

TRAX for the RSR

Ryan White HIV/AIDS Program Services Report (RSR)

HIV/AIDS Bureau

November 29, 2023

Welcome to today's webinar, TRAX for the RSR.

Thank you so much for joining us today!

My name is Margaret. 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 RSR.

Today's Webinar is Presented by:



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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. 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.

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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 composed of CAI, Abt Associates, and Mission Analytics and is supported by HRSA of HHS as part of a cooperative agreement totaling over \$4 Million.

DSAS (Ryan White Data Support) is composed of WRMA, CSR and Mission Analytics and is supported by HRSA of HHS as part of a contract totaling over \$7.2 Million.

Today's webinar is supported by the organizations shown on the slide, 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, the U.S. Department of Health and Human Services, or the U.S. Government.

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

Outline

Overview of TRAX

Steps for Using TRAX

Questions

For those who are new, TRAX is a free tool that you can download from the TargetHIV website. It takes files with your client-level data as input and converts those data to the correctly structured XML file.

I'll start the presentation with an overview of TRAX. Then, we'll go into more detail about each step. Throughout this discussion, we'll be pulling up resources and demoing key activities.

As always, we'll take your questions at the end. Please feel free to leave questions in the Q/A box throughout the webinar.

I know this webcast is very detailed but DO NOT worry. There is a detailed user manual with the same information in the TRAX download package. The webcast recording and slides will also be posted on TargetHIV.

I also want to note that this webcast just focuses on TRAX for the RSR; ADR TRAX users can find a recording of a similar webinar that targets the ADR. The TRAX process has not changed in the last couple of years, so if you are a seasoned user, you may not need to be here. But you may want a quick refresher to get your head around the RSR!



Before we get started, I'd like to ask Isia to launch a poll.

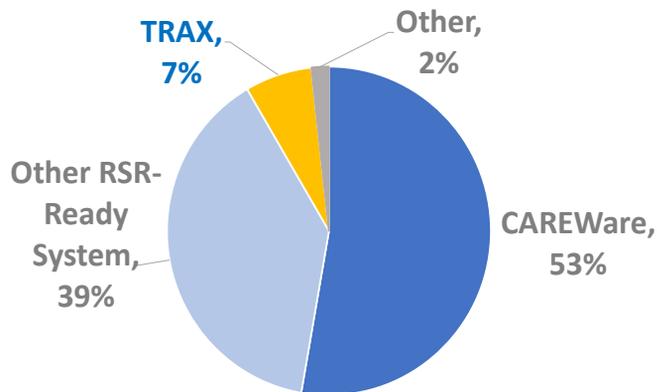
POLL: Let's find out who's in the room today. Which of the following best describes your agency's use of TRAX?

- 1) Seasoned TRAX users
- 2) Still learning!
- 3) Considering TRAX
- 4) Other

Claire - Great, looks like we have a lot of seasoned users who are here for a refresher. And, we have some newbies as well!

(thank you everyone for sharing that information and joining today!)

Systems Used to Create the Client-level Data XML File in 2022



So, let's take a step back. There are three main strategies for creating your client-level data file. The first is to use an RSR-Ready System. These are data management systems that create the XML file for you. As you can see on this pie chart, most provider files created in 2022 were created with one of these systems. CAREWare is the most commonly used RSR-Ready System.

About 2% of files were created by providers that developed their own file generation functions and 7% of files in 2022 were created by TRAX. This was about the same as what we saw in 2021. You can see that TRAX plays an important part in the RSR.

Why Use TRAX?

- You don't use an RSR-Ready System to capture RSR data
- You would like to start using your Electronic Health Record (EHR) data to create the client-level data file instead of using an RSR-Ready System
- You would like to report some data not captured in your existing system

Why use TRAX? Some of you may be wondering if you should be here today. You've been diligently signing up for all the webinars – yay – but this content may not be relevant for you. TRAX is a good tool for you if you don't already input or export your data into an RSR-Ready System.

TRAX is also good for folks who would like to start using their EHR data to create the RSR instead of using an RSR-Ready System.

You may need to report data not already captured in your RSR-Ready System. You can create a supplemental file with TRAX. The data will be merged on client eUCI. All RSR-Ready Systems and TRAX use the same algorithm for creating that eUCI.

If this sounds like you, then you are in the right place today!

