



Healthy Start Monitoring and Evaluation Data System (HSMED) – Grantee User Training

June 25, 2024

Healthy Start Monitoring and Evaluation Data System (HSMED) User Manual
June 2024

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This manual covers 6 main topics: HSMED system description, system registration and account set up, log in and navigation, uploading client-level data, upload history and data validations, and reviewing uploads and marking reports as complete.

What is HSMED?

- The **Healthy Start Monitoring and Evaluation Data System (HSMED)** is integrated with HRSA's Electronic HandBooks (EHBs) and collects client-level data from Healthy Start grantees using the Healthy Start Data Collection Forms (Demographic Form, Background Form, Prenatal Form, and Parent/Child Form).
- Grantees collect data from individuals served during each reporting quarter (3 months) and submit the data through EHBs, by uploading an XML or CSV file to the HSMED web application.

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The **Healthy Start Monitoring and Evaluation Data System (HSMED)**, is a data collection system that has been integrated with HRSA's Electronic HandBooks (EHBs) to collect client-level data from Healthy Start grantees using the four Healthy Start Data Collection Forms: the Demographic Form, Background Form, Prenatal Form, and Parent/Child Form.

Every 3 months, grantees collect data from individuals served during the period and record the data in their own data collection systems. Then, they submit the data through EHBs for Project Officer review by uploading XML or CSV files to the HSMED web application.

What is HSMED? (cont.)

- The collected information will allow HRSA Healthy Start Program to view, store, and analyze data from grantees around the country in a uniform standardized way and format.
- This system also provides HRSA and grantees other capabilities, including near real-time standardized reports (to be released April 2025).

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The data that is submitted by grantees will allow HRSA's Healthy Start Program to view, store, and analyze data from grantees around the country in a uniform, standardized way and format. It also allows HRSA and grantees to review the data in real time and create near real-time standardized reports.

Reporting Requirements

- First HSMED submission is due **July 16th, 2024**
 - Opens on 7/1/24
- What to submit (by 7/16):
 - All forms completed from 6/10 to 6/30.
 - Demographic form for Group-based Education participants
 - All forms for Case Management/Care Coordination participants
 - If you are unable to upload data, please contact your project officer
 - All grantees are expected to be ready and able to upload data by the October 1, 2024 submission

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General reporting requirements for the first quarterly HSMED submission:

- The first submission opens July 1st, and is due by 11:59pm ET on July 16.
- In the first submission, you will upload data for any forms collected from 6/10 (the release of the forms) to 6/30.
 - Group-Based Health Education (GBE) participants are expected to complete a Demographic Form.
 - Case Management/Care Coordination (CM/CC) participants are expected to complete all forms – a Demographic Form, Background Form, Prenatal Form (if they are pregnant), and a Parent/Child form (if they have a child enrolled in HS).

If you are unable to upload data in the July 1st submission, please contact your Healthy Start Project Officer. HRSA's expectation is that all programs will be ready and able to upload data by the October 1, 2024 submission.

Reporting Timeline

5-year Submission Schedule

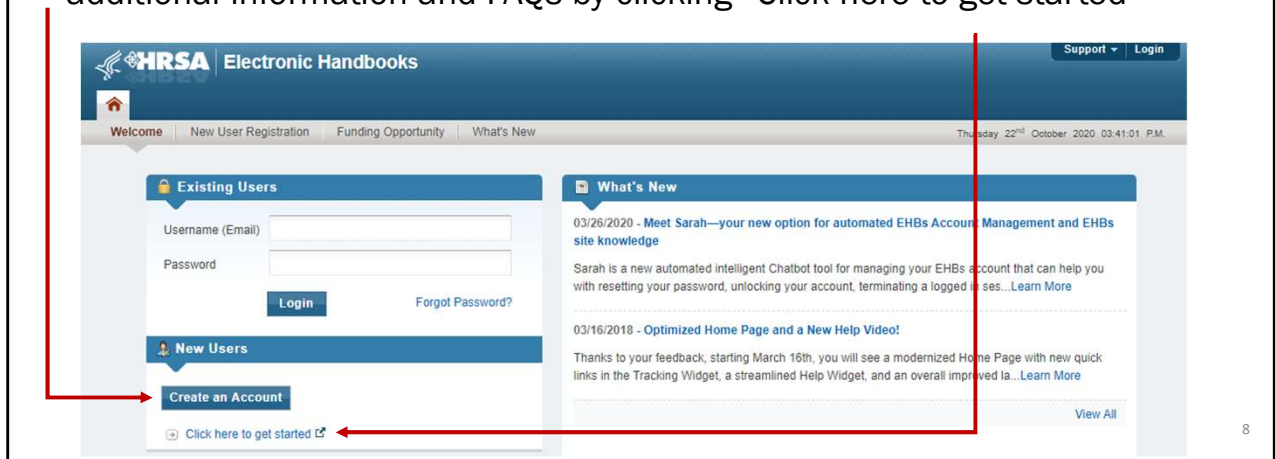
Report #	Report Available Date	Submission Due Date	Reporting Period
1	7/1/2024	7/16/2024	6/10/2024 – 6/30/2024
2	10/1/2024	10/15/2024	7/1/2024 – 9/30/2024
3	1/1/2025	1/21/2025	10/1/2024 – 12/31/2024
4	4/1/2025	4/15/2025	1/1/2025 – 3/31/2025
5	7/1/2025	7/15/2025	4/1/2025 – 6/30/2025
6	10/1/2025	10/21/2025	7/1/2025 – 9/30/2025
7	1/1/2026	1/20/2026	10/1/2025 – 12/31/2025
8	4/1/2026	4/21/2026	1/1/2026 – 3/31/2026
9	7/1/2026	7/21/2026	4/1/2026 – 6/30/2026
10	10/1/2026	10/20/2026	7/1/2026 – 9/30/2026
11	1/1/2027	1/19/2027	10/1/2026 – 12/31/2026
12	4/1/2027	4/20/2027	1/1/2027 – 3/31/2027
13	7/1/2027	7/20/2027	4/1/2027 – 6/30/2027
14	10/1/2027	10/19/2027	7/1/2027 – 9/30/2027
15	1/1/2028	1/18/2028	10/1/2027 – 12/31/2027
16	4/1/2028	4/18/2028	1/1/2028 – 3/31/2028
17	7/1/2028	7/18/2028	4/1/2028 – 6/30/2028
18	10/1/2028	10/17/2028	7/1/2028 – 9/30/2028
19	1/1/2029	1/16/2029	10/1/2028 – 12/31/2028
20	4/1/2029	4/17/2029	1/1/2029 – 3/31/2029

The five year submission schedule for the HSMED is posted above. Reports open on the 1st of every quarterly reporting month, and are due on the 3rd Tuesday of that month. The reporting period for collected data is the 3 months prior to the reporting month.

Recap: Topics in this Section

- HSMED System Description
- Reporting Requirements and Timeline

- Navigate to EHBs Log-In Page (grants.hrsa.gov)
- To register for a new EHBs account, click “Create an Account.” Find additional information and FAQs by clicking “Click here to get started”



If you are already an existing EHBs user, then you can directly log into EHBs. If you have never created or used an EHBs account before, you will need to create a new account.

To register for a new EHBs account, go to grants.hrsa.gov and click the “Applicant/Grantee” tile to access the EHBs login page. On the login page, click the “Create an Account” button. FAQs and additional information on the registration process can be found by clicking the “Click here to get started” link located directly under the “Create an Account” button.

The registration process is designed to be intuitive, and is an inherent function of the EHBs. If you have any questions or issues with registration, you can call the EHBs hotline. The information for the hotline is located in the "Contact Us" pane on the bottom left of the page.

Notes on Registration

- Vendors who will be uploading for grantees are required to follow the same registration process as grantees.
- Vendors can be associated to multiple organizations to submit data for those institutions.
- Once you have created an account, the Project Director (PD) of the organization(s) you are associated with must grant you access to the grant to allow you to upload submissions for their organization.

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There are a few additional items to note on registration.

