INTRODUCTION

Welcome to the documentation for LHCSA (Licensed Home Care Services Agency) and ALP (Assisted Living Program) LHCSA Statistical Report using the Universal Data Collection System (UDCS), a data collection tool that enables you to enter data for submission to the Department of Health in a spreadsheet-like environment. In the past, the Statistical Report information was collected through the Health Electronic Response Data System (HERDS). This has been upgraded to UDCS because it offers a more familiar, Excel-like interface and more powerful editing capabilities.

A UDCS data collection application has two parts – the UDCS Report Manager and Shell, which manage the reports on your computer and is like the Microsoft Excel executable, and the reports or formats that correspond to spreadsheets. This document will guide you through the process of downloading and installing the UDCS Report Manager and Shell and the reports.

NOTES:
- A Health Commerce System (HCS) account is required to download the UDCS Report Manager, Shell, and the reports.
- The Report Manager requires Windows 7 or later operating system. The software WILL NOT operate correctly with previous operating systems such as Windows Vista or Windows XP and CANNOT be run on an Apple computer.
- The software, executables, and reports must be installed on the computer of the user who will be entering and submitting the data. The user installing the software must have Windows Administrator privileges on the computer on which it is being installed. The Windows Administrator must not use the "Administrator Shortcut" – where the user is signed on to the computer, but the Administrator right clicks and chooses "Run as Administrator". The Administrator must sign on to the computer.
- Only users who were assigned the HCS Administrator role **when the application was released** will be able to submit data. Other users can be added afterward but a request must be sent to HCStatRpts@health.ny.gov after the user has been assigned the HCS Administrator role.
- A single data file (this file has an extension of .pnp) should be created for each licensed site that your organization operates.
- A single copy of the data file can be stored in a location where multiple people can access it. This will enable people to enter the data that is appropriate for their organizational function – e.g. business office personnel entering the cost and revenue data and human resources personnel entering staffing and wages data. **HOWEVER, ONLY ONE PERSON SHOULD ENTER DATA AT A TIME.** If multiple people are entering data at the same time, only the data from the last person who saved will be retained.
- **This documentation has been updated from previous versions. Images may be from previous report years. Dates in the text have been updated for the current report year (2023).**

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User Account Control ✕

Do you want to allow this app from an unknown publisher to make changes to your device?

C:\WINDOWS\Installer\b61361a.msi

Publisher: Unknown
File origin: Hard drive on this computer

Show more details

To continue, enter an admin user name and password.

| User name |

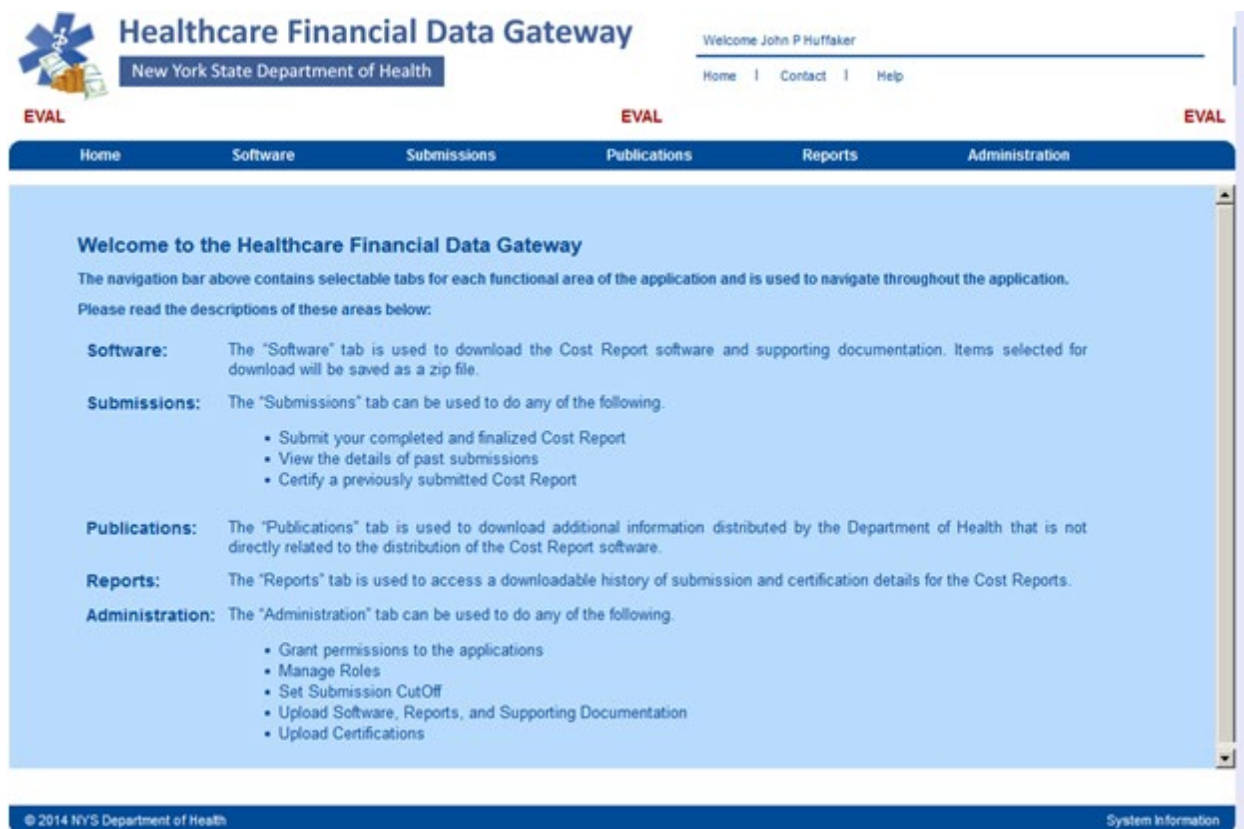| Password |

Domain: SVC

More choices

| Yes | No |

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Installing the Software, Reports and Documentation

1. Login to the HCS.
2. Click on **Healthcare Financial Data Gateway** in **My Applications.**
3. If it is not there:
    a. Click on the **My Content** tab at the top of the HCS home page.
    b. Click on **All Applications.**
    c. Click on **H** in the **Browse by** alphabet list.
    d. Click on the **green sphere** marked with a plus sign (+) on the row for the **Healthcare Financial Data Gateway**.
    e. Go back to **My Content**.
    f. Click on **Healthcare Financial Data Gateway** in **My Applications.**

This will take you to the **Healthcare Financial Data Gateway** main page.