Steps to Using TRAX

Become familiar with RSR data elements

Identify structure of the required input files

Prepare your input files

Use CHEX to check data quality

Install TRAX

Load data into TRAX and create the XML file

Here are the steps you need to take when using TRAX:

1. Become familiar with the RSR data elements.
2. Identify structure of the required input files.
3. Prepare your input files, which are 12 .CSV files. .CSV files can easily be saved from Excel.
4. Use CHEX to check data quality.
5. Install TRAX.
6. And lastly load data into TRAX and create the client-level data XML file.

Demo of TRAX – The Basics

Before we go into each of these steps, Ellie is going to demo TRAX, so you have a sense of how it works.

Thanks, Claire. Let's assume all these data files are ready to go....[Demo the import function.]

- Show folder
- Import folder
- Generate XML
- Show the XML file (already saved)

Steps to Using TRAX

Become familiar with RSR data elements

Identify structure of the required input files

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Install TRAX

Load data into TRAX and create the XML file

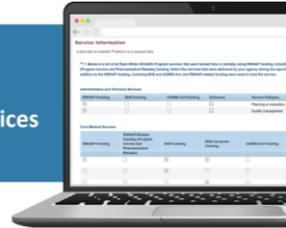
Now we have a basic idea of how TRAX works. Back to you Claire.

Claire -- let's revisit this process and see how we can get to the point where we're loading data into TRAX to create that XML file. We'll start with getting familiar with RSR data elements.

Instruction Manual

- Detailed description of RSR data elements
- [RSR Instruction Manual](#)

Ryan White
HIV/AIDS
Program Services
Report (RSR)



Instruction Manual 2023
Release Date: October 20, 2023



To start preparing your input files, you need to become very familiar with the RSR data elements. If you haven't already done so, please check out the instruction manual, which has a detailed description of each item required.

As of October, the 2023 instruction manual is updated and available using this weblink.

Meatball chart:
Required data
elements by
service

Table 6. Required Client-Level Data Elements for RWHAP Services

Client-level Data Elements	Outpatient/Ambulatory Health Services	Medical Case Management	Oral Health Care	Early Intervention Services	Home Health Care	Home and Community-Based Services	Hospice Services	Mental Health Services	Medical Nutrition Therapy	Substance Abuse Outpatient	AIDS Pharmaceutical Assistance	Health Insurance Premium and Cost-Sharing Assistance	Case Management	Child Care Services	Emergency Financial Assistance	Food Bank/Home-Delivered Meals	Health Education/Risk Reduction Housing	Linguistics Services	Medical Transportation	Outreach Services	Peer Support Services	Psychosocial Support Services	Referral for Health Care and Support Services	Rehabilitation Services	Respite Care	Specialized Services (residential)	EHE Initiative Services	Rationale
Client Demographics																												
Year of birth	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,6
Ethnicity	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3,6
Hispanic subgroup	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3,6	
Race	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,6	
Asian subgroup	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,6	
NHPI subgroup	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,6	
Gender	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3,6	
Sex at birth	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3,6	
Health coverage	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,6	
Housing status	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,6	
Housing status collection date	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,6	
Federal poverty level percent	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,6	
HIV/AIDS status	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3	
Client risk factor	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	6	
Vital status	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	4,5	
HIV diagnosis year (for new clients)	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3	
New client (for EHE initiative-funded providers)	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	1,6	
Received services previous year (for EHE initiative-funded providers)	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,4,6	
Client Clinical Data																												
First outpatient/ambulatory health service visit date	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3,4	
Outpatient/ambulatory health service visits and dates	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,4	
CD4 counts and dates	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,4	
Viral load counts and dates	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,4	
Prescribed ART	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3,4	
Screened for syphilis	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	3	
Pregnant	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	2,3,4	
Date of first positive HIV test (for clients with new HIV diagnosis)	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	1,3,4,5,6	
Date of QAHS visit after first positive HIV test (for clients with new HIV diagnosis)	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	1,3,4,5	

Page 96 of the instruction manual lists the required data elements by service, so you know which data elements to report depending on the services the client received.

Data Dictionary

- Required values for each data element
- [RSR Data Dictionary](#)

Ryan White Services Report (RSR)
Web Application

Data Dictionary and XML Schema Implementation Guide
Version 3.9
August 27, 2020

Submitted to
HPSA
Health Resources and Services Administration
Office of Information Technology
5600 Fishers Lane
Rockville, MD 20857



In addition to the RSR instruction manual, you'll also need the data dictionary, which provides values for each data element and response option.

