ART Gallery Report 0552
Goal Outcomes
Outcomes and Analytics

EXECUTIVE SUMMARY:

Want to see if your clients are achieving their goals? This report serves the dual function of demonstrating goal outcomes within a program, as well as serving as the beginning of a more in-depth analysis of factors potentially affecting goal achievement in a program. This report can be run for case managers to show if their clients are meeting their goals

AUDIENCE:

For stakeholders in programs where goals are set, this report is intended for: case managers to see how their clients fare, for program staff to chart program success, for executive directors to use in funding applications, and for funders to see how the programs are progressing during the funding period.

FREQUENCY:

The report should be run any time data are needed regarding outcomes. If desired, the report date prompts may be used to modify the date range for the current funding cycle.

PURPOSE:

The report is run for any program designed to have an impact on goal achievement. Since goals are to be completed during the program, the report counts goals within completed program stays. For each entry exit, there may be more than one goal, so the goals themselves are counted rather than the program stays.

The primary comparison is between the entries of clients who have positive outcomes, or have achieved their recorded goals while a program, versus the entries of clients who have negative outcomes, or who do not achieve their recorded goals while in the program. Goal outcomes are grouped by several other variables of interest as well, for example demographic variables like gender. Also includes are comparisons of variables related to the structure of a program, such as the number of services received during a program stay. The positive and negative outcomes are then also grouped by each of these other variables in turn, such as the number of goals of females with positive outcomes, or the number of entries with positive outcomes who received 5 services during the program.

COMPATIBILITY AND SYSTEM REQUIREMENTS

This version of the report requires ServicePoint 5x and ART 3x.

PREREQUISITES AND WORK FLOW REQUIREMENTS

This report assumes adherence to the Bowman-specified workflow including the proper collection of the demographic variables contained within. In order for the services tabs to function correctly, the Bowman workflow for services should also be used. Please see page 16 for some additional workflow considerations.

REPORT INSTRUCTIONS AND PROMPTS

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 Diagram 1 below:
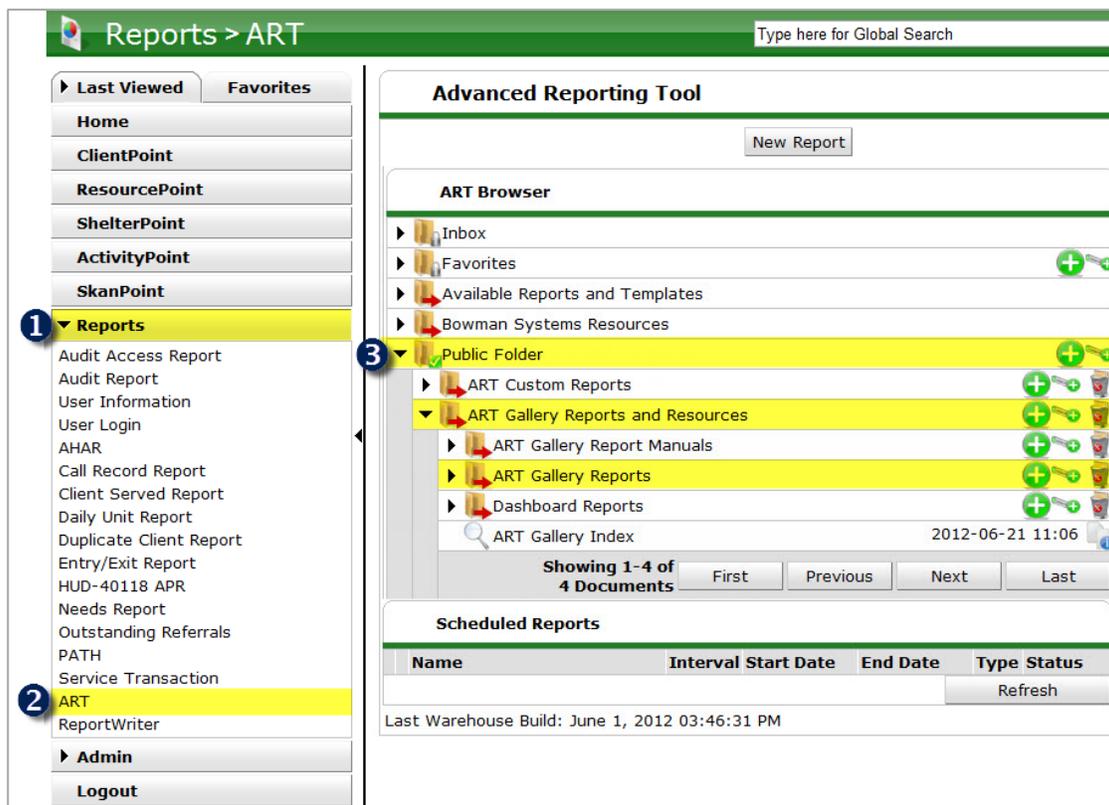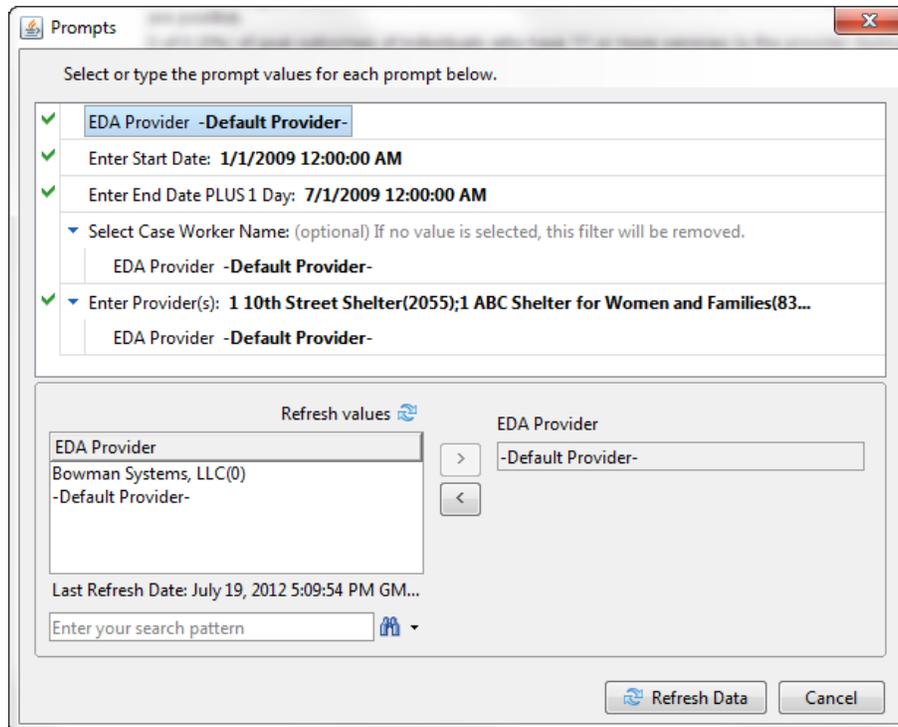