Installing the Software

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1. Go to the **Healthcare Financial Data Gateway** main page.
2. Click on the **Software** tab – the **Software, Reports and Documentation** page will display.

3. Click the **Software** button– the **Download Software** page will display.

4. Select **Report Manager and Shell Version 5 (Installation Instructions Included).**
5. Click on the **Download** button at the bottom of the page.
6. Save the .zip file to the location of your choice.
7. Open the .zip file and extract the Report Manager and Shell software and the installation documentation (this documentation is more extensive than is required to install the software for the Statistical Report and contains some information not applicable to LHCSAs).

Installing the Software continued…

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8. Run the **UDCS_REPORT_MANAGER_SETUP_<version>.exe** program. The InstallShield Wizard splash screen will display after some initializations are performed. Click **Next.**
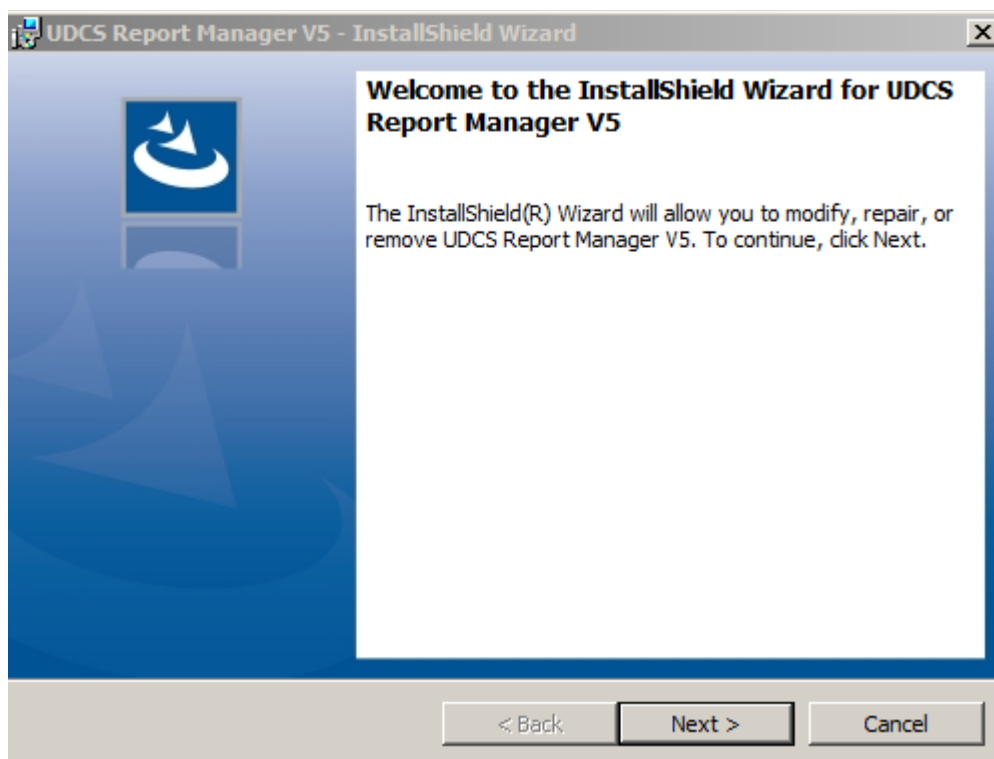
9. The **Program Maintenance** dialog will display. Select **Modify** and click **Next.**

