

# ART Gallery Report 0407

## Self Sufficiency Outcomes Matrix

### Client Progress

### Case Management Report

#### **EXECUTIVE SUMMARY:**

This report compares the initial (first) and the most recent (last) Self Sufficiency Outcome rating for each of the clients in a selected project. First/last comparisons with calculated gains/losses are reported for each domain where at least one value has been recorded, as well as an average score for all domains. This summary report displays the results both graphically and in table format. A second report tab displays a history of the clients' SSOM assessment, and shows the raw scores on all of the clients' SSOM assessments in table format. To be included in this report the client must have at least an initial SSOM assessment and one additional assessment of any type by the specified provider, at least one of which must be in the specified date range.

#### **AUDIENCE:**

The report is intended primarily for use by Case Managers.

#### **FREQUENCY:**

Report should be run as needed or as proscribed/planned.

#### **PURPOSE:**

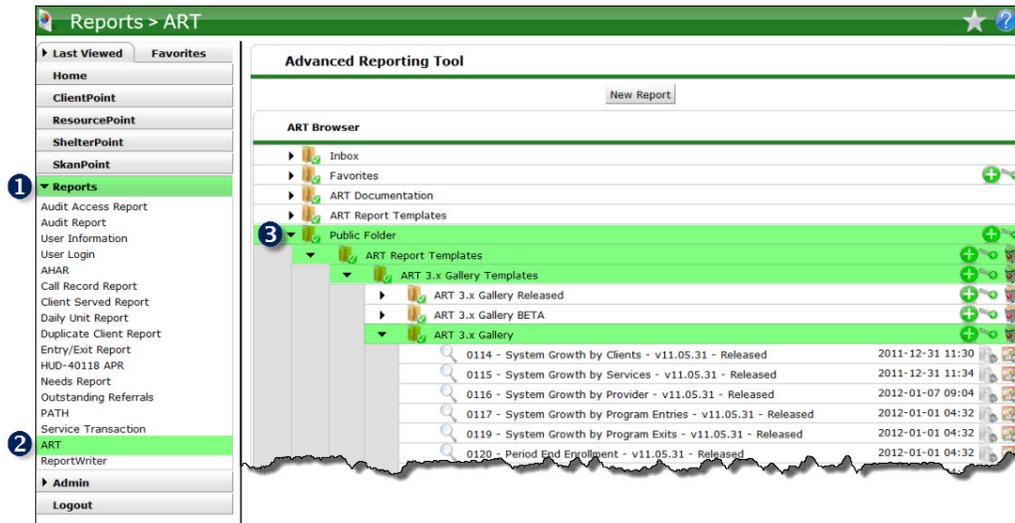
This report is useful to case managers for tracking the achievements of their individual clients. It is intended primarily for use with current/active clients, as it reports on all clients who have had at least two SSOM assessments, whether or not they have had a "final" SSOM assessment, as opposed to ART Gallery report 405 (SSOM Client Achievement Report) which includes only clients with a "final" assessment.

**NOTE:** The Self-Sufficiency Outcomes Matrix is designed as a long-term measurement instrument to measure a client's transition to self-sufficiency over time. For this report to function accurately there should only be one matrix record per person per reporting period for the project selected.

## INSTRUCTIONS:

The easiest way to start using this report is to navigate to the automapper. This is a folder that has the reports automatically mapped to your site, so that you don't have to map them yourself. You can navigate to the automapper as shown in Figure 2.1 below:

Figure 2.1



Requests for additional information concerning the report function/design should be directed to Bowman Systems' Customer Support Specialist (CSS) staff.

**Before running the report:** Prior to running the report the User must determine the provider to be included in the report and a date range on which to base the results. The report includes two date prompts and takes into account the SSOM exit records that occurred during the date range and the initial matrix created for each exit matrix record found.

## How to run:

Upon opening the report, the User will be prompted (see Diagram 1) to specify parameters which control the data returned by the report. Once the User has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a selection has been made. The User should then single-click the “Run Query” button to generate the report.