Diagram 1

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 determined the providers to be included in the report and a date range on which to base the results.

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 2

The three user prompts contained in this report are:

1. **EDA Provider:** The user should select the EDA provider to run the report as, or leave it as the default "-Default Provider-" if EDA mode is not desired.

2. **Enter Start Date:** The user should enter (or select from the calendar) the first date in the range of interest. Entry exits after this date and before the end date will be included in the report. The value selected is retained as the default for the next time the report is run.

3. **Enter End Date PLUS 1 Day:** The user should enter (or select from the calendar) one day after the last date the range of interest. Entry exits before the end date and after the start date will be included in the report. The value selected is retained as the default for the next time the report is run.

4. **Select Case Worker Name:** Click the "refresh list" icon and wait for the left window to refresh. Now select the case worker to include, by highlighting the value in the left window and moving it to the right window using the right selection arrow. This is an optional prompt. If no value is selected, the filter will be removed.

5. **Enter Provider(s) for Report:** Click the "refresh list" icon and wait for the left window to refresh. Now select the providers to include by highlighting them in the left window and moving them into the right window using the right selection arrow.

How to read: The report will generally contain two or more Tabs. Each Tab is a separate sub-report containing three sections:

- **Report Header:** The header contains the title of the report, and specifies any date parameters. 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 are displayed and described below.

> NOTE: In the case of the 550 series, each tab before the final tab focuses on a different variable. The first tab focuses on the outcome variable. Each subsequent tab focuses on a different demographic variable or variable related to the program. For each focus variable, the first table is the number of goals from each category of the focus variable. The second table relates the focus variable to the outcome variable. The third table of each report contains an "Information Summary," in which the focus variable and the outcomes information are related in a series of statements. Also included in this table are statements about the impact of missing data for that particular tab. If the variable is calculated, a statement will appear that no data are missing since all variables are calculated.

Tab A – Goal Type and Outcome Information (Diagram 2)**:** This tab contains a basic count of goal types, an average number of goals listed per program entry/exit, a basic count of positive and negative outcomes, and an information summary:

Goal Outcome
Goal Type and Outcome Information
Date Range: 3/1/10 - 6/30/10

Goal Type	Goal Count
30 Days Sobriety	8
Access Mental Health Care	8
Address Health Care Problem	9
Attend AA	14
Develop Social Support Systems	3
Eliminate Anxiety	1
Enroll in Treatment	2
Gain Access to Regular Health Care	1
GED	3
Get A Job	105
Get A Promotion	1
Graduate Highschool	3
HSED	5
Improve Family Relationships	3
Improve School Performance	1
Learn to Accept Authority	1
Maintain A Job	7
Move to Permanent Housing	21
Obtain Public Benefits	17
Obtain Supportive Housing	20
Other	115
Relieve Depression	8
Total	**356**

Average number of goals per program entry	1.77

Goal Outcome	Goal Count

Diagram 3

- **Goal type:** The first section is a table of all the goal types included in the report, and the frequency with which they occur.
- **Average goals per program entry:** Shows on average the number of goals per client entry exit.
- **Outcomes:** A table of positive and negative outcomes categories and the count of goals in each category. A positive outcome is when a goal outcome is recorded as "achieved," and a negative outcome is anything other than "achieved," "revised" or missing data. "Revised" and missing data are considered "Indeterminate" goal outcomes.
- **Information Summary:** Text statements giving information relating to the most frequent goal type, the number of positive outcomes, the number of negative outcomes, and the number of indeterminate outcomes. The associated percentages are also included in these text statements.
- **Note:** If the total count of goal outcomes exceeds the total count of goal types, more than one goal outcome exists for the same goal type in the same entry exit. To identify which cases are causing the inflated count, see the cases in red in Tab L- Goal Data Quality. If you want these numbers to match and this is not a data quality issue, consider modifying the program workflow to allow for only one goal outcome per goal type in a client's entry exit.
- **Dimensions used:** Entry Exit UID, Goal Type, and Goal Outcome from the Goal query.