Installing the Software Continued…

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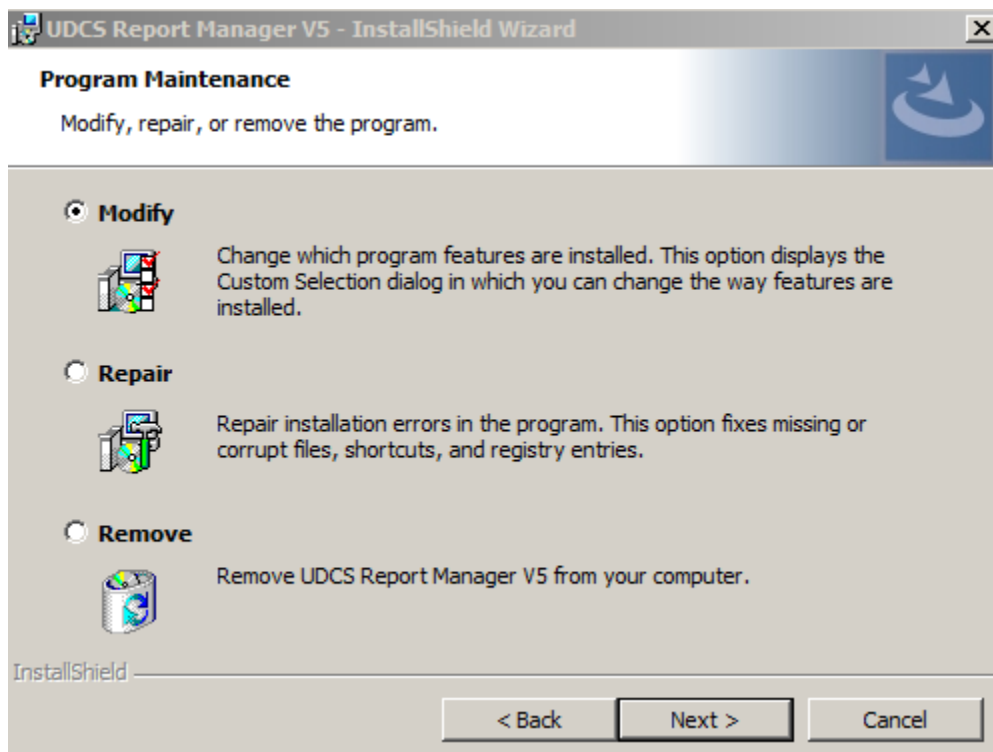
10. The **Custom Setup** dialog screen will display. Click **Next.**
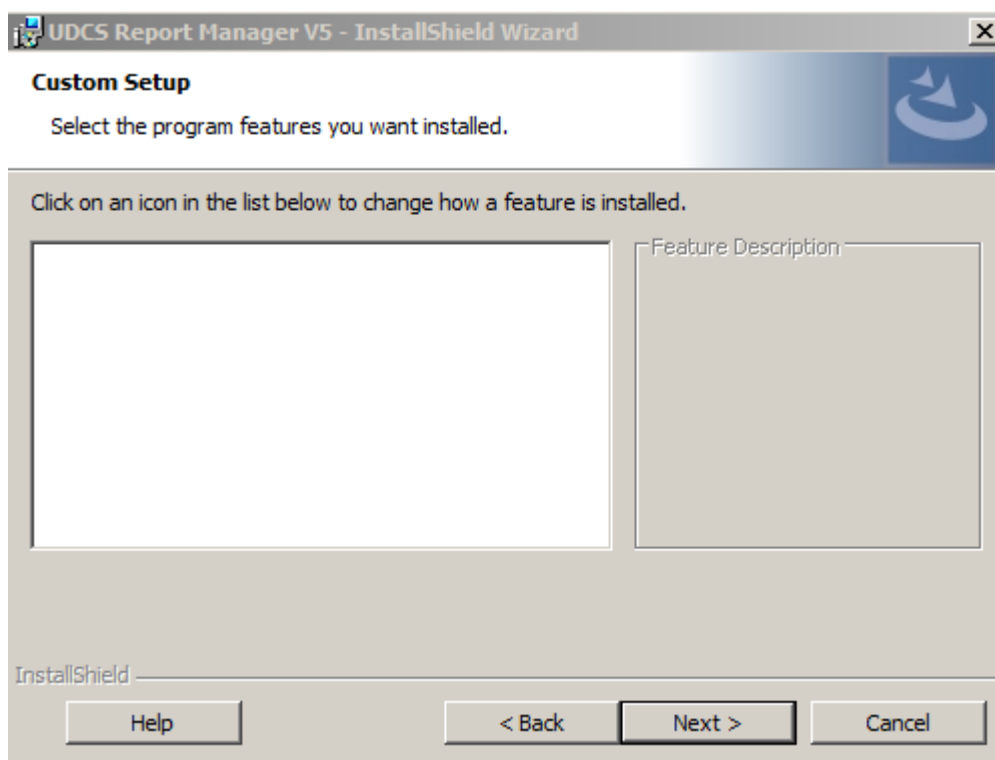
11. The **Ready to Modify the Program** dialog will display. Click **Install**.
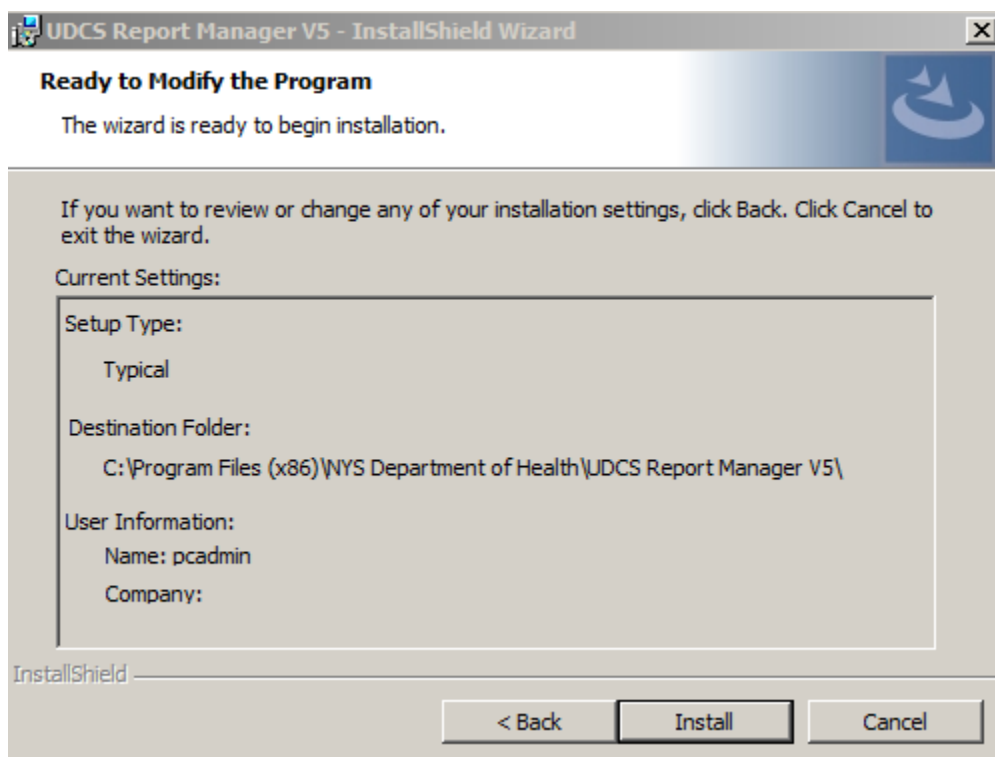
12. A Desktop icon will be created named **Launch Report Manager V5**. Use this to launch the application.

