)

Provider name ⚡	Program ⚡	Visit date ▼	Visit type ⚡	Provider credentials ⚡	Provider specialty ⚡
Provider names in this space	Obstetrics	9/5/2024 10:00 AM		MD	
	Obstetrics	9/5/2024 9:30 AM		MD	Should be mapped to medical visits
	Obstetrics	9/5/2024 9:00 AM		MD	
	Dentist	9/3/2024 4:15 PM		DDS	Should be mapped to dental visits
	Dentist	9/3/2024 4:15 PM		DDS	
	Unknown	9/3/2024 4:15 PM		RDH	Should be mapped to dental visits

It is recommended that provider specialty be entered into your EHR (it helps with these kinds of lists) and display in Relevant



# Data Explorer: Staff Member Type

- Note that you can add Staff Member Type to Data Explorer
- Staff Member Type corresponds to the Table 5 categories

## FILTERS

Show a subset data from visits by adding filters to the table

Only include visits that meet **all** of the following criteria:

was with ▾ staff member type  ▾ 

[Add a filter on visits ▾](#)

- Laboratory Personnel
- Licensed Clinical Psychologists
- Licensed Clinical Social Workers
- Management and Support Staff
- Nurse Practitioners**
- Nurses



# Example of Using Staff Member Type

- So, you could list providers by staff member type (if interested). Note the output is composed of visits
- Or, make sure that UDS visits have no non-countable staff member types on Table 5

## FILTERS

Show a subset data from visits by adding filters to the table

Only include visits that meet **all** of the following criteria:

was in visit set UDS visits x | v | 

was with staff member type

- Other Medical Personnel x
- Laboratory Personnel x
- X-ray Personnel x | v | 
- Other Dental Personnel x
- Other Vision Care Staff x

Add a filter on visits v



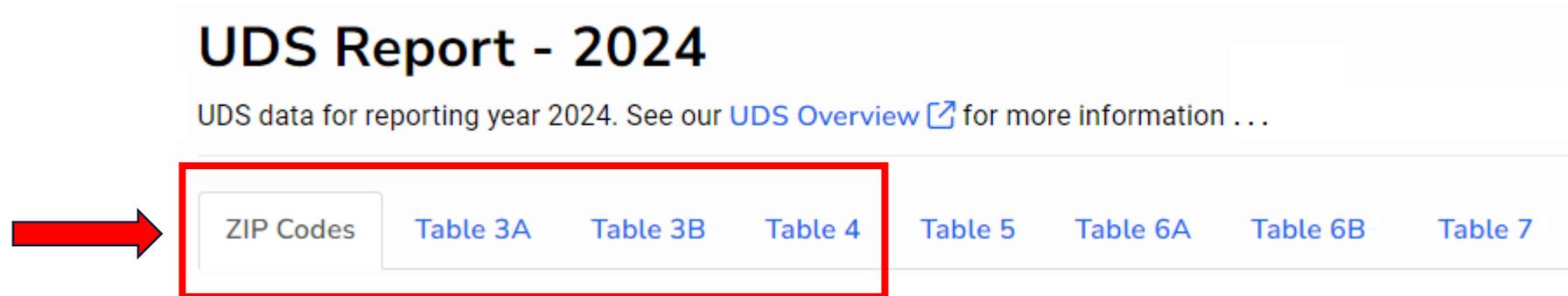
# Early Start: Things to do Now

Inspect Data Using the Relevant UDS Module



# Things to do Now in Relevant

Check all of the demographics tabs for data that does not fit into the UDS model



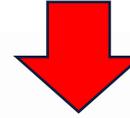
**UDS Report - 2024**  
UDS data for reporting year 2024. See our [UDS Overview](#) for more information ...

ZIP Codes Table 3A Table 3B Table 4 Table 5 Table 6A Table 6B Table 7



## Table: Patients by ZIP Code

Counts of patients' geographic origin by primary medical insurance. [How we map this table](#)



ZIP Code (a)	None / Uninsured (b)	Medicaid / CHIP / Other Public (c)	Medicare (d)	Private (e)	Invalid Payer ⓘ	Total Patients (f)
95401	0	32	4	6	8	

## Table 3B: Demographic Characteristics

An unduplicated count of patients by demographic characteristics.

