ART Gallery Report 0607
Client and Household Demographics by Funding Stream

EXECUTIVE SUMMARY:

This ART report extracts data to provide information about clients served by a project with a specified funding source attached to a service. It can also be used to assist with completing sections of the "Consolidated Annual Performance and Evaluation Reporting" report (CAPER) which is required by Community Development Block Grant (CDBG) funded programs. This report varies from community to community so verify that it matches your community's needs before making it available to your provider agencies. The report breaks down client race, CMI income level and various household characteristic by service funding source. The report also includes a client detail tab, and a household detail tab which are designed to assist users with data cleaning and verification.

> *Note: This report is not intended for use for the ESG sections of the CAPER (CR-65). Please use the "canned" ServicePoint report to extract that data.*

AUDIENCE:

The primary audience for this report includes administrators and support staff responsible for CDBG reporting and in preparing the CAPER report. The report however will also be of interest to other ServicePoint administrators because of its ability to aggregate client and household data by funding source.

FREQUENCY:

This report is intended to be used annually for preparation of the CAPER report and periodically to monitor progress throughout the funding cycle.

PURPOSE:

The report's purpose is the monitor and report performance related to CDBG funding.

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 1, below:

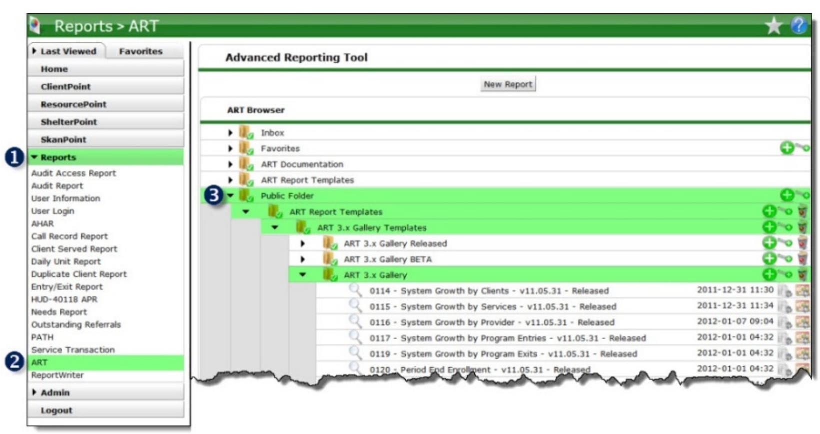


Figure 1

Before running the report: Prior to running the report the user must determine the providers and funding sources 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 Figure 2) 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.