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Installing the Reports
Downloading the Reports

1. Go to the **Healthcare Financial Data Gateway** main page.
2. Click on the **Software** tab – the **Software, Reports and Documentation** page will display.

3. Click on the **Reports** button – the **Download Matrix Reports** page will display.
   a. Organization Type is **Home and Community Based Services**
   b. Submission Schedule can be **Annual LHCSA** or **Annual ALP_LHCSA**
   c. Select the Submission Year.
   d. Submission Period is **Annual**
4. Click on the **Search** button.

Downloading the reports continued…

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5. Unselect all reports except for the current year's **LHCSA Annual** report and click the **Download** button.


6. **DO NOT OPEN THE .zip FILE**. Save the .zip file to the location of your choice. Some computers automatically save the downloaded .zip file into the computer's Download folder. If your computer does not ask where you would like to save the file, it has most likely automatically saved the file in the Downloads folder. Do not modify this .zip file – it contains an encrypted file and can only be used by the UDCS Shell. Instructions for managing this file with the UDCS Report Manager and using it with the UDCS Shell are contained later in this documentation.
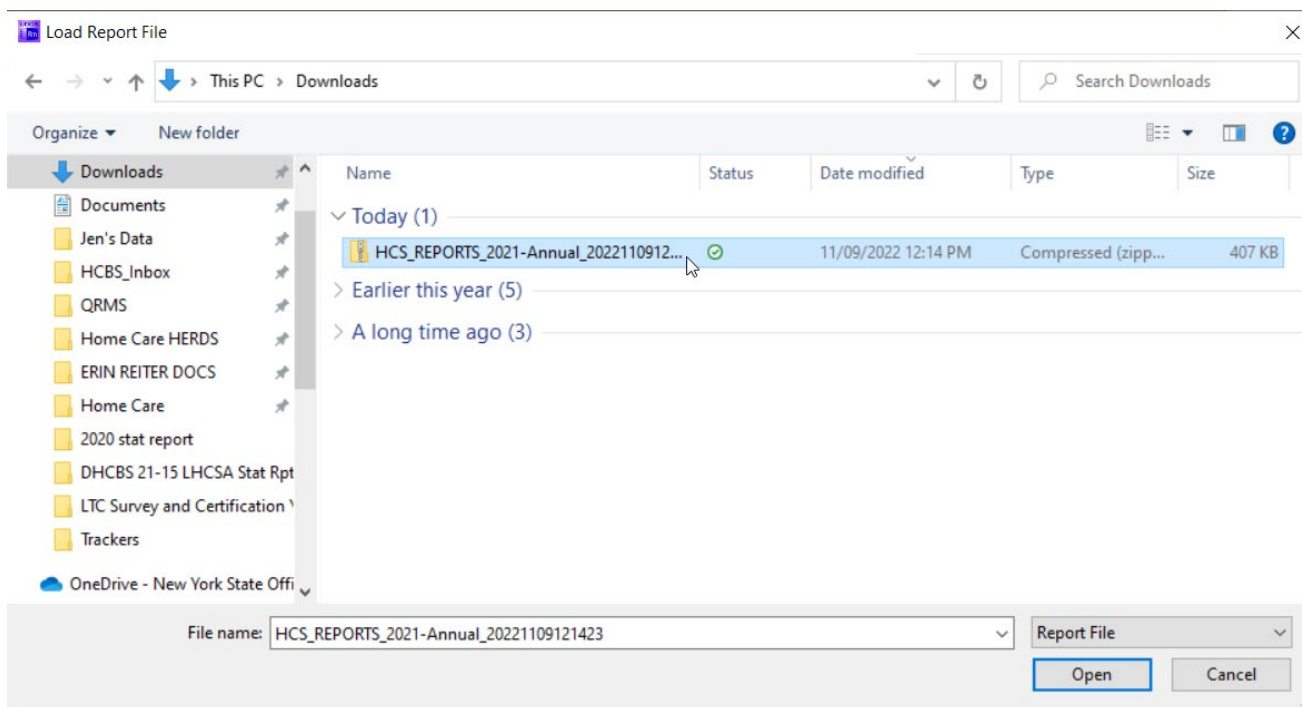
Running the Application

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Running the application for the first time