Tab B – Gender and Outcome (Diagram 3)**:** This tab contains a table of gender categories, a relation of gender categories to the outcome categories, and an information summary:

Goal Outcome
Gender and Outcome
Date Range: 3/1/10 - 6/30/10

Gender	Goal Count
Female	112
Male	243
Missing Value	1
Total	356

Gender and Outcome	Outcome		
	Positive	Negative	Total
Female	51	49	100
Male	78	161	239
Total	129	210	339

Information Summary

51 of 100 (51%) female goal outcomes are positive.
78 of 239 (32.64%) male goal outcomes are positive.
29 of 368 (7.88%) goal outcomes are indeterminate and are therefore not included in the crosstabulation.
1 of 368 (0.27%) goal outcomes have no gender associated with them and are therefore not included in the crosstabulation.
339 of 368 (92.12%) goal outcomes have both gender and a determinate goal outcome and are therefore included in the crosstabulation.

Diagram 4

- **Gender:** The first section is a basic count of goals associated with the different gender categories recorded in the data.
- **Gender and Outcome:** The second section is a table of the relation of the gender categories to the outcome categories. This is a crosstabulation of the outcome given by gender. Rows are the different gender categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular gender category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each gender category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The information summary also includes text statements of how many goal outcomes were unable to be included due to indeterminate goal outcomes and missing gender designations, and compared to the total number of goal outcomes. Percentage descriptions of these comparisons are again included. The final text statement gives the included goal outcomes compared to the total goal outcomes, including a percentage, to be used as a positive expression of data quality.
- **Dimensions used**: Client Gender from the Entries query; Entry Exit UID, Goal Type, and Goal Outcome from the Goal query.

Tab C – Family Status and Outcome (Diagram 4): This tab contains a table of family status categories, a relation of the family status categories to the outcome categories, and an information summary:

Goal Outcome
Family Status and Outcome
Date Range: 3/1/10 - 6/30/10

Family Status	Occurrences
Single Children	6
Child Households without Adults	4
Single Adults without Children	307
Single Adults with Children	18
Multiple Adults without Children	7
Multiple Adults with Children	12
One or more Missing Date of Birth	5
Total	356

Family Status and Outcome	Outcome		
	Positive	Negative	Total
Single Children	5	1	6
Child Households without Adults	4	0	4
Single Adults without Children	95	200	295
Single Adults with Children	8	7	15
Multiple Adults without Children	5	2	7
Multiple Adults with Children	12	0	12
Total	129	210	339

Information summary
5 of 6 (83.33%) of goal outcomes in single children households are positive.
4 of 4 (100%) of goal outcomes in children only household are positive.
95 of 295 (32.2%) of goal outcomes of single adults households without children are positive.

Diagram 5

- **Family Status:** The first section is a basic count of goals of the different family status categories recorded in the data. The categories are: single children (one child without any adults), child households without adults (multiple children without any adults), single adults without children, single adults with children, multiple adults without children, and multiple adults with children.
- **Family Status and Outcome:** The second section is a table of the relation of the family status categories to the outcome categories. This is a crosstabulation of the outcome given by family status. Rows are the different family status categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular family status category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each family status category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The information summary also includes text statements of how many goal outcomes were unable to be included due to missing family status designations and indeterminate goal outcomes, and compared to the total number of goal outcomes. Percentage descriptions of these comparisons are again included. The final text statement gives the included goal outcomes compared to the total goal outcomes, including a percentage, to be used as a positive expression of data quality.
- **Note**: Family status designations are calculated using age data to classify clients as children or adults. If age data for one or more of the members is missing, all members of that group go into the missing data category to prevent a misclassification.
- **Dimensions used**: Client Age at Entry, Entry Exit Group ID, and Entry Exit UID from the Entries query; Entry Exit UID, Goal Type, and Goal Outcome from the Goal query; Entry Exit UID from the Income query; Entry Exit UID from the Services query.

Tab D – Race and Outcome (Diagram 5): This tab contains a table of race categories, a relation of race categories to the outcome categories, and an information summary:

Goal Outcome
Race and Outcome
Date Range: 3/1/10 - 6/30/10

Race	Goal Count
American Indian or Alaska Native	7
Asian	2
Black or African American	52
Native Hawaiian or Other Pacific Islander	4
Other	13
Other Multi-Racial	9
White	265
Missing Value	4
Total	**356**

Race and Outcome	Outcome		
	Positive	Negative	Total
American Indian or Alaska Native	3	4	7
Asian	0	2	2
Black or African American	21	29	50
Native Hawaiian or Other Pacific Islander	1	4	5
Other	3	9	12
Other Multi-Racial	4	5	9
White	97	157	254
Total	**129**	**210**	**339**

Information summary
3 of 7 (42.86%) American Indian or Alaska Native goal outcomes are positive.

Diagram 6

- **Race:** The first section is a basic count of goals of the different race categories recorded in the data. These categories are determined only by the "Primary Race" field.
- **Race and Outcome:** The second section is a table of the relation of the race categories to the outcome categories. This is a crosstabulation of the outcome given by race. Rows are the different race categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular race category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each race category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The information summary also includes text statements of how many goal outcomes were unable to be included due to missing race designations or indeterminate goal outcomes, and compared to the total number of goal outcomes. Percentage descriptions of these comparisons are again included. The final text statement gives the included goal outcomes compared to the total goal outcomes, including a percentage, to be used as a positive expression of data quality.
- **Dimensions used**: Client Primary Race from the Entries query; Entry Exit UID, Goal Type, and Goal Outcome from the Goal query.

