

# HAB 2010 RSR Client-Level Data XML Upload Test

## Instructions for the RSR XML Upload Test Application

**These instructions are designed to assist you with the HAB 2010 RSR Client-Level Data XML Upload Test (RSR XML Upload Test) system.**

If you need additional assistance, please contact the HRSA Call Center:

- Phone: 877-464-4772
- Email: callcenter@hrsa.gov

The purpose of this test is for you to demonstrate your organizations' readiness to report your Client-Level Data in the upcoming RSR 2010 Annual Reporting Period. In doing so, you simply need to upload an RSR Client-Level Data file in the proper XML schema format to this database.

If you have access to this test application, that means that you were identified by HAB as being required to demonstrate your organizations' readiness to submit client-level data files during the summer of 2010 by completing a successful client-level data XML file upload as a part of the "RSR XML Upload Test."

The reference table below shows who is required to upload client-level data for the RSR 2010 "Interim Reporting Period" (Summer 2010):

Were You Required to Upload CLD in 2009?*	Did You Upload CLD in 2009?	Are You Required to Upload Client Level Data in Interim 2010?
Y	Y	No
Y	N	Yes
N	N	Yes
N	Y	No

*\*Required in 2009: This means that you were funded for Outpatient/Ambulatory Medical Care, Medical Case Management or Non-Medical Case Management services (OA/CM).*

If you think that your organization should not have been identified as "required" to participate, please contact the HRSA Call Center.

**Note: The RSR XML Upload Test system is completely separate from the EHBs and/or the HAB RSR system, so it is required that you register an account in this system regardless of whether you have an account in the EHBs or the HAB RSR system.**

### Accessing the RSR XML Upload Test website

To demonstrate your capacity to report client-level data, you must successfully upload client-level data into the RSR XML Upload Test Application.

You will be asked to register as a user for your organization.

Reminder: The XML Upload Test application is a role-based application. The items and actions available for each user-role shall be different, depending on the role.

1. Please access the XML Upload Test site at: <https://perf-test.hrsa.gov/HAB/RsrXmlImport>
  - a. You will immediately see a Security screen. Please click "OK" to access the login screen.

Note: You must log into the 2010 RSR Client-Level Data XML Upload Test website *directly*. You cannot access this website via the HRSA EHBs.

### New Users Must First Register

If you are a user representing a Provider organization (that is required to participate) or a user representing a Grantee organization funding a Provider organization (that is required to participate), you are required to register and create a User Account in order to access the RSR XML Upload Test website.

Note: Since this system is not the RSR Web Application, you will not be automatically registered, even if you participated in the 2009 Annual Reporting Period. You must register as a new user in order to access the RSR XML Upload Test system.

1. Select the "Create Account" Link.
2. Enter the required information:
  - a. **User Name:** The username must consist of alphanumeric characters (only) and be between 4 and 10 characters in length.
  - b. **Registration Code:** The registration code entered must match a valid registration code in the system associated with an organization that has been identified as required to participate.
  - c. **Email:** The email must be a valid email address format.
  - d. **Password:** The password must include: Length between 8 and 20 characters; At least 1 lower case alphabet (a-z); At least 1 upper case alphabet (A-Z); At least 1 number (0-9); At least 1 special character (ex: ~,!,@,#,\*).

*Please note that you must enter your Email and Password twice, in order to confirm that you have typed it in properly.*

3. Select the "Create" button.
  - a. If the Account was created successfully, you should see a "success" message.
  - b. If any of the information is incorrect, you should see an error message telling you what needs to be corrected.

Note: You must use your organizations' Registration Code to create a User Account.

If you do not know what your Registration Code is, please contact your Grantee –or- contact the Data Support Call Center at 1-888-640-9356.

# HAB 2010 RSR Client-Level Data XML Upload Test

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Health Resources and Services Administration

## HAB 2010 RSR Client-Level Data XML Upload Test

[About](#) [Logon](#)

User names are required to be at least 4 characters and no more than 10 characters in length and may only contain letters and numbers. Passwords are required to be at least 8 characters and no more than 20 characters in length and must contain at least one lowercase letter, at least one uppercase letter, at least one number and at least one special character.