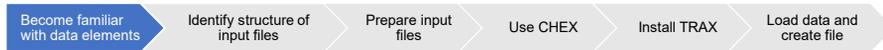
This is an important resource for TRAX users because you'll need this to know which values to put in your input files.

I'd like to note that the RSR Data Dictionary has not been updated recently because there have been no schema changes.

Create an RSR Crosswalk

- Where do these data elements live in your system(s)?
 - What is the field name?
 - What are the response options?
- How do I need to transform my data?

Your Data (Race)		RSR Data (RaceID)
White	→	1
Black	→	2
Asian	→	3
Hawaiian/PI	→	4
Native American (AK Native)	→	5



Next, you'll need to map the data elements in the RSR to the data elements in your data management system. By creating this crosswalk, you will identify the field name and response options of the data elements in your system that correspond to the RSR. This will help you assess the data you have and determine if any changes are necessary to correctly format and report your data using the RSR.

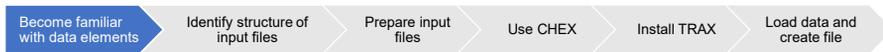
In this example, with the RaceID variable, your own database might categorize clients as "white", "black", etc. However, the RSR requires this variable be categorized as numbers 1 through 5. Using this crosswalk, it will be easier to see and track what data transformations are necessary, as "white" becomes "1", "black" becomes "2", and so on.

Create an RSR Crosswalk

Ryan White Services Report (RSR) Crosswalk

RSR				Your System		
ID	Variable	Definition	Value	Variable	Value	Notes
Demographics						
2	Vital Status	The client's vital enrollment status at the end of the reporting period.	12. Alive 6. Deceased 7. Unknown			
4	Birth Year	Client's year of birth. This value should be on or before all service date years for the client.	yyyy			
5	Ethnicity	Client's ethnicity.	1. Hispanic/Latino/a, or Spanish origin 2. Non-Hispanic/Latino(a), or Spanish origin			
68	Hispanic Subgroup	If Ethnicity = Hispanic/Latino(a),	1. Mexican, Mexican American, Chicano/a			

[Ryan White Services Report \(RSR\) Crosswalk](#)



Here you can see the crosswalk template for you to fill out. You can download the crosswalk from the TargetHIV website.

Download Support Materials

- [Support Package](#)
 - User guide
 - RSR crosswalk
 - **Templates for input files (12 .CSV files)**
 - CHEX



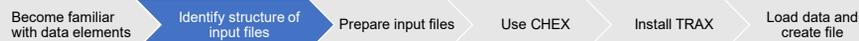
TRAX for the RSR: Application and Manual

February 2, 2021
Data Integration, Systems and Quality (DISQ) Team

Note: You must enter a valid email address before downloading the TRAX package. This is so we can keep track of TRAX users, and keep you informed about updates.

Please enter your email address *

SUBMIT



Now that you have a good idea of what is required for the RSR, you'll need to start creating the input files, which consist of 12 .CSV files. If you don't know what .CSV is, it is essentially the same as Excel. You can easily create a .CSV file from an Excel file using "Save As".

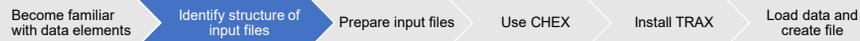
To know how to structure your data, go to the TargetHIV website, input your email address, and download the support package. The support package is a zip file that contains:

- The TRAX user manual
- The RSR crosswalk I just showed
- Blank templates for the 12 input files
- Sample files
- It also contains CHEX, a tool to help you assess data quality. We'll discuss CHEX later.

The support package has been recently updated. Because there have been no schema changes, the .CSV files templates have not changed. But, we did update CHEX to incorporate the new validations. Please note that the support package does not contain TRAX itself – you can access and install TRAX through a separate link.

TRAX .CSV Files

Name	Date modified	Type	Size
 ClientReport	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB
 ClientReportAmbulatoryService	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB
 ClientReportAsianSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportCd4Test	11/18/2021 7:58 AM	Microsoft Excel Co...	1 KB
 ClientReportHealthCoverage	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportHispanicSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportHivRiskFactor	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportNhpiSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportRace	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportServiceDelivered	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportServiceVisits	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
 ClientReportViralLoadTest	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB



Here is a view of the inside of the folder with the 12 .CSV files. As a reminder, you'll download this folder from the TARGETHIV website. You'll create a folder that looks exactly like this, but the files will be populated with your data.

