



RSR Check Your XML Feature

Ryan White HIV/AIDS Program Services Report (RSR)

HIV/AIDS Bureau

November 3, 2021



Welcome to today's webinar. Thank you so much for joining us today!

My name is AJ Jones. 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 Services Report, or RSR.

Today's Webinar is Presented by:



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Data.TA@caiglobal.org



Today's Webinar is presented by Ruchi Mehta and myself. Ruchi and I both represent the DISQ Team's work with client-level data for the RSR. In this webinar, Ruchi will showcase the Check Your XML Feature, which is a tool in the RSR Web System that you can use to check your client-level data quality prior to submission.

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 Audrey is going to chat out the link to a document right now that includes the locations of 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. We will address all questions during the Q&A portion at the end of the webinar.

Before we get started, I'm going to answer one of the most commonly asked questions about the slides. The recording of today's webinar will be available on the TargetHIV website within one week of the webinar; the slides and written question and answer document are usually available within two weeks.

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 \$4,000,000.00.

Ryan White HIV/AIDS Program Data Support is comprised of WRMA and CSR and is supported by HRSA of HHS as part of a contract totaling \$5,092,875.59.

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Now I'd like to turn the webinar over to Ruchi.

Outline

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

What Features Are Available

How Do I Use It?

Questions

I'm going to provide an overview of what the Check Your XML feature is and how it can help you with the RSR. We'll also review the features of Check Your XML and go through the different reports that are available to review your data quality. Finally, we'll review the steps for using Check Your XML. And as always, we'll 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 Audrey chatted out at the beginning of the webinar.

2021 RSR Submission Timeline

Activity	Start Date	Due Date
Grantee Contract Management System (GCMS)	Year-Round	Year-Round
Check Your XML Opens	November 1 st , 2021	-
RSR Recipient Report	December 6 th , 2021	February 7 th , 2022
RSR Provider Report/ Client-level Data	February 7 th , 2022	Target Upload Date: March 7 th , 2022 Final Deadline: March 28st, 2022 6:00 PM ET

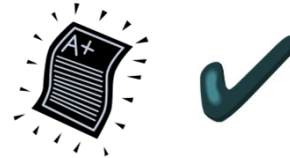
First, let's start with a reminder of where we are in the reporting process. The GCMS – or the Grantee Contract Management System – is open for recipients to enter their provider's contract information all year round. The Check Your XML feature, which is the focus of today's webinar, is currently available in the RSR Web System and has been since November 1st.

On December 6th, the system will be available for recipients to begin their Recipient Report. This report must be certified by February 7th. Providers can go in and complete the online Provider Report in the RSR Web System starting February 7th as well. The final deliverable including the Recipient Report, Provider Report, and client-level data upload are due no later than March 21st at 6pm ET – any reports submitted after this time will be marked late by the system.

HAB strongly encourages providers to submit their client-level data and Provider Report to their recipients to review by March 7th. 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 7th, 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 was created for two main purposes: first, it allows you to check that your file is compliant with the system schema. Once your file passes the schema checks, the other major 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 you still need to upload data into the RSR Provider Report. regardless of whether you upload into the Check Your XML, or your submission will not be considered complete.



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. Audrey, 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

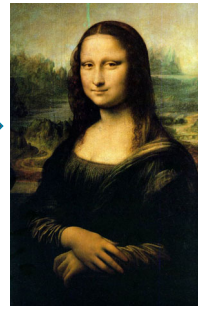
We are really excited to have all of you here today whether you're new to Check Your XML or if you've been using it for years. For those of you who use the feature every year, this will be a great refresher. And if you're new to Check Your XML or not quite sure how to use it, we hope this presentation 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. I just want to remind everyone 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.

Check Your XML File's Schema (Part 1)



<EthnicityID>2</EthnicityID>



EthnicityID

1=Hispanic/Latino;

2=Non-Hispanic/Latino

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

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.

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 conforms with the schema.

Check Your XML File's Schema (Part 2)



<SexAtBirthID>M</SexAtBirthID>

<SexAtBirthID>1</SexAtBirthID>



SexAtBirthID

1=Male;

2=Female



In this example, our provider has reported a value of “M” indicating Male for a client’s sex assigned at birth. The system schema allows a value of 1 (for Male) or 2 (for Female) – “M” is not allowed, so a file containing this value would be rejected.

Instead, the provider would need to report the sex assigned at birth as a “1” in their XML file. This tag would pass the schema checks.