**Account Information**

**User name:**

**Registration Code:**

**Email:**

**Confirm email:**

**Password:**

**Confirm password:**

[Create](#)

### Registration Page

4. Select "OK" to clear the Account Creation message.

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Health Resources and Services Administration

## HAB 2010 RSR Client-Level Data XML Upload Test

Successfully created user account 'test1'.

[OK](#)

test1 (Provider)

Provider Import History - Provider						
Grantee	Provider	Clients	Upload	Print	Exempt	Updated
New Jersey	Dooley House	0			<input type="checkbox"/>	5/21/2010 3:05:51 PM

### Successful Account Creation Message

## Help With Logging In

Regardless of your role, all users will log in the same way:

1. If you have already registered, simply enter your Username and the Password that you registered with.
2. If you have already registered, but forgot your Password, simply select the “Retrieve Password” link at the bottom of the page.
  - a. Enter the User Name that you registered with, and your Email Address.
  - b. Your Password will be sent to you via email.
3. If you are unfamiliar with the XML Schema Definitions, please select the “Download XML Schema Definitions” link at the bottom of the page.
  - a. This download information will open in a separate window.
  - b. Your email address will be required in order to download the schema (as seen below).

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### HAB 2010 RSR Client-Level Data XML Upload Test

About Logon

Logon

User name:

Password:

Remember me

Logon

[Create Account](#) [Retrieve Password](#) [Download XML Schema Definitions](#)

## [Login Page](#)

## Uploading the Client-Level Data File

Upon successful login, you will be taken to the "Upload Status" page. The "Upload Status" page will display a table listing all Providers that you (based on your user-role) are authorized to view. Because the RSR is a role-based application, the view and actions available for each user-role may be different.

The information that will be displayed for your organization may include:

- **Grantee** – The "Grantee" column will display the name of the Grantee funding the Provider. (*not displayed for Grantees*)
- **Provider** - The "Provider" column will display the name of the Provider organization.
- **Clients** - The "Clients" column will display the number of Client records that have been uploaded and stored in the database only after the Client-Level Data has been successfully uploaded for that Provider.
- **Upload** - The "Upload" column will display the Upload icon.
- **Print** - The "Print" column will display the Print icon only after Client-Level Data has been successfully uploaded for that Provider.
- **Exempt** – The "Exempt" column will display a checkbox to indicate if a Provider organization has been exempted from reporting.
- **Updated** - The "Updated" column will display the Date/Timestamp of the last update to the corresponding Provider organization.
- **Updated By** - The "Updated By" column will display the username of the user who last updated the corresponding Provider organization.

In addition to your user-role, the listing of Providers that each user is authorized to view will also be determined based on your registration code:

- Grantees may upload Client-level data for any Provider organization that they are associated with.
- Providers may upload Client-level data for only their own organization.

testgr1 (Grantee)    About    Account    Logoff    Upload

Search:

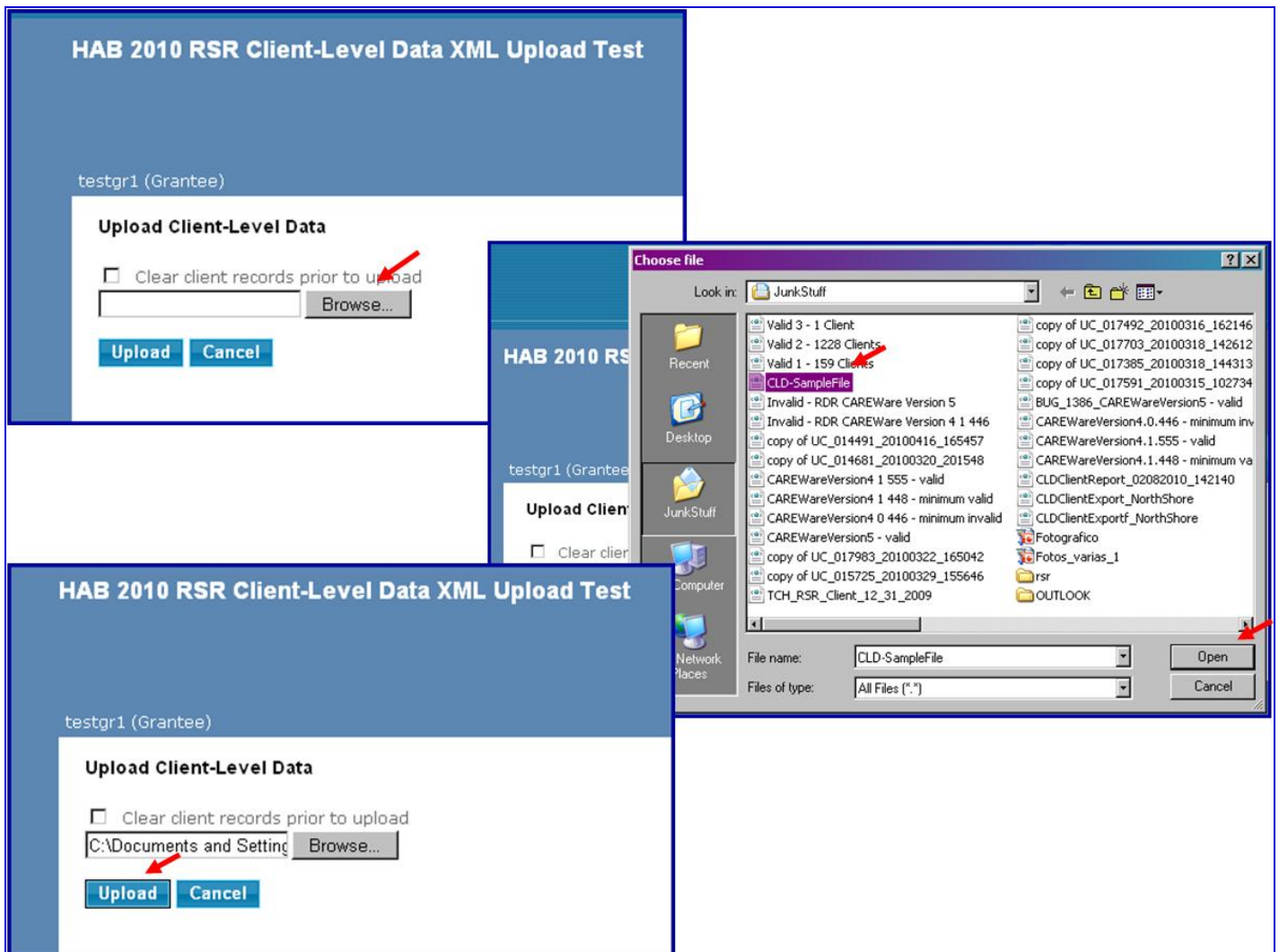
Provider	Clients	Upload	Print	Exempt	Updated
Health Council of South Florida, Inc.	0			<input type="checkbox"/>	5/21/2010 3:05:51 PM
Miami Dade County Health Department	0			<input type="checkbox"/>	5/21/2010 3:05:51 PM
NEHEMIAH EDUCATIONAL AND ECONOMIC DEVELOPMENT, INC.	0			<input type="checkbox"/>	5/21/2010 3:05:51 PM
United Deliverance	0			<input type="checkbox"/>	5/21/2010 3:05:51 PM

### Upload Status Screen

Note: The RSR XML Upload Test system is pre-populated with only the Provider organizations that have been identified as "required" to participate. Provider organizations that are not required to participate will not be displayed.

## HAB 2010 RSR Client-Level Data XML Upload Test

1. Select "Upload" button adjacent to the Provider that you would like to upload a Client-Level Data XML file for.
  - a. The Upload Window will open.
2. Select the "Browse" button.
  - a. This will open up a window that will allow you to browse-for and select a file to upload.
3. In the "Choose File" pop-up window, highlight the file (name) that you would like to upload.
  - a. Ensure that you highlight a properly formatted XML.
4. Select the "Open" button to load that file into your Upload Window.
5. Once the file name and path is visible in the Upload Window, select the "Upload" button underneath the file name.



### **Browsing, Selecting, and Uploading Files**

Note: Only XML files will be processed; any other file type will be rejected.  
Only properly formatted XML files that conform to the published schema can be processed.

### Confirm Your XML Upload via the Upload Status Screen

To confirm your uploaded data is successful, simply check the Upload Status screen. Once you have successfully uploaded your Client-Level Data, the “Clients” column will be populated with the number of clients that were uploaded.

