

Patients by Zip Code

Welcome and thanks for dropping by to learn about the Zip Code Table where you will report patients by their zip code and insurance.

Please click START to begin.

Welcome

I'm Kelly, your UDS Report expert, and I am here to help you complete the Zip Code Table.

This table is important in that it provides information about service access and market penetration in the different geographical areas in the country.

Introductions

Let's start with introductions.

- If you'd like, please let me know who you are by typing your name in the box.
- If you don't want to enter your name, just click **Sign In**.

Get Started or View Navigation

If you've been here before and know how to use the navigational features, you can go straight to the training by clicking on the **LET'S GET STARTED button**.

If you'd like to learn more about our training's navigational features - click on the **HOW TO NAVIGATE button** to continue.

Navigation: Table of Contents & Transcript

Before I go on - if you are interested in hearing the audio narration, please be sure to adjust your computer speakers so that you can hear me.

Also ON THE LEFT of the screen, you'll see a tab that says "TABLE OF CONTENTS." You can use this tab to go anywhere you want in this course. You may find it useful if you want to review something specific about the Zip Code Table. In that case, you can just click on any of the topics listed and jump to that particular section of the course. If you would like an overview that covers all the topics, just stick with me.

Navigation: Play, Previous, Next

AT THE BOTTOM of the screen, you'll see a control bar with navigation controls and buttons that will let you adjust your viewing experience:

- If you want to stop the video, just hit the play button once (to pause), and then hit it again to resume.
- You can also slide the progress bar to the left if you would like to repeat some of the material, or slide it to the right to jump ahead.
- To go to the slide just before or to proceed to the next slide, use the buttons to the right of the control bar labeled "PREVIOUS" and "NEXT."

Navigation: Resources, Exit

There are several links AT THE TOP RIGHT of your screen:

- If you click on the RESOURCES link, you will see additional files and links to websites that will help you in completing your Report; and
- When you're done, click on the EXIT link, and you will exit the course entirely.

Navigation: Icons

Throughout the course, you will see icons that you can click on to:

- View or print the UDS tables;
- Refer to the UDS Manual;
- See helpful hints that should help you with your UDS Report; or
- Take you to a Case Study example to see how all of the UDS data works together.

One last thing before we begin - if you need to leave this training early and return to it later, you can do that. When you come back next time, we will remember where you left off and ask you whether you want to continue from there or start again from the beginning.

I think that covers the details about how to move through the course. Let's get started!

What is the Zip Code Table?

So, what exactly is the Zip Code table?

What is the Zip Code Table?

- The Zip Code Table is the first of four tables that make up the Patient Profile for the UDS Report.
- Every health center will complete it each year as part of their Universal Report.

As we start, if you would like to see a close-up of this table, please click on the VIEW THE TABLE icon to view (and even print out) the Zip Code table. Having a copy will be useful as we go through the training.

What is the Zip Code Table?

In this table, you will report all of your health center's patients by Zip Code of residence and primary medical insurance type.

Did You Know: Zip Code Data

One thing that might be helpful to know as you begin to collect data for the Zip Code table is that you should be able to take this information from your patient registration system.

Why are These Data Important?

The data on the Zip Code Table, specifically, are GIS-mapped and evaluated by the Bureau of Primary Health Care (BPHC) to assess potential service areas on the basis of market penetration. So, as you can see, the information you will be providing is very helpful to the Bureau and to your communities.

How to Use the Data

While the UDS data are critically important to the Bureau of Primary Health Care and Bureau of Health Workforce and used in a number of ways - some of which we just talked about-this wealth of information can also be useful to you and other health centers.

One interesting way you can make use of the Zip Code Table data is to access an online tool called the “UDS Mapper.” The UDS Mapper uses data reported in this table to create maps that would allow you to view the relationships between patients, population and health services.

There are many ways this information has been used by health centers. You could use the UDS Mapper to:

- Explore relationships with nearby health centers;
- Plan for growth or changes in your local network of services;
- Generate maps and data for grant applications, presentations, and marketing materials; or
- Work on a community health needs assessment, for example.

How you use the information is up to you! Just remember that this powerful resource is available to help support your work.

How Can This Training Help Me?

Given the importance of the data and its variety of uses, we're looking forward to spending this time together to help you report as accurately and as efficiently as possible!

After this time focusing on the Zip Code Table, we hope that you will be ready to:

- Report patients by their Zip Code and their primary medical insurance type;
- Include special population groups, such as patients experiencing homelessness or migrant or agricultural workers and their dependents, in your report; and
- Make sure that the Zip Code table is consistent with the numbers reported on the other Patient Profile tables (like Tables 3A, 3B, and 4) and the rest of your UDS report.