The good news is, there are no updates to the RSR schema for 2021 reporting. So if you completed the RSR last year, the schema will be the same.

Required in 2021 RSR: Eligible Services Reporting

- **Eligible Services Reporting:** Agencies must report client-level data for eligible clients who receive at least one service which the agency used RWHAP *or RWHAP-related* funding to provide
- **RWHAP funding:** Part A, Part B, Part C, Part D, FY 2020 CARES Act, EHE Initiative
- **RWHAP-related funding:** Program income ([PCN 15-03](#)) and pharmaceutical rebates ([PCN 15-04](#))
- [In Focus document](#) on Eligible Services Reporting

Although there are no changes to the XML schema for 2021 reporting, one change to the 2021 RSR that may impact your client-level data is the Eligible Services Reporting requirement. Eligible Services Reporting was introduced as optional for the 2019 and 2020 RSRs, but for 2021 it will be required for all applicable providers.

Eligible Services Reporting means that agencies must report client-level data for eligible clients who receive at least one service that was provided using either Ryan White funding OR Ryan White-related funding for. While this might sound mostly familiar, the Ryan White-related funding aspect is new.

In previous years, you were required to report client-level data for clients who received a service from a category that was funded with traditional Ryan White funding – meaning funding from Part A, Part B, Part C, Part D, CARES Act, or Ending the HIV Epidemic. Now, in addition to that requirement, Ryan White-related funding will also be included; this includes program income and pharmaceutical rebates. For more information on these types of funding, check out HAB's PCNs 15-03 and 15-04.

For more information on Eligible Services Reporting requirement, check out our new In Focus document on Eligible Services Reporting which is included in the document with all of the links from today's presentation that Audrey chatted out earlier.



Now that we've reviewed Eligible Services Reporting, I just want to make sure that you all are prepared to include the necessary clients in your XML file this year. So Audrey, can you please launch our second poll?

Are you prepared to include additional clients and/or services in your client-level data XML file to fulfill the Eligible Services Reporting requirement?

- a. Yes, my agency has already implemented Eligible Services Reporting.
- b. Yes, we will be doing it for the first time this year but we're ready.
- c. I'm not sure, can someone help me figure out if we're on track?
- d. No, we need help making changes to include new clients/services.
- e. This change does not affect my agency.

If you need help figuring out what to do to make necessary changes to your reporting processes to prepare for Eligible Services Reporting, someone from our team will reach out to you to help.

Check Your XML Data Quality (Part 1)

- The **Validation Report** and **Upload Completeness Report** are available:
 - To providers and their recipients
 - For a single or consolidated client-level data file
 - In multiple formats to better print, analyze, and share your reports!

Once you've ensured that your file passes 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 included in the feature. 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, you can use the 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 formats. Why so many 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 (Part 2)

- **Single** versus **consolidated** client-level data file
 - If providers upload more than one client-level data file, data are merged via the [RSR Merge Rules](#)
 - Pinpoint issues in the single file
 - 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 is linked in the resource document.

Once all the files are uploaded to Check Your XML, you can run the Check Your XML report 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.

You can also run the reports on your consolidated file – the consolidated file 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



The first report you'll be able to access in Check Your XML is the Validation Report.

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. Errors must be fixed in order for you to submit your data. You should try to resolve all warnings as appropriate, but if you can't do so, you may enter a comment for each error 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 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 2021 validation messages is also included on your resource sheet.

Upload Completeness Report (UCR)

- Shows breakdown of response options for each RSR data element, including missing data (for required clients)
- 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. 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.

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 is a great tool to spot-check your data to ensure that what you're reporting looks aligned with the services you provide. However, I want to note that these reports are really targeted to providers. Recipients can absolutely use them to check their providers' data, but you have to generate one report at a time since there is no consolidated report across all providers.

I also want to highlight a new resource that we've developed this year that we hope will be helpful for you all in using the UCR this year. The RSR UCR Training Module 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!

Logging in to the system




- Recipients and providers can access the Check Your XML Feature via the [RSR Web System](#)

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

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.

If you are a provider and you don't have access to the RSR Web System, click the "Create an Account" button to access the registration form. You can reach out to Ryan White Data Support if you need your agency's registration code. Please note that you don't need to register more than once, so you should only register if you have NEVER accessed the system before.

If you are a recipient and don't have the access you need to the EHBs, check out our recent EHBs webinar for more information about how to access the system.