1. If the XML Upload was successful:
  - a. The Client-Level Data XML file has been processed.
  - b. The Client records have been inserted into the database.
  - c. An Upload “success” message will be displayed.
  
2. If the XML Upload was not successful:
  - a. If the XML file that the user attempts to upload is not in the proper format the system will issue an error message and will make no further attempts to process the file.
  - b. If the XML file validation fails, the system will display a list of error messages to the user, and notify the user that the upload attempt was unsuccessful.
  - c. An “error” message will be displayed.

Note: You must correct the data in your XML file and re-upload successfully, in order to complete your obligation to prove that your organization is ‘ready’ to participate in the upcoming RSR Annual Reporting Period.

3. Select “OK” to close the Upload message and continue.

The screenshot shows the HRSA HAB 2010 RSR interface. At the top, the HRSA logo and "U.S. Department of Health and Human Services Health Resources and Services Administration" are displayed. A blue message box in the center reads "Successfully uploaded 1228 client records." with an "OK" button. Below the message box, the user is logged in as "testgr1 (Grantee)". A search bar is visible, and a table titled "Provider Import History - Florida" shows the upload status for "Health Council of South Florida, Inc." with 1228 clients uploaded on 5/25/2010 at 11:13:18 AM.

Provider	Clients	Upload	Print	Exempt	Updated
Health Council of South Florida, Inc.	1228			<input type="checkbox"/>	5/25/2010 11:13:18 AM

### **Successful Upload Message**

## HAB 2010 RSR Client-Level Data XML Upload Test

The screenshot displays the HRSA HAB 2010 RSR Client-Level Data XML Upload Test interface. At the top, the HRSA logo and the text 'U.S. Department of Health and Human Services Health Resources and Services Administration' are visible. Below the header, the page title 'HAB 2010 RSR Client-Level Data XML Upload Test' is shown. A user profile 'testgr1 (Grantee)' is displayed on the left, and navigation buttons for 'About', 'Account', 'Logoff', and 'Upload' are on the right. A search bar is located below the user profile. The main content area features a table titled 'Provider Import History - Florida'. A red arrow points to the 'Upload' column in the table. The table has columns for 'Provider', 'Clients', 'Upload', 'Print', 'Exempt', 'Updated', and 'Updated By'. The data rows are as follows:

Provider	Clients	Upload	Print	Exempt	Updated	Updated By
Health Council of South Florida, Inc.	159				5/25/2010 1:31:14 PM	testgr1
Miami Dade County Health Department	1228				5/25/2010 1:40:24 PM	testgr1
NEHEMIAH EDUCATIONAL AND ECONOMIC DEVELOPMENT, INC.	0				5/21/2010 3:05:51 PM	
United Deliverance	0				5/21/2010 3:05:51 PM	

### **Upload Status Screen Showing Successful Upload**

4. The number of Client-Level Data records that were successfully uploaded will be displayed in your Upload Status grid in the “Clients” column.
5. The “Updated” column will display the Date/Timestamp of the last successful upload of Client-Level Data.
6. The “Updated By” column will display the username for the user that last updated/modified the Client-Level Data.

You *may* upload multiple files into the XML Upload Test system.

- If you choose to upload a subsequent file without clearing the client records from the first successful upload, the number of unique client records will be merged and added to the first file.
- If you choose to upload a subsequent file and “Clear” the existing client records, the number of client records reflected in the “Clients” column will reflect the second upload (only).
  - If the subsequent upload fails, the number of Client records in the database for that Provider will still reflect the original number of Client records.

You may not delete or “clear” the client records that have been successfully uploaded without subsequently uploading a valid XML file.

## Confirm Your XML Upload via the Upload Confirmation Report

Another way to confirm your uploaded data is by reviewing the Client-Level Data Upload Confirmation Report. Once you have successfully uploaded your Client-Level Data, the “Print” icon will be enabled. The Print command allows you to generate a PDF version of the “Client-Level Data XML Upload Confirmation Report” that is associated with Provider.

The Client-Level Data Upload Confirmation Report can be used to verify that the counts and totals reported match what you expected from your source system (i.e., the data you believe was exported from your source data system).