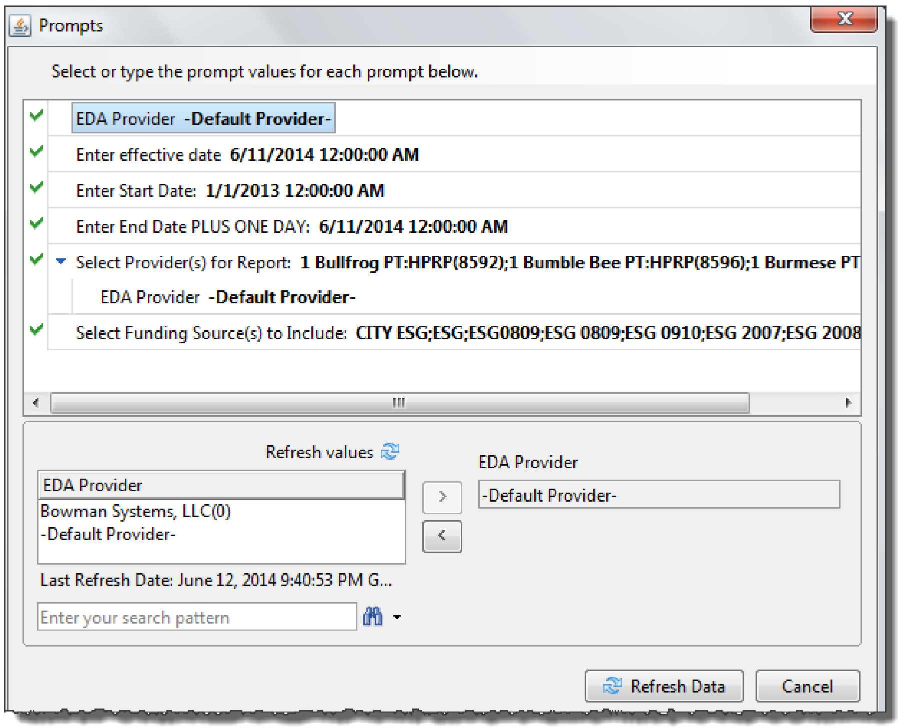


Figure 2

The 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 at the "-Default Provider-" if the default has the appropriate security level.
2. **Enter Effective Date:** The user should enter (or select from the calendar) the date immediately following the last day of the reporting date range.
3. **Enter Start Date:** The user should enter (or select from the calendar) the first day of the desired date range.
4. **Enter End Date (Plus One Day):** The user should enter (or select from the calendar) the date immediately following the last day of the reporting date range.
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.
6. **Select Funding Source(s) to Include:** Click the "refresh list" icon and wait for the left window to refresh. Now select the funding sources to include by highlighting them in the left window and moving them into the right window using the right selection arrow.

Tab A – Race

Client and Household Demographics by Funding Stream

Race Designation

Report Dates: 1/1/2013 - 6/10/2014

Funding Source	White	Black or African American	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaskan Native	American Indian or Alaska Native and Black or African American	Black or African American and White	Asian and White	American Indian or Alaska Native and White	American Indian or Alaska Native and Black or African American	Other Multi-Race	Missing or Non-HUD	Total Persons
CITY ESG	0	2	0	0	0	0	0	0	0	0	0	0	7
ESG	1	0	0	0	0	0	0	0	0	0	0	0	7
	1	3	0	0	0	0	0	0	0	0	0	0	7
TOTALS:	2	5	0	0	0	0	0	0	0	0	0	0	7

Column totals will not equal to the sum of the rows where clients have multiple funding sources.

Row totals will not equal to the sum of the columns in cases where duplicate clients have different race designations.

Figure 3

TAB INFORMATION:

This tab contains a breakdown of the client race data aggregated by funding source (Figure 3). A client is counted under a particular funding source if they received a service from one or more of the specified providers during the specified time period, and if the service was designated to that particular source. The client counts in Tab A are de-duplicated using the Unique Client Uid. Note: since a single service can be allocated to multiple funding sources, and because a client can have multiple services, the sum of the columns may exceed the total.

INPUT CONTROLS:

There are several input controls on Tab A (Figure 4) that allow the user to filter data by either Ethnicity or Gender.

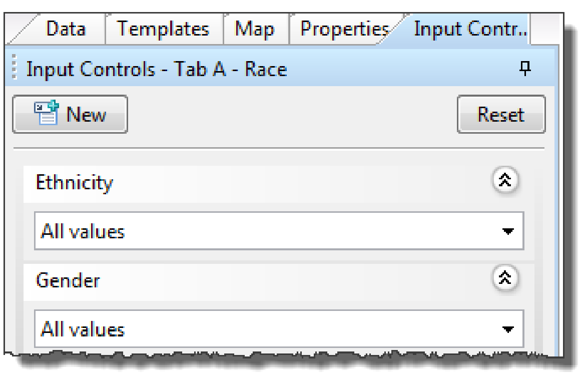


Figure 4

ALERTERS:

There are no alerters on Tab A.

Tab B – CMI Data

Client and Household Demographics by Funding Stream

Household County Median Income

Report Dates: 1/1/2013 - 6/10/2014

Household County Median Income Percentage

Funding Source	Missing	Total Persons
CITY ESG	1,576	1,576
ESG	192	192
Local/City (Non-ESG)	17	17
	548	548
TOTALS:	2,201	2,201

Column totals will not equal to the sum of the rows where clients have multiple funding sources.

Row totals will not equal to the sum of the columns in cases where duplicate clients have different CMI% designations.

Figure 5

TAB INFORMATION:

This tab contains a breakdown of client income data as measured by the client's percentage of the County Median Income (CMI) for their particular county and family size(Figure 5). As in Tab A, the client counts are de-duplicated using the Unique Client Uid and since this is client data aggregated by the funding source(s) of the services received, the sum of the columns will often exceed the total.

INPUT CONTROLS:

There are no input controls for Tab B.

ALERTERS:

There are no alerters on Tab A.