RSR Inbox: Click “Check Your XML”

[Home](#)
[Tasks](#)
[Organizations](#)
[Grants](#)
[Dashboards](#)
[Free Clinics](#)
[FQHC-LALS](#)
[Resources](#)

[Welcome](#)
[Recently Accessed](#)
[What's New](#)
[Guide Me](#)

NAVIGATION

- Inbox
 - Provider Report
 - Check your XML**
- Search
 - Provider Reports
- Administration
 - Edit Registration
 - Change Password
 - Print Requests
- References
 - Merge Rules
 - Validation Rules
- Performance Measures

RSR Provider Report Inbox

Your session will expire in: 28:54


Report ID	Provider Name	Reg Code	Reporting Period	Modified Date	Status	Action	Clients	Action History
0	Data and Reporting Technical Assistance (DART) Team	71186	2019 Annual	11/22/2020 6:46:25 PM	Not Started	Create	0	History

1 items in 1 pages

Page Size: 25

For help with EHBs contact the HRSA Help Desk by phone at 1-877-Go4-HRSA (1-877-464-4772) Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time. Or use the [HRSA Electronic Handbooks Contact Center help request form](#) to submit your question online. For questions regarding data content and/or reporting requirements, please contact Data Support at 1-888-640-9356 or email to RyanWhiteDataSupport@wrma.com



Logged in as: Provider

The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click 

Once you access the RSR Web System, you just need to locate the Check Your XML feature. Providers will be taken directly to the Provider Report inbox. To access the Check Your XML feature, just look for the link in the left-hand navigation menu.

RSR Inbox: Click “Create” or “Open”


The screenshot shows the 'RSR Check Your XML' page. A table lists report details, and the 'Open' button in the 'Action' column is highlighted with a red box and a magnifying glass.

Report ID	Name	RegCode	Reporting Period	Modified Date	Status	Action	Clients	Action History
49958	Data and Reporting Technical Assistance (DART) Team	71186	Check Your XML	11/22/2020 6:50:45 PM	Waiting		0	

Page Size: 25

1 items in 1 pages

Action

 Open


For help with EHBs contact the HRSA Help Desk by phone at 1-877-Go4-HRSA (1-877-464-4772) Monday through Friday. Contact Center help request form to submit your question online. For questions regarding data content and/or reporting RyanWhiteDataSupport@wrma.com

Logged in as: Provider

The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat R...

the HRSA Electronic Handbooks
888-640-9356 or email to

Once you click on “Check Your XML” this is the page that you’ll see. To proceed to upload data, you’ll click on the “Create” or “Open” button with the envelope icon.



Check Your XML Page

NAVIGATION

Inbox

Provider Report

Check your XML

Check your XML Actions

Import CLD XML File

Validate

Clear Clients

Check your XML Reports

Upload

Completeness Report

Action History

Search

Provider Reports

Administration

Edit Registration

Change Password

Print Requests

References

Merge Rules

Validation Rules

Performance Measures

HIVQM Inbox

Emerging Initiatives

CDR Inbox

EHE Triannual Inbox

RSR Check Your XML

Your session will expire in: 29:52

Data and Reporting Technical Assistance (DART) Team

Report ID: 49958

Status: Working

Data Expiration Date: 12/22/2020 6:50:46 PM

Report Period: Check Your XML

Last Modified Date: 11/22/2020 6:50:46 PM

Last Modified By: DART

Access Mode: Read/Write

Client Count (unique combination of provider and eUCI): 0

Locked By: DART

Check your RSR Client-Level Data XML and Data Quality Page

This page will allow you to upload a RSR client-level data XML file to ensure that it conforms to the schema. When your XML file is successfully processed, you can view any alerts, warnings, or errors that are in the data. You can also view the Upload Completeness Report. Select the arrow to the left of the ID number to see the Validation Report and Upload Completeness Report for each individual file that was successfully processed. To see the Validation Report and Upload Completeness Report for the merged client-level data, select the links in the left navigation menu.