Tab E – Age and Outcome (Diagram 6): This tab contains a table of age categories, a relation of the age categories to the outcome categories, and an information summary:

Goal Outcome
Age and Outcome
Date Range: 3/1/10 - 6/30/10

Age	Goal Count
a. Under 1	2
b. 1 - 4	4
c. 5 - 9	2
d. 10 - 14	1
e. 15 - 19	16
f. 20 - 24	32
g. 25 - 29	22
h. 30 - 34	27
i. 35 - 39	25
j. 40 - 44	25
k. 45 - 49	39
l. 50 - 54	24
m. 55 - 59	17
o. 65 - 69	2
Total	238
Total children (clients under age 18)	15

Age and Outcome	Outcome		
	Positive	Negative	Total
a. Under 1	2	0	2

Diagram 7

- **Age:** The first section is a basic count of goals of the different age categories recorded in the data. These categories are under 1 year, 1-4 years, and then categories proceed in 5-year increments until the final category, 85 years and older. Age is calculated from the recorded client date of birth. The total clients for all ages are included, as well as a separate total of clients under age 18.
- **Age and Outcome:** The second section is a table of the relation of the age categories to the outcome categories. This is a crosstabulation of the outcome given by age. Rows are the different age categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular age category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table. Totals are also displayed for clients under age 18.
- **Information Summary**: For each age category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The information summary also includes text statements of how many goal outcomes were unable to be included due to missing age designations and indeterminate goal outcomes, and compared to the total number of goal outcomes. Percentage descriptions of these comparisons are again included. The final text statement gives the included goal outcomes compared to the total goal outcomes, including a percentage, to be used as a positive expression of data quality.
- **Dimensions used**: Client Age at Entry from the Entries query; Entry Exit UID, Goal Type, and Goal Outcome from the Goal query.

Tab F – Veteran Status of Adults and Outcome (Diagram 7): This tab contains a table of veteran status categories, a relation of the veteran status categories to the outcome categories, and an information summary:

Goal Outcome
Veteran Status of Adults and Outcome
Date Range: 3/1/10 - 6/30/10

Veteran Status	Goal Count
No	201
Yes	18
Missing Value	4
Total	223

Veteran Status and Outcome	Outcome		
	Positive	Negative	Total
No	73	118	191
Yes	8	10	18
Total	81	128	209

Information Summary
73 of 191 (38.22%) No goal outcomes are positive.
8 of 18 (44.44%) Yes goal outcomes are positive.
11 of 223 (4.93%) goal outcomes are indeterminate and are therefore not included in the crosstabulation.
4 of 223 (1.79%) goal outcomes have no veteran status associated with them and are therefore not included in the crosstabulation.
209 of 223 (93.72%) goal outcomes have both a designated veteran status and a calculable outcome and are therefore included in the crosstabulation.

Diagram 8

- **Veteran Status:** The first section is a basic count of goals of the different veteran status categories recorded in the data.
- **Veteran Status and Outcome:** The second section is a table of the relation of the veteran status categories to the outcome categories. This is a crosstabulation of the outcome given by veteran status. Rows are the different veteran status categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular veteran status category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each veteran status category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The information summary also includes text statements of how many goal outcomes were unable to be included due to missing veteran status designations and indeterminate goal outcomes, and compared to the total number of goal outcomes. Percentage descriptions of these comparisons are again included. The final text statement gives the included goal outcomes compared to the total goal outcomes, including a percentage, to be used as a positive expression of data quality.
- **Note**: This tab only includes those clients ages 18 and over.
- **Dimensions used**: Is Client U S Military Veteran? from the Entries query; Entry Exit UID, Goal Type, and Goal Outcome from the Goal query.

Tab G – Service Types Provided and Outcome (Diagram 8): This tab contains a table of service type categories, a relation of the service type categories to the outcome categories, and an information summary:

Goal Outcome
Service Types Provided and Outcome
Date Range: 3/1/10 - 6/30/10

Service Types Provided and Outcome	Frequency within Outcome		
	Positive	Negative	Total
Community Clinics	0	1	1
Education	5	0	5
Employment Preparation	34	44	78
Gas Money	40	22	62
Gift Card Donation Programs	13	13	26
Hairdressing/Nail Care	19	27	46
Household Goods Vouchers	20	9	29
Housing Counseling	47	32	79
Identification Cards	5	10	15
Job Training Formats	3	0	3
Legal Services	2	0	2
Local Automobile Transportation	4	1	5
Local Bicycle Transportation	0	12	12
Moving Assistance	0	1	1
Personal/Grooming Needs	7	0	7
Prescription Expense Assistance	8	11	19
Records/Licenses/Permits	3	0	3
Assistance	8	3	11
Rent Payment Assistance	19	8	27
Shoes	34	47	81
Taxi Fare	18	22	40
Transportation Expense Assistance	3	0	3
Vision Screening	3	13	16
Work Clothing	3	0	3
Work Tools/Equipment	0	1	1
Y Facilities	14	12	26

Diagram 9

- **Service Type Provided:** The first section is a basic count of goals of the different service type categories recorded in the data.
- **Service Type Provided and Outcome:** The second section is a table of the relation of the service type categories to the outcome categories. This is a crosstabulation of the outcome given by service type. Rows are the different service type categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular service type category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each service type category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The numbers of services associated with indeterminate goal outcomes, along with the corresponding percentage, is included. Likewise included is the number and percentage of services associated with determinate goal outcomes, for a positive expression of data quality. The sum of the services associated with indeterminate and determinate goal outcomes may exceed the total number of services; see the technical exposition section for an explanation.
- **Note**: These data are different from those in the preceding tabs because there may be more than one service type provided per goal.
- **Dimensions used**: Entry Exit UID, Goal Type, Goal Outcome, and Service Code Description from the Services query.