1. Click the **Launch Report Manager** desktop icon.
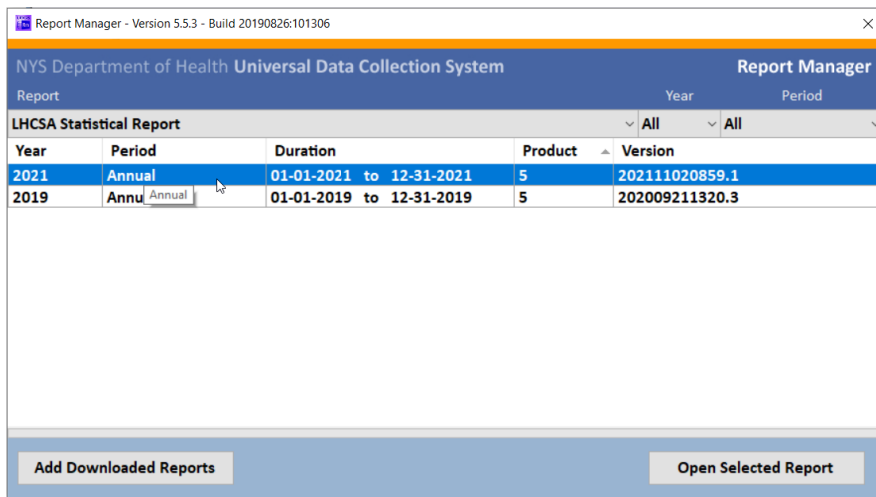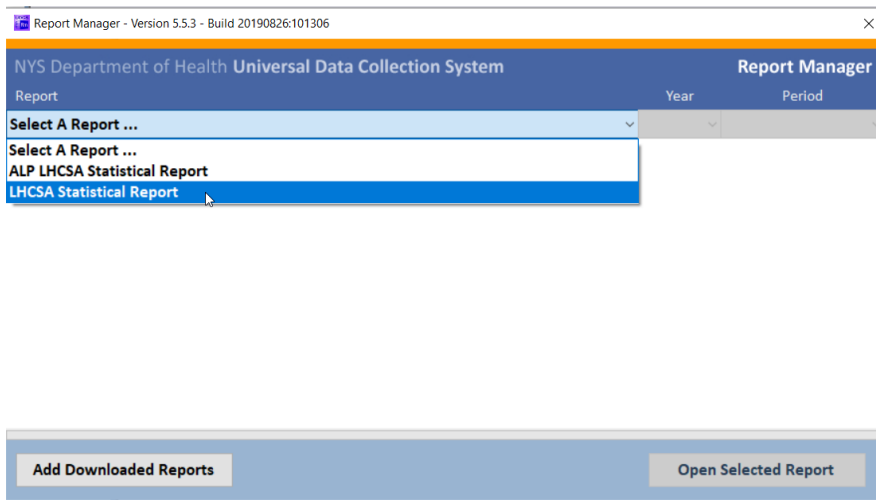2. The **UDCS Select a Report** dialog will display. Click the **Add Downloaded Report** button.
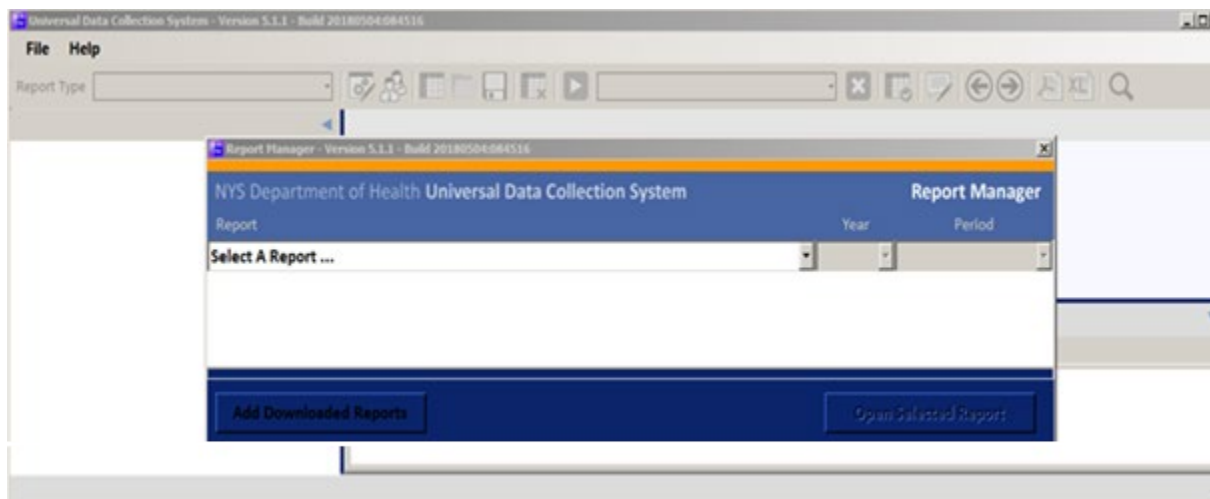
3. Locate and select this year's annual report that you downloaded earlier.

Running the Application for the First Time, continued…

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4. Click the down arrow at the end of the **Select a Report…** drop down menu and click on either the **LHCSA Statistical Report** menu item, or the ALP LHCSA Statistical Report item. Then select the correct year for the report. This will load the report into the UDCS Report manager.
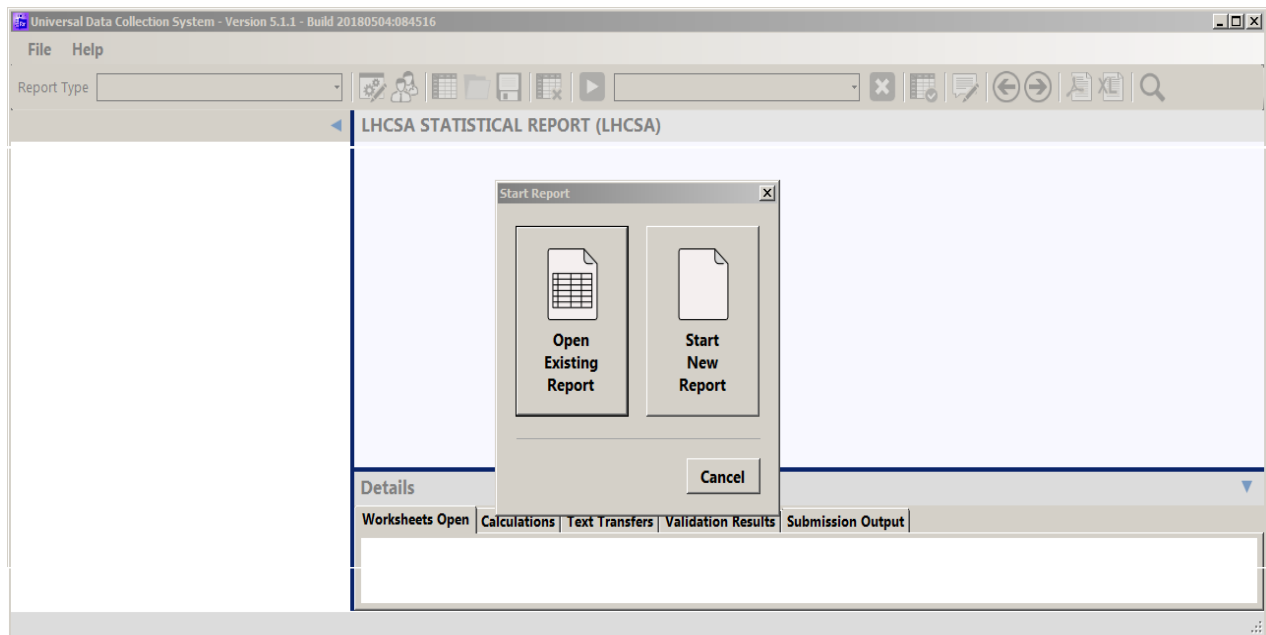