TRAX .CSV Files

Name	Date modified	Type	Size
ClientReport	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB
ClientReportAmbulatoryService	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB
ClientReportAsianSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportCd4Test	11/18/2021 7:58 AM	Microsoft Excel Co...	1 KB
ClientReportHealthCoverage	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportHispanicSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportHivRiskFactor	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportNhpiSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportRace	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportServiceDelivered	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportServiceVisits	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportViralLoadTest	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB

One row per client

Become familiar with data elements

Identify structure of input files

Prepare input files

Use CHEX

Install TRAX

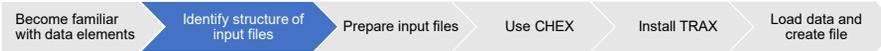
Load data and create file

The first file contains the bulk of the data elements in the RSR. It has all the data elements with just one response per client, like ethnicity. You'll have just one row per client in this file.

TRAX .CSV Files

Name	Date modified	Type	Size
ClientReport	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB
ClientReportAmbulatoryService	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB
ClientReportAsianSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportCd4Test	11/18/2021 7:58 AM	Microsoft Excel Co...	1 KB
ClientReportHealthCoverage	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportHispanicSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportHivRiskFactor	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportNhpiSubgroup	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportRace	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportServiceDelivered	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportServiceVisits	11/16/2021 10:12 AM	Microsoft Excel Co...	1 KB
ClientReportViralLoadTest	11/18/2021 7:57 AM	Microsoft Excel Co...	1 KB

Multiple rows per client



Each of the subsequent files represent one data element that allows for multiple responses. So, for example, an individual might have more than one Race or multiple viral load counts.

Ellie, why don't you show us the files.

Sample Input Files

Ellie

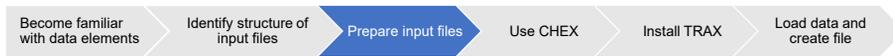
Sure, Claire

- Client Report
- Race file

Back to you, Claire.

Extract Data from Your System

- Most time-consuming part of the process!
- Meet with your IT staff and take:
 - Data Dictionary
 - RSR Crosswalk

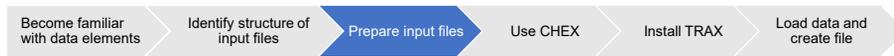


After you have completed the RSR Crosswalk and downloaded the example input files, you need to extract client-level data from your system or from multiple systems. Some providers have set up an automated process that pulls data from the EHR and spits it out in the correct .CSV file format. Others have to do the work manually.

Either way, we understand that getting data out of your EHR is the hardest part of the process. Most likely, you'll need to meet with your IT staff. When you do this, please take your crosswalk and data dictionary, so they understand exactly what data you need. Please get started soon! IT staff are busy, so it could take some time to create the files you need.

Prepare Input Files

- Your files must have identical names as the templates
- Column order does not matter, but column headers should be identical
- Replace your values with RSR-required values



Next, you will structure your data to mirror TRAX's 12 .CSV files. File names must be identical to those in the folder on TargetHIV.

Within the file, although the column order does not matter, the columns headers do – they must be identical to the ones in the .CSV files. As a reminder, capitalization in the header names matters!

You also must replace your values with the RSR-required values.

ClientID is the Primary Key

- Unique sequential or internal number
- First column in every table
- Must be the same for a given client across files

	A	B	C	D
1	Clientid	FirstName	LastName	ClientDateofBir
2	1	Carmelo	Sahy	11/2/1983
3	2	Noel	Cordova	4/19/1998
4	3	Kiana	Winslow	12/18/2001
5	4	Aysha	Candelari	6/19/2014

File 1: Client Report

A	B	C
Clientid	Medical	Insurance
1	16	
1	11	
2	16	
3	12	

File 2: Health Insurance

Same person

Become familiar
with data elements

Identify structure of
input files

Prepare input files

Use CHEx

Install TRAX

Load data and
create file

Now, let's talk about a couple of specific data elements. The tables are linked by the Client ID. It is the first column in every file. This number must be unique for every client. It can be a sequential number or internal number, like a medical record number and it does not show up on the XML file.

You must make sure that the same client has the same ID in each table.