Tab G2 – Service Types Provided and Outcome (Services Linked Directly to Goal) (Diagram 9): This tab contains a table of service type categories, a relation of the service type categories to the outcome categories, and an information summary. All services on this tab were assigned and directly linked during the Goal (services were created in the Case Plan module). Using this workflow eliminates the cross-join between services and goals and means that users can see which services were specifically applied to a given goal:

Diagram 10

- **Service Type Provided:** The first section is a basic count of goals of the different service type categories recorded in the data.
- **Service Type Provided and Outcome:** The second section is a table of the relation of the service type categories to the outcome categories. This is a crosstabulation of the outcome given by service type. Rows are the different service type categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular service type category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each service type category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The numbers of services associated with indeterminate goal outcomes, along with the corresponding percentage, is included. Likewise included is the number and percentage of services associated with determinate goal outcomes, for a positive expression of data quality.
- **Note**: These data are different from those in the preceding tabs because there may be more than one service type provided per goal. In order to use Tab G2 - Service Type, services must be added via the Add Service or Add Multiple Service buttons at the bottom of the goal in the Case Plans module.
- **Dimensions used**: Entry Exit UID, Goal Type, Goal Outcome, and Service Code Description from the Services ID query.

Tab H – Number Services Provided and Outcome (Diagram 10)**:** This tab contains a table of the number services provided per goal, a relation of the number services provided to the outcome categories, and an information summary:

Goal Outcome
Number Services Provided and Outcome
Date Range: 3/1/10 - 6/30/10

Number Services Provided	Goal Count
0 Services	39
1 Service	17
2 Services	22
3 Services	41
4 Services	37
5 Services	23
6 Services	24
7 Services	15
8 Services	25
9 Services	17
10 Services	8
11+ Services	85
Total	353

| Number Services Provided | Outcome | | |
	Positive	Negative	Total
0 Services	11	22	33
1 Service	2	12	14
2 Services	3	19	22
3 Services	10	31	41
4 Services	11	25	36

Diagram 11

- **Number Services Provided:** For each number of services received during an entry exit, the table records a basic count of associated goals. There are separate categories for each number of services from 0-10, and any number of services over 10 is recorded in a residual "11+ Services" category.
- **Number Services Provided and Outcome:** The second section is a table of the relation of the number services per goal outcome to the outcome categories. This is a crosstabulation of the outcome given by the number of services. Rows are the different number of services, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular number of services with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each number of services, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The number and percentage of goal outcomes missing due to indeterminacy is also included, as well as those included due to having determinate outcomes.
- **Dimensions used**: Entry Exit UID, Goal Type, Goal Outcome, and Service UID from the Services query. Entry Exit UID from the Entries query; Entry Exit UID from the Goals query; and Entry Exit UID from the Income query.

Tab H2 – Number Services Provided and Outcome (Services Linked Directly to Goal)(Diagram 11): This tab contains a table of the number services provided per goal, a relation of the number services provided to the outcome categories, and an information summary. All services on this tab were assigned and directly linked during the Goal (services were created in the Case Plan module). Using this workflow eliminates the cross-join between services and goals and means that users can see which services were specifically applied to a given goal:

Diagram12

- **Number Services Provided:** For each number of services received during an entry exit, the table records a basic count of associated goals. There are separate categories for each number of services from 0-10, and any number of services over 10 is recorded in a residual "11+ Services" category.
- **Number Services Provided and Outcome:** The second section is a table of the relation of the number services per goal outcome to the outcome categories. This is a crosstabulation of the outcome given by the number of services. Rows are the different number of services, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular number of services with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each number of services, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The number and percentage of goal outcomes missing due to indeterminacy is also included, as well as those included due to having determinate outcomes. The sum of the services associated with indeterminate and determinate goal outcomes may exceed the total number of services; see the technical exposition section for an explanation.
- **Note**: In order to use Tab H2 – Number Services, services must be added via the Add Service or Add Multiple Service buttons at the bottom of the goal in the Case Plans module.
- **Dimensions used**: Entry Exit UID, Goal Type, Goal Outcome, and Service UID from the Services ID query.

Tab I – Income Source and Outcome (Diagram 12): This tab contains a table of income source categories, a relation of the income source categories to the outcome categories, and an information summary.

Goal Outcome
Income Source and Outcome
Date Range: 3/1/10 - 6/30/10

Income Source	Frequency within Goals
Alimony or Other Spousal Support	2
Child Support	7
Earned Income	47
No Financial Resources	195
No income	4
Other	4
Pension From a Former Job	2
Retirement Income From Social Security	2
SSDI	8
SSI	11
Unemployment Insurance	22
Veteran's Pension	1
Missing Value	67
Total	**372**

Income Source and Outcome	Frequency within Outcome		
	Positive	Negative	Total
Alimony or Other Spousal Support	1	1	2
Child Support	4	0	4
Earned Income	25	22	47
No Financial Resources	58	135	193
No income	0	4	4
Other	1	3	4

Diagram 13

- **Income Source:** The first section is a basic count of goals of the different income source categories recorded in the data.
- **Income Source and Outcome:** The second section is a table of the relation of the income source categories to the outcome categories. This is a crosstabulation of the outcome given by income source. Rows are the different income source categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular income source category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each income source category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The information summary also includes a text statement of how many income sources associated with goal outcomes were unable to be included due to outcome indeterminacy and compared to the total number of goal outcomes. A percentage description of this comparison is again included. The final text statement gives the included income sources associated with goal outcomes compared to the total income sources associated with goal outcomes, including a percentage, to be used as a positive expression of data quality. The sum of the income sources associated with indeterminate and determinate goal outcomes may exceed the total number of income sources; see the technical exposition section for an explanation.
- **Note**: These data are different from those in the preceding tabs because there may be more than one income source per goal.
- **Dimensions used**: Entry Exit UID, Goal Type, Goal Outcome, Last 30 Day Income, Income received from any source in the past 30 days? from the Income query.

