# ART Gallery Report 0703
## Employment and Income Growth for CoC Funded Projects Metric 4

## Contents

## 1. INTRODUCTION:

This report is one in a series of CoC System Performance Measures. This report looks at clients with an Entry or Exit from a CoC Funded Project within a given operating year to determine the percentage of clients who have increased Earned, Other (non-earned) or total income during that timeframe.

This report should be run as needed to report to HUD on the CoC Performance Measures.

Prerequisites and workflow requirements:

- Use of a standard HUD Workflow by participating providers
- Proper recording of CoC Code, Program Type Code and Federal Partner Funding Source Configurations for each provider in the dataset.

Compatibility and system requirements: This report requires ServicePoint 5.11.x or higher and ART 3.1.

## 2. REPORT INSTRUCTIONS AND PROMPTS:

The easiest way to start using this report is to navigate to the auto-mapper. 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 auto-mapper as shown in Figure 2.1 below:

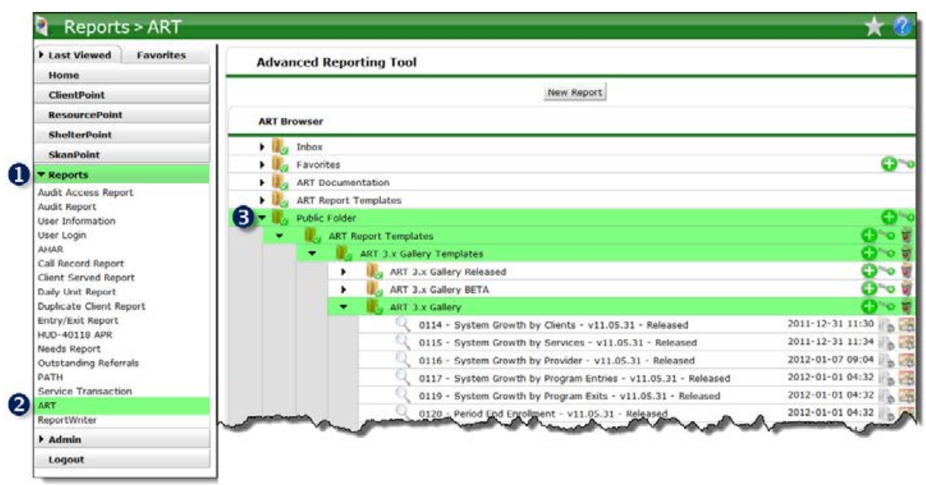


**Figure 2.1**

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

**How to run:** Upon opening the report, the User will be prompted 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 "Refresh Data" button to generate the report.