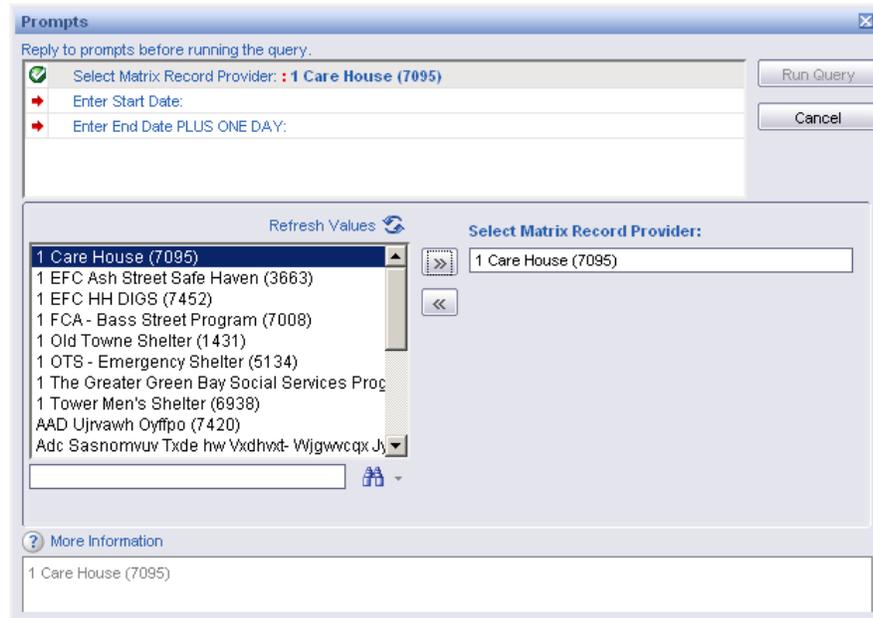


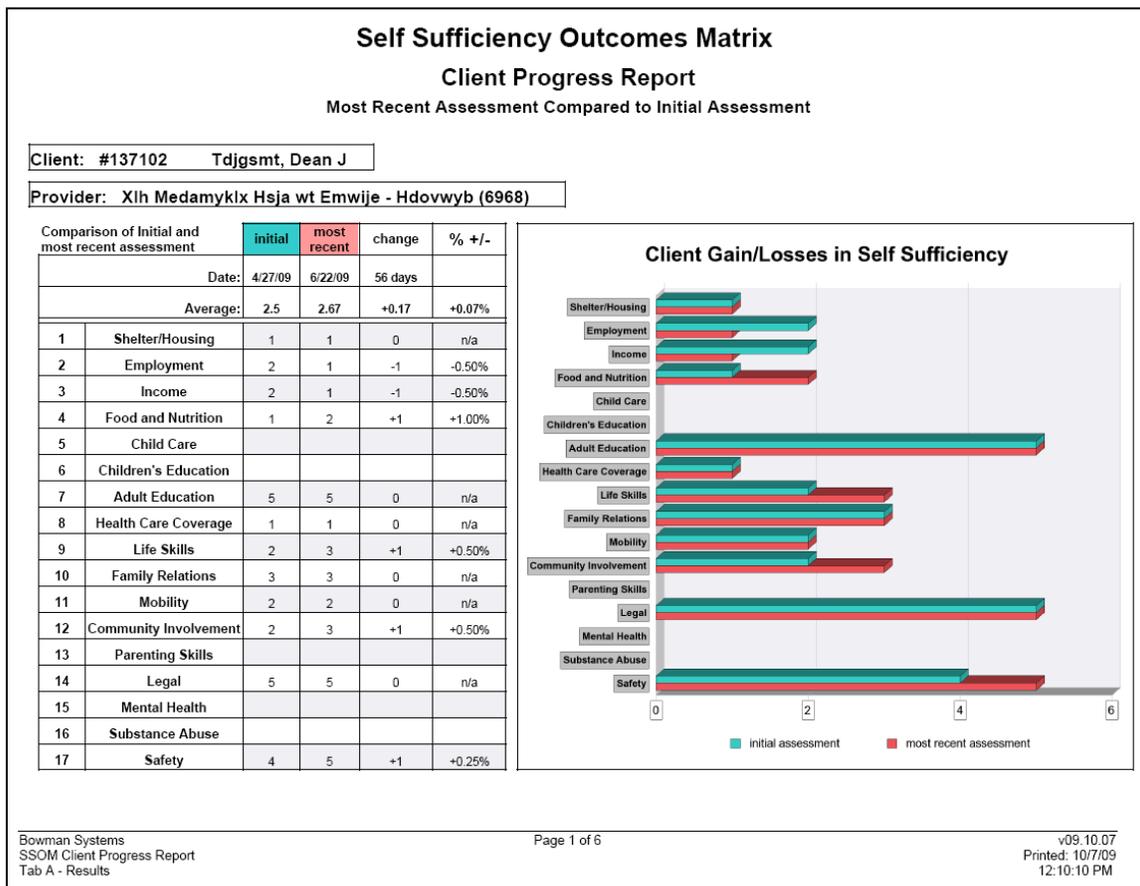
Diagram 1

The three user prompts contained in this report are:

1. **Select Matrix Record Provider:** Click the “refresh list” icon and wait for the left window to refresh. Now select a single provider (project) to include by highlighting it in the left window and moving it into the right window using the right selection arrow.
2. **Enter Start Date:** The user should enter (or select from the calendar) the first day of the date range for the desired reporting period. To be included in the report at least one of the clients SSOM assessments must fall within the specified date range.
3. **Enter End Date PLUS 1 Day:** The user should enter (or select from the calendar) the day following the last date for the desired reporting period. (Example. If the desired reporting period is for the month of March, the end date should be April 1<sup>st</sup>.)

**How to read:** This report contains three report Tabs. Each Tab is a separate sub-report containing three sections:

- **Report Header:** The header contains the title of the report. When running the report in “modify” view, the report header is only visible in print/page layout mode.
- **Report Footer:** The report footer contains the title of the report, the name of the sub-report, the page number, the version number, and the date/time the report was run /printed. Like the header, the footer is only visible in print mode when the report is run in modify view.
- **Report Body:** The Report Body is the main section of the report located between the header and the footer where the reports data is displayed in a variety of different chart and graph formats. The data contained in each of the Tabs in this report is displayed and described below:



**Diagram 2**

**Tab A – Client Progress Report - Results (Diagram 2):** This report tab produces a separate page for each client who has had at least an initial and one additional SSOM assessment recorded. The report pages print in the order of client number and each page includes the client number, client name, and project name along with a table and a bar graph that compare the client’s initial and most recent. This comparison also includes the net change and percentage change in the client’s average ratings (over all domains where both the initial and most recent scores are non-null values).

**Self Sufficiency Outcomes Matrix**  
**Client Progress Report**  
 Client's Assessment History

Client: #313855    Gymm, Karl F

Provider: Xlh Medamykix Hsja wt Emwije - Hdovwyb (6968)

AVERAGE:		2.18	2.5	3.27
TYPE:		Initial	Interim	Final
DATE:		2/5/09	4/8/09	6/22/09
1	Shelter/Housing	1	2	2
2	Employment	1	1	3
3	Income	1	2	3
4	Food and Nutrition	1	2	3
5	Child Care	n/a	n/a	n/a
6	Children's Education	n/a	n/a	n/a
7	Adult Education	4	4	4
8	Health Care Coverage	1	1	1
9	Life Skills	4	4	4
10	Family Relations	3	n/a	4
11	Mobility	1	2	4
12	Community Involvement	3	3	4
13	Parenting Skills	n/a	n/a	n/a
14	Legal	n/a	n/a	n/a
15	Mental Health	n/a	n/a	n/a
16	Substance Abuse	n/a	n/a	n/a
17	Safety	4	4	4

**Diagram 3**

**Tab B – Client Progress Report – History (Diagram 3):** This report provides the complete history of SSOM assessment detail for each client. As with Tab A, this report tab also produces a separate page for each client who has had at least two SSOM assessments recorded. The report pages print in the order of client number and each page includes the client number, client name, and project name along with a table that compare the client’s SSOM ratings. Note that the number of columns in the table correspond to the number of assessments the client has had recorded.