Please note:

- This information will not be submitted to HRSA. You will still have to upload your XML in your RSR Provider Report. This site simply allows you to check the structure of your XML file and the quality of your data prior to uploading it in the live report.
- This feature only works with RSR client-level data XML files that conform to the RSR Client-Level Data XML Schema Definitions. The most recent RSR XML Schema Definitions are available on the [TargetHIV website](#).
- You will be unable to upload files larger than 29MB. If your client-level data XML file is larger than 29MB, please zip your file before upload. [Create Compressed Zip File](#)
- Changes to the file status in the Upload History Table are not automatically displayed. To view real-time updates to the Upload History Table, you must manually refresh this browser window.
- You will receive an email confirmation after you have successfully uploaded a client-level data XML file.
- All files are deleted 30 days after they are processed.

Client Upload

Select the client records that you would like to upload. You will receive an email confirmation after your records are successfully processed.

Choose File

No file chosen

Upload File

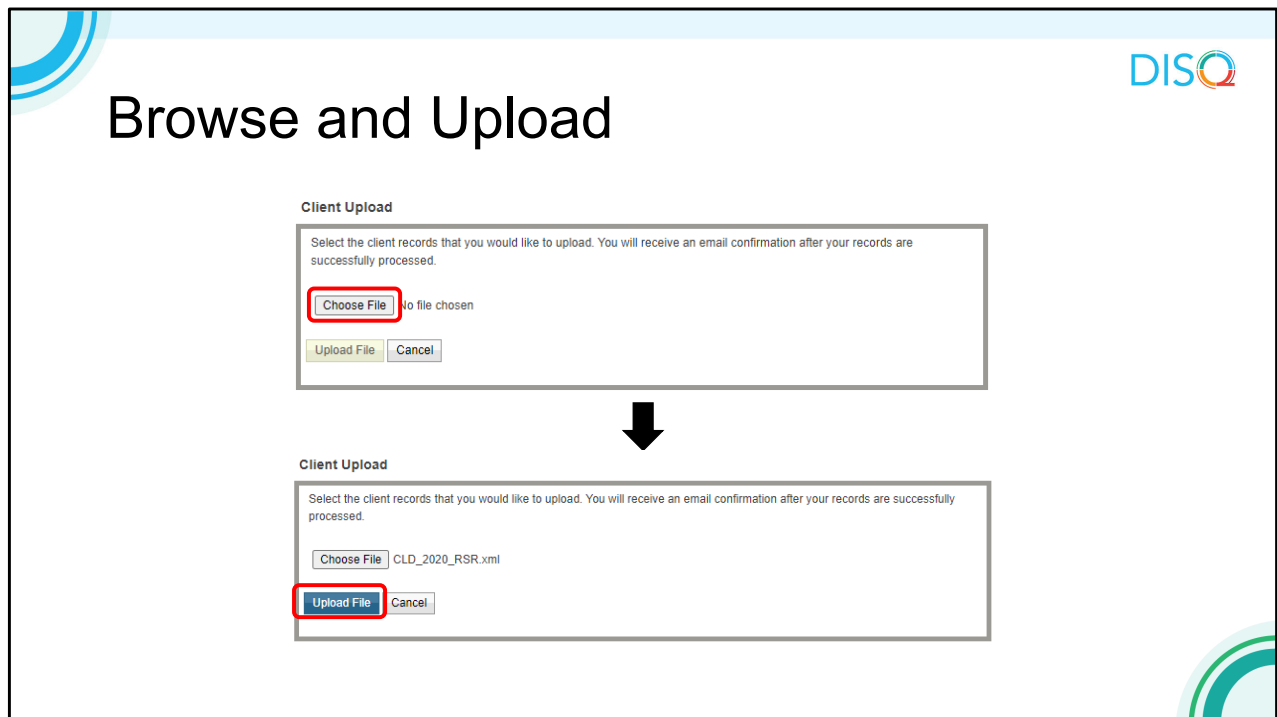
Cancel

Upload History

ID	User	Description	Request Date	Processed Date	Clients in File	Status
No records to display.						

This is the page you'll be taken to for the Check Your XML, which you can get to again by clicking "Import CLD XML File" in the left navigation menu. You'll see some helpful tips and links on this main page.

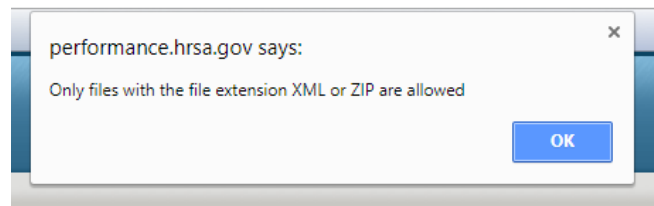
20



Your first step will be to upload your XML file. First, click “Choose File” to browse for where you’ve saved your data, and then click “Upload File” once you’ve selected the XML you want to upload.