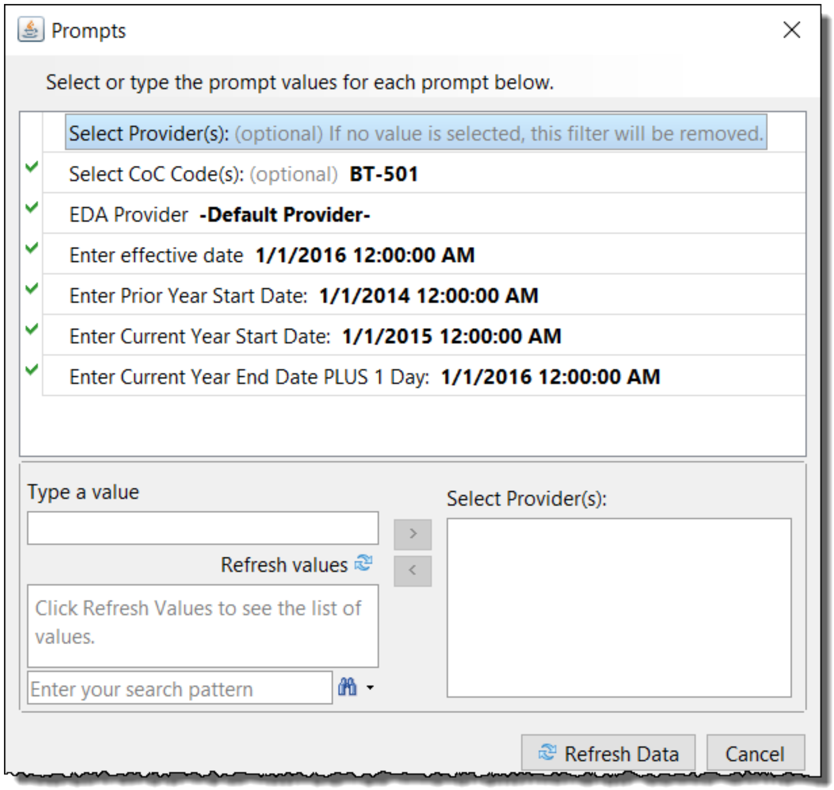


**Figure 2.2**

The user prompts contained in this report are:

1. **Select Provider(s):** This prompt is optional. 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.
2. **Select CoC Code(s):** This prompt is optional. Either leave "None Selected" in the prompt or click the "refresh list" icon and wait for the left window to refresh. Now select the provider CoC Codes to include by highlighting them in the left window and moving them into the right window using the right selection arrow
3. **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.
4. **Enter Effective Date:** The user should select the Effective Date to use in the report.
5. **Enter Prior Year Start Date:** Enter the date for the Prior Year to be considered in the report. This should be one year prior to the Current Year Start Date.
6. **Enter Current Year Start Date:** Enter the date for the Current Year Start Date. This is the start date of the fiscal year for the report.
7. **Enter Current Year End Date PLUS 1 Day:** Enter the Current Year End Date plus one day.

# 3. DESCRIPTION AND LAYOUT:

## 3.1 Tab A - Summary

The first table contains data for each of the required Stayer and Leaver metrics required.

**Summary**

**Prior Year Report Dates: 1/1/2014 - 12/31/2014** **Current Year Report Dates: 1/1/2015 - 12/31/2015**

*Metric 4.1 - Change in earned income for adult system stayers during the reporting period*

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|
| Number of adults (system stayers) | 85 | 87 | 2 |
| Number of adults with increased earned income | 7 | 12 | 5 |
| Percentage successful exits | 8.24% | 13.79% | |

*Metric 4.2 - Change in non-employment cash income for adult system stayers during the reporting period*

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|
| Number of adults (systems stayers) | 515 | 530 | 15 |
| Number of adults with increased non-employment cash income | 36 | 52 | 16 |
| Percentage of adults who increased non-employment cash income | 6.99% | 9.81% | |

*Metric 4.3 - Change in total income for adult stayers during the reporting period*

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|
| Number of adults (system stayers) | 719 | 713 | -6 |
| Number of adults with increased total income | 39 | 61 | 22 |
| Percentage of adults who increased total income | 5.42% | 8.56% | |

*Metric 4.4 - Change in earned income for adult system leavers*

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|
| Number of adults who exited (system leavers) | 98 | 119 | 21 |
| Number of adults who exited with increased earned income | 39 | 30 | -9 |
| Percentage of adults who increased total income | 39.80% | 25.21% | |

*Metric 4.5 - Change in non-employment cash income for adult systems leavers*

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|
| Number of adults who exited (system leavers) | 220 | 243 | 23 |
| Number of adults who exited with increased non-employment cash income | 68 | 73 | 5 |
| Percentage of adults who increased non-employment cash income | 30.91% | 30.04% | |

*Metric 4.6 - Change in total income for adult system leavers*

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|
| Number of adults who exited (system leavers) | 452 | 590 | 138 |
| Number of adults who exited with increased total income | 178 | 156 | -22 |
| Percentage of adults who increased total income | 39.38% | 26.44% | |

**Figure 3.1**

**Definitions:**

- **System Stayers** are persons who were in one or more of the applicable project types listed in a specific measure as of the end of the reporting period. This value will be the same across 4.1 – 4. 3.
- **System Leavers** are persons who are not system stayers and who exited from one or more of the applicable project types listed in a specific measure during the reporting period and was not enrolled in one of the applicable project types at the end of the reporting period. This value will be the same across 4.4 – 4.6.
- **Earned Income** is the Income recorded with a type of "earned".
- **Non Employment Cash Income** is all income (HUD picklist) that is *not* "earned" income.
- **Total Income** is the total of Earned and Non Employment Cash Income.