## Self Sufficiency Outcomes Matrix Client Progress Report

### Additional Information

User Prompt Field	Value(s) Selected
Enter End Date PLUS ONE DAY:	10/1/09
Enter Start Date	1/1/08
Select Matrix Record Provider:	Xlh Medamykix Hsja wt Emwije - Hdowwyb (6968)

Providers Reporting Information	Client Count
Xlh Medamykix Hsja wt Emwije - Hdowwyb (6968)	8

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Bowman Systems  
333 Texas Street, 300  
Shreveport, LA 71101  
Toll Free: (888) 580-3831  
Direct: (318) 213-8780  
Fax: (318) 213-8784  
Email: ART\_Reports@BowmanSystems.com  
<http://www.bowmansystems.com>

**Diagram 4**

**Tab C – Additional Information (Diagram 4):** This tab is the standard appendix that is included in all ART Gallery reports, and is provided as a reference to the user running the report. This tab lists the parameters specified in the user prompts, as well as the total count of the clients included in the report.

#### TECHNICAL NOTES:

1. As stated above, all clients who have an initial set of answers and one additional set are included in the report and the report includes both clients with “final” ratings and those without.
2. In Tab A, the values in the “Change” column are calculated by subtracting the “initial” score from the “most recent” score. The “% +/- “ column represents the percentage of change between the initial and most recent assessment scores and is calculated by dividing the “change” amount by the “initial” score.
3. It should be noted that the numbers produced by this report are not necessarily meaningful in and of themselves since there may be a great number of uncontrolled variables that impact the client’s outcomes. In assessing a project’s effectiveness or a client’s success, acceptable research methods must be used before conclusions can be drawn. The function of this report is simply a tool for collecting, reporting, observing and printing the assessment values which the project has recorded.

**ALERTER**

**Self Sufficiency Outcomes Matrix**  
**Client Progress Report**  
 Most Recent Assessment Compared to Initial Assessment

Client: #52224 Qyturw, Lori T

Provider: UCEJ Htsevkwi Kfemhkw Wdvejka(8673)

Comparison of Initial and most recent assessment		initial	most recent	change	% +/-
Date:		5/13/09	12/31/11	962 days	
Average:		4.24	5.71	+1.47	+0.35%
1	Shelter/Housing	2	5	+3	+1.50%
2					
3					
4					
5					
6	Children's Education	2	2	0	n/a
7	Adult Education	5	5	0	0.00%

**Client Gain/Losses in Self Sufficiency**

Multiple initial matrices records exist for this client / provider / time period.  
Please reference the document for more information.

**Diagram 5**

In cases where a client has more than one initial matrix record for the client/provider/time period selected the user will receive an alerter (see Diagram 5) that indicates there is a matrix record that must be addressed. User should run the 0508 SSOM Domains at Population Entry report to see the client deal and address the data quality issue.

**REPORT MODIFICATION**

Users with ad-hoc ART licenses may wish to modify/customize this report to better suit their needs and purposes. When modifying an ART Gallery report such as this one, the user will need to make a copy of the original report into a different folder. This copy can be created either by using the “save as” feature or by clicking on the “organize” icon in folder view.

NOTE: The original un-modified version of this report is a template and is retained in ART Gallery Templates folder structure. These template folders are read-only and any reports must be copied to a location in the user’s site (Favorites or Public Folders) then mapped to the site’s data.