Tab C – Household Characteristics

Client and Household Demographics by Funding Stream

Household Characteristics

Report Dates: 1/1/2013 - 6/10/2014

Household Characteristics of Clients Served By Funding Source								
Funding Source	Household Type			Household Characteristics (Subset of Household Type)				Total of Household Types
	Households without Children	Households with at least One Adult and One Child	Households with Only Children	Households with Female Head	Large Households (>5 members)	Households with Disabled Member	Households that Include a Client Age 62+	
CITY ESG	1,175	190	237	168	8	87	0	1,602
ESG	132	56	0	41	5	20	0	188
Local/City (Non-ESG)	17	0	0	0	0	0	0	17
	15	244	0	19	13	49	0	259
TOTALS:	1,253	245	237	224	13	131	0	1,735

Figure 6

TAB INFORMATION:
This tab contains a breakdown of various household characteristics broken down by funding source (Figure 5). As in the case of Tabs A and B, the column totals will likely exceed the total for each column since services may funded by more than one source and because households may receive multiple services each funded differently. Only the Household Types (labeled in the header) are included in the Total of Household Types Column. The household counts contained in this tab are listed and described below:

- **Households without Children** – This count includes households receiving service(s) either as a single individual, or where two adults are reciving services together. It should be noted that in some cases a client may be counted in both the single-person household category and in one or more of the multi-person household categories if they received services both as a single and as part of different household configuration.
- **Households with at least One Adult and One Child**– This count includes households where two or more clients of the same household received service(s) as a household, and at least one of the persons who received the service was under the age of 18.
- **Households with Only Children –** This count includes households where there are one or more clients under the age of 18 receiving services together.
- **Households with Female Head** – This counts households where the head of household is a female.
- **Large Households:** This counts households where there are 6 or more family members grouped together for a service.
- **Households with a Disabled Member –** This counts households where there are two or more clients in the household and at least one is designated as having a disability of long term duration. This calculation uses only the "yes/no" disabiling condition question only.
- **Households with that include a Client Aged 62+ -** This counts households where two or more clients of the same household received service(s) as a household, and at lease one of the persons who received the service was over the age of 61.
- **Total of Household types –** This totals the count of all household types as designated in the header.

INPUT CONTROLS

This tab contains an input control to allow the user to filter for either All Values or Active Households Only (Figure 7).

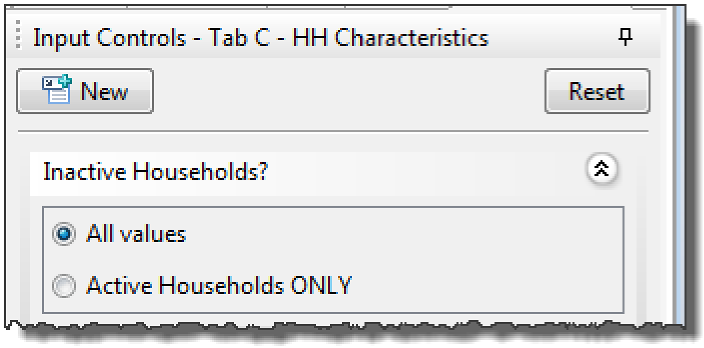
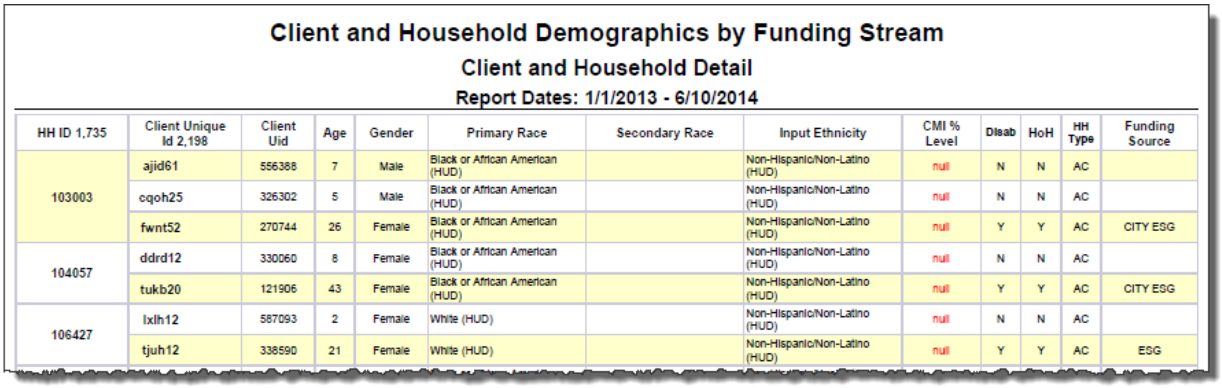


Figure 7

ALERTERS:

There are no alerters on Tab C.