**Each metric shows the number of adult stayers or leavers, the number of clients with increased income for the appropriate income category and the percentage of adults with increased income:**

- **Metric 4.1: Change in earned income for adult system stayers during the reporting period:** This metric shows all clients with an increase in earned income during the report period.
- **Metric 4.2: Change in non-employment cash income for adult system stayers during the reporting period:** This metric shows all clients with an increase in non-employment cash income during the report period.
- **Metric 4.3: Change in total income for adult system stayers during the reporting period:** This metric shows all clients with an increase in total income (earned income plus non employment cash income) during the report period
- **Metric 4.4: Change in earned income for adult system leavers:** This metric shows all clients with an increase in earned income who have left the system as of the end of the report period
- **Metric 4.5: Change in non-employment cash income for adult system leavers:** This metric shows all clients with an increase in non-employment income who have left the system as of the end of the report period
- **Metric 4.6: Change in total income for adult system leavers:** This metric shows all clients with an increase in total income (earned income plus non-employment income) who have left the system as of the end of the report period

### 3.2 Tab B – Detail

This tab contains detailed information for all of the entry and exit transactions included in the report.

**Employment and Income Growth for CoC Funded Projects, Metric 4**

**Detail**

**Prior Year Report Dates: 1/1/2014 - 12/31/2014 Current Year Report Dates: 1/1/2015 - 12/31/2015**

| Client Uid | Unique Id 2,154 | Provider | Proj Type | Start Date | End Date | FY |
|---|---|---|---|---|---|---|
| 433 | asgs53 | 1 Sun Bear PT:TH TA1:SM(7314) | TH | 8/11/2014 | 7/25/2015 | PC |
| 1727 | azyh62 | 1 Sun Bear PT:TH TA1:SM(7314) | TH | 10/31/2015 | 11/1/2015 | C |
| 3693 | mprs52 | 1 Jackal PT:PSH TA1:SMF(8698) | PSH | 11/10/2015 | | C |
| 3946 | julk64 | 1 Heron PT:PSH TA1:SMF+HC(7861) | PSH | 1/1/2005 | | PC |

**Figure 3.2**

**Column Detail:**

- **Client Uid:** The column lists all Client Uid's in the report range.
- **Unique Id:** The column header counts all Unique Id's in the report range. The cells are merged, which means multiple rows of data for that client will only display one Client Unique Id.
- **Provider:** This column displays the provider of the Entry/Exit
- **Proj Type:** This column displays the project type for each Entry/Exit
- **Start Date:** This column displays the start date for the project Entry
- **End Date:** This column displays the end date for the project Exit and is blank if there is no exit date recorded
- **FY:** This column displays a PC if the client overlaps both the Prior and Current Year, a P if the client is enrolled only in the Prior Year and a C if the client is enrolled in only the Current Year

### 3.3 Tab C – Transaction Detail

This tab contains detailed information each client's income records for current and prior years.

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**Counted in Tab A (Valid Trans)**

*Entry Exit Details*

| Client Uid | EE Id | Provider | Proj | Start Date | End Date | FY |
|---|---|---|---|---|---|---|
| 363704 | 579448 | 1 Himalayan PT:PSH TA1:SMF+HC(7863) | PSH | 9/12/2014 | 12/3/2014 | P |

*Entry Income Records*

| YN Inc | Income Id | Source | Start Date | End Date | Amount |
|---|---|---|---|---|---|
| Yes (HUD) | 1017025 | TANF (HUD) | 12/30/2010 | | $628.00 |
| | 1145800 | TANF (HUD) | 2/1/2011 | | $628.00 |
| | 1367012 | SSI (HUD) | 6/3/2014 | | $897.00 |
| | | | | | |

*Annual Assessment Income Records*

| Review Date | YN Inc | Income Id | Source | Start Date | End Date | Amount |
|---|---|---|---|---|---|---|
| | | | | | | |

*Exit Income Records*

| YN Inc | Income Id | Source | Start Date | End Date | Amount |
|---|---|---|---|---|---|
| Yes (HUD) | 1017025 | TANF (HUD) | 12/30/2010 | | $628.00 |
| | 1145800 | TANF (HUD) | 2/1/2011 | | $628.00 |
| | 1367012 | SSI (HUD) | 6/3/2014 | | $897.00 |
| | | | | | |