Line	Patients by Race <a href="#">How we map this section</a>	Mexican, Mexican American, Chicano/a (a1)	Puerto Rican (a2)	Cuban (a3)	Another Hispanic, Latino/a, or Spanish Origin (a4)	Hispanic, Latino/a, Spanish Origin, Combined (a5)	Total Hispanic, Latino/a, or Spanish Origin (Sum Columns a1 + a2 + a3 + a4 + a5) (a)	Not Hispanic, Latino/a, or Spanish Origin (b) ⓘ	Unreported/Chose Not to Disclose Ethnicity (c) ⓘ	Unmapped (Not a UDS category) ⓘ	Total (a + b + c) (d)
1a	Asian Indian	0	0	0	0	0	0	1		10	11



Line	Patients by Gender Identity <a href="#">How we map this section</a>	Number (a)
20	Male	105
21	Female	153
22	Transgender Man/Transgender Male/Transmasculine	10
23	Transgender Woman/Transgender Female/Transfeminine	0
24	Other	4
25	Chose not to disclose	7
25a	Unknown	0
Not a UDS category	Unassigned ⓘ	4
26	<b>Total Patients</b>	

Click



## Patients

[Export to Excel](#)

[Open in Data Explorer](#)

Q Search by name/MRN

Displaying 4 of 4 results

Patient Name ↓	MRN	Risk Score	Patient DOB	Assigned Female at Birth	Language	Preferred Phone	ZIP Code	Gender	Race	Ethnicity	Sexual Orientation	PCG	Primary Location	Primary Insurance	UDS Insurance
[Redacted]	[Redacted]	CCI 0.0	[Redacted]	No	[Redacted]	[Redacted]	[Redacted]	Unassigned	Unknown/Race not mapped	Unreported/Refused to Report	Unknown	Prov Unassigned	[Redacted]	[Redacted]	[Redacted]

Look-up patient in EHR to see the gender identity that is not mapped

This is the Relevant interpretation of the gender identity (not the raw data)



# Table 5

- Look for providers who are not mapped or not properly mapped
- Much of this mapping impacts which patients are considered to have a UDS visit in the year (in other words, the numbers on the demographic tables)



## Table 5: Staffing and Utilization

A profile of health center personnel and services rendered.

Line	Personnel by Major Service Category	FTES (a) ⓘ	Clinic Visits (b) ⓘ	Virtual Visits (b2) ⓘ	Patients (c) ⓘ
Unassigned	Staff member type unassigned ⓘ		257	444	
Non-provider	Non provider staff member type ⓘ		82	61	



## Visits

[Export to Excel](#)

[Open in Data Explorer](#)

Patient Name ↓	MRN	Risk Score	Patient DOB	Visit ID	Visit Date	Visit Type	Provider Name	Location	Program	UDS	Billable	UDS Medical
		Complexity Score 4.5			6/25/2024	Office Visit				true	true	true

*Provider record in Relevant needs Staff Member Type*

List out the provider names who are not mapped

These appear to be UDS medical visits



## Table 5: Staffing and Utilization

A profile of health center personnel and services rendered.

Line	Personnel by Major Service Category	FTES (a) ⓘ	Clinic Visits (b) ⓘ	Virtual Visits (b2) ⓘ	Patients (c) ⓘ
Unassigned	Staff member type unassigned ⓘ		257	444	
Non-provider	Non provider staff member type ⓘ		82	61	



## Visits

[Export to Excel](#)

[Open in Data Explorer](#)

Patient Name ↓	MRN	Risk Score	Patient DOB	Visit ID	Visit Date	Visit Type	Provider Name	Location	Program	UDS	UDS Billable	UDS Medical
		Complexity Score 0.5			8/10/2024	Office Visit				true	true	false