Tab D – Client HH Detail



Client and Household Demographics by Funding Stream

Client and Household Detail

Report Dates: 1/1/2013 - 6/10/2014

HH ID 1,735	Client Unique Id 2,198	Client Uid	Age	Gender	Primary Race	Secondary Race	Input Ethnicity	CMI % Level	Disab	HoH	HH Type	Funding Source
103003	ajid61	556388	7	Male	Black or African American (HUD)		Non-Hispanic/Non-Latino (HUD)	null	N	N	AC	
	cqoh25	326302	5	Male	Black or African American (HUD)		Non-Hispanic/Non-Latino (HUD)	null	N	N	AC	
	fwnt52	270744	26	Female	Black or African American (HUD)		Non-Hispanic/Non-Latino (HUD)	null	Y	Y	AC	CITY ESG
104057	ddrd12	330060	8	Female	Black or African American (HUD)		Non-Hispanic/Non-Latino (HUD)	null	N	N	AC	
	tukb20	121906	43	Female	Black or African American (HUD)		Non-Hispanic/Non-Latino (HUD)	null	Y	Y	AC	CITY ESG
106427	lxlh12	587093	2	Female	White (HUD)		Non-Hispanic/Non-Latino (HUD)	null	N	N	AC	
	tjuh12	338590	21	Female	White (HUD)		Non-Hispanic/Non-Latino (HUD)	null	Y	Y	AC	ESG

Figure 8

TAB INFORMATION:

This tab contains a listing of the individual clients contained in the Tab A and Tab B breakdowns (Figure 8). The data is sectioned by Household ID, Client Unique ID, Age, Gener, Race, Ethnicity, CMI, Disability, Head of Household, Household Type and Funding Source.

INPUT CONTROLS:

This tab contains a number of input controls that assist the user in filtering data to specific criteria (Figure9). *Note: The "Client Served in Multiple HH" input control cannot be combined with other input controls.*

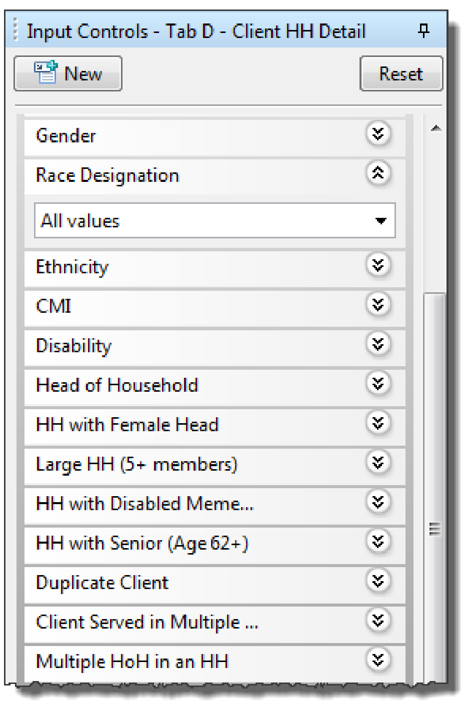


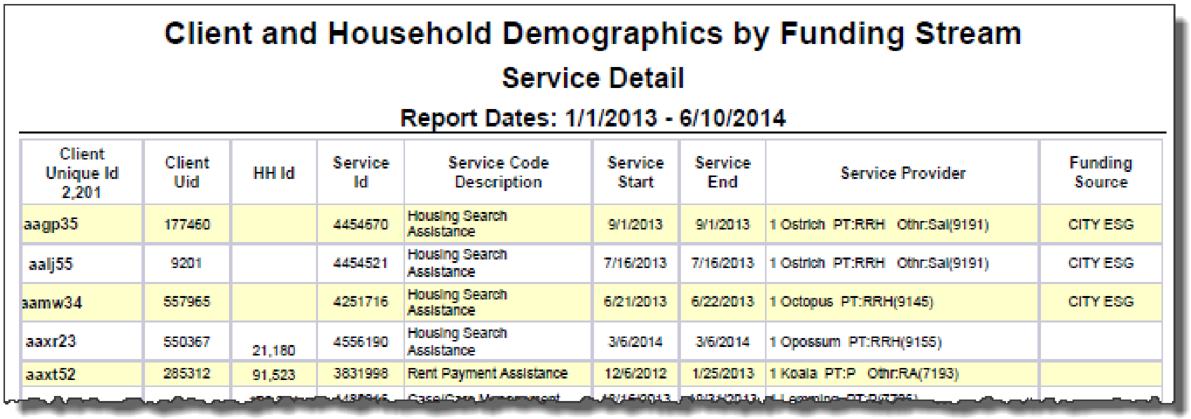
Figure 9

ALERTERS:

A red null will appear for missing data.