**Figure 3.3**

**Entry Exit Details/Annual Assessment Records – provides details about the Entry Exit and Annual Income Records. Entry and Exit Records are indented and provide information about the source of income recorded.**

- **Client Uid:** The column lists all Client Uid's in the report range.
- **EE Id:** This displays the Entry Exit Id for each client
- **Provider:** This column displays the provider of the Entry/Exit
- **Proj Type:** This column displays the project type for each Entry/Exit
- **Start Date:** This column displays the Project Entry Date
- **End Date:** This column displays the Project Exit Date and is blank if the exit date is null
- **FY:** This column displays a PC if the client overlaps both the Prior and Current Year, a P if the client is enrolled only in the Prior Year and a C if the client is enrolled in only the Current Year
- **Review Date:** This is the date of the recorded Annual Assessment
- **YN Inc:** This column provides the value for Is client Receiving Income assessment question
- **Income Id:** This provides the income Id for each income record
- **Source, Start and End Dates and Amount:** This column provides the Source of income, start and end dates and amount.

## 3.4 Tab D – Review Accuracy

This tab contains detailed information for recorded Annual Assessments for Stayers. These must be +/- 30 days of the Client's Project Entry Date to be used for income comparison (Figure 3.4).

**Employment and Income Growth for CoC Funded Projects, Metric 4**

**Annual Review Date Accuracy (Data Quality for Stayers)**

**Prior Year Report Dates: 1/1/2014 - 12/31/2014 Current Year Report Dates: 1/1/2015 - 12/31/2015**

| Client Uid | Unique Id 931 | Provider | Proj Type | Start Date | End Date | Entry Exit Review | Prior Outside +/-30 | Current Outside +/-30 | FY |
|---|---|---|---|---|---|---|---|---|---|
| 433 | asgs53 | 1 Sun Bear PT:TH TA1:SM(7314) | TH | 8/11/2014 | 7/25/2015 | 2/9/15 | | | PC |
| 1900 | tjej52 | 1 Flamingo PT:TH TA1:SF+HC(2691) | TH | 11/21/2014 | 12/13/2014 | 12/1/14 | | | P |
| 3380 | pkpw63 | 1 Flamingo PT:TH TA1:SF+HC(2691) | TH | 9/20/2014 | 10/31/2015 | 9/20/15 | | | PC |
| 3380 | pkpw63 | 1 Flamingo PT:TH TA1:SF+HC(2691) | TH | 9/20/2014 | 10/31/2015 | 9/20/15 | | | PC |
| 3693 | mprs52 | 1 Sun Bear PT:TH TA1:SM(7314) | TH | 12/5/2014 | 2/26/2015 | 2/9/15 | | | PC |
| 3946 | julk64 | 1 Heron PT:PSH TA1:SMF+HC(7861) | PSH | 1/1/2005 | | 1/1/15 | | Ok | PC |
| 5064 | dvpt46 | 1 Tropicbird PT:TH TA1:SMF Othr:Sal(8229) | TH | 8/5/2014 | | 1/6/16 | | | PC |
| 5892 | erbg32 | 1 Sun Bear PT:TH TA1:SM(7314) | TH | 8/15/2014 | 2/21/2015 | 2/12/15 | | | PC |
| 7208 | szgm62 | 1 Heron PT:PSH TA1:SMF+HC(7861) | PSH | 5/1/2010 | | 1/1/15 | | X | PC |
| 8859 | jndg61 | 1 Heron PT:PSH TA1:SMF+HC(7861) | PSH | 7/1/2014 | | 1/1/15 | | X | PC |