*Provider record in Relevant has a non-provider staff member type*

List out the provider names to check how they are mapped

These appear to be UDS visits but not medical visits



# Other Table 5 Ideas

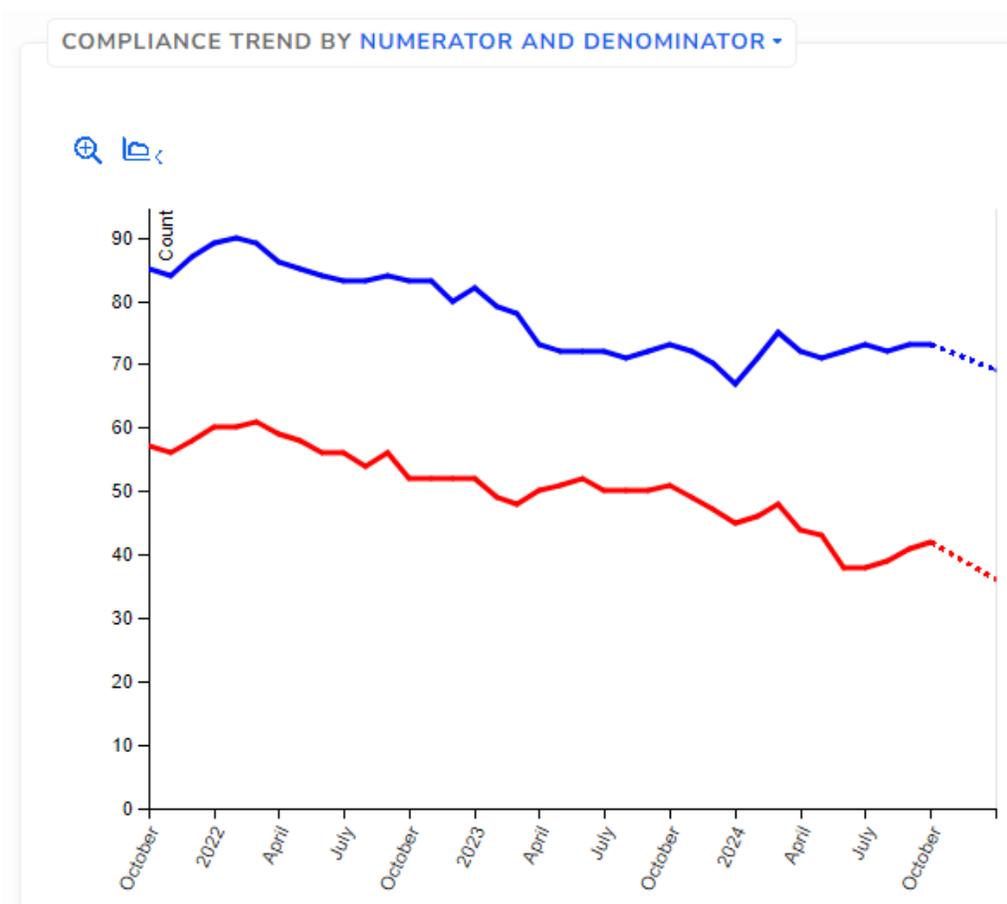
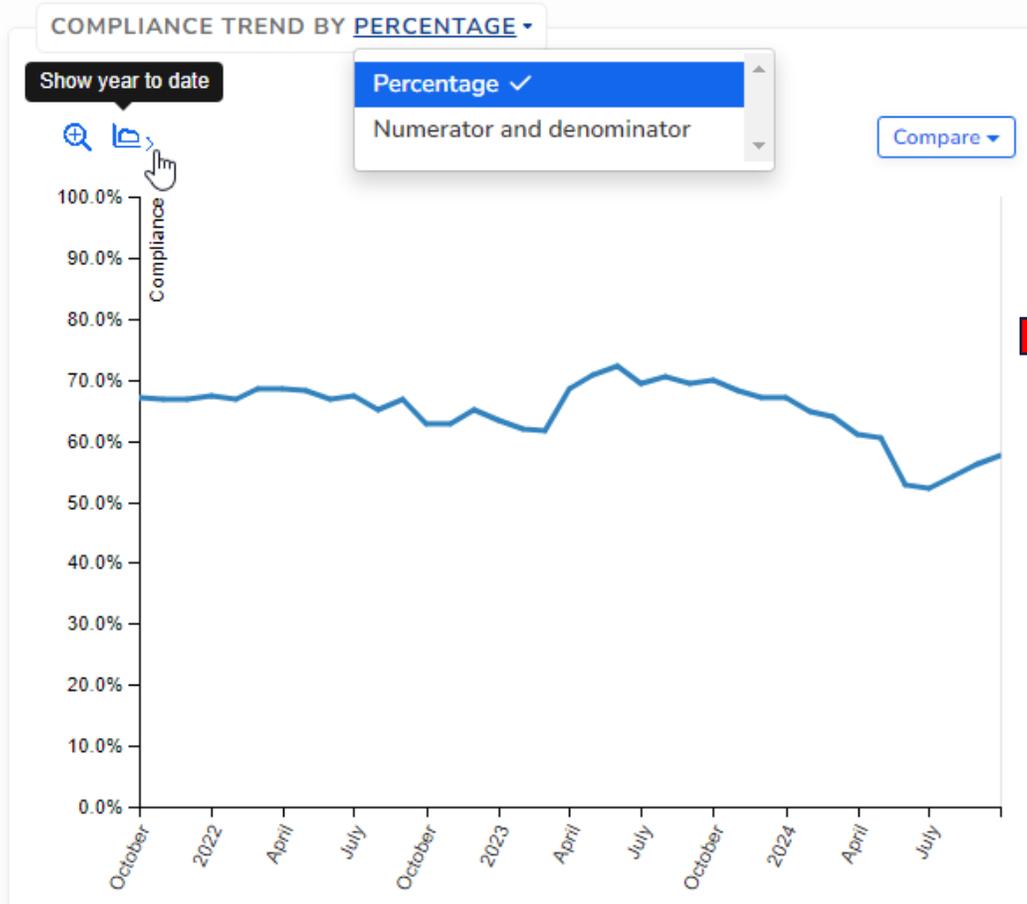
- Look for rows where columns “Clinic Visits (b)” plus “Virtual Visits (b2)” are equal to zero. Based on what you know about groups of staff at your health center, does this make sense?
- For example, if Line 1 (Family Physicians) equals zero and you know there are Family Physicians who see patients, then you are missing mapping
- This situation might be picked up in the screenshot examples in the previous slides, but a new provider not mapped in any way to visit memberships or staff member type in Relevant might be “invisible”