This report can serve as a “receipt” that demonstrates you have successfully fulfilled your obligation to upload Client-Level Data.

### To view a copy of your Upload Confirmation Report:

1. Select the “Print” icon adjacent to the Provider for which you would like to generate an Upload Completion Report.
  - a. The File Download pop-up will open.
  - b. The format of the generated report is PDF.
2. You will have the option to “Open” or “Save” a copy of the CLD Upload Confirmation Report.
  - a. **To Print the Report:** Select the “Open” option to open the PDF.
    - i. Once you have opened the file, you can print the report by selecting File→Print from the Acrobat Reader menu.
    - ii. If you want to save the file after opening it first, select File→Save a Copy from the Adobe Acrobat Reader menu).
  - b. **To Save the Report:** Select the “Save” option to save a copy of the PDF to your computer.
    - i. Once you have saved the file, you can then open or print it as you would any other PDF.

The screenshot shows the 'HAB 2010 RSR Client-Level Data XML Upload' interface. A 'File Download' dialog box is open, asking 'Do you want to open or save this file?'. The dialog shows the file name 'RsrClientReport.pdf', type 'Adobe Acrobat Document, 47.8 KB', and source 'perf-test.hrsa.gov'. There are 'Open', 'Save', and 'Cancel' buttons. Below the dialog is a table titled 'Provider Import History - Florida' with columns: Provider, Clients, Upload, Print, Exempt, and Updated. The table lists providers like 'Health Council of South Florida, Inc.', 'Miami Dade County Health Department', and 'NEHEMIAH EDUCATIONAL AND ECONOMIC DEVELOPMENT, INC.'. The 'Print' column contains icons for each provider, indicating that the data has been successfully uploaded.

Provider	Clients	Upload	Print	Exempt	Updated
Health Council of South Florida, Inc.	159			<input type="checkbox"/>	5/25/2010 1:31:14 PM
Miami Dade County Health Department	1228			<input type="checkbox"/>	5/25/2010 1:40:24 PM
NEHEMIAH EDUCATIONAL AND ECONOMIC DEVELOPMENT, INC.	0			<input type="checkbox"/>	5/21/2010 3:05:51 PM
United Deliverance	0			<input type="checkbox"/>	5/21/2010 3:05:51 PM

### Generating the Upload Confirmation Report

Note: The "Print" column will display the Print icon only after Client-Level Data has been successfully uploaded for that Provider.

# HAB 2010 RSR Client-Level Data XML Upload Test

RsrClientReport[1].pdf - Adobe Reader  
File Edit View Document Tools Window Help

1 / 15 Zoom In 69.1% Scrolling Pages One Full Page Find

Date: 5/25/2010 Page 1 of 15

### Client-Level Data Upload Confirmation Report

2010 Interim (January 01, 2010 through June 30, 2010)

Grantee: All Grantees Provider: Health Council of South Florida, Inc. Total Client Records: 159

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The Client-Level Data Upload Confirmation Report verifies the client-level data that has been uploaded for selected providers. As a provider, you can use this report to serve as a "receipt" that demonstrates your successful upload of client-level data. You can also use this report to verify that counts and totals match what you expected (i.e. what you believe was exported from your source data system). Please note that because of data rules applicable to specific elements, the "totals" for some elements may not match the total count of uploaded clients/client records. In some cases the totals may be more than, or less than, the total number of client-level records uploaded. Refer to the individual report descriptions for further explanation.

In all the tables in the report, the item number specified in parentheses in the column header corresponds to the Item number in both the RSR Instruction Manual and the RSR Data Dictionary.

First Service Date (Item 1)					
< 2006	2006	2007	2008	2009	2010
19	3	2	1	136	

The First Service Date table shows the dates of clients' first service visits (count) at the specified provider's agency organization. The data is shown from the current year back through the past five years along with the data prior to the last five years. This is a required field in the client report and must be reported in the format mm.dd.yyyy. This date must always be less than or equal to the end of the reporting period.