**Figure 3.4**

**Annual Assessment Records – provides details about the accuracy of the recorded Annual Assessments for each review:**

- **Client Uid:** The column lists all Client Uid's in the report range.
- **Unique Id:** This displays the Unique Id for each client
- **Provider:** This column displays the provider of the Entry/Exit
- **Proj Type:** This column displays the project type for each Entry/Exit
- **Start Date:** This column displays the Project Entry Date
- **End Date:** This column displays the Project Exit Date and is blank if the exit date is null
- **Entry Exit Review:** This column shows the date of the recorded Annual Assessment
- **Prior Outside +/- 30:** This displays an Ok for Prior Year where the Annual Assessment is within the 30 day requirement and an X where the date is outside of the 30 day requirement.
- **Current Outside +/- 30:** This displays an Ok for Current Year where the Annual Assessment is within the 30 day requirement and an X where the date is outside of the 30 day requirement.
- **FY:** This column displays a PC if the client overlaps both the Prior and Current Year, a P if the client is enrolled only in the Prior Year and a C if the client is enrolled in only the Current Year

### 3.5 Tab E – Additional Information

This tab contains the information included in the prompts and a list of all providers in the report with Project Type, Federal Partner Program, Grant Start and End Dates, EE Count and Client Count specified per provider.

| User Prompt Field | Value(s) Selected |
|---|---|
| Select Provider(s): | 1 Bassett PT:TH(9146);<br>1 Beagle PT:ES TA1:SMF(8551);<br>1 Beaver PT:ES TA1:HC(8552);<br>1 Black Bear PT:ES TA1:SM(9005);<br>1 Bloodhound PT:ES TA1:YMF(9050);<br>1 Blue Whale PT:ES(9288);<br>1 Buffalo PT:HO Othr:PATH(8472);<br>1 Bulldog PT:HO(8997);<br>1 Bull Shark PT:HO(8901);<br>1 Cardinal PT:ES TA1:HC-SF-SM Othr:Sal(4686);<br>1 Chameleon PT:O(819);<br>1 Cheetah PT:O(1177);<br>1 Chicken PT:O(1237);<br>1 Chipmunk PT:O(1323);<br>1 Clown Fish PT:O(1365);<br>1 Collie PT:O(1366);<br>1 Cougar PT:O Othr:Sal(1408);<br>1 Coyote PT:O(1431);<br>1 Crocodile PT:O(1478);<br>1 Dormouse PT:O(1555);<br>1 Dragonfly PT:O Othr:HOPWA(1565);<br>1 Duck PT:O(2028);<br>1 Jackal PT:PSH TA1:SMF(8698);<br>1 Jaguar PT:PSH TA1:SMF(8822);<br>1 Jellyfish PT:PSH TA1:SMF(8881);<br>1 Kangaroo PT:PSH TA1:SM TA2:VET Othr:SRO(8889);<br>1 Killer Whale PT:PSH TA1:SMF TA2:VET(8891);<br>1 King Crab PT:PSH TA1:SMF+HC TA2:VET(8942) |
| Select CoC Code(s): | - Optional Prompt - |
| EDA Provider: | -Default Provider- |
| Enter Prior Year Start Date: | 1/1/2014 |
| Enter Current Year Start Date: | 1/1/2015 |
| Enter Current Year End Date PLUS 1 Day: | 1/1/2016 |
| Enter Effective Date: | 1/1/2016 |

| Provider | Proj Type | Federal Partner Program | Grant Start | Grant End | EE Count | Client Count |
|---|---|---|---|---|---|---|
| 1 Jackal PT:PSH TA1:SMF(8698) | PSH | HUD:CoC - Permanent Supportive Housing | 1/1/2001 | | 110 | 110 |
| | | HUD:CoC - Permanent Supportive | | | | |