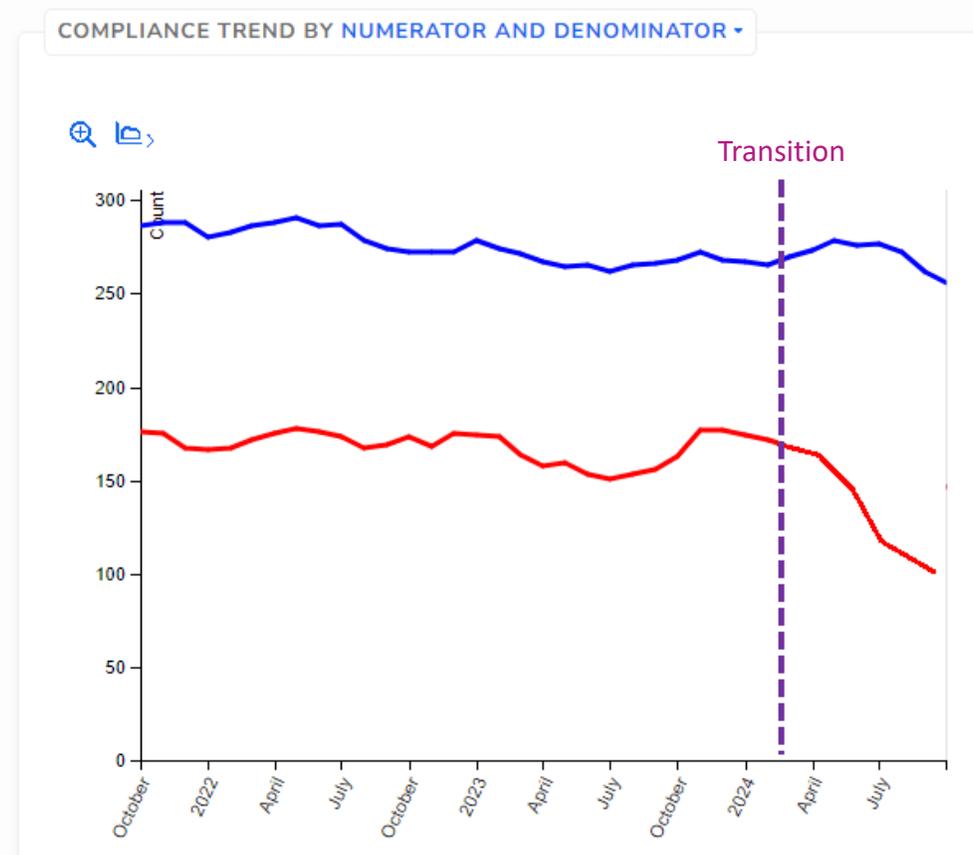
# Ideas for Health Centers Transitioning to Epic