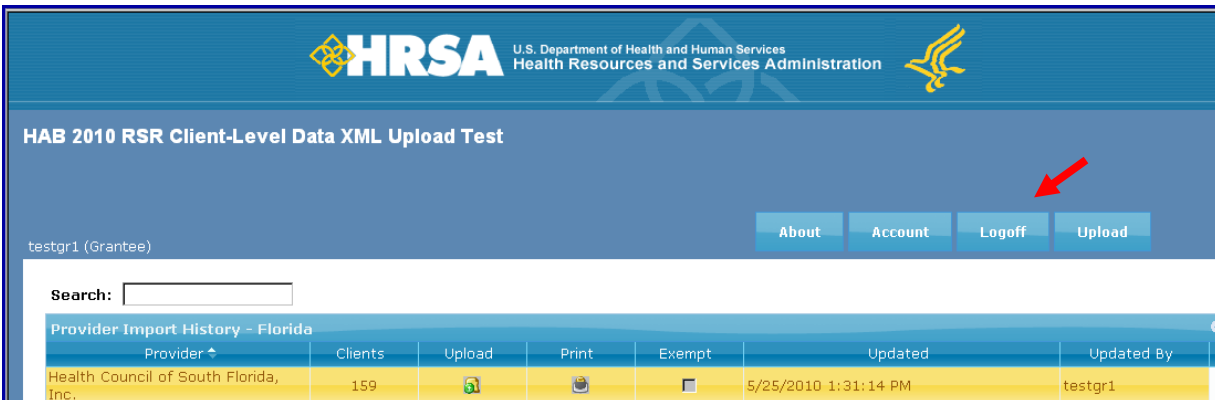
Enrollment Status Breakdown (Item 2)	
Enrollment Status (Item 2)	Count
Active, continuing in program	105
Referred to another program or services, or became self-sufficient	27
Removed from treatment due to violation of rules	25
Incarcerated	1

[Sample of Page 1 of the CLD Upload Confirmation Report](#)

## Logging Out

Once you have successfully uploaded Client-Level Data to the XML Upload Test database, you have completed your requirement to participate.

1. To logout of the RSR Client-Level Data XML Upload Test application, simply select the “Logoff” tab at the top of the screen.



The screenshot shows the HRSA application interface. At the top, the HRSA logo and the text "U.S. Department of Health and Human Services Health Resources and Services Administration" are displayed. Below this, the title "HAB 2010 RSR Client-Level Data XML Upload Test" is shown. The user is logged in as "testgr1 (Grantee)". A navigation menu contains four tabs: "About", "Account", "Logoff", and "Upload". A red arrow points to the "Logoff" tab. Below the navigation menu is a search bar and a table titled "Provider Import History - Florida".

Provider	Clients	Upload	Print	Exempt	Updated	Updated By
Health Council of South Florida, Inc.	159				5/25/2010 1:31:14 PM	testgr1

## Logout

The “Logout” tab returns you back to the “Login” page.

## Other Information Available to You

### “Download XML Schema Definitions” Link

If you are unfamiliar with the XML Schema Definitions and/or the XML file format, you may download the XML Schema Definitions documents by selecting the “Download XML Schema Definitions” link at the bottom of the Login Page.

All users have access to the Download XML Schema Definitions link.

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Health Resources and Services Administration

### Ryan White HIV/AIDS Services Reporting System (RSR) File Download

The download file contains the following information:

- RSR Client-Level Data Dictionary
- XML schema definitions
- Sample XML files
- T-Rex application

If you have any questions, please contact Michael Dols at Michael.J.Dols@SAIC.com.

Email:

**Download**

Please enter your email address so that we may inform you of any updates.

### *The “Download XML Schema Definitions” Page*

Note: Your email address will be required to download the schema.

## “About” Tab

The “About” tab takes you to a page that contains generic information about the RSR Client-Level Data XML Upload Test system. This information is available once you are logged into the application.

The “About” page contains information on the following:

- Purpose of the 2010 Summer test
- Exemption Criteria
- How this test compares to the RSR Annual Reporting

All users have access to the “About” Tab.

The screenshot shows the application interface for the HAB 2010 RSR Client-Level Data XML Upload Test. At the top, there is a blue header with the HRSA logo and the text "U.S. Department of Health and Human Services Health Resources and Services Administration". Below the header, the page title "HAB 2010 RSR Client-Level Data XML Upload Test" is displayed. A navigation bar contains buttons for "About", "Account", "Admin", "Logoff", and "Upload". The user is logged in as "lisa (Administrator)". The main content area is titled "About the 2010 RSR Client-Level Data XML Upload Test Application" and contains the following text:

This purpose of this test is for you to demonstrate your organization's ability to upload RSR client-level data files in the proper format.