First, vendors who will be uploading data for grantees are required to follow the same registration process as grantees. Vendors can associate their account with multiple organizations to submit data for those institutions.

Once you have created your account and associated it with the correct organizations, the Project Directors (PD) of the organization you are associated with must provide you access to the grant to allow you to upload submissions for their organization.

Granting User Privileges

- PDs must grant access to other users to allow them to upload for HSMED. Click the “Grants” tab and select the “Grant Folder” for your HS grant.

The screenshot shows the HRSA Grants management interface. The top navigation bar includes 'Tasks', 'Organizations', 'Grants', 'Free Clinics', 'FQHC-LALs', and 'Resources'. The 'Grants' tab is selected. Below the navigation bar, the breadcrumb path is 'Home > Grants > Browse'. The main content area is titled 'My Grant Portfolio - List' and includes an 'Add Grant To Portfolio' button. Below this, there are two tabs: 'My Grant Portfolio (2)' and 'My Grant Access Requests (0)'. The 'My Grant Portfolio (2)' tab is active. The page shows a table of grants with columns: Grant Number, Organization Name, Current Budget Period, Current Project Period End Date, CRS-EIN, Grant Role, Grant Active, Last Award Issue Date, and Options. The first row shows grant H49MC00101 for CRABTREE HAPPEL PROJECT, MI, with a 'Grant Folder' button in the Options column. A red arrow points to this button. The page also includes pagination controls and a page number '10' in the bottom right corner.

Grant Number	Organization Name	Current Budget Period	Current Project Period End Date	CRS-EIN	Grant Role	Grant Active	Last Award Issue Date	Options
H49MC00101	CRABTREE HAPPEL PROJECT, MI	04/01/2020-03/31/2021	03/31/2024	1556269193A5	PD	Yes	03/04/2020	Grant Folder
U62MC00001	CRABTREE HAPPEL PROJECT, MI	07/01/2017-06/30/2022	06/30/2022	1556269193A5	Other	Yes	10/15/2019	Grant Folder

To give a user access, PDs should click on the “Grants” tab, find their Healthy Start grant in their grant portfolio and click the “Grant Folder” button for their Healthy Start grant.

Granting User Privileges (cont.)

- Check Grant details and select “Update Privileges” from the Users pane.

The screenshot displays the 'Grant Home' interface for the grant H49MC00101: CRABTREE HAPPEL PROJECT, AXTELL, MI. The page is organized into several sections:

- Grant Details:** Shows the current budget period (04/01/2020 - 03/31/2021), current project period (04/01/2019 - 03/31/2024), CRS-EIN (1556269193A5), budget support year (20), project title (ELIMINATING DISPARITIES IN PERINATAL HEALTH), and grant period (07/01/2001 - 03/31/2024).
- Resources:** Includes a 'View' button and links for 'Last NoA', 'HRSA Contacts', and 'Awarded Funding Opportunities'.
- Grants:** A section header for the main content area.
- Submissions:** A list of tasks including 'Work on Financial Report', 'Work on Progress Report', 'Performance Report', 'Work on My NCC Report', and 'Work on Other Submissions'. A '+ View More' link is at the bottom.
- Requests:** A list of tasks including 'Applications', 'Existing Prior Approvals', 'Request New Prior Approval', 'Existing H80 Health Center CIS', 'Request New H80 Health Center CIS', and 'Legacy H80 Health Center CIS'. A '+ View More' link is at the bottom.
- Users:** A list of tasks including 'Approve Requests', 'Update Privileges', and 'Authorize New'. A red arrow points to the 'Update Privileges' option.

On their Healthy Start grant information page, PDs should click the “Update Privileges” button from the Users pane.

Granting User Privileges (cont.)

- Find the user you would like to assign privileges to using the search and/or filters and select “Update.”

The screenshot shows the 'Users - List' interface. At the top, there is a header for 'H49MC00101 : CRABTREE HAPPEL PROJECT, AXTELL, MI' with details for budget and project periods. Below this is a search bar with 'Search' and 'Saved Searches' options. A table lists users with columns for Name, Email, Phone, Grant Role, Grant Access, and Options. The 'Options' column for the first user, Alvin, Rylee, has an 'Update' button highlighted with a red arrow. Another red arrow points to the search bar area.

Name	Email	Phone	Grant Role	Grant Access	Options
Alvin, Rylee	reitester1@hotmail.com	(000) 000-0000	Other	Approved	Update
Coonfare, Corey	reitester1@hotmail.com	(000) 000-0000	Other	Approved	Update

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There, you must find the user you would like to assign privileges to using the search function or the filters directly beneath the column headers. Click the “Update” button to update the user’s privileges.

Granting User Privileges (cont.)

- Scroll down to the “Grant” Section. Assign “Access” permissions.
- Under Submissions, assign users “View,” “Create/Edit,” and “Submit” Performance Reports permissions to allow them to upload and submit.

Grant	View	Create / Edit	Submit	Administer	Access
Grant					<input checked="" type="checkbox"/>
Grant Users				<input type="checkbox"/>	
Awards	<input type="checkbox"/>				
Requests					
Prior Approval Request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Submissions					
Financial Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Performance Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Progress Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Noncompeting Continuations Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Other Submissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Action Plan					<input type="checkbox"/>

Scroll down on the screen and find the “Grant” section on the light blue header bar. Assign the user “Access” permission to the grant by checking the box. In the Submissions section, assign users “View,” “Create/Edit,” and “Submit” permissions for Performance Reports to allow the user to upload and submit data.

Click the “Save and Continue” button to advance.

Granting User Privileges (cont.)

- Review changes to privileges and click “Save and Continue” to confirm.

▼ Current Privileges

▼ List of Privileges Granted

Access Grant

View Performance Report

Edit Performance Report

Submit Performance Report

▼ List of Privileges Revoked

Cancel

Save and Continue

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Upon clicking the “Save and Continue” button, you will be taken to a confirmation page that shows a list of the privilege changes you have selected.

You must click “Save and Continue” again to save the changes. If you leave the page before clicking the “Save and Continue” button, the changes will not be saved and the user will not have access to HSMED tasks.

The Project Director must repeat these steps for each user that will be responsible for uploading data to HSMED.

Recap: Topics in this Section

- Registration
- Granting User Privileges

Login and Navigation

- On the EHBs Log-In Page, enter your username (the email connected to your account) and your password and click “Login.” If you forget your password, follow the prompts in “Forgot Password” to receive a temporary password.

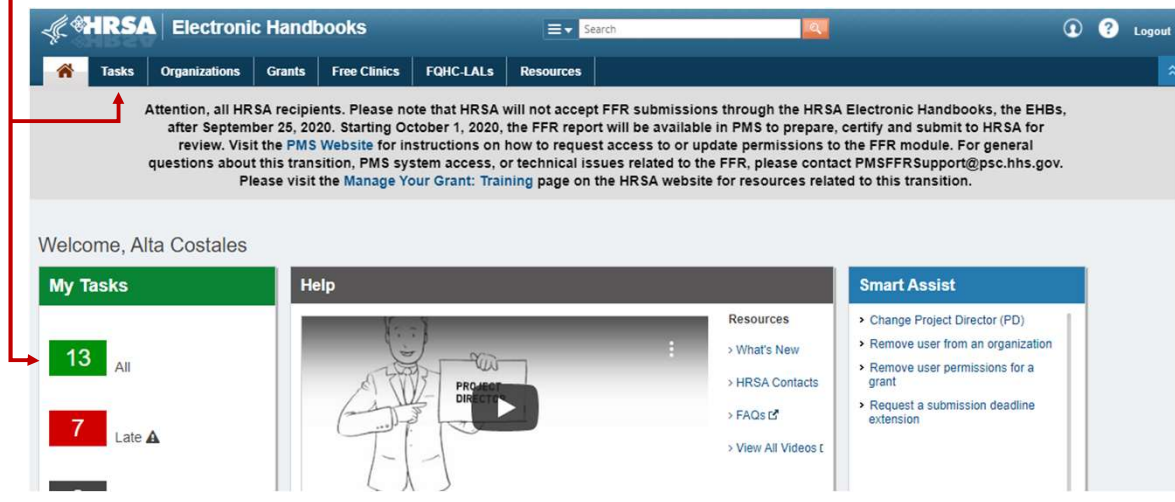
The screenshot shows the HRSA Electronic Handbooks login page. The page has a blue header with the HRSA logo and 'Electronic Handbooks' text. Below the header is a navigation bar with links for 'Welcome', 'New User Registration', 'Funding Opportunity', and 'What's New'. The main content area is divided into three columns. The left column is titled 'Existing Users' and contains a login form with two input fields: 'Username (Email)' and 'Password'. Below these fields are a 'Login' button and a 'Forgot Password?' link. The middle column is titled 'New Users' and contains a 'Create an Account' button and a link 'Click here to get started'. The right column is titled 'What's New' and contains several news items. Red arrows point from the text above to the 'Forgot Password?' link and the 'Login' button.