Key Terms

Before we get into the details of the numbers, let's review some key terms that will be important for understanding this table. We'll spend more time on each of these in today's training, but we want to take a moment to familiarize you with these important terms.

If you want to view the portion of the UDS Manual that provides more detailed definitions of each, please click on the icon in the bottom right of your screen.

So, let me briefly run through them here:

- We will talk about “total patients” and by that we mean all of the people who had at least one UDS-reportable visit during the reporting year.
- So, to figure out who is a patient you have to know what a “reportable visit” is, right? You can click on the Manual icon to read about how a visit is defined in detail. But briefly, it is a face-to-face contact between a patient and a provider during which the provider exercised independent, professional judgment in the provision of services. To be included as a visit, the services must have been documented in your health center's charts.
- As we've already mentioned-you will be reporting “patients by Zip Code” on this table. Patients by Zip Code is the total number of your health center's patients, reported according to their Zip Code (of residence) and their primary source of health insurance as of their last visit.

Key Terms

- You'll also hear us talk about a category called “Other Zip Patients” - this will include patients from Zip Codes from which 10 or fewer patients were served (typically, this includes individuals who reside far away from your health center).
- You may need to use the “Unknown Residence Patients” category to report patients who were served by your health center, but who do not have a Zip Code on record.
- And, lastly, “Insurance” - which refers to the patient's primary source of medical insurance (if any) at the time of their last visit. Medical insurance includes Medicaid, Medicare, and Other Public and Private insurance, such as Blue Cross. Just one quick note here-some patients will have more than one type of insurance, and you may bill each of them. Here, we're asking you to categorize patients based on the insurance type that you would bill first if they had a medical visit.

Zip Code Table: Step-by-Step Instructions

With that overview and an idea of how you're feeling about the Zip Code table, let's go ahead and jump into the step-by-step instructions on how to complete it accurately.

Who Should I Include?

- One of the first things to note is that the Zip Code Table asks for an **unduplicated count** of patients. What this means is that each patient is counted only once on this table, regardless of how many times they received services or how many types of services they've received.
- Also, you will need to report ALL of your health center's patients here; this is not limited to just medical. This table includes everyone who had at least one reportable visit, in any of the service categories, in the reporting year.

Zip Code Table: Columns A-E

OK, great, now that we have all of your unduplicated patients in mind, you will use this table to report two things about them:

- In column a, you will list their Zip Code of residence; and
- In columns b through e, you'll report their category of medical insurance.

If you have patients who do not have any type of medical insurance-you will report them in column b (None or Uninsured). This has to be reported for everyone-there is no unknown category when it comes to medical insurance.

Let's go through each of the columns together to make sure you're feeling confident about what to report in each category.

Zip Code Table: Column A

So, the first one, column a (Zip Code) is an easy one-this is where you will use each row to report each Zip Code that has 11 or more patients living in it.

Did You Know: Aggregate Zip Codes

So, although column is an easy one - I'd like to make sure you know that you can aggregate Zip Codes with 10 or fewer patients. This will save you time and effort!

We'll talk more about this later but just remember-if you have a Zip Code that has **10 or fewer** patients registered within it, you can just add the patient to the "Other Zip Codes" row.

Zip Code Table: Column A

While we would like Zip Codes to be reported for everyone, we recognize that some health centers may serve patients from a wide range of Zip Codes, some of them outside of their normal service area. If this is the case for your center, again, you can aggregate zip codes with 10 or fewer patients and report these on the "Other Zip Codes" row.

Just to give you an idea of what we mean here - think about a person who might be a tourist visiting your area. So, they might be from somewhere far away with a Zip Code of residence that is not within your usual service area but they come to your health center

for medical attention while on vacation. In that case, you would include that patient in the “Other Zip Codes” category.

Sounds easy enough, right? OK, so let's cover one more Zip Code category before talking about insurance.

Zip Code Table: Column A

The last Zip Code category listed in column a is labeled “Unknown Residence.” You would use this category to report patients who do not have a Zip Code on record with you.

Did You Know: Other and Unknown

So, while we offer the “Other Zip Code” and “Unknown Residence” categories as a way to capture patients who may not fit into one of your commonly-served areas-you would use these options sparingly. Let me explain what I mean.

If you have a large percentage of your total patients in those two categories-your Reviewer may ask you for more information to help us understand your data or ask you to correct the data if you made a mistake. There may be a clear programmatic reason for why a lot of your patients fall into one of these categories-just know that your Reviewer may want to hear more about that to better interpret your data.