Incorrect File Types and Invalid Values Cannot be Uploaded

- Only files with XML or ZIP extensions allowed
- Values in XML Must Match Values in Data Dictionary



If you try to upload a file that is not an XML, you'll receive this message. For a very large file greater than 29Mb, you will need to zip your file before upload. You can only include 1 file; you cannot use the zip feature to upload multiple files at one time.

How Do You Know If You Did It Correctly?

The screenshot shows the HRSA Electronic Handbooks interface. A green success message is highlighted with a red box:

Success:
XML Uploaded Successfully

Below the success message, the "Data and Reporting Technical Assistance (DART) Team" section displays the following information:


- Report ID: 49958
- Report Period: Check Your XML
- Access Mode: ReadWrite
- Status: Working
- Last Modified Date: 11/22/2020 6:57:48 PM
- Client Count (unique combination of provider and eUCI): 0

The "Upload History" table at the bottom shows the following data:

ID	User	Description	Request Date	Processed Date	Clients in File	Status
48560	DART	Upload CLD_2020_RSR.xml	11/22/2020 6:57:48 PM		0	Pending

Page Size: 25 | 1 items in 1 pages

How do you know if you did it correctly? Well, there are two different things to look for. One is the green “Success: XML Uploaded Successfully” at the top of the page. Second, you’ll see the pending status in your upload history at the bottom of your screen.



Refresh the Page After 3-5 Minutes (Importing CLD XML)

NAVIGATION

Inbox

Provider Report

Check your XML

Check your XML Actions

Import CLD XML

File

Validate

Clear Clients

Check your XML Reports

RSR Check Your XML

Data and Reporting Technical Assistance (DART) Team

Report ID: 49958

Report Period: Check Your XML

Access Mode: ReadWrite

Status: Working


Last Modified Date: 11/22/2020 6:57:57 PM

Client Count (unique combination of provider and eUCI): 6

Check your RSR Client-Level Data XML and Data Quality Page

This page will allow you to upload a RSR client-level data XML file to ensure that it conforms to the schema. When your XML file is s that are in the data. You can also view the Upload Completeness Report. Select the arrow to the left of the ID number to see the Vaili file that was successfully processed. To see the Validation Report and Upload Completeness Report for the merged client-level data.

Wait 3-5 minutes. If a lot of people are using the system, it can take a little longer, so yet another reason to start early. Refresh the page by selecting the “Import CLD XML File” link under the Check Your XML Actions heading in the menu on the left.



To See Your Processed File

Client Upload

Select the client records that you would like to upload. You will receive an email confirmation after your records are successfully processed.

No file chosen

Upload History


	ID	User	Description	Request Date	Processed Date	Clients in File	Status
	48560	DART	Upload CLD_2020_RSR.xml	11/22/2020 6:57:48 PM	11/22/2020 6:57:50 PM	6	Processed

1

Page Size: 25


1 items in 1 pages

You'll now see that the status says "Processed". You can also see that the number of clients in the file is displayed, as is the process date and time. If you have multiple XML files, repeat the same steps to upload the additional files.




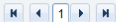
Review Reports

Upload History

	ID	User	Description	Request Date	Processed Date	Clients in File	Status
	48560	DART	Upload CLD_2020_RSR.xml	11/22/2020 6:57:48 PM	11/22/2020 6:57:50 PM	6	Processed

Uploaded for: Data and Reporting Technical Assistance (DART) Team
 Software Vendor: CAREWare


[View Upload Completeness Report](#)
[View Detailed CLD Validation Report](#)


 Page Size: 25

1 items in 1 pages

One of the great features is that you can view the reports immediately once the file is processed for each XML file uploaded. To access the reports, click on the plus sign or arrow at the left of the id #. It will be a plus sign or an arrow depending on your web browser. The two reports ready for viewing will display beneath the file. Just click on the link to access the report that you want.

If the reports are blank, it means that you didn't wait for the file to be processed.

Click on “Validate” to Review Validations for Multiple XML Files



If you uploaded multiple XML files, you’ll need to review the reports on the merged data by clicking on “Validate” on the left hand menu. Once you click on validate, you’ll see a message that your validation request has been scheduled.