As soon as you have created an account, you can log in to EHBs via the EHBs login page.

Enter your username (the email connected to your account), and your password. Click “Login” to enter the system. If you forget your password, follow the prompt in “Forgot Password” to receive a temporary password. You will then be prompted to create a new password when you log in.

Login and Navigation

- On the Home Page, click the “Tasks” tab or the “All” button in the “My Tasks” pane to view the Tasks Page



On the home page, click the “Tasks” tab or the “All” button in the “My Tasks” pane to view the Tasks page.

Tasks Page

- The “Pending Tasks” List shows all incomplete tasks that are assigned to you. HSMED tasks will always include “HSMED” in the tracking # and can be filtered using the “Contains” or “StartsWith” options.
- Tasks that have not been started can be opened using the “Start” button, while tasks that have already been started will have the “Edit” option.

The screenshot shows the 'Pending Tasks - List' page. The table contains the following data:

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Options
10/16/2020 11:59 PM (Late by 19 Days)	Grant Submissions	HSMED00000198	NoFilter Contains DoesNotContain StartsWith EndsWith	H49MC00101 (Grant)	CRABTREE HAPPEL PROJECT	Start
09/15/2020 11:59 PM (Late by 41 Days)	Grant Submissions	HSMED00000089		H49MC00101 (Grant)	CRABTREE HAPPEL PROJECT	Edit
08/15/2020 11:59 PM (Late by 72 Days)	Grant Submissions	HSMED00000125	Performance Reports	H49MC00101 (Grant)	CRABTREE HAPPEL PROJECT	Edit

On the Tasks page, the Pending Tasks list will show all incomplete tasks that are assigned to you. HSMED tasks will always include “**HSMED**” in the tracking number, so you can filter by tracking number with the “Contains” or “StartsWith” options to find open HSMED tasks.

Tasks that have not yet been started can be opened with the “Start” button. Once the task has already been started, by you or by anyone else in the organization with access to HSMED, the button will change to the “Edit” option.

Please note, HSMED tasks will only be visible on the Tasks page starting on the 1st of each quarterly reporting month. Your first submission will appear on July 1st, 2024.

- New reports will be created on the 1st of the month following the reporting period. Reports are due on the 3rd Tuesday of the same month. If a report is not completed, the system will indicate when it is late.

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

ALL ENTITIES << Pending Tasks - List

Not Completed Recently Completed Archived

Detailed View | Search | Saved Searches

Page size: 15 | Go | 13 items in 1 page(s)

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Options
10/15/2020 11:59 PM (Late by 10 Days)	Grant Submissions	HSMED00000198	NoFilter Contains DoesNotContain StartsWith EndsWith	H49MC00101 (Grant)	CRABTREE HAPPEL PROJECT	Start
09/15/2020 11:59 PM (Late by 41 Days)	Grant Submissions	HSMED00000089		H49MC00101 (Grant)	CRABTREE HAPPEL PROJECT	Edit
08/15/2020 11:59 PM (Late by 72 Days)	Grant Submissions	HSMED0000089	Performance Reports	H49MC00101 (Grant)	CRABTREE HAPPEL PROJECT	Edit

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Each quarter, new reports will be created on the first of the quarterly reporting month for the prior 3 months (also known as your “reporting period”). Reports will be due on the 3rd Tuesday of the same month. If a report is not completed, the system will indicate how many days late the report is **but will not prevent you from uploading data for the task**. The system will auto-send reminder emails 5 days before the report is due, and the day after the report is late.

If you do not see any tasks, then there are two possibilities: 1) The PD of your organization has not granted you access to view and upload data for HSMED. 2) Another user in your organization has already marked the report as complete. As a reminder, once any user marks a task as complete, it will be completed for all users with the same task. We address the “Mark as Complete” function on pg. 49 of this manual.

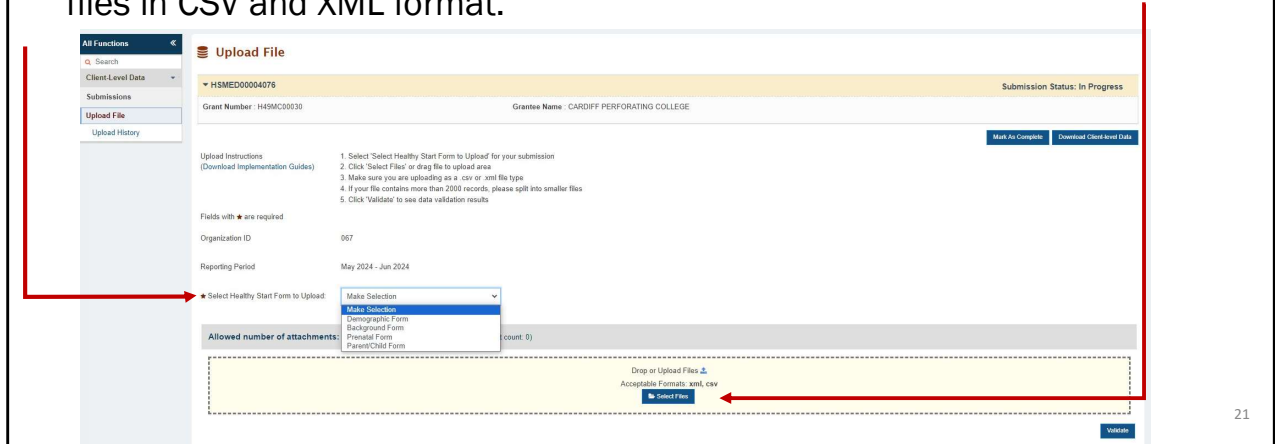
If you are sure that neither of these options have occurred, please contact Technical Support at HealthyStartData@hrsa.gov and use the subject line: “**Technical Support Request for HSMED**”. Technical support contact information will also be provided at the end of this presentation.

Recap: Topics in this Section

- Login
- Navigation
- Tasks Page

Uploading Client-Level Data

- On the Upload File Page, you can confirm your grant information and upload files. Select the Healthy Start form you are uploading and click “Select Files” to select the file you would like to upload. HSMED accepts files in CSV and XML format.



This next section will address uploading client-level data.

When you click on an open report, you will be taken directly to the upload file page. On this page, you can confirm your grant information and upload files for your report. This page was enhanced to also include your OrgID.

To upload a file, select the Healthy Start form you are uploading and click “Select Files” to select the file you would like to upload. You may also drag a file into the drop area to upload.

HSMED accepts files in CSV and XML format. We’ll discuss these two formats in the next few pages.

What is XML?

- XML stands for “Extensible Markup Language” and is used to define sets of rules for encoding documents in human-readable and machine-readable format.
- It allows us to automatically check files for compliance to formats and values; ensuring consistent data quality.
- Allows HRSA to conduct real-time monitoring.
- XML templates are available on the HealthyStart-tasc.org website for you to design your export.

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HSMED accepts files in two formats: XMLs and CSVs.

XML stands for “Extensible Markup Language.” It is used to define sets of rules for encoding documents in human-readable and machine-readable format. It allows HSMED to automatically check files for compliance to formats and values, which ensures consistent data quality.