Let's look at an example on this slide here. Through the linking ClientID 1, you know which health insurance status Carmelo has

Services: Two Files

- Service Delivered: Two Services

	A	B	C
1	ClientID	ServiceID	DeliveredID
2	1	9	2
3	11	12	2
4	11	9	2
5	18	9	2
6	22	12	2
7			

Client received:

- AIDS Pharmaceutical Assistance (LPAP, CPAP)
- Health Insurance Premium and Cost-Sharing Assistance for Low-Income Individuals

- Service Visits: All Other Services

	A	B	C
1	ClientID	ServiceID	Visits
2	1	8	2
3	2	18	3
4	11	8	1
5	11	18	4

Client received 1 OAHs and 4 medical case management services during the reporting period

Become familiar with data elements

Identify structure of input files

Prepare input files

Use CHEx

Install TRAX

Load data and create file

Let's talk a little about reporting services. You report services in two files in TRAX. One file captures two services: **AIDS Pharmaceutical Assistance** and Health Insurance Premium and Cost Sharing Assistance for Low-income Individuals.

The other one is for all other services. For each of these files, you report the ClientID and the ServiceID. For the services delivered file, you just indicate that the client received the service with the value of 2.

Please note that you do not have to report services that were not delivered. So, for the service delivered file, you'll report 2 across the board, indicating the client indeed received the service.

For all other services, you actually have to put the number of visits the client received in the reporting period.

Viral Load

- For “undetectable” viral load counts:
 - Report the lower test limit for the viral load count
 - If you don’t know the threshold, report 0 for clients with “undetectable” status

	A	B	C	
1	ClientId	ServiceDat	Count	
2	29	2/15/2019	11,546	
3	29	6/19/2019	350	
4	35	3/2/2019	20	
5	40	4/14/2019	0	
6				

Undetectable viral loads

Become familiar with data elements

Identify structure of input files

Prepare input files

Use CHEX

Install TRAX

Load data and create file

We also get lots questions about viral load. Values under a certain threshold are captured as “undetectable.” The RSR does not accept text or less than signs for the viral load value. Because of this, you should input the lab threshold value in the count field.

In this example, you see these clients have undetectable viral loads. The test has a threshold of 20.

If you don’t know the threshold, report 0.

TRAX and the eUCI

- There are multiple identifier fields that relate to the eUCI in the ClientReport tab
- The ones you populate depend on whether you already create the eUCI or would like TRAX to do it for you
- If you want TRAX to create the eUCI for you, populate:
 - First name
 - Last name
 - Full date of birth
 - Gender
- More information in the TRAX user guide!

Finally, let's talk about the encrypted Unique Client Identifier, or eUCI. The eUCI is the identifier HAB uses to link data across providers. It's made up of letters within the first and last name, date of birth, and a gender code. This 11-digit number is then encrypted to a 40-digit number. The last digit is used to indicate whether more than one client shares the same eUCI.

That first .CSV file – ClientReport – has multiple data elements related to the eUCI. The ones you populate depend on whether you already create the eUCI or want TRAX to create it for you.

If you do not already create the eUCI and you want TRAX to create it for you, you need to populate the first and last name, full date of birth, and gender ID.

Please take a look at the user guide for more information on this.

Avoid Common Mistakes

- Only use values required by the RSR, as specified in the [Data Dictionary](#)
- Eliminate duplicate values
- Eliminate special characters in the ClientID
- Include all files even if there are no data
- Use the XX/XX/XXXX format for date, not commas
- How to deal with missing data:
 - In the Client Report file, leave cell blank
 - In the other files, exclude clients entirely



Here are some tips to avoid common mistakes.

- Only use values required by the RSR, as specified in the data dictionary.
- Make sure to eliminate duplicate values. You can do this using the Excel function.
- Also, the ClientID should only have letter and numbers, so drop any special characters.
- Include all files even if there are no data. For example, you may not provide medical services. You still need to include the viral load file even if it's blank.
- Use the month-day-year format for date, not commas, like what you see in the Data Dictionary.
- Finally, TRAX allows you to create files with missing data. In the ClientReport file, just leave that cell empty. In the other files, exclude those clients entirely.

CHEX: Checking Data Quality

- An Excel spreadsheet pre-loaded with drop down menus and conditional formatting
- Steps:
 - Copy and paste your data into each tab
 - “Validate” data to find invalid values
 - Review color-coded cells to identify other validation issues



As a next step, you want to check the quality of your data in the .CSV files. TRAX does not have a lot of validations that check for missing data or data inconsistencies, which is why you can use the tool, CHEX. CHEX is an Excel spreadsheet pre-loaded with drop down menus and conditional formatting to help you check the quality of your data. It is also located in the support package.