5. Make sure that the correct report is selected and click the **Open Selected Report** button – the Start Report dialog will display.
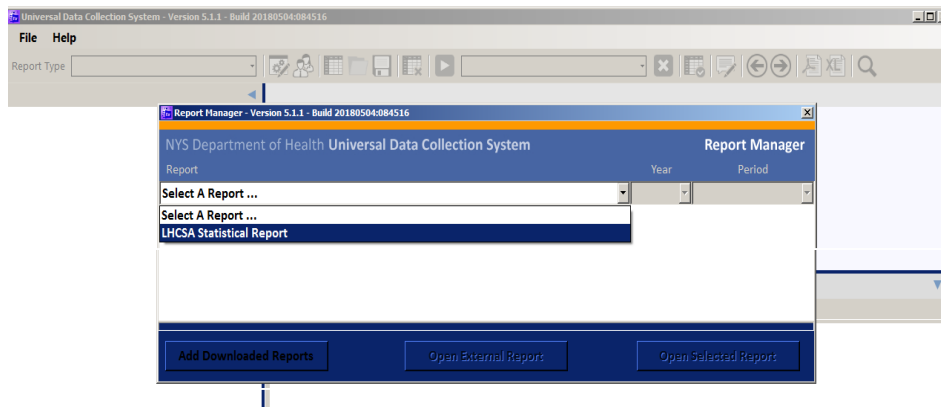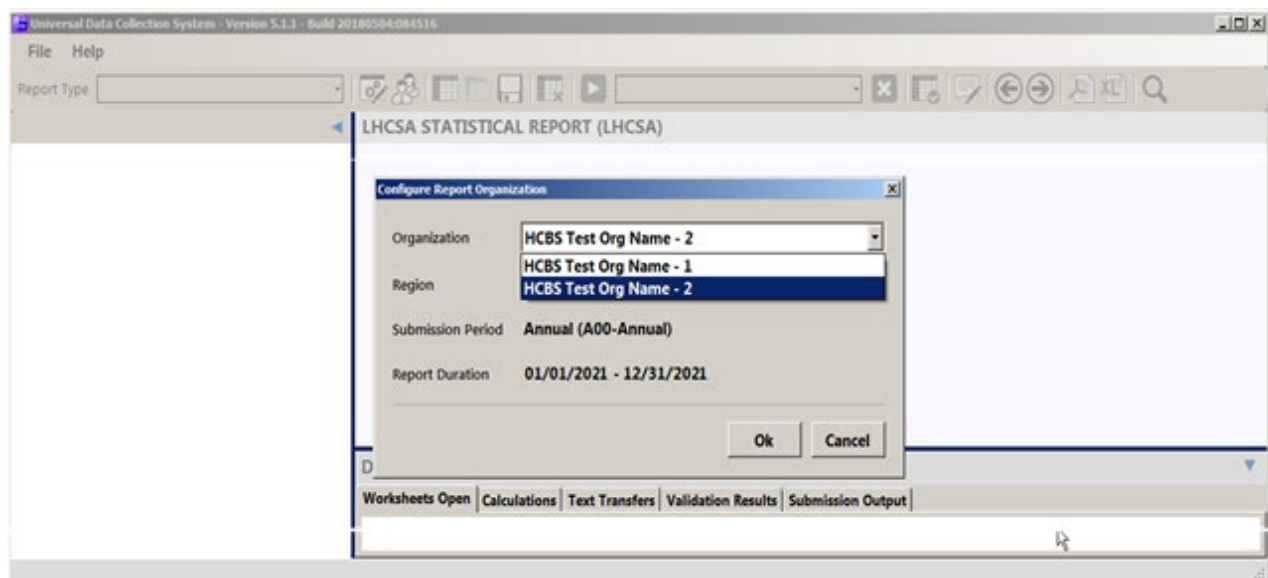

Running the Application for the First Time, continued…

6. Click the **Start New Report** button.

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Running the Application for the First Time, continued…