It also allows grantees to keep using their existing data system. Once grantees have created export functions in their existing data collection systems, the export can be used every reporting quarter to create consistent files.

XMLs allow HRSA to conduct real-time monitoring of the data that is coming into the system to ensure that it follows predefined rules and formatting requirements.

XML Example

- This is an example XML file for the Background Form. This XML was opened in Notepad++, a free source code editor.

- Values are sandwiched here in black.
- Data elements (in blue) are case-sensitive and must be spelled exactly as stated in Implementation Guides and Schemas
- Multiple-value fields are placed together in multiple-select List tables.

```
1 <?xml version="1.0" encoding="UTF-8"?>
2 <ROOT xmlns="urn:hsmid">
3   <HsmidBackground>
4     <CoverPage>
5       <ParticipantType>1</ParticipantType>
6       <OtherPPSpecification>test</OtherPPSpecification>
7       <PPUID>123PP0001</PPUID>
8       <OtherLinkedPPList>
9         <OtherLinkedPP>String123</OtherLinkedPP>
10        <OtherLinkedPP>String234</OtherLinkedPP>
11      </OtherLinkedPPList>
12      <NoOtherPP>1</NoOtherPP>
13      <HasEnrolledChild>1</HasEnrolledChild>
14      <PPErollmentDate>2020-09-24</PPErollmentDate>
15      <PPErollmentPhaseList>
16        <PPErollmentPhase>1</PPErollmentPhase>
17        <PPErollmentPhase>7</PPErollmentPhase>
18      </PPErollmentPhaseList>
19      <CompletionDate>2020-09-24</CompletionDate>
20      <UpdateType>4</UpdateType>
```

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Above is an example of an XML file. This example shows an excerpt from the Background form, opened in Notepad++, a free source code editor that can be downloaded online.

Here, you can see that values, shown in black, are sandwiched between data element nodes. Data elements, shown in blue, are case-sensitive and must be spelled exactly as stated in the Implementation Guides and Schemas. Multiple-value fields, shown in forms as “Select all that apply” questions, are placed together in multiple-select “List” tables.

The form Implementation Guides and Schemas are available on the [HealthyStart-tasc.org](https://www.healthystart-tasc.org) website.

What is CSV?

- A CSV is a “Comma-Separated Value” file that stores numbers and text values in plain text. These can be viewed in Excel, your browser, or a text editor.
- This may be an easier format for some systems to export data into as there are fewer rules associated with the format.
- CSV templates are available on the HealthyStart-tasc.org website for you to design your export.

In addition to XML files, HSMED also accepts CSVs.

CSVs are “Comma-Separated Value” files that store numbers and text values in plain text. These can be viewed in Microsoft Excel, your browser, or a text editor. This format can be easier to read and review, and is also easier to export data into since there are fewer rules associated with the format.

CSV templates are available on the HealthyStart-tasc.org website for you to design your export.

Guidelines for Preparing CSV Files

- You must follow the templates' column order and number of columns when preparing your data export.
- **Do NOT change the column headers.** The HSMED system will not recognize alternative column headers and will return an error.
- Data elements that accept multiple values have the word “List” included in the Column name. In these fields, values should be listed with pipe (|) separation with no space separation.
 - For example, if values 1, 2, and 5 are selected for a field, they would be represented as 1|2|5 in the CSV file.

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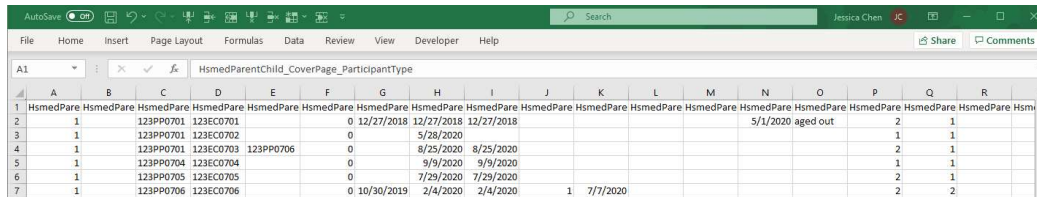
When preparing CSV files, you must follow the templates' exact column order and number of columns when preparing your data export.

Additionally, you can NOT change the column headers. The HSMED system will not recognize alternative column headers and will return an error if headers are changed.

Data elements that accept multiple values have the word “List” included in the column name. In these fields, values should be listed with a pipe (generally Shift + \) separating individual values, with no spaces. For example, if the values 1, 2, and 5 are selected for a field, you would enter 1|2|5 with no spaces in the CSV file. **You should NOT use commas to separate values, as a comma denotes a new column in a CSV file.** If you include commas in your file, you will receive errors indicating you have incorrect column headers because the system will think you are adding new columns.

Example CSV File

- This is an example Parent/Child CSV file being viewed in Microsoft Excel.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R		
1	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare	HsmedPare		
2	1		123PP0701	123EC0701			0	12/27/2018	12/27/2018	12/27/2018					5/1/2020	aged out	2	1		
3	1		123PP0701	123EC0702			0		5/28/2020								1	1		
4	1		123PP0701	123EC0703	123PP0706			0	8/25/2020	8/25/2020							2	1		
5	1		123PP0704	123EC0704				0	9/9/2020	9/9/2020							1	1		
6	1		123PP0705	123EC0705				0	7/29/2020	7/29/2020							2	1		
7	1		123PP0706	123EC0706				0	10/30/2019	2/4/2020	2/4/2020						1	7/7/2020	2	2

- Each column represents a data element, such as ParticipantType, PPUID, etc.
- Each row represents a different Participant.
- **Column names can NOT be renamed.**
- When opening via Excel, ensure dates are in the format MM/DD/YYYY, as saving in the incorrect format will cause schema errors.

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Above is an example CSV file. This sample shows a Parent/Child CSV file being viewed in Microsoft Excel.

Each column represents a data element, such as ParticipantType, PPUID, etc. Each row represents a different client.

As a reminder, column names can NOT be renamed.

Please also pay attention to the format of the data in the fields when you use Excel to open the file. Excel will often change the format of data (for example, dates may change from full date [MMDDYYYY] format to short dates [MMDDYY]). If you submit a file with these formatting issues, your file will be rejected by the HSMED system.

Uploading Client-Level Data

- Once a file has been selected and it is loaded on the page, you will receive a green “Success” message. This only means the file is ready to be validated; it does not mean that your file passed the Schema validation.

The screenshot shows a web interface for uploading client-level data. At the top, the reporting period is set to 'May 2024 - Jun 2024'. Below this, there is a dropdown menu for 'Select Healthy Start Form to Upload' with 'Demographic Form' selected. A green success message box is displayed, stating 'Success: Document(s) successfully uploaded. File(s): 1_Demographic:SpecialCharacter_Comma[1].csv'. Below the success message, there is a section for 'Allowed number of attachments: (Minimum: 1 - Maximum: 1) (Current attachment count: 1)'. This section contains a dashed box for 'Drop or Upload Files' with a 'Select Files' button and 'Acceptable Formats: xml, csv'. Below the dashed box, the uploaded file is listed as '1_Demographic:SpecialCharacter_Comma[1].csv 04/23/2024 1 KB'. There is a 'Description:' field with a text input area. At the bottom right, there are 'Save' and 'Validate' buttons.

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The EHBs received a new enhancement last year to notify users on the Upload File page when a file has been successfully loaded on the page – In the HSMED, once you have selected your file or dropped it into the “Select Files” area, you will receive a green “Success” message if it loaded correctly. Please note that this message **does not** mean that your file has passed schema validation – to run the schema validation, you must select the “Validate” button at the bottom of the page. This green message only means that your file is ready to be validated.

Uploading Client-Level Data

- Once a file has been selected and loaded successfully, it will be shown under the attachment box. Click “Delete” to remove the file and attach a new file. Click “Validate” to initiate validation.