Tab J – Number Income Sources and Outcome (Diagram 13): This tab contains a table of the number income sources per goal, a relation of the number income sources to the outcome categories, and an information summary:

Goal Outcome
Number of Income Sources and Outcome
Date Range: 3/1/10 - 6/30/10

Number of Income Sources	Goal Count
0 Income Sources	67
1 Income Sources	272
2 Income Sources	15
3 Income Sources	2
4 Income Sources	0
5 Income Sources	0
6 Income Sources	0
7 Income Sources	0
8 Income Sources	0
9 Income Sources	0
10 Income Sources	0
11+ Income Sources	0
Total	356

Number of Income Sources and Outcome	Outcome		
	Positive	Negative	Total
0 Income Sources	28	30	58
1 Income Sources	95	172	267
2 Income Sources	6	6	12
3 Income Sources	0	2	2
4 Income Sources	0	0	0
5 Income Sources	0	0	0
6 Income Sources	0	0	0
7 Income Sources	0	0	0
8 Income Sources	0	0	0

Diagram 14

- **Number Income Sources:** The first section is a basic count of goals associated with different numbers of income sources recorded in the data.
- **Number Income Sources and Outcome:** The second section is a table of the relation of the number income sources per goal outcome to the outcome categories. This is a crosstabulation of the outcome given by the number of income sources. Rows are the different number of income sources, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular number of income sources with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each number of income sources, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. A text statement of the number of income sources associated with indeterminate goal outcomes is included along with the corresponding percentage. Another text statement of the number of income sources associated with determinate goal outcomes, along with the corresponding percentage, is included as a positive statement of data quality. The sum of the income sources associated with indeterminate and determinate goal outcomes may exceed the total number of income sources; see the technical exposition section for an explanation.
- **Dimensions used**: Entry Exit UID, Goal Type, Goal Outcome, and the Income Subassessment Recordset ID from the Income query. Entry Exit UID from the Entries query; Entry Exit UID from the Goals query; and Entry Exit UID from the Services query.

Tab K – Monthly Income and Outcome (Diagram 14): This tab contains a table of monthly income categories, a relation of the monthly income categories to the outcome categories, and an information summary:

Diagram 15

- **Monthly Income:** The first section is a basic count of goal outcomes of the different monthly income categories recorded in the data. Income is categorized in increments of 100 dollars. Any monthly income over $2000 is recorded in a separate residual category. A separate category of "no income" is also included.
- **Monthly Income and Outcome:** The second section is a table of the relation of the monthly income categories to the outcome categories. This is a crosstabulation of the outcome given by monthly income. Rows are the different monthly income categories, and columns are the different outcome categories (positive and negative). The number in each cell shows the number of goal outcomes of that particular monthly income category with that particular outcome category. The totals within each category are displayed within the marginals (the bottommost row and the rightmost column) of the table.
- **Information Summary**: For each monthly income category, there is a text statement of the number of positive goal outcomes within that category in relation to the total number of goal outcomes. The percentage of this relation is also included. The information summary also includes a text statement of how many occurrences were unable to be included due to missing monthly income designations compared to the total number of goal outcomes. A percentage description of this comparison is again included. The final text statement gives the included goal outcomes compared to the total goal outcomes, including a percentage, to be used as a positive expression of data quality. The sum of the monthly incomes associated with indeterminate and determinate goal outcomes may exceed the total number of income sources; see the technical exposition section for an explanation.
- **Dimensions used**: Entry Exit UID, Goal Type, Goal Outcome, Last 30 Day Income, and Income received from any source in past 30 days? from the Income query.

Tab L – Goal Data Quality (Diagram 15): This tab is provided as a reference to the user in order to eliminate duplicate goal types during a client's entry exit. The entries in the black text show duplicate goal types during an entry/exit but with the same outcome; these entries do not cause any discrepancies between the tables on the preceding tabs. The entries in the red text are duplicate goal types with different outcomes; these entries cause the numbers of goal outcomes to exceed the numbers of goal types.

Diagram 16

- **Dimensions used**: Entry Exit Client ID, Entry Exit UID, Goal UID, Goal Date Set, Goal Type, and Goal Outcome, from the Goal query.

Tab M – Additional Information (Diagram 16): This tab is provided as a reference to the user running the report and lists the parameters specified in the user prompts, as well as the client, goal, and outcome counts per provider.

Diagram 17

TECHNICAL EXPOSITION:

Goals are one form of transactional data in ServicePoint, associated by date. The entry exit universe provides a framework by which to pull these transactional data, pulling in the applicable information by date of entry exit. In research jargon, which goals are the unit of analysis, entry exits are the unit of observation. However, pulling these data creates a cross join between entry exits and goals. This is intentional, since it is necessary to the structure the report this way in order to examine goals. Additional cross joins occur when services and income sources are added in, shown in the later tabs. For more information please see technical note #3.

What to examine if the numbers do not add up as expected:

On tab A, if the total count of goal outcomes exceeds the total count of goal types, more than one goal outcome exists for the same goal type in the same entry exit. To identify which cases are causing the inflated count, see the cases in red in Tab L- Goal Data Quality. If you want these numbers to match and this is not a data quality issue, consider modifying the program workflow to allow for only one goal outcome per goal type in a client's entry exit.

On tabs B-F, there are counts of goal outcomes excluded due to the goal outcome being indeterminate, goal outcomes being excluded due to missing information on the variable of interest (the focus of each tab), and the number that are included. Occasionally, the sum of these three numbers will exceed the total number of goal outcomes—this is due to the fact that some of the goal outcomes may be missing information on the variable of interest as well as a determinate outcomes status.

On tabs G-K, the cross join tabs, the same services or entry exits are being used as a multiplier for any goal outcomes a client might have, whether they are determinate or indeterminate. So if a client has, for example, one determinate goal outcome and two indeterminate goal outcomes, twice the number of services will appear in the indeterminate category as the determinate category. Even if a client has one determinate outcome and one indeterminate outcome, all services will be added to each category. Tabs G2 and H2 do not have this multiplier issue as the service uid is directly linked to a goal uid.

