RSR Check Your XML Feature

Ryan White HIV/AIDS Program Services Report (RSR)

HIV/AIDS Bureau

November 1, 2023

Welcome to today's Webinar. Thank you so much for joining us today!
My name is Hunter Robertson. I'm a member of the DISQ Team, one of several groups engaged by HAB to provide training and technical assistance to recipients and providers for the Ryan White HIV/AIDS Program Services Report, or RSR.

Today's Webinar is Presented by:

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Throughout the presentation, we will reference some resources that we think are important. *To help you keep track of these and make sure you have access to them immediately, my colleague Isia is going to chat out the link to the presentation slides right now which include all the resources mentioned in today's webinar.*

At any time during the presentation, you'll be able to send us questions using the "Question" function on your settings on the bottom of the screen. You'll also be able to ask questions directly "live" at the end of the presentation. You can do so by clicking the "raise hand" button (on your settings) and my colleague Isia will conference you in.

Now before we start, I'm going to answer one of the most commonly asked questions about the recording. The recording of today's webinar will be available on the TargetHIV website within one week of the webinar. The slides are already available for you to access on the TargetHIV website using the link that Isia just chatted out. Please note that these slides are not 508 compliant, but we will follow up with all registrants in about two weeks when the 508 compliant slides and written question and answer are posted.

Disclaimer

Today's webinar is supported by the following organizations and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, the Health Resources and Services Administration (HRSA), the U.S. Department of Health and Human Services (HHS), or the U.S. government.

> The DISQ Team is comprised of CAI, Abt Associates, and Mission Analytics and is supported by HRSA of HHS as part of a cooperative agreement totaling over $4 Million.

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Resources

2023 RSR Instruction Manual

Ryan White HIV/AIDS Program Services Report (RSR)
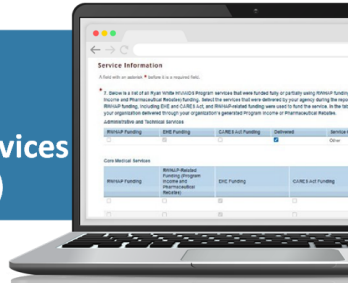
Available now on TargetHIV

Before we begin the webinar, please note that the 2023 RSR Instruction Manual is now available on the TargetHIV website.

The RSR Instruction Manual is an essential resource to utilize while completing your RSR. I recommend downloading it and beginning to familiarize yourself with it.

Outline

What Is Check Your XML and Why Should I Use It?

What Features Are Available?

How Do I Use It?

Questions

Let's get started. As I mentioned, today's webinar is about the "Check Your XML" feature for the RSR. The Check Your XML feature is a great tool available for use before and during the RSR submission period.

Today, I'll provide an overview of (CLICK) what the Check Your XML feature is and how it can help you with the RSR. We'll also review the (CLICK) features of Check Your XML and go through the different reports that are available to review your data quality. Finally, Ellie will review the (CLICK) steps for using Check Your XML. And as always, we'll (CLICK) address any questions you have in the live Q&A session at the end of the webinar.

Now this is a more technical webinar than some of our webinars – if you aren't familiar with the RSR, I encourage you to stick with us, but strongly recommend that you check out our other more basic webinars before accessing the Check Your XML. A link to our webinar archive can also be found on the resource sheet that Isia chatted out at the beginning of the webinar.

RSR Submission Timeline

Date	Recipients	Providers
Year-Round	Grantee Contract Management System (GCMS) is open year-round	--
Thursday, October 26, 2023	Check Your XML Open	Check Your XML Open
Monday, December 4, 2023	Recipient Report Start Date	--
Monday, February 5, 2024	Recipient Report Due Date	Provider Report Start Date
Monday, March 4, 2024	--	Provider Report Target Date
Monday, March 18, 2024	Return for Changes Deadline	--
Monday, March 25, 2024	All RSRs must be in "Submitted" status by 6pm ET	All RSRs must be in "Submitted" status by 6pm ET

Let's do a quick check of the RSR submission timeline. The Grantee Contract Management System (GCMS is open year-round for recipients to enter their provider contract and service information. As a reminder, the GCMS is a data-storage system where Ryan White HIV/AIDS Program recipients enter contract information for their grant funds. This includes service categories and the funding amounts for those services you or your subrecipients will be providing. This system helps to save time and decrease reporting burden as the contract details are used to populate multiple reports, including the RSR.