Fields with ★ are required

Reporting Period

Aug 2020

★ Select Healthy Start Form to Upload:

Background Form

Allowed number of attachments: (Minimum: 1 - Maximum: 1) (Current attachment count: 1)

Drop or Upload Files 
Acceptable Formats: xml, csv


189323.csv 6 KB

 Edit

 Delete

Validate

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Once you’ve selected a file, you will see it show directly underneath the upload box. You will not be able to select additional files or drag new files into the upload area, since you can only upload one file at a time. You may click “Delete” to remove the file and attach a new file.

The “Edit” button does not provide any additional functionality in the HSMED system. Values entered in the description field that is displayed when you click “Edit” are not saved to HSMED. This button is a legacy function that is sometimes used for other reports on EHBs, but it does not provide any function in HSMED.

Once you’ve selected the correct file, click “Validate” to initiate schema validation of the file.

Uploading Client-Level Data

- If your file does not follow schema requirements (required fields, allowed values, allowed occurrences), then schema errors are shown on the Upload File page in red.
- Click “Download Implementation Guides” to download a copy of the requirements and data validations for each element.

Upload File

▼ HSMED00000027 Submission Status: In Progress

Grant Number : H49MC00060 Grantee Name : MOWING VENT HOSPITAL DISTRICT

The data element 'PPIUID' is required

[Mark As Complete](#) [Download Client-level Data](#)

Upload Instructions
(Download Implementation Guides)

1. Select 'Select Healthy Start Form to Upload' for your submission
2. Click 'Select Files' or drag file to upload area
3. Make sure you are uploading as a .csv or .xml file type
4. If your file contains more than 2000 records, please split into smaller files
5. Click 'Validate' to see data validation results

Fields with ★ are required

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When you click validate, your file will undergo a quick schema validation. If your file does not follow schema requirements, including required fields, allowed values, and allowed number of occurrences, then schema errors will be shown in red on the upload file page.

To view requirements for each of the data elements, you can click “Download Implementation Guides” to download a copy of the most current materials. Additionally, the Implementation Guides and Schemas are posted on the HealthyStart-tasc.org website.

Recap: Topics in this Section

- Uploading Files
- XMLs
- CSVs
- Schema Validations

Upload History

- Once a file passes schema check, the system will redirect to the **Upload History** page. A green box will show in the lower right hand of the screen indicating that the file has successfully passed schema validations.
- The Status of the uploaded file will be listed as “Not Started” or “In Progress.” Once the system has processed the file, it will send an email informing you of the status of the upload.

Upload History

File Name	Uploaded By	Upload Date	Processed Date	Report Type	Report Period	Status	Options
191137 BG All DVs	Arthur, Searls	10/26/2020 5:00:25 PM	10/26/2020 5:00:25 PM	Background Form	Aug 2020	In Progress	Validation Report
191137 BG All DVs	Arthur, Searls	10/26/2020 9:02:10 PM	10/26/2020 9:02:11 PM	Background Form	Aug 2020	Upload Failed	Validation Report
191137 BG All DVs	Arthur, Searls	10/23/2020 1:16:29 PM	10/23/2020 1:16:30 PM	Background Form	Aug 2020	Completed With Alerts	Validation Report
ParentChild_11ECs for same PP	Arthur, Searls	10/22/2020 5:30:00 PM	10/22/2020 5:30:00 PM	Parent Child Form	Aug 2020	Completed With Alerts	Validation Report
195132 BG Archive1	Arthur, Searls	10/22/2020 5:29:27 PM	10/22/2020 5:29:33 PM	Background Form	Aug 2020	Completed With Alerts	Validation Report

If your file passes the schema check, the system will redirect to the Upload History page. A green box will show in the lower right hand of the screen indicating that the file has successfully passed the schema validations.

Your most recently uploaded file will be on the top of the table, and the file’s status will be listed as “Not Started” or “In Progress.” You are welcome to leave the page at this time and work on other reports or other business, as needed. Once the system has processed the file, it will send you an email informing you of the status of the upload. The email will be sent only to the user that uploaded the file. Generally, you should receive this email within a few minutes. On days where many files are being uploaded (such as close to the due date), it may take up to 30 minutes for your file to process.

- ✘ **Errors:** All errors must be resolved before the report can be successfully accepted.
- ✘ **Warnings:** Users must review and, if appropriate, resolve their warnings. Users must enter a justification comment in the CSV or XML file, and reupload to the system to submit the report and resolve the warning(s).
- ✓ **Alerts:** A report can be submitted with alerts. Users do not need to enter comments to explain the data that caused the alert. These may be present even when data is valid and can also be considered as reminders to grantees about key data elements.

There are three main data validation checks that may be displayed.

- **Errors** are major issues with the data that must be resolved before the report can be successfully accepted. A file with errors will show status “Upload Failed.”
- **Warnings** are also major issues with the data, however MCHB has provided an opportunity for grantees to provide justifications for these data issues rather than requiring grantees to correct the data. Users must either correct their data or enter a justification comment in the appropriate Warning Comment field and then re-upload their file to the system to submit the report and resolve any warnings. Files with warnings will show status “Processed with Warnings.”
- **Alerts** are minor data issues that highlight key data elements that MCHB has prioritized. Alerts may show even when the data submitted is correct. They can be considered reminders for grantees to review key data elements for accuracy and completeness. Files with only alerts have been successfully submitted and saved to the system, and do not need to be re-uploaded with changes. Users are also not required to submit comments or justifications to explain the data that caused the alert.

Validation checks performed on data elements are described in the Implementation Guides (available from the HealthyStart-tasc.org website and on the Upload File page).

File Statuses – Processing Statuses

- ✘ **Not Started:** The file is in queue to be processed by the system but has not yet started.
- ✘ **In Progress:** The file has not yet been fully processed by the system.
- ✘ **Server Error:** The system did not process the file correctly. Please re-attempt upload of your file. If you receive this status multiple times, please reach out to technical support for assistance (HealthyStartData@hrsa.gov).

There are 7 file statuses that may be displayed when you upload your file to the HSMED. There are three processing statuses when you first upload your file:

- **Not Started** means the file is in queue to be processed by the system but it has not yet started the actual review of the file.
- **In Progress** means the system has started processing the file but has not yet completed the processing of the file.
- **Server Error** means that the system had an error when attempting to process the file. If you receive this status, please re-attempt upload of your file. If you receive this error more than once for a single file, please reach out to Technical Support at HealthyStartData@hrsa.gov with a copy of the file so that our technical team can resolve any issues.

- ✘ **Upload Failed:** One or more errors are present in the data. Warnings and/or alerts may also be present in the file. Users must correct their data and resubmit.
- ✘ **Processed with Warnings:** The file has been processed and no errors were found. Warnings are present in the file and alerts may also be present. Users must correct their data or provide justifications for warnings to submit their data.

There are two failed statuses. **If your file is in one of these statuses, you must resubmit your file or your data will not be saved to HSMED.**

- **Upload Failed** means that there is at least one, possibly more than one error present in the data. Warnings and alerts may also be present in the file. If you receive this status, you must correct your data to resolve any errors present in the file and resubmit your data. You must resolve all errors, or your data will not be saved to HSMED.
- **Processed with Warnings** means that your file has been processed and no errors were found in the file. There are one or more warnings present in the file, and alerts may also be present in the file. In this case, you should review the data and determine if corrections are necessary. If the data is correct, then you must provide a justification for the data in the appropriate Warning Comment field and resubmit your data with the justification or correction. Like errors, you must resolve all warnings, or your data will not be saved to HSMED.

File Statuses – Successful Statuses

- ✓ **Completed:** The file has been processed and no data validation issues were found.
- ✓ **Completed with Alerts:** The file has been processed and no warnings or errors were found, however alerts are present within this file.

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Finally, there are two successful upload statuses.

- If your file has status **Complete**, then the file has been processed and no data validation issues were found. This will not be a common case, as there are many alerts that can show up even when the data is correct. We'll go through the types of data validations you'll see a little later in this training.
- If your file has the status **Completed with Alerts**, this means that your file has been processed and no warnings or errors were found. There may be one or more alerts in the file, but these did not prevent your file from being saved to HSMED.