DISQ

Refresh the Page After 3-5 Minutes

(

NAVIGATION

Inbox

Provider Report

Check your XML

Check your XML Actions

Import CLD XML

File

Validate

Clear Clients

Check your XML Reports

RSR Check your XML

Data and Reporting Technical Assistance (DART) Team

Report ID: 49958	Status: Working	Data Expiration D
Report Period: Check Your XML	Last Modified Date: 11/22/2020 6:57:57 PM	Last Modified By:
Access Mode: ReadWrite	Client Count (unique combination of provider and eUCI): 6	Locked By: DART

Your validation request (scheduled at 11/22/2020 7:03:08 PM) is being processed. It may take several minutes to generate the report.

NOTE: You must refresh this page to display your results.

Wait 3-5 minutes and click on validate again for the report to display.

Now if you're like me and can be a little impatient and you click too soon, you'll get a reminder message that tells you the validation request has been scheduled and it may take a few minutes to generate the report. As a reminder, this takes longer the more people are in the system, so get started early!

DISQ

Validation Results

NAVIGATION

Inbox

Provider Report

Check your XML

Check your XML Actions

Import CLD XML

File

Validate

Clear Clients

Check your XML Reports

Upload

Completeness Report

Action History

Search

Provider Reports

Administration

Edit Registration

Change Password

Print Requests

References

Maria Riley

RSR Check your XML

Your session will expire in: 29:53

Data and Reporting Technical Assistance (DART) Team

Report ID: 49958

Status: Working

Data Expiration Date: 12/22/2020 6:57:57 PM

Report Period: Check Your XML

Last Modified Date: 11/22/2020 6:57:57 PM

Last Modified By: DART

Access Mode: Read/Write

Client Count (unique combination of provider and eUCI): 6

Locked By: DART

Validation Results

The data that were uploaded using the Check your XML feature have triggered the following client-level data validations checks. For any validation that includes the number of clients, please click on the arrow to the left of the message to see a list of the clients' eUCIs.

If your data have errors when you upload your client-level data XML file to your RSR Provider Report, you will not be able to complete your submission. You must fix all errors in your client-level data before you can submit your RSR Provider Report. You should also address all warnings and alerts as appropriate. For the warnings that you cannot or should not fix, a comment will be required before you may submit your RSR Provider Report. You are not required to enter a comment before submitting your RSR Provider Report with alerts. Contact the help desk if you have questions about any of the validation errors, warnings, or alerts.

View Detailed CLD Validation Report

Row No.	Check No.	Message	Level
1	232	6 Clients are missing a response to capture if they are new to the service provider.	Warning
2	233	6 Clients are missing the response to capture if the client received at least one service in the previous year.	Warning

This is what the validation results look like. The report that displays will be in HTML format. If you click on the arrow or plus sign, it will display the eUCIs for which the validations occurred. If you click on the “View Detailed CLD Validation Report”, it will take you to this page.

29

Validation Report (preview Part 1)

Sort by: Check Number

View Report

1 of 1

Find | Next

Detailed CLD Validation Report

Organization Name: Data and Reporting Technical Assistance (DART) Team

Report ID: 49958

Reg Code: 71186

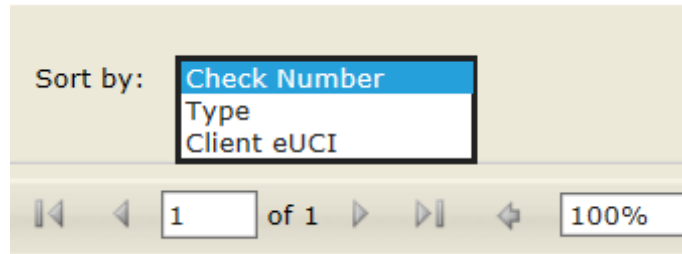
Your client-level data file contains Personal Health Information (PHI). PHI includes, but is not limited to, client names, addresses, DOB, SSN, dates of service, and unique record numbers (URNs) generated for your organization's client-level data XML file. To ensure client confidentiality, never share PHI. You must protect this information the same way you protect all client data. For additional information visit the HHS Office of Civil Rights Health Information Privacy webpage.