The best practices to follow to keep duplication to a minimum are to only have one outcome per goal per entry exit, and to enter as many determinate outcome records as possible.

TECHNICAL NOTES:

1. The services that appear in the report are only those of the entry exit providers included in the report.
2. Goal types of "Other" are filtered out of the report. The "Goal type" picklist is editable; we suggest specificity for the most useful information. However, those users with ad-hoc licenses may wish to remove this filter; see the "Report Modification" section below.
3. There is a workflow used by some implementations where the "Need Goal Id" field provides a means of linking services to goals, but for the majority, the only way to examine services and goals together is to create a cross join between all of the clients goals during and entry exit and the services received during that entry exit, and examine all services that could potentially influence a goal outcome. While a workflow that uses the "Need Goal Id" field does provide the ability to display specific services linked to specific goals in the report, due to the addition of the needs table, reporting to accommodate this workflow will create an additional cross join on the query side of the report. If this table is added in, the resulting performance deficit will increase exponentially in

relation to the size of the implementation database. If you modify the report to serve this workflow, please keep the performance limitation in mind.

4. Tabs G2 and H2 will only work if the services are added using the Add Service or Multiple Service buttons at the bottom of the goal in the Case Plan module. It will not calculate any services entered in any other manner.

MODIFICATION OPTIONS:

1. This report has been designed to report on all types of goals except for "Other". Some implementations may wish to modify this report to include the "Other" type goals. This can easily be done by removing the "Goal Type is not equal to 'Other'" filter criteria statement from each of the four queries and resaving the report. This modification is illustrated in the screen shot below (repeat for each query):
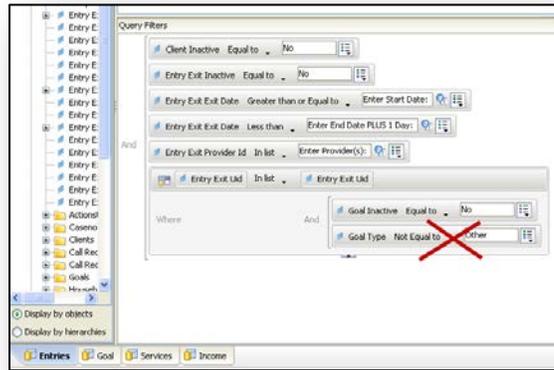
2. Other implementations may wish to modify the report to only include certain goal types or to exclude certain goal types. This can be accomplished in a similar fashion by changing the "not equal to" criteria in the four queries to an "in list" criteria or a "not in list" criteria as shown in the example below:
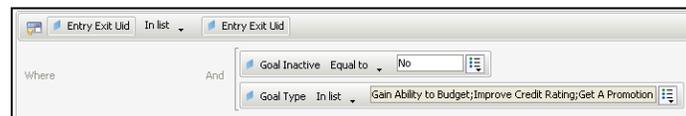
MAPPING OBJECTS:

A listing of the report objects and their source universe and source folder is provided below. Objects are arranged by query and by object type.

===

Query Name: **Caseworker**
Universe: **_u (Client Universe)**

Result Objects:

- Client Uid   from   Clients folder
- Case Worker Name   from   Clients/Case Workers folder
- Case Worker Date Started   from   Clients/Case Workers folder
- Case Worker Date Ended   from   Clients/Case Workers folder

Filter Objects:

- Case Worker Name   from   Clients/Case Workers folder
- Case Worker Uid   from   Clients/Case Workers folder
- Case Worker Date Started   from   Clients/Case Workers folder
- Entry Exit Exit Date   from   Clients/Entry Exit (Outer) folder
- Case Worker Date Ended   from   Clients/Case Workers folder
- Client Inactive   from   Clients folder
- Entry Exit Inactive   from   Clients/Entry Exit (Outer) folder
- Entry Exit Provider Id   from   Clients/Entry Exit (Outer) folder
- Goal Inactive   from   Clients/Goals folder
- Goal Type   from   Clients/Goals folder
- Goal Date Set   from   Clients/Goals folder
- Goal Provider   from   Clients/Goals folder

===

Query Name: **Entries**
Universe: **ee_u (Entry Exit Universe)**

Result Objects:

- Entry Exit Client Id   from   Entry Exit folder
- Entry Exit Uid   from   Entry Exit folder
- Entry Exit Group Id   from   Entry Exit folder
- Entry Exit Entry Date   from   Entry Exit folder
- Entry Exit Exit Date   from   Entry Exit folder
- Entry Exit Provider Id   from   Entry Exit folder
- Entry Exit Type   from   Entry Exit folder
- Client Unique Id   from   Entry Exit/Clients folder
- Client First Name   from   Entry Exit/Clients/Client Unique Id folder
- Client Last Name   from   Entry Exit/Clients/Client Unique Id folder
- Client Middle Name   from   Entry Exit/Clients/Client Unique Id folder
- Client Date of Birth   from   Entry Exit/Clients folder
- Client Gender   from   Entry Exit/Clients folder
- Client Primary Race   from   Entry Exit/Clients folder
- Client Ethnicity   from   Entry Exit/Clients folder
- Client Age at Entry   from   Entry Exit/Clients folder
- Is Client U S Military Veteran   from   Entry Objects folder
  (VETERAN)

Filter Objects:

- Entry Exit Client Id   from   Entry Exit folder
  Results from another query
  Client Uid   from   Caseworker Query
- Client Inactive   from   Entry Exit/Clients folder
- Entry Exit Inactive   from   Entry Exit folder
- Entry Exit Exit Date   from   Entry Exit folder
- Entry Exit Provider Id   from   Entry Exit folder
- Entry Exit Uid   from   Entry Exit folder
- Goal Inactive   from   Goals folder
- Goal Type   from   Goals folder