Yes/No/Don't Know/Refused values appear as Y/N/DK/R.

Tab E – Service Detail



Client and Household Demographics by Funding Stream
Service Detail
Report Dates: 1/1/2013 - 6/10/2014

Client Unique Id 2,201	Client Uid	HH Id	Service Id	Service Code Description	Service Start	Service End	Service Provider	Funding Source
aagp35	177460		4454670	Housing Search Assistance	9/1/2013	9/1/2013	1 Ostrich PT:RRH Othr:Sal(9191)	CITY ESG
aalj55	9201		4454521	Housing Search Assistance	7/16/2013	7/16/2013	1 Ostrich PT:RRH Othr:Sal(9191)	CITY ESG
aamw34	557965		4251716	Housing Search Assistance	6/21/2013	6/22/2013	1 Octopus PT:RRH(9145)	CITY ESG
aaxr23	550367	21,180	4556190	Housing Search Assistance	3/6/2014	3/6/2014	1 Opossum PT:RRH(9155)	
aaxt52	285312	91,523	3831998	Rent Payment Assistance	12/6/2012	1/25/2013	1 Koala PT:P Othr:RA(7193)	

Figure 10

TAB INFORMATION:

This tab contains a listing of the service Id, Service Code Description, Service Start and End and Service Provider by fund source.

INPUT CONTROLS

This tab contains several input controls to assist the user with filtering Service Data (Figure 11).

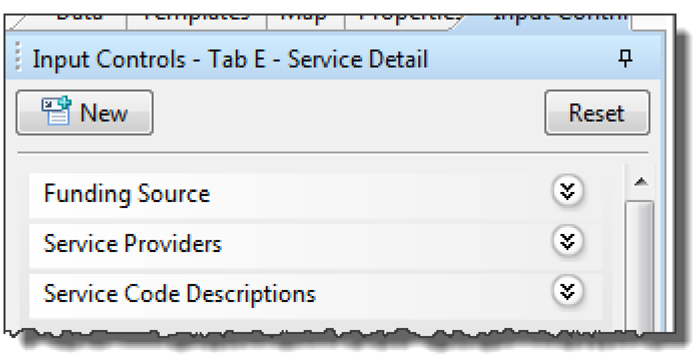


Figure 11

ALERTERS:

This tab contains no alerters.

Tab F – Additional Information

Client and Household Demographics by Funding Stream
Additional Information
Report Dates: 1/1/2013 - 6/10/2014

User Prompt Field	Value(s) Selected
EDA Provider:	-Default Provider-
Effective Date:	6/11/2014
Enter Start Date:	1/1/2013
Enter End Date PLUS ONE DAY:	6/11/2014
Select Provider(s) for Report:	1 Bullfrog PT:HPRP(8592); 1 Bumble Bee PT:HPRP(8596); 1 Burmese PT:HPRP(8599); 1 Butterfly PT:HPRP(8601); 1 Camel PT:HPRP(8603); 1 Dragonfly PT:O Othr:HOPWA(1565); 1 Flamingo PT:TH TA1:SF+HC(2691); 1 Grey Seal PT:PSH TA1:SMF+HC(7443); 1 Grizzly Bear PT:PSH TA1:SF(7694); 1 Guppy PT:PSH TA1:SMF TA2:VET(7709); 1 Hippopotamus PT:PSH TA1:SMF(8376); 1 Kingfisher PT:P(7175); 1 Koala PT:P Othr:RA(7193); 1 Lemming PT:P(7706); 1 Lionfish PT:P Othr:Sal(8140); 1 Mayfly PT:P(8999); 1 Nightingale PT:RRH TA1:HC TA2:VET(8893); 1 Nurse Shark PT:RRH TA1:SM(8972); 1 Ocelot PT:RRH(9104); 1 Octopus PT:RRH(9145); 1 Opossum PT:RRH(9155); 1 Ostrich PT:RRH Othr:Sal(9191)
Select Funding Source(s) to Include:	CITY ESG; ESG; ESG0809; ESG 0809; ESG 0910; ESG 2007; ESG 2008; Local/City (Non-ESG); STATE ESG

Providers reporting Information	Service Count	Unique Client Count	Client Count
1 Flamingo PT:TH TA1:SF+HC(2691)	634	213	213
1 Grey Seal PT:PSH TA1:SMF+HC(7443)	17	17	17

Figure 8

TAB INFORMATION:

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 number of services, number of clients and the number of unique/un-duplicated clients for each of the Service Providers contributing data to the report.