**Figure 3.5**

# 4. INPUT CONTROLS:

## 4.1 Tab B – Detail

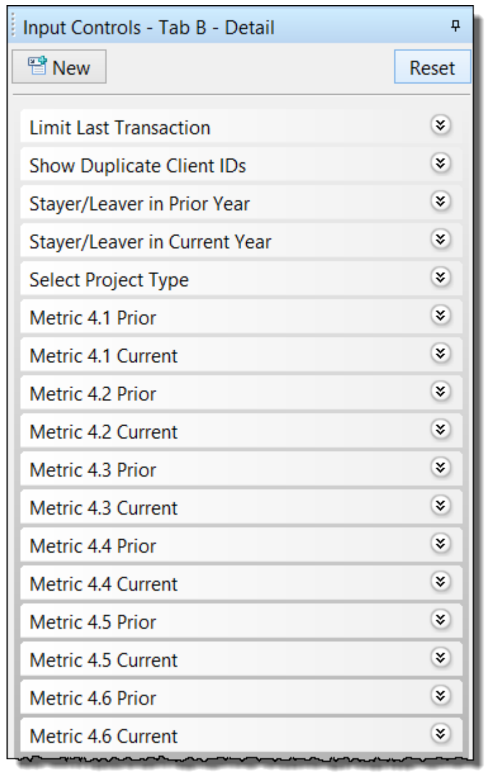


**Figure 4.1**

**Input controls include the following:**

1) **Limit Last Transaction –** this input control allows the user to limit to the last transaction in the operating year
2) **Show duplicate client Ids**– this input control allows the user to limit the dataset to any clients with duplicate client ids
3) **Stayer/Leaver in Prior Year** – this input control allows the user to filter to Stayers or Leavers for the Prior Year
4) **Stayer/Leaver in Current Year** – this input control allows the user to filter to Stayers or Leavers in the Current Year
5) **Select Project Type** - this input control allows the user to limit to a particular project type
6) **Metrics 4.1 to 4.6 Prior/Current** – these input controls allow the user to filter each of the specific metrics and for either prior or current year as desired

### Notes:

- "S" represents Stayers who have been enrolled 1 year (365 days or +) or more; "s" represents clients who have been enrolled less than 1 year (less than 365 days)
- To isolate data to a specific metric use the following logic:
  - Choose Valid
  - Choose Stayer ("S" for 1 year or more) or Leaver
  - Choose Metric
  - Choose Increase (or No Increase)

### 4.2 Tab C – Transaction Detail

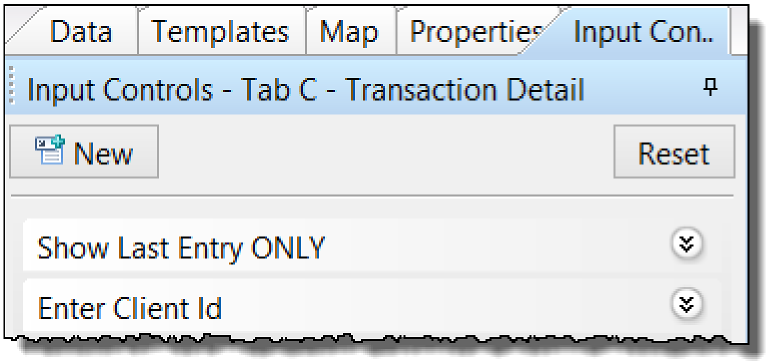


**Figure 4.2**

**Input controls include the following:**

1) **Show Last Entry ONLY** – this input control allows the user to filter data to only the Last Entry for the Client.
2) **Enter Client Id** – this input control allows the user limit the dataset to a single client to make it easier to review a single client record.

### 4.3 Tab D – Review Accuracy

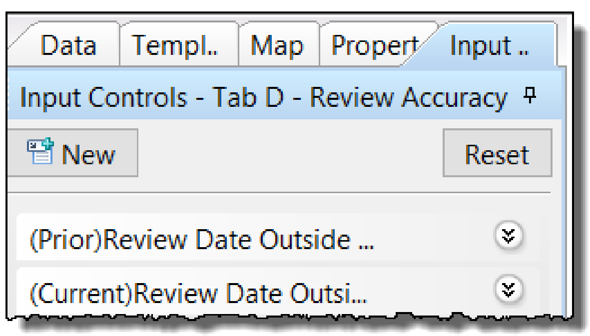


**Figure 4.3**

**Input controls include the following:**

1) **(Prior) Review Date Outside +/- 30** – this input control allows the user to filter data to Prior year
2) **(Current) Review Date Outside +/- 30** – this input control allows the user to filter data to Current year

Notes:

- “Ok” means the Annual Assessment is recorded in the appropriate time frame
- “X” means that the Annual Assessment is either recorded too early or too late
- A blank cells means the client is either not enrolled for 365 or more days or was a leaver (Exit Information is used for Leavers).