7. Click the **OK** button on the **Select Report** Type dialog – the **Configure Report Organization** dialog will display. Select your LHCSA from the **Organization** dropdown menu.
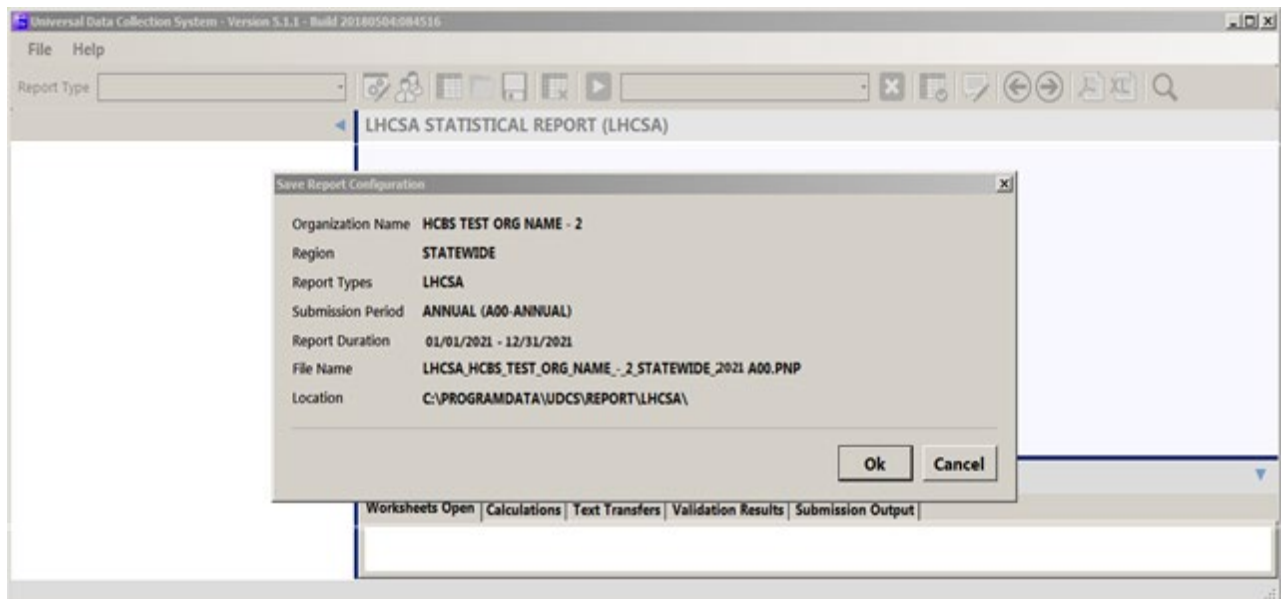

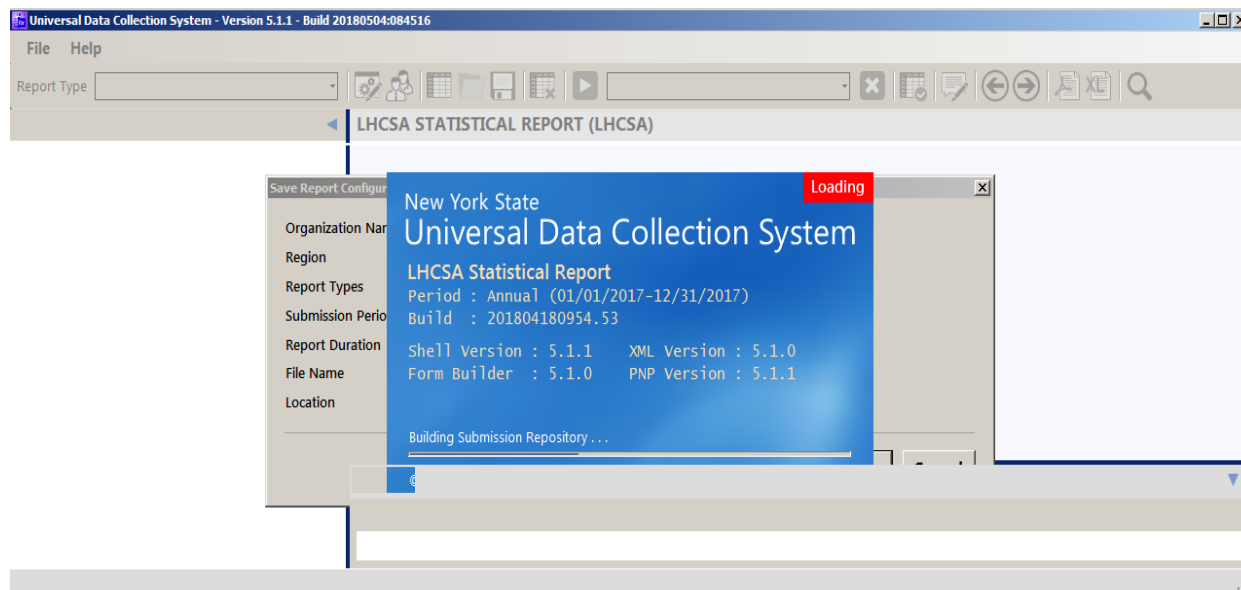8. Select **Statewide** from the **Region** dropdown menu click the **OK** button.

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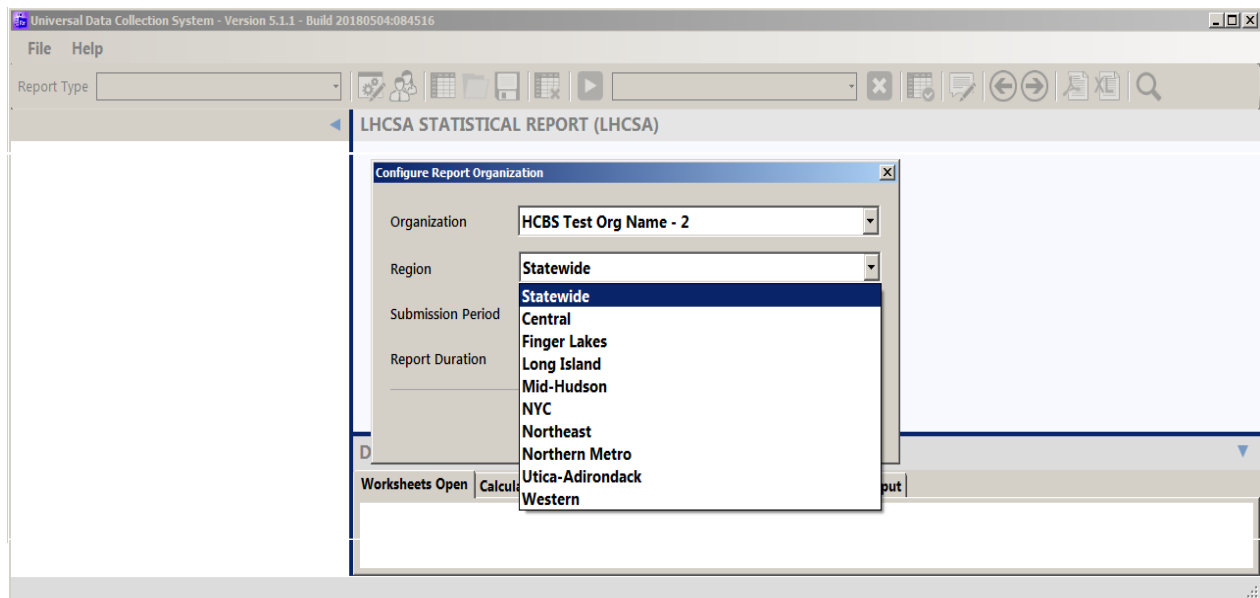
Running the Application for the First Time, continued…