Sort by: Check Number

Check No.	Message	Level	eUCI
232	CLD Upload: Clients are missing a response to capture if they are new to the service provider.	Warning	0DF8493DE9A23BDD1DF526691F78F34AF8477938U
232	CLD Upload: Clients are missing a response to capture if they are new to the service provider.	Warning	1BD43CB805C136AED332A044E71382CE0117D9A3U
232	CLD Upload: Clients are missing a response to capture if they are new to the service provider.	Warning	28C0CD7896799A137C488A84A911097324A8EC45U
232	CLD Upload: Clients are missing a response to capture if they are new to the service provider.	Warning	4884443DE61248BB47CC5714990DDD36C23C828BU

On this page, you can sort the information by...

Validation Report (preview Part 2)



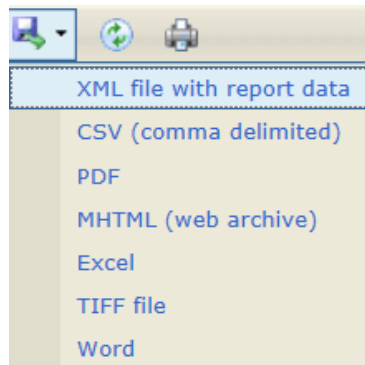
Sort by: **Check Number**
Type
Client eUCI

1 of 1 100%

You can sort validations by type
(alert, warnings and errors) and
client (using the eUCI)

Validation number, validation type (alert, warnings, and errors), or by the Client eUCI.

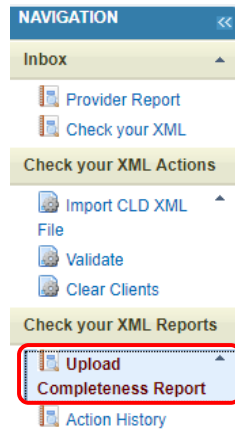
Validation Report (preview Part 3)



7 reports formats to
choose from in
addition to HTML!

And, you can click on what format you want the report in.

When Uploading Multiple XML Files



- Review the Upload Completeness Report for the merged data
 - If you only uploaded 1 file, this is the same as the reports previously shown

To view the Upload Completeness Report for consolidated data, click on the “Upload Completeness Report” link in the left navigation menu.

Incongruent Data

Sex at Birth (Item 71)

Denominator: Clients with any service (N = 10)

Response Category	N	%
Male	6	60.0%
Female	3	30.0%
Incongruent	1	10.0%
Missing/Out of range	0	0.0%

Validation Results

The data that were uploaded using the Check your XML feature have triggered the following client-level data validations checks. For any validation that includes the number of clients, please click on the arrow to the left of the message to see a list of the clients' eUCIs.

If your data have errors when you upload your client-level data XML file to your RSR Provider Report, you will not be able to complete your submission. You must fix all errors in your client-level data before you can submit your RSR Provider Report. You should also address all warnings and alerts as appropriate. For the warnings that you cannot or should not fix, a comment will be required before you may submit your RSR Provider Report. You are not required to enter a comment before submitting your RSR Provider Report with alerts. Contact the help desk if you have questions about any of the validation errors, warnings, or alerts.

[View Detailed CLD Validation Report](#)

Row No.	Check No.	Message	Level
1	41	1 Clients with an "Incongruent" response for Sex at Birth in multiple client-level data XML files. 38A7272563982693ABAFF5F6D963CC8406248441U	Alert
2	84	4 Clients age 90 years or older.	Alert
3	96	5 Clients missing Poverty Level.	Warning

If you've uploaded multiple files and there are incongruent responses, you can identify those issues in 2 places. First, in the Upload Completeness Report, an aggregate count of clients with incongruent data will be listed. To drill down to who those clients are, check out the Validation report, and expand the validation message to identify which client(s) are triggering the validation.

Need to Fix a File? How to Clear Clients

NAVIGATION << RSR Check Your XML Your session will expire in: 29:40

▼ Data and Reporting Technical Assistance (DART) Team

Report ID: 49958 Status: Working Data Expiration Date: 12/22/2020 7:13:06 PM
 Report Period: Check Your XML Last Modified Date: 11/22/2020 7:13:06 PM Last Modified By: DART
 Access Mode: ReadWrite Client Count (unique combination of provider and eUCI): 10 Locked By: DART

Clear Client Records

Client records that were imported by your organization can be cleared by selecting the checkbox next to the file or files that you would like to clear. Then select the "Clear Selected File(s)" button below to schedule your request. If more than one organization provided client records for this report and you need to have all of the client records cleared from this report, please contact the help desk.