If you receive one of these two upload statuses, then your data was successfully uploaded and saved to HSMED, and your PO will be able to review the data that was submitted. However, **if you receive any other status, then your file has NOT been saved to HSMED and cannot be reviewed by your PO.** When you receive the email indicating that your file has processed, please check the actual status of your upload to determine whether it was successfully saved!

File Statuses – Data Storage Notes

- The **Data Storage Notes** column will also indicate whether your file was stored or not. “Data stored” indicates your data was saved to the HSMED, “Data not stored” indicates your data was not saved because it has validation issues.

File Name	Uploaded by	Upload Date	Processed Date	Report type	Report Period	Status	Data Storage Notes	Options
2_Background_UseCase2	Marcial, Schweyen	4/24/2024 1:46:39 PM	4/24/2024 1:46:40 PM	Background Form	May 2024 - Jun 2024	Upload Failed	Data not stored	Validation Report
HSMED2PRINOUT	Blaine, Zutter	3/6/2024 1:07:09 PM	3/6/2024 1:07:11 PM	Prenatal Form	Feb 2024	Completed	Data stored	Validation Report
HSMED2BCKOUT	Blaine, Zutter	3/6/2024 11:05:45 AM	3/6/2024 11:05:52 AM	Background Form	Feb 2024	Completed With Alerts	Data stored	Validation Report

In 2022, a “Data Storage Notes” column was added to the Upload History page to further clarify the storage status of your file.

If your file contained data validation issues, such as errors or warnings, you will receive the “Data not stored” message. If your file was “Completed” or “Completed with alerts”, you will receive the “Data stored” message to indicate your data was successfully saved to the HSMED.

If your data was not stored, you will need to resolve your validation issues and re-upload your file until you receive the “Data stored”/“Completed”/“Completed with alerts” messages.

Upload History

- Once the file has been processed, return to the Upload History page. The status of the file will automatically update. Click “Search” to initiate a search of the uploaded files.
- Click “Validation Report” to see a list of the data validations found in the file. Click the arrow beside “Validation Report” to see other possible actions.
- Click “Download Raw File” to download a copy of the file that was uploaded.

The screenshot displays the 'Upload History' interface. On the left, a sidebar menu includes 'All Functions', 'Client-Level Data', 'Submissions', 'Upload File', and 'Upload History'. The main content area features a search bar, a table with 128 items, and a dropdown menu for 'Validation Report'.

File Name	Uploaded By	Upload Date	Processed Date	Report Type	Report Period	Status	Options
195132 BG Archive1	Arthur, Searls	10/26/2020 10:43:15 PM	10/26/2020 10:43:18 PM	Background Form	Aug 2020	Completed With Alerts	Validation Report
195138 PC Archive1	Arthur, Searls	10/26/2020 10:42:50 PM	10/26/2020 10:42:53 PM	Parent Child Form	Aug 2020	Completed With Alerts	Action Validation Report Download Raw File
195135 PN Archive1	Arthur, Searls	10/26/2020 10:42:31 PM	10/26/2020 10:42:33 PM	Prenatal Form	Aug 2020	Completed With Alerts	Validation Report
191144 PN No DV-1	Arthur, Searls	10/26/2020 10:42:07 PM	10/26/2020 10:42:07 PM	Prenatal Form	Aug 2020	Upload Failed	Validation Report

Once you receive the email indicating that your file has been processed you should return to the Upload History page. The status of the file will automatically update when you refresh the page. If you click “Validation Report”, you will see a list of the data validations found in the file. This will only be available for files that have completed processing (files with the status Upload Failed, Processed with Warnings, Completed with Alerts, and Completed). Files with other statuses will show only blank data validations pages and will not have the correct data validations shown.

If you click the arrow to the right of “Validation Report,” you will also be able to download a copy of the XML or CSV file that you uploaded by clicking the “Download Raw File” button.

Upload History (cont.)

- Search for specific uploads using the parameters in the Basic Search. Note that Upload dates MUST be in the correct format to search by date.

Upload History

Search Filters: ×

Basic Search Parameters

File Name

Report Period All Mar 2020 Apr 2020 Aug 2020 May 2020

Status All In Progress Upload Failed Processed With Warnings Completed With Alerts

Report Type All Background Form Prenatal Form Parent Child Form

Advanced Search Parameters

Upload Date

From

To

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On the Upload History page, you can also search for specific uploads using the search button. **As a note, when using the search, if you enter dates in the upload date fields, they MUST be in the correct format.** If you enter dates in an incorrect format and click the “search” button, it will cause an endless loading screen. You will then have to refresh the page to perform any searches or see any files you have uploaded.

Validation Report

- Validations are grouped by PPUID and show the PPUID in which the data issue is present, the validation type, the element name, and a message regarding the issue present in the data.
- Validations can be filtered by typing in the fields directly below the column headers or searched using the search function.

Validation Report

The screenshot shows a web interface for a Validation Report. At the top right, there is a 'Download' button and a search bar with a magnifying glass icon and the text 'Search'. Below the search bar, there are navigation controls including 'Page size: 15' and '62 items in 5 page(s)'. The main content is a table with the following columns: PPUID, Validation Type, Element Name, and Message. The table is grouped by PPUID. The first group is '123PPAIInonWomanPPDVs' and contains one row: PPUID: 123PPAIInonWomanPPDVs, Validation Type: Alert, Element Name: UsualHealthcarePlace, Message: Element 'UsualHealthCarePlace' is missing. The second group is '123PPAIInWomanPPDVs1' and contains four rows: 1. PPUID: 123PPAIInWomanPPDVs1, Validation Type: Alert, Element Name: PreviousNeonatalDeathNumber, Message: Element 'PreviousNeonatalDeathNumber' is missing. 2. PPUID: 123PPAIInWomanPPDVs1, Validation Type: Alert, Element Name: UpdateType, Message: If this upload is an update to the background form, 'UpdateType' should be provided. 3. PPUID: 123PPAIInWomanPPDVs1, Validation Type: Warning, Element Name: PPErollmentDate, Message: 'PPErollmentDate' for primary participant is different than the system records. Please confirm the correct 'PPErollmentDate' in this submission or explain the reason for the change. 4. PPUID: 123PPAIInWomanPPDVs1, Validation Type: Error, Element Name: PPErollmentDate, Message: Input 'PPErollmentDate' for the primary participant. A red line highlights the search bar and the 'Download' button. Red arrows point from the search bar to the table headers and from the 'Download' button to the table.

PPUID	Validation Type	Element Name	Message
123PPAIInonWomanPPDVs			
123PPAIInonWomanPPDVs	Alert	UsualHealthcarePlace	Element 'UsualHealthCarePlace' is missing.
123PPAIInWomanPPDVs1			
123PPAIInWomanPPDVs1	Alert	PreviousNeonatalDeathNumber	Element 'PreviousNeonatalDeathNumber' is missing.
123PPAIInWomanPPDVs1	Alert	UpdateType	If this upload is an update to the background form, 'UpdateType' should be provided.
123PPAIInWomanPPDVs1	Warning	PPErollmentDate	'PPErollmentDate' for primary participant is different than the system records. Please confirm the correct 'PPErollmentDate' in this submission or explain the reason for the change.
123PPAIInWomanPPDVs1	Error	PPErollmentDate	Input 'PPErollmentDate' for the primary participant.

On the validation report page, validations are grouped by Participant Unique ID's (PPUID) and show the PPUID in which the data issue is present. Each validation will also show the validation type (error, warning, or alert) and a message regarding the issue present in the data.

Validations can be filtered by typing in the fields directly below the column headers or searched using the search function. You can also select the "Download" button on the top right of the page to download a copy of the validations into an Excel sheet.

Additional Upload and Data Validation Rules **HRSA**

Health Resources & Services Administration

- All CM/CC participants must have existing Demographic and Background forms before Prenatal and/or Parent/Child forms can be submitted.
- For each form type, you may not include the same participant multiple times.
 - For the Demographic, Background, and Prenatal forms, this means you may not submit participants with the same PPUID – each participant must have their own Unique ID. You cannot submit the same PPUID in a single file.
 - For Parent/Child forms, the child is considered the participant so you may not submit multiple participants with the same ChildUID (you may submit multiple instances of the same PPUID with different ChildUIDs)

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In addition to the validation rules listed in the Implementation Guides, there are a few additional rules to keep in mind when uploading files to the system.