Now, you may be saying to yourself, “but we serve a lot of patients experiencing homelessness” or “we provide services to a lot of agricultural workers.” Well, you should know that the UDS has some guidelines to help handle data for special population groups that allow you to capture almost everyone. Let's talk about those next.

Column A: Special Populations

Again, it is the Bureau's goal to be able to identify all health center patients by their Zip Code of residence. However, we do understand that this may be missing for a small number of patients. This may be especially true for health centers serving patient populations that are particularly transient.

Let's look at some instructions to help cover a couple of these special populations:

- If you are serving homeless patients, report the Zip Code of where they are staying-maybe in a doubled up situation or in a shelter or transitional housing. For others who may be living on the street and who do not know or will not share an exact location, use the Zip Code of the location where the patient is being served as a proxy. Similarly, if the patient has no other Zip Code and receives services on a mobile van, the Zip Code of the location where the van was parked that day should be used.
- If you serve patients who are migratory agricultural workers-individuals who may have a permanent residence in a community far away from where they are

working and from where your health center is providing services-then you should report the Zip Code of that patient's temporary housing, that is, the location within your service-delivery area.

Columns B-E: Insurance

Now that you know more about how to report the total, unduplicated number of health center patients by residential Zip Code in column a, let's focus on how to also report patients by their primary medical insurance in columns b through e.

Columns B-E: Insurance

First, you can see that, primary medical insurance has been grouped and is reported in 4 separate categories:

- Column b-None or uninsured;
- Column c-Medicaid/CHIP/Other Public;
- Column d-Medicare; and
- Column e-Private Insurance

Let me point out that these categories in the Zip Code table are slightly different from those on Table 4 (Selected Patient Characteristics). On the Zip Code table, Medicaid, CHIP, and Other Public insurances are lumped into one category (and reported on column c); while Table 4 separates out those insurance types a bit more.

You can click on the UDS Manual icon to see more specific rules for reporting insurance categories.

Columns B-E: Insurance

Remember three things when reporting the different insurance categories:

1. Only report the patients' third party MEDICAL insurance;
2. Include them under the insurance type that you would bill first if the patient had a medical visit (and was covered by more than one type of insurance); and
3. Make sure you are reporting the type of insurance the patient had **as of their last visit** in the reporting year, even if it did not pay for the visit in whole or in part.

Collecting Insurance Information

It's important for you to know that there is no option for "Unknown Insurance" on the Zip Code Table. The reason for this is that you must be obtaining medical insurance information for every person counted as a patient in your UDS Report.

Even if you have a patient who is only receiving dental services - for the purposes of the UDS Report - you are required to collect and submit information about their medical insurance coverage. Now, you may never need that medical insurance for billing

purposes, but you do need that information so that you can submit a complete Zip Code table.

It is also important to remember that you need to ask your patients for this information. Don't assume that you know the source of their insurance coverage based on something you may think you know about them - simply collect that information directly from your patient and report it on the table. If, for example, a dental-only patient has private dental insurance, don't assume that they also have private medical insurance; you must ask them for this information. Similarly, if you don't know what type of medical insurance a dental patient has, don't assume that they are uninsured. Along these same lines, income should not be used as a proxy for insurance.

Did You Know: Workers Comp

Workers Compensation is not insurance belonging to the patient since it does not provide broad coverage, but rather coverage for work-related injuries or illness, only. If a patient is seeking services that are covered by Workers Compensation, the patient's medical insurance may be private insurance, they may be uninsured, or they may have another form of insurance.

Publicly-funded programs, such as the Breast and Cervical Cancer Screening Program, are also not insurance and should not be counted here.

Uninsured

Since we know that there is no "Unknown" category for reporting patients by insurance, let's make sure you can handle a range of possible patient situations.

- If a patient is eligible and you are serving them through a grant program such as Breast and Cervical Cancer, or Family Planning-these services are not being covered by medical insurance. These types of programs "belong" to the health center and not the patient-meaning that the patient can't "take" the benefit and use it elsewhere or for other services. It's often the case that these patients are uninsured and, if so, you should report them on your Zip Code table as "Uninsured" (on Line 7).
- Patients served in correctional facilities may be classified as "Uninsured;" and,
- Patients receiving services through state or local government subsidized "indigent care" programs are considered "Uninsured."

Take a Minute & Explore the Zip Code Table

OK, so now let's take a minute to explore the Zip Code Table.

In this short example, 221 patients documented their residential Zip Code as '93401' and their primary medical insurance as a private insurance provider. To report this accurately, you would report:

- The Zip Code '93401' on a row in column a; and

- The number of patients who documented they were covered by private insurance (221) on that same row, in column e (Private).

