

Table 3A: Patients by Age & Sex Assigned at Birth

Course Introduction

Hi, welcome and thanks for joining today to learn about Table 3A: Patients by Age and Sex Assigned at Birth.

Please click START to begin.

Welcome

I'm Steve, your UDS Report expert for this training, and I am here to help you complete Table 3A.

This table is important in that it provides key demographic information about your and other health center patients.

Introductions

Let's start with introductions.

- If you'd like, please let me know who you are by typing your name in the box. This information is just used as we interact during this session and is not saved.
- 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

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.

ON THE LEFT of your screen, you'll see a tab that says "TABLE OF CONTENTS." You can use this tab to go anywhere you want within this course. You may find it useful if you want to review something specific about Table 3A. 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 topics, just stick with me.

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. You can also download a copy of the Transcript here; and
- When you're done, click on the EXIT link, and you will exit the course entirely.

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), 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: 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 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 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!

Table 3A Training

What is Table 3A?

So, what is Table 3A?

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Table 3A is the second 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.

- If you receive two or more 330 grants, you will also complete a separate Grant table for each of the special population funding streams you have.

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) Table 3A. Having a copy will be useful as we go through the training.

Did You Know: Universal Report & Grant Reports

Throughout these trainings, we talk about the Universal Report and Grant Reports. Let's stop to make sure we all understand what these mean.

- The Universal Report is completed by all health centers. It provides unduplicated data on services, staffing, & financing across all programs. If you are funded under one BPHC funding authority only, you will complete the Universal report only.
- If you receive BPHC grants under multiple program authorizations (for example, two or more of CHC, MHC, HCH, and/or PHPC grants), you are required to also complete Grant Reports. Grant Reports are shorter than the Universal Report and only include Tables 3A, 3B, 4, (part of) 5, and 6A. A second important difference is that they cover only those patients served in the special population program(s).

What is Table 3A?

In Table 3A, you will report the age and sex assigned at birth of all of your health center's patients.

Did You Know: Same Group

Did you know that you are reporting on the same group of patients that you included on the Zip Code table? So, if you reported on 1,000 patients on the Zip Code table, you will also report 1,000 total patients (Line 39) on Table 3A.

Be sure to count each patient only once, regardless of the number of different types of services they receive.

Why Are These Data Important?

While the UDS data are critically important to the Bureau of Primary Health Care (BPHC) and are used in a number of ways-this wealth of information can also be useful to you.

For example, you can use the age and sex data from Table 3A to describe your patients, look at any service gaps-given the age and sex of your population, and work to target services for the ages you serve. How you use the information is up to you! It is all available to you, so remember it as a resource that can 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 Table 3A, we hope that you will be ready to:

- Report patients by their age and sex assigned at birth;
- Determine age accurately and consistently for all patients;
- And, ensure that Table 3A is accurate and reported on a scope consistent with the other Patient Profile tables, meaning that you are including the same patients.

Key Terms

Before we get into the details of the numbers, let's review some key terms that are important for understanding this table. We'll spend more time on each of these in today's training; but also know that you can click on the icon in the upper left corner of the screen to view the UDS Manual and see all of these definitions in more detail.

So, let me briefly run through them here:

- As we go through the training, we will talk about “total patients.” And by that we mean all of the people who have had one or more UDS-reportable visits at your health center, during the reporting year.
- We'll also talk about “Grant Program Patients” or those patients who have had one or more UDS-reportable visits that were supported by one of the special population grant programs (For example, Health Care for the Homeless (HCH)).
- And, lastly, a “visit” - which we mean to be a documented, face-to-face contact between a patient and a provider during which the provider exercised independent, professional judgment in the provision of services.

Table 3A: Instructions

With that overview and an idea of how you're feeling about Table 3A, let's go ahead and turn to the detailed steps that are involved in completing this table accurately.

Who Should I Include?

- One of the first things to note is that, like the Zip Code Table, Table 3A 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 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.

Did You Know: Grant Report Tables

Remember, a Grant Report table contains a subset of the total population served by your health center. You will report only patients who were supported by one of the

special population grants.

What this means is that you can never have more patients reported in any cell on your Grant Report table, than in the same cell on your Universal Report.

Let me see if I can make that a little clearer:

- If you have an HCH grant and report 10 two-year-old patients on your Universal Report; then
- You need to report 10 or fewer two-year-old patients on your Grant Report
- In other words, you can't report having more “homeless” 2-year-olds than total 2-year-old patients at your health center.