Check Your XML and TRAX opened a few days ago on Thursday, October 26, 2023. The Recipient Report opens on December 4, 2023, and is due February 5, 2024. The Provider Report opens the same day as the Recipient Report due date, February 5, 2024. All RSRs must be in submitted status by 6PM Eastern on March 25, 2024.

HAB strongly encourages providers to submit their client-level data and Provider Report to their recipients to review by March 4th. This gives you plenty of time to review the data before the final submission to ensure that your data accurately reflect the great work that you all are doing. For those of you that are ready to get started on reviewing your data before the Provider Report opens on February 5th, this webinar is for you – we'll walk through how you can use the Check Your XML feature right now to make sure that your RSR client-level data file is the best it can be. It's never too early to get started on checking your data!

What Is the Check Your XML Feature?

- Feature in the RSR Web System that allows you to check:
  - Your file for schema compliance
  - The quality of your data
- Same as the upload except:
  - NOT tied to Recipient or Provider Reports
    - Does not include all validations
    - You still need to upload into the Provider Report
  - Data are deleted after 30 days

The Check Your XML feature has two main purposes: first, it allows you to check that your file is compliant with the system schema meaning is your file in the right format. Once your file passes the schema checks, the other purpose of Check Your XML is to check the quality of your data before prime time RSR season. The Check Your XML feature includes the same client-level reports that are in the Provider Report – namely, the Validation and the Upload Completeness Reports – but there are a few critical differences. The Check Your XML is NOT tied to the RSR Recipient or Provider Reports, so it does not include validations that cross-reference between these reports and your client-level data. For example, the Check Your XML can tell you if you uploaded clients with Outpatient/Ambulatory Health Services (OAHS) with missing viral load data, but it cannot tell if your agency was funded for OAHS. Also, data uploaded into the Check Your XML are deleted after 30 days. This means that uploading into Check Your XML is not the same thing as completing the RSR Provider Report and you will still need to upload data into the RSR Provider Report.

Poll #1

Now that we've done a quick review of the Check Your XML feature, we'll launch into our first poll because I'd like to know how familiar you all are with the feature already. Isia, can you launch the poll?

How familiar are you with the Check Your XML feature?

      a. I use it every year
      b. I've tried using it, but I'm not quite sure what I'm doing
      c. I have never used the Check Your XML feature

We are really excited to have all of you here today whether you're new to Check Your XML or if you've been using it for years. For those of you who use the feature every year, this will be a great refresher. And if you're new to Check Your XML or not quite sure how to use it, we hope this presentation can help you understand how to take advantage of this great tool and how important it is to check your data quality early.

Why Is RSR Data Quality So Important?

- RSR data are used to report information about the Ryan White HIV/AIDS Program to stakeholders
- Good data can help you assess program quality

Check Your XML
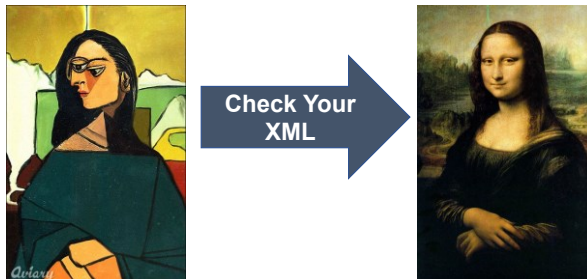
For those of you who have been on webinars with us previously, you're probably familiar with the Mona Lisa example of how your program will look if there are holes in your data. This is a great example to demonstrate why data quality is so important: you want your RSR data to reflect the good work that you do. Your project officer and HAB leadership will review RSR data to learn more about your program. RSR data are also used to present the Ryan White Program to Congress, the HIV community, and the public at large.

In addition, good quality data can help you improve quality of care, but poor-quality data cannot. If your data do not reflect your actual program activities, you can't use them to improve your performance.

The Check Your XML feature helps you get a head start before the submission season to make sure your data reflect your program.

Outline

What Is Check Your XML and Why Should I Use It?

What Features Are Available?

How Do I Use It?

Questions

Now that we've discussed what the Check Your XML feature is and why you should use it, let's review the (CLICK) features that are available.

Check Your XML File's Schema

<EthnicityID>2</EthnicityID>

EthnicityID
1=Hispanic/Latino;
2=Non-Hispanic/Latino

As I mentioned, the first thing that the Check Your XML helps you do is ensure that your XML file schema match with the system schema. What I mean by that is that your XML file has to be in the right structure with the right contents for the system to be able to read your data. Let's take a look at a couple quick examples.