===

Query Name: **Goal**
Universe: **ee_u (Entry Exit Universe)**

Result Objects:

- Entry Exit Client Id   from   Entry Exit folder
- Entry Exit Uid   from   Entry Exit folder
- Goal Uid   from   Entry Exit/Goals folder
- Goal Inactive   from   Entry Exit/Goals folder
- Goal Provider   from   Entry Exit/Goals folder
- Goal Type   from   Entry Exit/Goals folder
- Goal Classification   from   Entry Exit/Goals folder
- Goal Status   from   Entry Exit/Goals folder
- Goal Outcome   from   Entry Exit/Goals folder
- Goal Followup Outcome   from   Entry Exit/Goals folder
- Goal Date Set   from   Entry Exit/Goals folder
- Goal Group Id   from   Entry Exit/Goals folder
- Goal Household Id   from   Entry Exit/Goals folder

Filter Objects:

- Entry Exit Uid   from   Entry Exit folder
  Results from another query
  Entry Exit Id   from   Entries Query
- Goal Inactive   from   Entry Exit/Goals folder
- Goal Type   from   Entry Exit/Goals folder

==

Query Name: **Services**
Universe: **ee_u (Entry Exit Universe)**

Result Objects:

- Entry Exit Client Id   from   Entry Exit folder
- Entry Exit Uid   from   Entry Exit folder
- Client Unique Id   from   Entry Exit/Clients folder
- Service Uid   from   Entry Exit/Services (Outer) folder
- Service Code   from   Entry Exit/Services (Outer) folder
- Service Code Description   from   Entry Exit/Services (Outer) folder
- Service Provide Provider   from   Entry Exit/Services (Outer) folder
- Service Provide Start Date   from   Entry Exit/Services (Outer) folder
- Service Provide End Date   from   Entry Exit/Services (Outer) folder
- Goal Type   from   Entry Exit/Goals folder
- Goal Outcome   from   Entry Exit/Goals folder
- Goal Uid   from   Entry Exit/Goals folder
- Goal Date Set   from   Entry Exit/Goals folder

Filter Objects:

- Entry Exit Uid   from   Entry Exit folder
  Results from another query
  Entry Exit Id   from   Entries Query
- Service Inactive   from   Entry Exit/Services (Outer) folder
- Service Provided   from   Entry Exit/Services (Outer) folder

==

Query Name: **Income**
Universe: **ee_u (Entry Exit Universe)**

Result Objects:

- Entry Exit Client Id   from   Entry Exit folder
- Entry Exit Uid   from   Entry Exit folder
- Client Unique Id   from   Entry Exit/Clients folder
- Goal Type   from   Clients/Goals folder
- Goal Outcome   from   Clients/Goals folder
- Income received from any source
  in the past 30 days?   from   Exit Objects
  (SVP_ANYSOURCE30DAYINCOME)
- Recordset ID   from   Entry Objects/Monthly Income folder
- Source of Income   from   Entry Objects/Monthly Income folder
- Provider   from   Entry Objects/Monthly Income folder
- Start Date   from   Entry Objects/Monthly Income folder
- End Date   from   Entry Objects/Monthly Income folder
- Last 30 Day Income   from   Entry Objects/Monthly Income folder
- Goal Uid   from   Clients/Goals folder
- Goal Date Set   from   Clients/Goals folder

Filter Objects:

- Entry Exit Uid   from   Entry Exit folder
  Results from another query
  Entry Exit Id   from   Entries Query
- Inactive   from   Entry Exit/Services (Outer) folder

==

Query Name: **Services ID**
Universe: **ee_u (Entry Exit Universe)**

Result Objects:

- Entry Exit Client Id   from   Entry Exit folder
- Entry Exit Uid   from   Entry Exit folder
- Client Unique Id   from   Entry Exit/Clients folder
- Service Uid   from   Entry Exit/Services (Outer) folder
- Service Code   from   Entry Exit/Services (Outer) folder
- Service Code Description   from   Entry Exit/Services (Outer) folder
- Service Provide Provider   from   Entry Exit/Services (Outer) folder
- Service Provide Start Date   from   Entry Exit/Services (Outer) folder
- Service Provide End Date   from   Entry Exit/Services (Outer) folder
- Service Need Id   from   Entry Exit/Services (Outer) folder
- Goal Type   from   Entry Exit/Goals folder
- Goal Outcome   from   Entry Exit/Goals folder
- Goal Uid   from   Entry Exit/Goals folder
- Goal Date Set   from   Entry Exit/Goals folder

Filter Objects:

- Entry Exit Uid   from   Entry Exit folder
  Results from another query
  Entry Exit Id   from   Entries Query

- Service Inactive   from   Entry Exit/Services (Outer) folder
- Service Provided   from   Entry Exit/Services (Outer) folder
- Service Need Id   from   Entry Exit/Services (Outer) folder

  Object in this query
  Need Uid   from   Entry Exit/Needs (Outer) folder
- Need Goal Id   from   Entry Exit/Needs (Outer) folder

  Object in this query
  Goal Uid   from   Entry Exit/Goals (Outer) folder
- Goal Uid

  Results from another query
  Goal Uid   from   Goal Query

REVISION HISTORY:

Version	Description of Changes
V11.05.31	Original version –BETA
V2	Revision: Add optional query to allow filtering by a single case worker.
V3	Revision: Added tabs G2 and H2 for Services linked directly to Goals.
V4	Revision: Removed services and incomes related to inactive goals (on service/income tabs).