First, all CM/CC participants must have existing Demographic and Background forms before Prenatal and Parent/Child forms can be submitted. This includes all PPUIDs and OtherLinkedPPs submitted through the Prenatal and Parent/Child forms. **If you submit Prenatal or Parent/Child forms before Demographic and Background forms have been successfully saved to the system, your Prenatal and Parent/Child forms will fail and you will receive an error for each and every participant where the participant does not already have these forms.** Because of this, it is recommended that you wait until your Demographic and Background forms have changed to status "Completed" or "Completed with Alerts" prior to submitting any Prenatal or Parent/Child forms. Please note, the Demographic form must be saved to the HSMED before the Background form can be uploaded, so please consider this when preparing your files for upload – wait for the Demographic form to be saved before uploading the Background form.

Second, in each file submitted, you may not include the same client multiple times. For the Demographic, Background, and Prenatal forms, this means you may not submit clients with the same PPUID. For Parent/Child forms, the child is considered the client so you may not submit multiple clients with the same ChildUID, though you CAN submit multiple instances of the same PPUID with different ChildUIDs.

With the exception of the format requirement (which is the required OrgID and capitalized “PP” following it), **PPUIDs and ChildUIDs are NOT case sensitive, so you will need to change the order of letters and numbers for two IDs to count as separate IDs.**

Although you cannot submit the same client multiple times in the same file, you may submit multiple files in a reporting period for each form type. Each file can include the same or different clients as other files submitted within the report period. For instance, if a participant has multiple updates in a single month, you will submit separate files for each of the updates.

- Each PPUID may be linked to a maximum of 5 unique PPUIDs and 10 unique ChildUIDs.
 - PPUID linkages to PPUIDs are made through the OtherLinkedPP field (Background Form)
 - PPUID linkages to ChildUIDs are made through the Prenatal Form (EnrolledChildID) and the Parent/Child Form (PPUID and ChildUID are linked)
- Each ChildUID may be linked to a maximum of 4 unique PPUIDs.
 - ChildUID linkages to PPUIDs are made through the Prenatal Form (EnrolledChildID and PPUID are linked) and the Parent/Child Form (PPUID and OtherLinkedPP are linked to ChildUID)

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One other rule to consider is the cap on linkages that can be made between participants and children.

Each participant can be linked to a maximum of 5 other participants and 10 children. Participant linkages can be made through the OtherLinkedPP field in the Background form. Child linkages can be made through the Prenatal Form using the field EnrolledChildID and the Parent/Child Form, as the PPUID and ChildUID are linked.

Additionally, each Child may be linked to a maximum of 4 adult participants. Child linkages to adults are made through the Prenatal Form via the EnrolledChildID field, as well as through the Parent/Child Form, as the child will be linked to the PPUID and all IDs provided in the OtherLinkedPP field.

If you attempt to exceed the maximum number of linkages, the system will return an error. If you need to change or delete linkages, you will have to submit a request to HSMED technical support at HealthyStartData@hrsa.gov.

Handling Special Circumstances

- There are certain circumstances under which you may need to submit multiple changes to client data within a month.
- In this case, you should submit your data for participants in multiple files. You may submit as many files as you need to for each form.
- Files should be submitted in **chronological order**, from oldest update to newest, with the most recent updates submitted in the **LAST** file.

File 1	ParticipantType	erPage_PPUID	UpdateType	EntersPrenatalDate	OtherUpdateDate	OtherUpdateSpecification
Reporting Period: 05/2020	1	123PP0001	1	5/3/2020		
File 2	ParticipantType	erPage_PPUID	UpdateType	EntersPrenatalDate	OtherUpdateDate	OtherUpdateSpecification
Reporting Period: 06/2020	1	123PP0001	4		6/20/2020	Insurance Updated

****Please do not re-submit data that has already been saved to the HSMED****

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There are a few special circumstances under which you may need to submit multiple files within a reporting period. Whenever there are clients with multiple updates, clients who have received screening multiple times within a month, or when you are uploading data for many reporting periods that may have been missed, you will need to submit multiple files to address all of the updates.

For each reporting period, you may submit as many files as you need for each form. There is no limit on the number of files you can submit for each report, and no time limit – meaning, you can submit data that was collected outside of the reporting period. Files should be submitted in chronological order from the oldest update to the newest, with the most recent updates submitted in the LAST file uploaded to the system.

The image above shows a truncated version of the Background form. If the same participant was seen once in May and a second time in June, you should first submit updates from May in one file, and then submit the updates from June. This would also apply for situations in which there are multiple update types within the same month/ reporting period.

Please do not re-submit data that was already saved to the HSMED.

Recap: Topics in this Section

- Upload History
- File Statuses
- Data Validations
- Validation Reports
- Additional Validation Rules and Considerations
- Special Circumstances

Downloading Data

- Clicking the “Download Client-Level Data” button from the Upload File page will create an Excel download of all the HSMED data submitted by your organization. The download will have the Grant Number and Report Tracking Number included in the Excel file name.

The screenshot shows the 'Upload File' page in the HRSA system. On the left is a navigation menu with 'All Functions', 'Client-Level Data', 'Submissions', 'Upload File', and 'Upload History'. The main content area displays submission details for HSMED00004076, including Grant Number H49MC00030 and Grantee Name CARDIFF PERFORATING COLLEGE. The submission status is 'In Progress'. A red arrow points to the 'Download Client-level Data' button. Below the details are upload instructions and a reporting period of May 2024 - Jun 2024.

Once you’ve finished uploading your files, and they’ve reached the “Completed” or “Completed with Alerts” status, you can download your data to review what you are submitting.

On the Upload File page, you can click the “Download Client-Level Data” button to download an Excel document with all of the HSMED data that has been submitted by your organization. The download will include all participants that have been submitted, regardless of which reporting period they were submitted in, and will have the most recent updates for each of the participants submitted. The file will have the grant number and report tracking number included in the Excel file name.

Understanding the Data Download

- Within the Excel file, data for each form is separated into different tabs at the bottom of the Excel to navigate between different forms' data.
- Fields are separated by column, while participants are separated by rows.
- "Multiple-choice question" elements show the value of the response, and not the numerical ID (e.g., Enrolled Woman, rather than 1)
- Elements allowing multiple values (i.e., "Select all that apply" questions) are shown as separate variables with dichotomous values (No, Yes)

	A	B	C	D	E	F	G	H	I	J	K
1	ParticipantType	OtherPPSpeci	PPUID	OtherLinkedPP	NoOtherPP	HasEnrolledChi	PPEenrollment	PPEenrollmentPhase (Woman preconception)	PPEenrollmentPhase (Man preconception)	PPEenrollmentPhase (Currently pregnant)	PPEenrollmentPhase (Other)
2	Enrolled Man		123PP0736		TRUE	Yes currently	10/04/2020	Yes	No	No	No
3	Enrolled Man		123PP0731		TRUE	Yes currently	09/29/2020	Yes	No	No	No
4	Enrolled Woman	String	945PP1000014		TRUE	Yes currently	10/03/2020	Yes	No	No	No
5	Enrolled Woman	String	945PP1000017		TRUE	Yes currently	10/03/2020	Yes	No	No	No
6	Enrolled Woman	String	945PP1000013		TRUE	Yes currently	10/03/2020	Yes	No	No	No
7	Enrolled Woman	String	945PP1000011		TRUE	Yes currently	10/03/2020	Yes	No	No	No
8	Enrolled Man		123PP0631	123PP0002, 123F	TRUE	Yes currently	09/29/2020	Yes	No	No	No
9	Enrolled Man		123PPi0001	123PP0001	TRUE	Yes currently	09/28/2020	Yes	No	No	No
10	Enrolled Man		123PPNewID012		TRUE	Yes currently	09/29/2020	Yes	No	No	No
11	Enrolled Man		123PPNewID013		TRUE	Yes currently	09/29/2020	Yes	No	No	No

Above is a sample of the Excel download.