(CLICK) On the left is a tag, or essentially one data point, from an XML file. In this example, a provider has reported an Ethnicity ID of "2" for this client. The system schema – shown on the right – allow providers to upload a value of 1 (for Hispanic/Latino) or 2 (for Non-Hispanic/Latino) for each client. Since this file is properly formatted and has an acceptable value, this tag (CLICK) conforms with the schema.

Check Your XML File's Schema

<HousingStatusID>U</HousingStatusID>

<HousingStatusID>3</HousingStatusID>

HousingStatusID:

1=Stable Permanent Housing;

2=Temporary Housing

3=Unstable Housing

In this example, our provider has reported a value of "U" indicating the client is Unstably housed. The (CLICK) system schema allows a value of 1 (Stable Permanent Housing), 2 (for Temporary) and 3 for Unstable Housing– "U" is not allowed, so a file containing this value would be *rejected.

Instead, the (CLICK) provider would need to report the housing status as a "3" in their XML file. This tag would (CLICK) pass the schema checks. Values for the schema files can be found in the RSR Data Dictionary and XML Schema Implementation Guide which is on TargetHIV and also in the resources Isia chatted out earlier.

No Schema Changes for 2023!

- The RSR schema will not change for the 2023 RSR
- Check out the [Preparing for 2023 RSR Reporting: Updates and Best Practices](#) webinar for other updates

As I just mentioned, there were no changes to the RSR schema for 2023 reporting. So, while you should update your data management system to make sure that you have the most up-to-date build for any improvements, the schema will remain the same as last year.

However, you should check the recent webinar on preparing for the 2023 RSR: Updates and Best Practices for clarifications to reporting requirements, that may impact your report.

Check Your XML Data Quality

- The **Validation Report** and **Upload Completeness Report (UCR)** are available:

  o To providers and their recipients

  o For a single or consolidated client-level data file

  o In multiple formats to better print, analyze, and share your reports!

Once you've ensured that your file complies with the system's schema, you're ready to check your file for data completeness and quality using the Validation Report and the Upload Completeness Report, or UCR. I'm going to provide a brief overview of these reports, then we'll go into detail on each one.

If you are a provider or a recipient/provider, meaning you directly provide services to Ryan White clients, you can use Check Your XML reports to view your own data. If you are a recipient, you can also use the feature to view your providers' data. Remember, though, that data go away after 30 days, so you'll want to coordinate with your providers on the timing of their upload.

You can also run reports on a single XML file or consolidated data. I'll talk about what that means in a moment.

Finally, the reports are available in 7 different file formats. While that seems like a lot of choices, if you're writing a report for your agency leadership and want to include information from the Upload Completeness Report, you can save the report in Word and then easily cut and paste the information into the report you are writing. Being able to download in Excel is great for comparing the reports to your source data. You can also easily print and email the reports as PDFs.

Check Your XML Data Quality

- **Single** versus **consolidated** client-level data file

  o If providers upload more than one client-level data file, data are merged via the RSR Merge Rules

  o Pinpoint issues in the single file

  o Check for incongruent values in the consolidated file

As I mentioned, you can run Check Your XML reports on a single XML file or consolidated data combined from multiple files. If you upload more than one file, HAB merges your data based on eUCI and defined merge rules. The RSR Merge Rules can be found on TargetHIV and are linked in the resource document.

Once all the files are uploaded to Check Your XML, you can run the Check Your XML reports on each individual file or on the consolidated data. Running reports on each individual file may help you better pinpoint issues. For example, you may create the reports from different data management systems, and you want to identify which system is causing the problem.

Running the reports on your consolidated file is helpful because it might show more comprehensive data – fewer missing values. It will also show you if you have inconsistent values such as different genders for the same client. These inconsistent values will lead to a "incongruent" value. These incongruent values will show up in your Validation Report and your Upload Completeness Report, so you can fix inconsistencies.

Now, let's review each of the reports included in the Check Your XML in a little more depth.

Validation Report

- Types of validation messages
  - **Errors:** Fix to submit
  - **Warnings**: Fix or enter a comment
  - **Alerts**: Fix if needed, no comment required

- Features
  - Sortable
  - Available for individual files and the merged file
    - Merged file will include validations for incongruent values

- 2023 RSR Data Validations now available on TargetHIV

The validation report runs the same validation checks on your client-level data that are required to submit the RSR. Remember, Check Your XML does not include the recipient or provider reports so none of the validations that cross check data across the reports are included.