Row Number	Select All	Request ID	User	Description	Organization	Clients in File	Status	Processed Date	Software System	Marked For Delete
1	<input type="checkbox"/>	48561	DART	Upload CLD_2020_RSR-TRAX.xml	Data and Reporting Technical Assistance (DART) Team	8	Processed	11/22/20 19:13:06	TRAX	
2	<input type="checkbox"/>	48560	DART	Upload CLD_2020_RSR.xml	Data and Reporting Technical Assistance (DART) Team	6	Processed	11/22/20 18:57:57	CAREWare	

[Clear Selected File\(s\)](#)

To clear clients:

1. Click on clear clients on the left hand menu
2. Check the box next to the file(s) that you want to delete
3. Click on clear selected files(s)

Now, if you noticed when reviewing the reports that there was a data quality issue, you will need to fix data in your source system and re-upload the data. You'll need to be sure to clear clients for the file that is problematic. To clear clients, click on the "Clear Clients" link on the left hand menu, choose which file you want to clear by checking the box next to the file and click on "Clear Selected File(s)". As a note, you can only clear files that were uploaded by your agency.

How to Clear Clients

RSR Check Your XML

Your session will expire in: 29:56

✓ **Success:**

Clear Clients request has been successfully scheduled!

▼ Data and Reporting Technical Assistance (DART) Team

Report ID: 49958

Status: Working

Data Expiration Date: 12/22/2020 7:14:44 PM

Report Period: Check Your XML

Last Modified Date: 11/22/2020 7:14:44 PM

Last Modified By: DART

Access Mode: ReadWrite

Client Count (unique combination of provider and eUCI): 10

Locked By: DART

Clear Client Records

Client records that were imported by your organization can be cleared by selecting the checkbox next to the file or files that you would like to clear. Then select the "Clear Selected File(s)" button below to schedule your request. If more than one organization provided client records for this report and you need to have all of the client records cleared from this report, please contact the help desk.

Row Number	Select All	Request ID	User	Description	Organization	Clients in File	Status	Processed Date	Software System	Marked For Delete
1	<input type="checkbox"/>	48562		Delete Upload Request ID(s) 48561	Data and Reporting Technical Assistance (DART) Team	0	Pending			
2	<input type="checkbox"/>	48561	DART	Upload CLD_2020_RSR-TRAX.xml	Data and Reporting Technical Assistance (DART) Team	8	Processed	11/22/20 19:13:06	TRAX	<input checked="" type="checkbox"/>
3	<input type="checkbox"/>	48560	DART	Upload CLD_2020_RSR.xml	Data and Reporting Technical Assistance (DART) Team	6	Processed	11/22/20 18:57:57	CAREWare	

Clear Selected File(s)

You'll receive a message if this is done successfully.

You can also see it in the history listed at the bottom of your screen for pending status. Wait 3-5 minutes and then refresh your page by clicking on "Import CLD XML File". Remember if you clear clients and upload new files, you'll need to validate again to view the consolidated report.

If You Get a Schema Error...

Client Upload

Select the client records that you would like to upload. You will receive an email confirmation after your records are successfully processed.

No file chosen

☐ Schema check error(s) (Please click on this to view the error(s).) [Printer Friendly](#)

The format of the XML file, Test_File_4.xml, is invalid.

Don't panic! Contact the DISQ Team at
data.ta@caiglobal.org

Finally, some of you may get schema errors if your file schema don't line up with the system like we discussed earlier in this webinar. If that happens, you'll see a message in red underneath of the "Client Upload" box. If you get a message that looks like this, contact the DISQ Team for assistance.

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 demoed is for recipient/providers or providers that want to check their own agency's data. But what if you are a recipient and you want to review your provider's reports? To do so, once you are in the RSR Web System through the EHBs, go to Check Your XML link. Search by the provider's name. You'll have access to all of the reports that were just reviewed.

If you are a vendor for a 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 2021 reporting, please contact the DISQ Team.

Takeaways

- Check Your XML has many 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 7th, **upload to the Provider Report** to submit instead of Check Your XML
 - Validations will cross-check your Provider Report and XML
- HAB wants to support you in submitting the best data possible

In summary, the 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.

Check Your XML remains open throughout the RSR Submission period, but when the main system opens on February 7th, you should 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 in the demo, but 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.

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](#)
- EHBs Customer Support Center:
 - 877-464-4772
 - [Submit an EHBs TA Request](#)
- Ryan White HIV/AIDS Program Data Support:
 - RyanWhiteDataSupport@wrma.com
 - 888-640-9356
- 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!