Within the Excel, data for each of the forms is separated into different tabs at the bottom of the Excel to navigate between the different forms' data.

Similarly to the CSV files, fields are separated by columns, while participants are shown in separate rows.

Multiple-choice questions show the value of the response, rather than the numerical IDs (for example, Participant Type = 1 would show as "Enrolled Woman").

Elements that allow multiple values (i.e., select all that apply questions) are shown as separate variables with Yes/No answers. For example, PPEenrollmentPhase is broken out into "Woman preconception", "Man preconception", etc. for each of the possible answers, and each is given a response of "Yes" or "No."

- It is generally not advised to fix errors in CSVs and XMLs and upload again because this will not fix the source of the problem.
 - If your data collection system does not have the most current and correct data, it is likely that you will repeatedly generate files with the same error.
- Priority should be to fix the source of the error so it does not occur every time the CSV/XML is generated. This may require going into your data collection systems or contacting your vendor.
- The **Implementation Guides** explain and demonstrate in detail what types of values are compliant for each field in the CSV/XML. They also provide examples of how those fields should look within the CSV/XML.

If you find that there are any errors in your data, or if there are any changes you would like to make, you may need to correct your data.

In these cases, we generally do not advise that you fix errors in the CSVs and XMLs and upload again. If you only correct the CSV or XML, you will not fix the source of the problem. If your data collection system does not have the most current and correct data, it is likely that you will repeatedly generate files with the same error.

Instead, you should prioritize fixing the source of the error so it does not occur every time the CSV or XML is generated. This may require you to update your data collection system or contact your vendor.

The Implementation Guides explain and demonstrate in detail what types of values are compliant for each field in the CSV/XML. They also provide examples of how those fields should look within the CSV/XML.

Correcting Submitted Data

- To correct data you have already submitted to HSMED, upload your corrected file to HSMED using the same upload process previously discussed. Please note the following:
 - Mark the “Correction” data element as “Yes”, and leave all fields that were previously correct as is. The system will completely overwrite previous data for each participant in the upload file, so please ensure that your upload includes **all** previously included participants.
 - Do not make changes to the “UpdateType” data element. For example, if you submitted a Background form for a participant with UpdateType “2 – Enrolled woman ends Prenatal” selected and find that you need to correct the submission, please resubmit corrections with the same UpdateType selected.

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To correct data you have already submitted to HSMED, upload your corrected file to HSMED using the same upload process previously discussed. There are a couple of things to keep in mind when correcting your data.

You must ensure the “Correction” data element is marked as “Yes”. Leave all fields that were previously correct as is. The system will completely overwrite previous data for each participant in the upload file, so please ensure that your upload includes all previously included participants.

Do not make changes to the “UpdateType” data element. For example, if you submitted a Background form for a client with UpdateType “2 – Enrolled woman ends Prenatal” selected and find that you need to correct the submission, edit the fields that have incorrect data, select “Yes” in the Correction element, and resubmit corrections with the same UpdateType (“2 – Enrolled woman ends Prenatal”) selected.

Updating Submitted Data

- When participants reach key milestones according to MCHB guidelines, you will also need to update their information.
- In those cases, please correctly select the UpdateType to be sure that your participant's information correctly reflects the change in their status.
- If a participant has multiple updates within a reporting period, submit updated data multiple times to reflect each type of update.

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When participants reach key milestones according to MCHB guidelines, you will also need to update the client's information.

In those cases, please correctly select the UpdateType to be sure that your client's information correctly reflects the change in their status.

If a participant has multiple updates within a reporting period, submit updated data multiple times to reflect each type of update.

Mark as Complete

- Once your organization has finished uploading all applicable forms for the reporting period, clicking the “Mark as Complete” button will close the report for editing and allow your Project Officer to review the report.
- **NOTE:** When one user in an organization clicks the “Mark as Complete” button, the task will close for ALL users in the organization. **Please ensure that all forms have been uploaded prior to clicking “Mark as Complete”**

Upload File

▼ HSMED0000027 Submission Status: In Progress

Grant Number : H49MC00060 Grantee Name : MOWING VENT HOSPITAL DISTRICT

[Mark As Complete](#) [Download Client-level Data](#)

Upload Instructions
(Download Implementation Guides)

1. Select 'Select Healthy Start Form to Upload' for your submission
2. Click 'Select Files' or drag file to upload area
3. Make sure you are uploading as a .csv or .xml file type
4. If your file contains more than 2000 records, please split into smaller files
5. Click 'Validate' to see data validation results

Fields with ★ are required

Once you’ve finished uploading all required forms for the reporting period, and reviewed your data for submission, you must click the “Mark as Complete” button to close the report for editing and allow your Project Officer to review the report.

NOTE: When one user in an organization clicks the “Mark as Complete” button, the task will close for ALL users in the organization. If your organization has more than one person uploading files for a reporting period, please communicate within your organization to make sure that all files have been uploaded prior to clicking “Mark as Complete.”

Once a report has been marked as complete, your organization will no longer be able to make any changes or submit any additional data. At that point, should you need to make any changes, you should email your Project Officer and HealthyStartData@hrsa.gov to request that they send your submission back to you for changes.

What Happens Next?

- Your report will move to the Project Officers for review. POs will review your report and will have the option to approve the report or request changes.
- Your Project Director will automatically receive an email. Other users may also receive emails if the PO chooses to include them.
- If the PO requests changes, the report will return to your organization's "Pending Tasks" page, as described above. You can then upload new files and "Mark as Complete" when you have completed all requested changes.
- This process will repeat until the PO approves the report.

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As soon as you've submitted your report, it will move to your Project Officer (PO) for review. POs will review your report and will have the option to approve the report or request changes. In each of these cases, your Project Director will automatically receive an email. Other users may also receive emails if the PO chooses to include them, so if you wish to also receive the notification, please email your PO and request that they include you on notification emails.

If the PO requests changes, the report will return to your organization's "Pending Tasks" page, as described previously. You can then upload new files and "Mark as Complete" when you have completed all requested changes. This process will repeat until the PO approves the report.

New Validation Tool Roll-Out

- A new validation tool was created to allow programs to test their files against the HSMED schema and data validations *prior* to uploading in the system.
- **DO NOT SUBMIT TEST DATA TO THE HSMED** – you may use test data with the validation tool.
- A recorded training and guide will be posted to the HealthyStart-tasc.org website for the validation tool.

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DO NOT SUBMIT TEST DATA TO THE HSMED – you may use test data with the validation tool.

A recorded training and guide is posted to the HealthyStart-tasc.org website for the validation tool.

Recap: Topics in this Section

- Data Download
- Correcting Data
- Updating Data
- Mark as Complete
- PO Actions After Submission

Technical Assistance and Support

- For issues regarding EHBs login, please contact the EHBs helpline: 877-Go4-HRSA/877-464-4772
- For questions specific to use of HSMED, please send an email to: HealthyStartData@hrsa.gov and use the subject line: “**Technical Support Request for HSMED**”
- For questions regarding Healthy Start policy and SOPs, please send questions to: HealthyStartData@hrsa.gov and CC your Project Officer.

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If you run into any problems or issues while submitting your reports, please refer your questions to the technical support options listed on this slide.

For issues regarding EHBs login, please contact the EHBs hotline.

For issues regarding the HSMED system, please send an email to: HealthyStartData@hrsa.gov and use the subject line: “**Technical Support Request for HSMED**”. Questions about the HSMED system will include pretty much all topics included in this training. Please remember to include the correct subject line, as it will ensure that your question is redirected in a timely fashion to the people who are able to provide the best support. Please include as much information as possible, including browser used, screenshots, and any files that may be having issues.

Questions regarding MCHB policy, best practices, and standard operating procedures (SOPs) should be sent to: HealthyStartData@hrsa.gov and CC your Project Officer. For example, if you have questions about what type of data you should be reporting, completeness or data quality, update types, etc.