There are three types of validation messages you may receive. (CLICK) Errors must be fixed in order for you to submit your data. You should try to resolve all (CLICK) warnings as appropriate, but if you can't do so, you may enter a comment for each warning validation message to explain why the data appear the way they do. The data may actually be correct, or you may not have access to the correct data – either way, you'll need to provide a sufficient comment explaining the situation. Finally, the purpose of the (CLICK) alert is to have you consider your data. If it's incorrect, you should fix the problem, but some alerts are merely informational.

The validation results are sortable by eUCI and by message to help you fix any data issues with your file. Remember, a big advantage to using Check Your XML is that you can identify these issues before the RSR opens and address them so when you upload for the actual submission, you don't have validation messages to resolve! The link to the validation messages is also included on your resource sheet.

The 2023 RSR Data Validations are now available on TargetHIV. The document provides information on the data validations related to the RSR Recipient Report, Provider Report, and client-level data file. Data element numbers allow you to reference between validations document and the RSR Instruction Manual.

Upload Completeness Report (UCR)

- Shows breakdown of response options for each data element
- Reflects missing data
- Shows data for the current and previous year
- Available in multiple formats
- Targeted to providers
  - Recipients must generate an individual report for each provider
- RSR UCR Training Module
  - Practice using and interpreting the UCR
  - What to look out for, how to resolve data issues

Now let's move on to the Upload Completeness Report, or UCR. This report shows the breakdown of response options for each RSR data element, and the number and percent of clients that have missing data. It's important to note that the UCR only includes data for clients who require each data element. So, for example if you report housing status data for a client that is NOT required to have it, that client's housing status won't show up in the housing status table. But this also means if you see missing data in your UCR, you know that is data you should be reporting.

The UCR also shows data from the previous year which can also help you improve your data quality by being able to compare responses across years.

Like all the reports in the RSR Web System, you can access the report in multiple formats to help you better analyze and share content.

The Upload Completeness Report allows you to spot-check every data element, which can be really helpful for providers to make sure what you're reporting aligns with the services you provide. Recipients can also use the UCR to check their providers' data, you just have to generate one report at a time since there is no consolidated report across all providers. I also want to highlight the RSR UCR Training Module which is an interactive module on TargetHIV that walks you through how to use the UCR, how to interpret the tables included in the report, and what to do if you identify what look like data issues. The module allows you to actually practice spot-checking data using the UCR, so it's a really helpful resource we hope that you all take advantage of!

Outline

What Is Check Your XML and Why Should I Use It?

What Features Are Available?

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Questions

Now that we've reviewed the reports available in the Check Your XML feature, I'm going to turn things over to Ellie to show you (CLICK) how to access the Check Your XML Feature to upload and review your data.

Logging in to the System

Recipients

Access the Check Your XML Feature via the [Electronic Handbooks (EHB)](#)

Providers only

Thanks, Hunter!

Check Your XML lives in the RSR Web System which can be accessed through the EHBs by both recipients and providers via the link on this slide and in your resource document.

Click on applicant/grantee if you are a recipient, or an agency that receive a RWHAP or EHE award directly from HRSA HAB.

For everyone else, you'll use the service provider portal. This is for provider only organizations. You provide services using RWHAP, EHE, or RWHAP-related funding but you are not the direct recipient of a RWHAP or EHE award directly from HRSA HAB.

New for 2023: Login.gov

- You'll need to create an account through Login.gov
- Login.gov promotes security through two-factor authentication
- Learn more!
  - [Creating an account](#)
  - [FAQs](#)
  - [How to video](#)

Note, if you have not logged into the EHBs since May 2023, you'll need to create a Login.gov account with your existing email.

Login.gov promotes security through two-factor authentication.

It's a pretty straightforward process and there are some great how to resources, so don't worry, if you're new to this.

Navigate to the RSR

- Follow instructions in the:
  - [RSR Instruction Manual](#) (starting on page 30)
  - [How to Access the RSR Provider Report Video](#) (providers only)

Next, you want to navigate to the RSR. The process is different depending on whether you're a recipient/provider or provider only. Once again, I'm going to refer you to resources instead of going through the process step by step.