# Modify the Chart Format in Relevant



# Note when the Transition Happened and Look for Trends



For example, here it looks like the numerator started going way down right after the transition (red line). What could have caused this?



# Investigating Trends

- Assumption: patients receive the same level of care before and after the transition. The numbers are different due to the transition (new EHR, different fields, different mapping, etc.)
- The trend can be a significant decrease or a significant increase
- There can be legitimate reasons for the trend, like maybe certain structured data fields do not exist (or have not yet been established) in Epic. There are also different data entry procedures/workflows that are being implemented (so some human error might be present)
- It might be expected that some things like the number of labs, vaccines, billing codes, etc. should be the same before and after the transition.



# Compare Quality Measure Results Now

- Make a comparison spreadsheet
- Columns: Total patients (denominator plus exclusions), denominator, exclusions, numerator, numerator percentage (numerator over denominator)
- Record the UDS data for the same measurement period end date month for 2023 and 2024. For example, compare end of August 2023 to end of August 2024



# Example of Comparison Table

Measure name	MP End = 8/31/2023					MP End = 8/31/2024					Differences (%)			
	Total patients	Denominator	Exclusions	Numerator (#)	Numerator (%)	Total patients	Denominator	Exclusions	Numerator (#)	Numerator (%)	Total patients	Denominator	Exclusions	Numerator
Childhood Immunization Status														
Cervical Cancer Screening														
Breast Cancer Screening														
Child and Adolescent Weight Assessment and Counseling														
Adult Weight Screening and Follow-up														
Tobacco Use Assessment and Cessation Intervention														
Statin Therapy for the Prevention and Treatment of Cardiovascular Disease														
Ischemic Vascular Disease (IVD): Use of Aspirin or Another Anti-Thrombotic														
Colorectal Cancer Screening														
HIV Linkage to Care														
HIV Screening														
Screening for Clinical Depression and Follow-Up Plan														
Depression Remission at Twelve Months														
Dental Sealants for Children														



# Compare Changes to Overall Baseline

- If you are sure your provider mapping is complete, compare total medical patients in the same measurement periods to get a denominator baseline change.
- In other words, how did the overall number of medical patients change between the two periods (note that during the transition, you might see fewer patients)
- You can get this data from the Visit Calendar
- Use medical patients to compare medical QMs (and dental patients overall to compare dental QMs)
- Choose a minimum change level (5% difference? 10% difference) that triggers an investigation into the data



# Investigation

- Maybe there are data entry workflow issues, training issues, multiple potential fields for data entry, etc.
- These are all legitimate areas for further performance improvement efforts
- One priority for transitioning health centers now is to see if there are any places in Relevant where data sources are not mapped, or incompletely mapped.



Questions?