There are no Input Controls or Alerters on this tab.

TECHNICAL NOTES:
How the data are pulled:

This report utilizes a single query to based on the Client Universe. Active clients with at least one active service transaction provided by a provider specified in the prompt that occurs during the report date range and has a funding source specified in the prompt.

This report counts client data from ALL transactions pulled in the dataset. If a client has multiple selections to a single question, all answers will be counted. For example, if has different answers to the race question or the CMI question, the totals rows will not balance because the client will be counted under each of his/her answers. This can be corrected by merging the duplicate clients or by correcting the erroneous/incongruent data.

REPORT MODIFICATION:
Experienced users with ad-hoc ART licenses may wish to modify/customize this report. 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.

MAPPING OBJECTS

UNIVERSE: template_u

QUERY NAME	OBJECT TYPE	FIELD NAME	LOCATION/TYPE/USE
BISData	Results Objects	Client Uid	Clients folder
		Client Unique ID	Clients folder
		APR Entry Age	Clients / Assessments / APR Entry
		APR Entry Date of Birth	Clients / Assessments / APR Entry
		APR Entry Gender	Clients / Assessments / APR Entry
		Race	Clients / Assessments / APR Entry
		Secondary Race	Clients / Assessments / APR Entry
		% of county median income	Clients / Assessments / CDBG folder
		Do you have a disability of long term duration?	Clients / Assessments / APR Entry
		Relationship to Head of Household	Clients / Assessments / APR Entry
		Household Relate.Uid	Clients / Household Relationships folder
		Household Relate Date Added	Clients / Household Relationships folder
		Household Relate .Date Ended	Clients / Household Relationships folder
		Household Relate.Head of Household	Clients / Household Relationships folder
		Household Relate.Relationship	Clients / Household Relationships folder
		Household Relate.Inactive	Clients / Household Relationships folder
		Household Uid	Clients / Households folder
		Household Type	Clients / Households folder
		Household Inactive	Clients / Households folder
		Service Uid	Clients / Services (Outer) folder
		Service Provide Start Date	Clients / Services (Outer) folder
		Service Provide End Date	Clients / Services (Outer) folder
		Service Code Description	Clients / Services (Outer) folder
		Service Provide Provider	Clients / Services (Outer) folder
		Service Household Id	Clients / Services (Outer) folder
		APR Entry Ethnicity	Clients / Assessments / APR Entry
		Service Group Funding Source Id	Clients / Services (Outer) / Service Group (Outer) / Service Group Fund (Outer) / Service Group Fund Source (Outer) / Service Group Fund Source Amount (Outer) folder
		Service Group Funding Source Inactive	Clients / Services (Outer) / Service Group (Outer) / Service Group Fund (Outer) / Service Group Fund Source (Outer) / Service Group Fund Source Amount (Outer) folder
		Service Group Funding Source Fund Name	Clients / Services (Outer) / Service Group (Outer) / Service Group Fund (Outer) / Service Group Fund Source (Outer) / Service Group Fund Source Amount (Outer) folder
		Service Group Funding Source Amount	Clients / Services (Outer) / Service Group (Outer) / Service Group Fund (Outer) / Service Group Fund Source (Outer) / Service Group Fund Source Amount (Outer) folder
	Filter Objects	Client Inactive	Clients folder
		Service Inactive	Clients / Services (Outer) folder
		Service Provided	Clients / Services (Outer) folder

#0607 Revision History

Version	Description of Changes
V11.04.13	Original version –BETA
V11.05.31	Revision:
V3	Revision: Altered Tab B to display all CMI values instead of hard coded values that may differ from what is in each site's CMI picklist. Enhanced query design to reduce return time. Corrected inaccurate Mapping Guide. Included updated instruction for running report (page 1). The name of this report has been changed from "CDBG CAPER" to "IDIS CAPER for multiple funding streams.
V4	Revision: Altered structure of tabs to provide better detail; adjusted counts for inactive head of household; removed old fund source information and replaced with current fund manager fields.
V5	Revision: Updated PL values to work on 5.11 pre/post; change logic for Head of Household to new dynamic field; added alerter for multiple HoH.