9. Click the **OK** button on the **Save Report Configuration** dialog.

10. The Universal Data Collection System Shell will start loading the selected report.

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Running the Application for the First Time, continued…

11. The **Control Data Validation Message** dialog will display; click the **Yes** button.
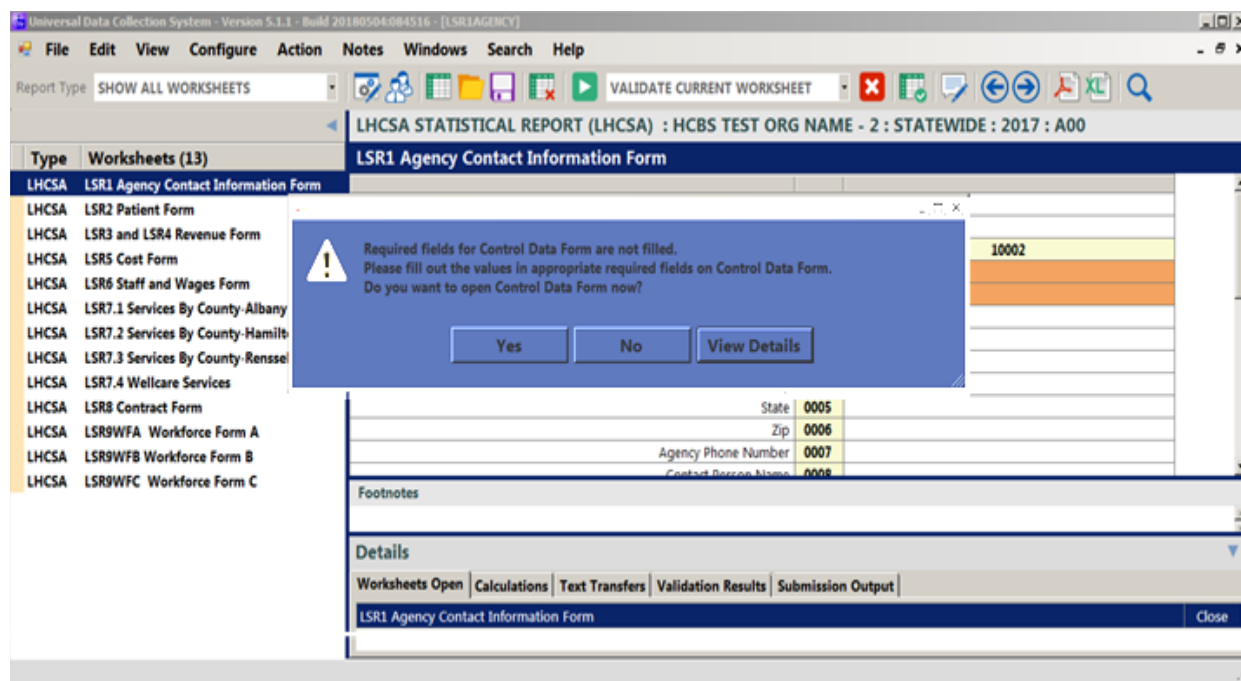
12. Fill out the **General Information** data and Click the **Validate** button.

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13. If the data validates, click the **Save** button.
14. Start entering data into the LHCSA Statistical Report or the ALP_LHCSA Statistical Report.

Running the application after the first time

1. Click on the **Launch Report** manager desktop icon.
2. The **UDCS Select a Report** dialog will display.
3. Click on the down arrow at the end of the **Select A Report…** drop down menu.
4. Select the **LJHCSA Statistical Report** menu item.
5. Click on the **Open Selected Report** button – The **Start Report** dialog will display.
6. Click on the **Open Existing Report** button.
7. When **File Explorer** opens, select the report created when the application was initially started and open it.
8. The **Universal Data Collection System Shell** will start loading the selected report.
9. If you have not yet entered the **Configuration Information** data
    a. the **Control Data Validation Message** dialog will display; click on the **Yes** button
    b. File out the **Configuration Information** data
    c. Click on the **Validate** button.
    d. If the data validates, click on the **Save** button.
10. Continue entering data into the LHCSA Annual Statistical Report

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Submitting the Finalized Statistical Report

1. Login to the HCS.
2. Click on **Healthcare Financial Data Gateway** in **My Applications.** This will take you to the **Healthcare Financial Data Gateway** main page.

3. Click the **Submissions** tab – the **Submissions** page will display.

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Submitting the Finalized Statistical Report continued…

4. Select **LHCSA or ALP_LHCSA** as the **Submission Type** and your organization from the **Organization** list and then click the **Search** button. The **Submission** page will be expanded.

5. Click the **Browse** button to display a dialog box that allows you to locate your finalized LHCSA Statistical Report. It will have a .pnp file extension.
6. Once you have selected the file to submit, click the **Submit** button.
7. The **Submission History** section of the **Submission** page will be updated to reflect the status of the submission.
8. A confirming email message will be sent to the email address listed in the **New Submission** section of the **Submission** page**.**

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