## MODIFICATION OPTONS

1. This report can be easily modified to include clients with only an initial assessment. This can be accomplished by removing the Matrix Type In List filter from the query. See Diagram 5 below:

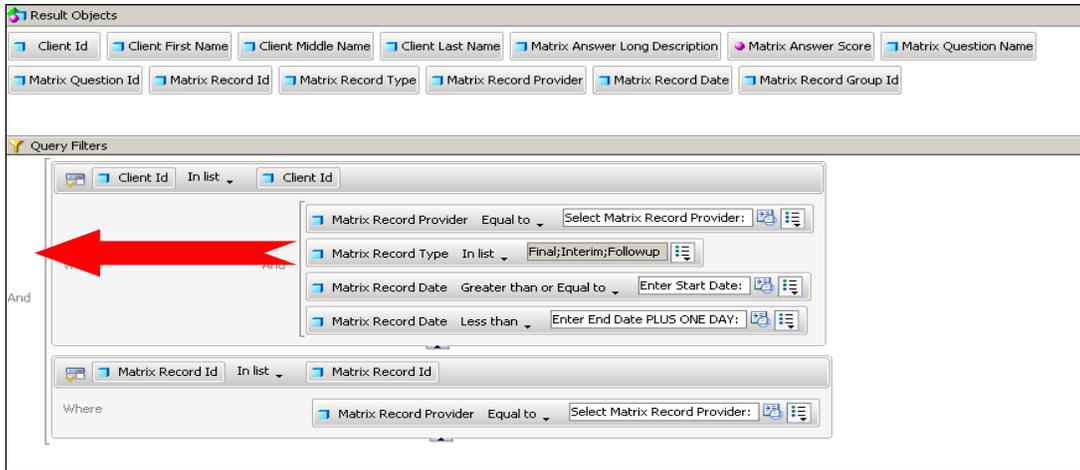


Diagram 5

2. Other variations of this report can be created by adding drill filters, or by incorporating other variables into the report. These types of modifications should only be attempted by experienced report designers since improper modification can cause the report to become dysfunctional or to produce erroneous results.

## REPORT MAPPING GUIDE

UNIVERSE: template\_matrix\_u

This report is mapped to the matrix universe. (template\_matrix\_u) and should be copied to your Public or Favorite folder then mapped to the equivalent matrix universe for your site (ex. *yoursite\_matrix\_u*). Mapping can be done from the first query (data).

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
BISdata	Client Id	Location: Clients Type: System Field Use: Results Object/Sub Query
	Client First Name	Location: Clients Type: System Field Use: Results Object
	Client Middle Name	Location: Clients Type: System Field Use: Results Object
	Client Last Name	Location: Clients Type: System Field Use: Results Object
	Matrix Answer Score	Location: Matrix Measures Type: System Measure Use: Results Object
	Matrix Question Name	Location: Matrix Measures Type: System Field Use: Results Object
	Matrix Question Id	Location: Matrix Measures Type: System Field Use: Results Object
	Matrix Record Id	Location: Matrix Records Type: System Field Use: Results Object /Sub Query
	Matrix Record Type	Location: Matrix Records Type: System Field Use: Results Object / Sub Query Filter (X2)
	Matrix Record Provider	Location: Matrix Records Type: System Field Use: Results Object / Sub Query Filter (X2)
	Matrix Record Date	Location: Matrix Records Type: System Field Use: Results Object / Sub Query Filter
Matrix Record Group Id	Location: Matrix Records Type: System Field Use: Results Object	

**REVISION HISTORY:**

Version	Description of Changes
V11.04.13	Original version –BETA
V3	Revision: Added note that each client should have only one Matrix Record per provider per reporting period selected for accurate calculation. Updated Mapping information. Added alert to refer user to documentation to resolve issues with multiple initial matrices for client. Added Revision History.
V4	Revision: Updated language from “program” to “project” to meet 2014 Data Dictionary updates; added filter for Matrix name for Matrix Universe changes.