There is a tab for each of the 12 .csv files.

Demo of CHEX



Now, let me show you some of the features of CHEX. There are filters, so you can sort by different feature. Also, there are drop down menus that provide you a mapping of the values to the RSE option and forces you to sue the correct RSR values.

There is conditional formatting that helps you see if you have some sort of data validation issues. Here I can see that this is highlight blue, to know what that is, I an hover over the cell and it tells me that this client is over 90 years old.

- Yellow shows me my data is missing
- Pink shows me my housing status collection data is after the reporting period
- Let's take a look at the green one. This means that this client is not on ART, but they are virally suppressed.
- This green is showing me that my OAHS link data is before the date the person was diagnosed.
- Finally, I want to highlight this pink one. I provide medical care, or OAHS, so for each of my HIV positive clients with OAHS, I have to report the total number of OAHS services in the reporting period in one section and the data of each OAHS visit in another section. This validation sums up with OAHS dates and compares them with the number of visits. This cells is pink because my number of dates is lower than the number of visits.

Install TRAX
TRAX application

Health Resources and Services Administration (HRSA)
Tool for RSR and ADR XML (TRAX)

Name: TRAX
Version: 5.7.0.0
Publisher: HRSA

The following prerequisites are required:

- Microsoft .NET Framework 4 Client Profile (x86 and x64)
- Windows Installer 3.1

Click the button below to install the prerequisites and run the application.

Become familiar with data elements → Identify structure of input files → Prepare input files → Use CHEX → **Install TRAX** → Load data and create file

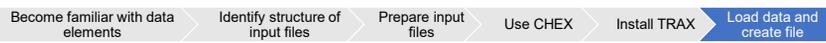
Ellie

Your next step is to install TRAX. I want to emphasize that TRAX does not live in the support package. You download it from a separate link.

It has recently been updated so you can start using it for 2023.

If you have already installed TRAX, you'll need to uninstall and reinstall it. [Click]

Demo of TRAX



Ellie

Finally, you load data into TRAX to create the file.

- File with wrong value (file 2)
- Missing file (file 3)
- Two people with similar eUCIs – with “A” and “B” (file 4)

Data Security

- Keep the populated Excel and .CSV files secure:
 - Store on a secure system
 - Only use secure transfer methods
- Resources on TargetHIV: [Data Security Refresher](#)

Let's discuss data security. I was using dummy data so the files were on my desktop. The client XML does not contain personally identifying information, like name or full date of birth. However, your Excel spreadsheet or .CSV file most likely will. So, I want to emphasize the importance of keeping these data secure. Please store your .CSV files on secure systems, behind firewalls, and only use secure transfer mechanisms to transfer the files.

If you would like more information about data security, just go to TargetHIV and do a search on "data security." There are lots of archived webcasts and resources there.

Resources and Questions

- Download [TRAX support package](#)
- Install [TRAX](#)
- Start with the DISQ Team: Data.TA@caiglobal.org
 - Be prepared to share your desktop with us through webinar software (we'll send you a link)

There are also lots of resources to help you with TRAX. These links will help you install and practice importing data into TRAX. And, the DISQ team is always happy to help.

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](#)

STREAMLINE

Before we finish up, I'd like to discuss 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.

The EHBs Customer Support Center addresses EHBs software-related questions.

Finally, the CAREWare help desk is your best resource for any TA requests related to CAREWare.

There is no wrong door for TA – if you're not sure who to contact, the DISQ team is happy to refer you to where you need to go!



Connect with HRSA

To learn more about our agency,
visit

www.HRSA.gov



Sign up for the HRSA eNews

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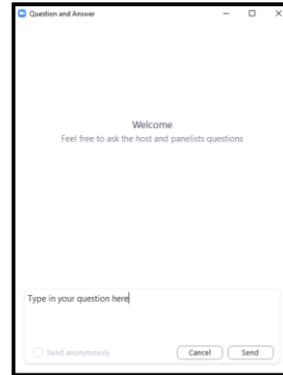
Finally, to connect with and find out more about HRSA, please check out HRSA.gov.

Let's Hear From You!

- Please use the “raise hand” function to speak. We will unmute you in the order that you appear.

OR

- Type your question in the question box by clicking the Q&A icon on the bottom toolbar.



I will turn it over to Margaret -

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.