What Do I report?

Now that we have all of your unduplicated patients in mind, you will use this table to report two things about them-age and sex.

Age Groups

We'll start out by focusing on age first. As you can see, age groups (from “under age 1” to “age 85 and over”) are listed in the rows of the table.

Age Groups

Know that when you calculate age for this table-you will use **June 30th** of the reporting year as the cut-off date.

For example, if someone turned 16 during the reporting year, but their birthday was after June 30th, you'd include them on this table as a 15-year-old because they were still 15 as of June 30th.

Did You Know: December Age

We just want to point out here that you might think that your patients' ages will remain the same, no matter where you are reporting their age on the UDS tables. However, that is not the case.

How age is calculated will differ across UDS tables. Let me clarify:

- As we just mentioned, for Table 3A, you will calculate patients' ages using a cut-off date of June 30th; but for
- Tables 6B and 7-you'll calculate patients' age as of December 31st.

Why is this important? Well, because this means that the number of patients in each age category will vary slightly across tables. So, while the number of patients of a certain age on Tables 6B and 7 may be close to the number on Table 3A, they will not be the same, because of the different dates used to calculate patients' ages.

You won't have to keep all of those rules and dates in your memory-if you refer to the

UDS Manual for instructions on who to include on each table, it lists the dates there for you.

Columns A & B: Sex Assigned at Birth

Now that we know how to report the total, unduplicated number of health center patients by age group, let's focus on how to also report them by their sex assigned at birth.

- In column a, you will report all male patients;
- In column b, you will report all female patients.

Did You Know: Age Change

Sometimes health centers experience a big fluctuation in the demographic profile of their patients from year-to-year.

If it turns out that this is the case for you, it will help to write a brief note in the EHB before submitting your report, explaining why this has occurred. This will help your Reviewer interpret your data upon initial review and give them a better understanding of your situation. If the explanation you provide is clear and explains the reason for the differences from year-to-year, your Reviewer may not have to follow up with you about this issue-ultimately saving you time and effort.

Columns A & B: Sex Assigned at Birth

It's important to note in reporting 3A that you are reporting on your patients by their sex assigned at birth. This is normally the sex reported on a birth certificate. For states that permit this to be changed, the birth certificate sex can still be used.

There will be places to report patients by their self-reported gender identity later on in Table 3B.

Cross-Table Issues

Now that you know how to complete Table 3A, it's important for you to also know how the information you'll report in this table relates to the information reported in the other tables in the UDS Report.

- First, remember that Tables 3A, the Zip Code Table and Tables 3B and 4 are all capturing the SAME patients. What we mean by this is that the total number of patients you report on Table 3A **must equal** the number of patients you report on all of the other Patient Profile Tables (like the Zip Code table and Tables 3B and 4).
- Relatedly, if you're completing Grant reports, data on these Patient Profile tables (3A, 3B, and 4) must be consistent.

Cross-Table Issues

Second, we often talk about how some numbers should be the same (or must match exactly) across various tables. This is not the case for Table 3A and the measures in Tables 6B and 7 where you report specific age groups.

- As we mentioned earlier, age is calculated using different cut-off dates for Table 3A versus Tables 6B and 7. Just remember that the cut-off date for calculating age: on Table 3A is June 30th; and on Tables 6B and 7 is December 31st.
- Another important thing to note is that while 3A reports all patients by age and gender, the measures on 6B and 7 have additional inclusion criteria such as medical visits, diagnoses, and other variables.
- So, while the number of patients by age is likely to be close on these tables, they will not be equal.

Look Out for These Common Problems!

Let's see if I can help save you and your team some time by telling you how to avoid some of the common errors we see on Table 3A.

When completing Table 3A, be sure to:

- Count all of your patients but include them only once; remember that Table 3A represents an unduplicated count of your patients.
- Make sure the total number of patients on Table 3A, is consistent with the total patients on the Zip Code Table and Tables 3A, 3B, and 4.
- Remember that the dates used to calculate age are slightly different across UDS tables. So, patients by age totals for Table 3A and Tables 6B and 7 will be close, but will not be an exact match.
- Don't forget to add a comment in the EHB if your health center experienced big changes in the age or sex profile of your patients since last year.
- And remember that each field on a Grant report must be less than or equal to the corresponding field on the Universal report.

Congratulations

Congratulations! You've completed the training on Table 3A!

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 & Additional Resources

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.