HSMED 2018 Data Submission Tip Sheet

Healthy Start Monitoring and Evaluation Data (HSMED) System

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# Introduction

This Tip Sheet is intended to provide guidance for grantees to meet the HSMED Calendar Year (CY) 2018 data submission requirements by February 15, 2019 using the lessons learned from the HSMED CY 2017 data submission. This document will provide background and recommendations for each tip to help grantees prepare for the 2018 data submission deadline. Please note that these guidelines and tips only apply for the HSMED client-level data submission and not the Aggregate Report submission.

# Prevent “Duplication” of Clients

## Background:

As stated in the previous tip sheet (Access here: [Tip Sheet for HSMED Data Upload Rule](https://healthystartdata.hrsa.gov/hs.web/Traininghttps%3A/healthystartdata.hrsa.gov/hs.web/Training)), cumulative uploads are allowed in data submissions, though it is recommended that grantees submit only new data to HSMED every month. “Cumulative uploads” occur when grantees upload their entire roster of clients with associated client data every month, including some clients that have not had any updates to their data (thus creating duplicate copies of client data). However, the cumulative approach may lead to confusion when HRSA’s data check determine a grantee’s dataset contains duplicative data (i.e. clients appeared month after month with no change to their data).

## Recommendation:

Grantees and vendors should only upload new data (i.e. new clients and new data for existing clients) every Reporting Period. If updates need to be made for previously submitted client data, grantees should submit the updated data to the original Reporting Period to avoid duplication. **Please note that if you are submitting updated/revised data for a past Reporting Period, that file will overwrite all the data for that given screening tool and Reporting Period. Please make sure your updated XML file contains all of the client data (including new data and data without changes) that has already been submitted for that Reporting Period and screening tool.** Please also note that you can update Demographics and Pregnancy History Tools’ data by uploading the updated data to any Reporting Period as these two tools are not associated with a Reporting Period in the database.

# Be Aware of Deletion Limitations

## Background:

DSFederal has previously received and fulfilled requests to delete grantee organizations’ data to allow a grantee or vendor to re-upload all of their data. However, since the final 2017 data has been submitted and is currently being analyzed, **DSFederal will no longer accept any requests to delete all data for an organization.**

## Recommendation:

DSFederal will no longer be able to delete all of an organization’s HSMED data. If specific clients were uploaded inadvertently and need to be deleted, requests may still be sent to HSsupport@dsfderal.com. DSFederal will review these requests on a case-by-case basis and determine what actions can be taken based on the risk and complexity involved in the request. DSFederal will assess whether other existing data will be affected and seek HRSA approval prior to completing any requests, but grantees are responsible for ensuring the information provided within the requests and actions requested are accurate and correct. **Deletions cannot be undone.** Grantees should conduct a data quality check prior to uploading data to HSMED. Please note data deletion takes a minimum of three weeks as it involves data verification, HRSA approval, internal testing and final execution. Grantees should account for the deletion timeframe when making deletion requests.

* For Demographics and Pregnancy History tools, ClientUniqueIdentifications (client IDs) cannot be deleted by grantees. Grantees should quality check all submissions and ensure that the client ID is correct before submission to HSMED. Client ID deletion for these two tools can be performed by DSFederal through a request sent to HSsupport@dsfederal.com, however requests will take a minimum of three weeks to complete. Although grantees cannot delete client IDs, they can submit revised data for an existing client ID by uploading an updated XML file.
	+ Below is a workaround scenario to correct Demographics and Pregnancy History client IDs without deletion:

All data for a Demographics Tool can be overwritten EXCEPT for the client ID. As such, a grantee/vendor can associate the incorrect client ID with a new client and update the system by submitting the new client’s data under the client ID. This way, the ClientUniqueIdentifier remains in the system but now contains data for a new client. This may not work for everyone as it may require a grantee or vendor’s case management system to be able to re-assign a client ID or recycle client IDs.

* For Preconception, Prenatal, PostPartum, and Parenting Tools, the data and client IDs can be completely overwritten within a specific Reporting Period. For details, please refer to the [Tip Sheet for HSMED Data Upload Rule](https://healthystartdata.hrsa.gov/hs.web/Traininghttps%3A/healthystartdata.hrsa.gov/hs.web/Training) in the HSMED Training Materials/User Guide Section.

# Verify Your Data Before Submitting to a Vendor

## Background:

Some grantees use vendors or a third party to submit data to HSMED. During the 2017 data submission, some vendors submitted data to HSMED before the data was complete and verified by grantees, leading to deletion of data from the system.

## Recommendation:

Before submitting/entering data to a vendor or a third party, please keep your vendor informed regarding whether the data is complete and when the data should be submitted to HSMED. It is also important to check data accuracy and completeness as vendors may submit data to HSMED without knowledge of potential data issues or sufficient quality checks to ensure the accuracy or completeness of the data. Grantees should avoid data deletion and correction in HSMED; rather, data quality checks should be completed in source systems (e.g. case management system or vendor system) prior to submittal.

# Use the HSMED Test Site to Test Files, Not Production

## Background:

In HSMED CY 2017, some grantees submitted test data to HSMED production as they were learning to use the system. This resulted in organizations requesting deletions of all submitted data to remove the test data and allow the organizations to submit their final, correct data. To meet users’ testing needs, HSMED has offered grantees access to the HSMED test site on a case-by-case basis.

## Recommendation:

Data testing should be conducted in the test environment. **Please DO NOT upload any test or dummy data to HSMED production site at** [**healthystartdata.hrsa.gov**](file:///C%3A%5CUsers%5CMatthew%20Donovan%5CDownloads%5Chealthystartdata.hrsa.gov). **This site is only for final data.**

HSMED’s test site is available for grantees and vendors to use, upon request. If you need to access the test site, please email HSMED Technical Support at HSsupport@dsfederal.com.

Please note that the test site is used by DSFederal for internal testing. Grantees using the test site should expect periodic and unscheduled downtime. Data submitted to the test site should not be expected to remain in the system and may be deleted without notice.

# Complete AdminDate Field for All Tools

## Background:

For the 2017 data submission, HRSA used AdminDate to determine 2017 clients. For the 2018 data submission, HRSA may continue to use AdminDate as the method to determine 2018 clients until a flagging feature (e.g. to indicate active vs. inactive clients in a selected year) is developed.

## Recommendation:

The AdminDate should be filled out for every client and screening tool. Currently, AdminDate is not a required field in HSMED (i.e. XML files can be accepted into the system without a filled AdminDate). However, grantees should complete this element to accurately reflect the data collection completion date of the specific screening tool to allow for correct client counts.

As a refresher, the definition for AdminDate is: *The date in which the screening tool was completed by the client.* This means that if a client is rescreened for a given tool, the AdminDate should reflect when the rescreening was completed.

# Avoid Last Minute Data Submission

## Background:

When many users attempt to upload files at the same time, the system may experience slowdown. While DSFederal has worked to reduce potential slowdowns, uploading files may still experience longer processing times during peak hours. Since users will need to wait for the Demographic Tool to be processed before uploading other tools, this could lead to an extended wait time.

## Recommendations:

Do not wait until the last minute to submit your 2018 data! The deadline for submitting all 2018 data into HSMED is: February 15, 2019. To avoid late submission of data, grantees should submit all 2018 data as early as possible, and at least a week prior to the submission deadline.

# *Additional Support*

*Please contact Healthy Start HSMED Technical Support at* *HSsupport@dsfederal.com* *or call us at 1-844-840-5650 if you have any questions regarding this Tip Sheet, the HSMED system or your files and data.*