The instruction manual is always your best bet. You can also watch a short video posted on TargetHIV.
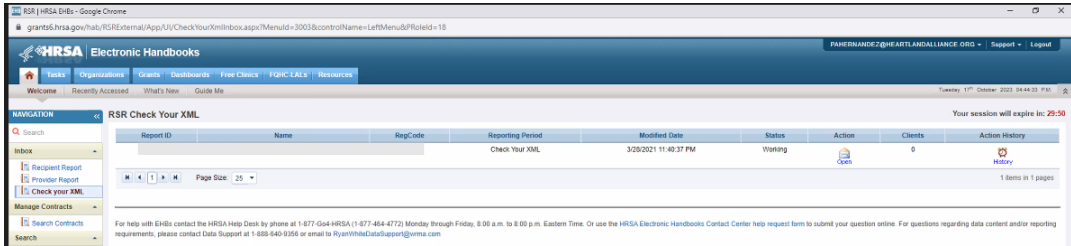
Access Check Your XML: Recipient Providers

February 5:
Provider Report Opens

Access through the **2022** RSR deliverable   Access through the **2023** RSR deliverable
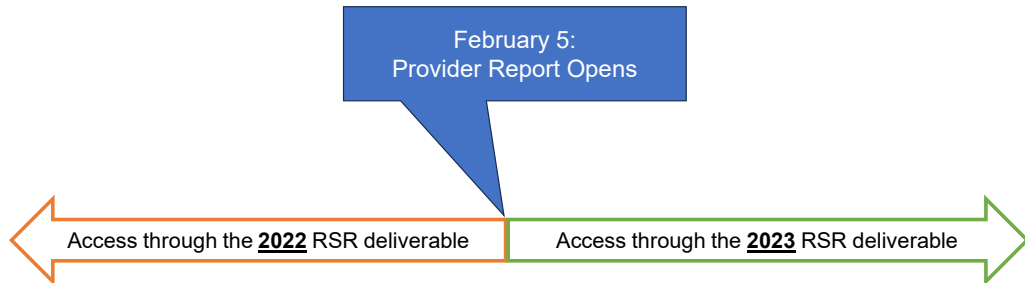
If you're a provider only, you'll be taken directly to the RSR Inbox to access your Check Your XML.

If you're a recipient provider, the process for accessing Check Your XML depends on when you access it. (CLICK) February 5 is the key date. That's the date the RSR Provider Report opens. (CLICK) Prior to that date, you'll need to go into your 2022 RSR. (CLICK) After that date, you can go in through your 2023 RSR.

RSR Inbox: Click "Check Your XML" then "Open"

Once you access the RSR, you just need to locate the Check Your XML feature.

RSR Inbox: Click "Check Your XML" then "Open"

Once you access the RSR, you just need to locate the Check Your XML feature. (CLICK)
To access the Check Your XML feature, click on the link in the left-hand navigation
menu and then click open. (CLICK)

Browse to and Upload Your File

Now it's time to upload your file. (CLICK) Click on Choose File, browse to your file and upload.

Run Your Reports

Data Quality Flags: Validation Report

Data Summary: Upload Completeness Report

If your file passes the schema check – yay – (CLICK) run your Validation Report and your (CLICK) Upload Completeness Report to check data quality. Contact DISQ if you have questions or concerns on the process or messages you get.

Non-Provider Users

- Recipients: View your providers' reports to check data quality
  - Enter the RSR Web System through the EHBs
  - Click on Check Your XML under the Search menu
  - Search by the provider's name
  - Access the reports the same way as providers

- RSR-Ready Systems: To test if your system is generating compliant files, contact DISQ at Data.TA@caiglobal.org

The process I just showed you is useful for providers and their recipients to review data prior to upload.

Although the reports are generated at the provider level, they're still useful for recipients to review before submission.

(CLICK) To do so, once you are in the RSR Web System through the EHBs, recipients will use to Check Your XML link. Search by the provider's name. You'll have access to all of the reports that were just reviewed.

(CLICK) If you are a vendor for an RSR-ready system and want to test some files now, or if you are a provider and you want to make sure your data system vendor is prepared for 2023 reporting, please contact the DISQ Team.

Takeaways

- Check Your XML has two reports to help you view and analyze your data prior to submission
  - Check Your XML is already available in the RSR Web System
  - Start now!