Cross-Table Issues

Now that you know how to complete the Zip Code table, it's also important for you to know how the information you'll report here will relate to information you'll report in other tables in the UDS Report.

- First, the Zip Code table and Tables 3A, 3B, and 4 are all capturing the SAME patients. What we mean by this is that the total number of patients you report on the Zip Code table **must equal** the number of patients you report on Table 3A and the other Patient Profile Tables (3B and 4).

Cross-Table Issues

Second, as I briefly mentioned earlier, the Zip Code table is also closely related to Table 4-both report patients by medical insurance but in slightly different ways. What this means is that the total number of patients by insurance that you report on the Zip Code table must equal the number of patients by insurance on Table 4. More specifically, the grand totals at the bottom of each insurance column on the Zip table must match the corresponding insurance numbers on Table 4.

Cross-Table Issues

For example, North Side Health Center reports 7,285 privately insured patients in column e, in the Total line on the Zip Code Table. On Table 4, on line 11, they report 1,959 privately insured patients 0 to 17 years old and 5,326 who are 18 and older. The numbers of privately insured patients in these two age groups add to the total 7,285 reported on the Zip Code table.

This is an area that many health centers struggle with. In a recent reporting year, more than half of all health centers received EHB edits because the information they were reporting on these two tables did not agree. So, take the time to double check those figures before submitting your report.

Find & Flip

Let's break for you to play "Find and Flip" where you try to find the problems in this health center's Zip Code table.

When you click on a number that is a problem, that area will flip over and provide more information. If you happen to click on something that isn't a problem, you can try again and keep trying until you find them all (just 5 areas in this report).

- Click the PLAY FIND & FLIP button to try your hand at the game; or
- Click the SHOW ME button to reveal the answers.

Find & Flip: Play Find & Flip

Let's get this detective work started by giving you some hints that will help you zero in on possible problems. Try to find...

- Some things that can save you time;
- A lot that is not known;
- Typing too fast and numbers switched; and
- It doesn't add up.

If you'd like to go ahead and see the answers, click the "SHOW ME" button.

Find & Flip: Answers

Total

Right! It doesn't add up - the total of 14,290 is incorrect.

Typo

That's right! Typing too fast and numbers switched - all of the Zip Codes start with 93 but one starts with 39 - this is likely a typo.

Unknown Residence

Good eye! A lot that is not known - a large proportion of total patients have an unknown residence.

Fewer Patients

Good eye! Some things that can save you time - Zip Codes 93101 and 93441 have 10 or fewer patients in each.

Find & Flip: Show me

These areas look like possible problems:

- Some things that can save you time - Zip Codes 93101 and 93441 have 10 or fewer patients in each.
- A lot that is not known - a large proportion of total patients have an unknown residence.
- Typing too fast and numbers switched - all of the Zip Codes start with 93 but one starts with 39 - this is likely a typo.
- It doesn't add up - the total of 14,290 is incorrect.

Look Out for These Common Problems!

Let me see if I can help save you and your team some time and frustration by telling you

how to avoid some of the common pitfalls on the Zip Code table.

When completing this table, be sure to:

- Enter Zip Codes carefully-typos and transposed numbers can create problems.
- Aggregate Zip Codes with 10 or fewer patients-and report that number in the “Other Zip Codes” category.
- Keep the number of patients you report in the “Unknown” or “Other Zip Code” categories to a minimum. While you can aggregate, having a lot in this category will trigger flags and questions.
- Use the “None or Uninsured” category to report patients who did not have medical insurance as of the time of their last visit. Do not count someone as “Uninsured” simply because they are only receiving a service that is not covered by their health insurance.
- Make sure the insurance numbers you're reporting on the Zip Code table and Table 4 match!

Congratulations

Congratulations! You've completed the training on the Zip Code table!

Thank you for taking the time today to learn about this table and for testing your knowledge. We appreciate your efforts to give us the data we need to support you in your important work.

Review

You can review any topic that we just covered by clicking on the hyperlinks in the Table of Contents on the left of your screen, but if you would like to do something else, click the **NEXT** button to see your options.

Please remember to access and download additional training resources by clicking on the RESOURCES LINK in the upper right-hand corner of your screen.

Additional Resources

These resources allow you to access National- and State-level UDS data; and, other reporting resources such as Quick Fact Sheets, training webinars, and the in-person regional training schedule. For ongoing questions, you can also email: UDSHelp330@BPHCDATA.NET or call the UDS Helpline toll-free at 866-UDS-HELP.