If you have access to this test application, that means that you were identified by HAB as being required to demonstrate your organization's readiness to submit client-level data files during the summer of 2010 by completing a successful client-level data XML file upload.

You MUST participate in the 2010 RSR Client-Level Data XML Upload Test if, for the RSR 2009 Annual Performance Report:

- You were not required to submit RSR client-level data files (i.e., if you were not funded for outpatient ambulatory care services, medical case management services, or non-medical case management services in 2009) or
- You were required to submit RSR client-level data but did not.

This test encompasses a scaled-down version of the RSR. You will use this system to "test" your XML uploads and demonstrate to HAB that you can successfully upload the required client-level data.

If you are required to participate in this exercise, you must successfully upload client-level data into the demonstration system no later than **September 24, 2010**.

**Exemption Criteria:** Your organization is exempt from the requirement to upload client-level data files if:

- Your organization is funded exclusively to provide administrative services only and/or counseling and testing services only.
- Your organization successfully completed the RSR 2009 Annual Provider Report, including the upload of client-level data.

If you do NOT have to participate in the 2010 RSR Client-Level Data XML Upload Test, your next required RSR report, including client-level data, will be for the RSR 2010 Annual Reporting period.

If you believe that you should be exempt, please contact Data Support at 1-888-640-9356 or at RyanWhiteDataSupport.WRMA@CSRIncorporated.com.

For all other types of assistance, please contact the HRSA Call Center at 1-877-Go4-HRSA (1-877-464-4772) or CallCenter@HRSA.gov.

## The “About” Page

## “Account” Tab

The “Account” tab takes you to the “Account Information” page. The Account Information page allows you to change some of the account information that you used when you registered. You may change the following fields:

- Email
- Password
- Registration Code

All users have access to the “Account” Tab.

The screenshot shows the HRSA website interface. At the top, the HRSA logo is displayed alongside the text "U.S. Department of Health and Human Services Health Resources and Services Administration". Below this, the page title "HAB 2010 RSR Client-Level Data XML Upload Test" is centered. A navigation menu contains buttons for "About", "Account", "Admin", "Logoff", and "Upload". The user's name "lisa (Administrator)" is shown in the top left. The main content area is titled "Account Information" and contains several input fields: "User name:" (a dropdown menu), "Current email:", "Current password:", "New email:", "Confirm new email:", "New password:", "Confirm new password:", and "Registration code:". An "Update Account" button is located at the bottom of the form.

## The “Account” Page

# HAB 2010 RSR Client-Level Data XML Upload Test

## “Upload” Tab

The “Upload” tab returns you back to the “Upload Status” page.

All users have access to the “Upload” Tab.

HRSA U.S. Department of Health and Human Services Health Resources and Services Administration

HAB 2010 RSR Client-Level Data XML Upload Test

lisa (Administrator) About Account Admin Logoff Upload

Search:

Provider Import History - Administrator

Grantee	Provider	Clients	Upload	Clear	Print	Exempt	Exempt Reason	Updated	Updated By
ACCESS COMMUNITY HEALTH NETWORK	Human Resources Development Institute, Inc.	159				<input checked="" type="checkbox"/>	Testing	5/13/2010 2:18:25 PM	admin
ACCESS COMMUNITY HEALTH NETWORK	South Suburban Council on Alcoholism and Substance Abuse	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
ACCESS COMMUNITY HEALTH NETWORK	Vital Bridges NFP, Inc.	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
AIDS Resource Council of Southwest Florida	AIDS Resource Council of Southwest Florida	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
Alabama	Alabama Department of Public Health - ADAP	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
Albany Medical College	Albany Damien Center	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
Arizona	Community Foundation for Southern Arizona	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
Arizona	North Country Community Health Center	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
Arizona	YAVAPAI County Health Department	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	
Atlanta, GA	AIDS Alliance for Faith and Health	0				<input type="checkbox"/>		5/5/2010 5:15:34 PM	

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## The “Upload Status” Page