- Starting February 5th, **upload to the <u>Provider Report</u>** to submit instead of Check Your XML
  - Validations will cross-check your Provider Report and XML
  - Data in Check Your XML is <u>NOT</u> submitted to HAB

- HAB wants to support you in submitting the best data possible

In summary, the (CLICK) Check Your XML feature has some great reports that help you review your data before submission. The system is already open so start as soon as you can so you have ample time to review your data and make corrections if needed.

(CLICK) Check Your XML is available now through your 2022 RSR deliverable. When the Provider Report opens on February 5th, you can access Check Your XML through the 2023 deliverable. However, we recommend you start using the main Provider Report system to check your data completeness and quality instead of Check Your XML. You can still delete and re-upload files, and do everything I just showed you.

This difference is what you upload into the Check Your XML is not reported to HAB, and the Validation Report in Check Your XML cannot cross-check between your client-level data and your Provider Report. Only the data imported to your Provider Report will be submitted to HAB and cross-checked with the other parts of your RSR.

(CLICK) HAB provides the Check Your XML feature to support you in submitting the best data that you can. Of course, if you have suggestions for the Check Your XML feature, please let us know. New features have been added in the past based on your recommendations.

TA Resources

- The DISQ Team:
  - Data.TA@caiglobal.org
  - Sign up for the DISQ listserv
  - Submit a DISQ TA request

- Ryan White HIV/AIDS Program Data Support:
  - RyanWhiteDataSupport@wrma.com
  - 888-640-9356

- EHBs Customer Support Center:
  - 877-464-4772
  - Submit an EHBs TA Request

- CAREWare Help Desk:
  - cwhelp@jprog.com
  - 877-294-3571
  - Join the CAREWare listserv

Before we finish up, I'd like to review the available technical assistance. The DISQ Team addresses questions for those needing significant assistance to meet data reporting requirements. DISQ also deals with data quality issues, as well as providing TA on TRAX and support in creating documentation.

Data Support addresses RSR-related content and submission questions. Topics include: Interpretation of the Instruction Manual and HAB's reporting requirements; Allowable responses to data elements; Policy questions related to the data reporting requirements; and Data-related validation questions.

The EHBs Customer Support Center addresses software-related questions. Topics include: Electronic Handbook (EHB navigation, registration, access and permissions and Performance Report submission statuses.

Finally, the CAREWare help desk is your best resource for any TA requests related to CAREWare. We encourage you to register for the listserv to join the conversation with other CAREWare users across the country.

Most importantly, there is no wrong door for TA – if you're not sure who to contact, we're happy to refer you to where you need to go!

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To learn more about our agency,
visit

www.HRSA.gov

✉ Sign up for the HRSA *eNews*

FOLLOW US: (f) (🐦) (in) (▶)

Finally, to connect with and find out more about HRSA, check out HRSA.gov. And now I would like to turn it over to Ellie for the Q&A portion of the webinar.

Outline

What Is Check Your XML and Why Should I Use It?
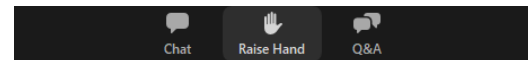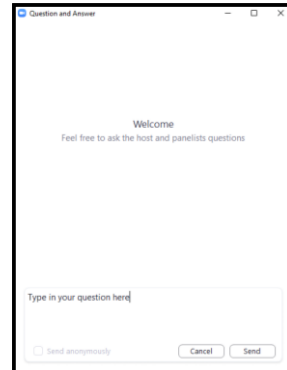
What Features Are Available?

How Do I Use It?

Questions

Now that we've gotten through all our content for today, we want to give you all a change to ask any (CLICK) questions you have today.

And now to your questions – but first, I would like to remind you that a brief evaluation will appear on your screen as you exit, to help us understand how we did and what other information you would have liked included on this webcast. We appreciate your feedback very much, and use this information to plan future webcasts. My DISQ colleague Isia is going to put a link out in the chat feature if you would prefer to access the evaluation right now. We'll also send a final reminder via email shortly after the webinar

As a reminder, you can send us questions using the "Question" function on your control panel on the right hand side of the screen. You can also ask questions directly "live." You can do this by clicking the raise hand button (on your control panel). If you are using a headset with a microphone, Isia will conference you in; or, you can click the telephone button and you will see a dial in number and code. We hope you consider asking questions "live" because we really like hearing voices other than our own.

We do want to get all of your questions answered, and we do not usually run over an hour. If you have submitted your question in the question box and we cannot respond to your question today, we will contact you to follow up. We often need to explore your question in order to give you the most appropriate answer.