

UDS Submission Checklist

Use this checklist as a reference to ensure a complete, accurate, and on-time UDS submission. It is common for multiple people to contribute to reporting. The lead preparer should organize the team, the report and review activities, and the submission process early.

Activity	Notes
<input type="checkbox"/> Plan ahead. Try to have a complete UDS Report available for internal review at least 2 days before submission.	Your UDS Report is due by February 15. Give yourself sufficient time to review the report for completeness and reasonableness.
<input type="checkbox"/> Review comments and questions that your UDS Reviewer sent last year.	Avoid making the same errors in the report year after year. Reviewing the letter will help to identify common mistakes to avoid.
<input type="checkbox"/> Pull your health center’s prior year UDS Report from the Electronic Handbooks (EHBs).	Be sure to retrieve the final report that includes all corrections, not the initial submission.
<input type="checkbox"/> Compare key metrics across years. Investigate large increases or decreases for accuracy. At minimum, review: <ul style="list-style-type: none"> • Tables 3A, 3B, 4, and ZIP: Patient demographics, income, and insurance shifts, and special population counts, • Tables 5, 6A, and 8A: Patient, visits, services, and costs by service category, • Tables 6B and 7: Denominator and compliance for each clinical quality measure, and • Tables 8A, 9D, and 9E: Ratio of total costs to total cash revenues. 	Unless your health center has experienced a substantial change or disruption in the service delivery model (new services, change in number or type of providers, or change in number of patients served), year-to-year changes are generally minor. Table changes can be viewed using the Comparison Tool within EHBs. <i>Note: If your program has experienced a significant change in activity, provide a brief explanation in the report comments.</i>
<input type="checkbox"/> Check responses to flagged edits for adequacy.	Edits help to identify potential issues with your data prior to submission and must be addressed through data changes (where appropriate) or through meaningful explanations. Explanations such as, “Looking into it,” “This is what the data say,” or “Verified with our EHR vendor” are not acceptable. <i>Note: If your program activity is not in line with state and/or national averages, explain the program’s impact and variance from the comparison in the edit comment(s).</i>
<input type="checkbox"/> Check that all tables are marked as complete.	All tables must be marked as complete. Tables that are complete are shown with a green check mark.
<input type="checkbox"/> Mark the UDS Report as complete and accurate and submit.	The health center staff person with submission rights in the EHBs is responsible for reviewing and approving the UDS Report before submission.