# 5. ALERTERS:

## 5.1 Tab A – Summary Tab

Tab A has an alerter in red that notifies the user if there are duplicate Annual Assessments or duplicate Updates on the same date for a client (Figure 5.1). Clients may only have a single Annual Assessment per client per provider on the same date or single Update with the same timestamp per client per provider on a single date. A multivalue error will appear until the data is corrected.

**Prior Year Report Dates: 1/1/2014 - 12/31/2014 Current Year Report Dates: 1/1/2015 - 12/31/2015**

**This report will not function properly until Annual Assessment data quality issue(s) are resolved. Please examine record(s) listed below and eliminate duplicate Annual Assessment(s) recorded on the same date.**

| | | |
|---|---|---|
| aneg61 | 553,796 | 7/26/14 |

***Metric 4.1 - Change in earned income for adult system stayers during the reporting period***

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|
| Number of adults (system stayers) | #MULTIVALUE | #MULTIVALUE | #MULTIVALUE |
| Number of adults with increased earned income | #MULTIVALUE | #MULTIVALUE | #MULTIVALUE |
| Percentage successful exits | #MULTIVALUE | #MULTIVALUE | |

***Metric 4.2 - Change in non-employment cash income for adult system stayers during the reporting period***

| | Prior Year Counts | Current Year Counts | Difference |
|---|---|---|---|

**Figure 5.1**

# 6. TECHNICAL INFORMATION:

## 6.1 How the data are pulled:

This report utilizes four separate queries where one is in the resourcepoint_universe, two are in the ee cutoff_universe and one is in the review_universe.

The first query, Provider EE, pulls providers in the following ways:

- Providers in the “Select Provider(s)” prompt
- Providers with a new CoC Code as selected in the “Selected CoC Code(s)”.
  AND
- Provider Program Type Code is either Safe Haven, Transitional Housing, PH – Permanent Supportive Housing, PH – Housing Only, PH – Housing with Services (no disability required for entry or PH – Rapid Re-Housing.
  AND
- Federal Partner Funding Source is either HUD: CoC - Permanent Supportive Housing, HUD: CoC – Supportive Services Only, HUD: CoC – Rapid Re-Housing, HUD: CoC – Transitional Housing or HUD: CoC – Safe Haven
  AND
- Have a Grant Start Date less than or equal to Report End Date AND Grant End Date is null or greater than or equal to Report Start Date

The second query, Income Entry, pulls in clients in the following way:

- Active adult clients with an Active Entry Exit by a provider as listed in the Provider query
  AND
- Where there is valid income recorded at entry.

The third query, Income Exit, pulls in clients in the following way:

- Active adult clients with an Active Entry Exit with an exit date (or if null at report end) by a provider as listed in the Provider query
  AND
- Where there is valid income recorded at exit or at the end of the reporting period

The fourth query, Income Review, pulls in clients in the following way:

- Active adult clients with an Active Entry Exit with an Annual Assessment that is +/- 30 days of the client's entry date
  AND
- Where there is valid income recorded at Annual Assessment

### 6.2 Technical Notes:

1) Report is limited to Adults

2) Clients missing Entry Income data are completely excluded from the report.

3) System Stayers are not exited from one of the listed project types in Query 1 and when looking at the last stay, it must be 365 or more days to be included in the report
    - If client is enrolled less than 365 days, they are excluded from the report.
    - Comparison for System Stayers is most recent Annual Assessment (+/- 30 days of project entry date anniversary) to Project Entry Data
    - If the Annual Assessment is missing, the client is still included in the report and shown as having no increase in income.
    - If an Annual Assessment is recorded, it will only pull into the report for comparison purposes if it is +/- 30 days of the project Entry Date for the client. See Tab D for Annual Assessments with incorrectly recorded dates.

4) System Leavers are those completely exited from the project types listed in Query 1 and the report examines their last exit.
    - Income data from Entry to Exit are compared.
    - Clients missing Exit Income data are included in the report and are shown as having no increase in income.

5) The report looks only at recorded sub-assessment income data and ignores the Total Monthly Income field in calculations.

6) If the report is run for different operating years, the Current and Prior Values may not match up as the report is based on Valid Transaction and this may vary for a client from year to Year.

### 6.3 Modification Options:

This report is based on HUD established System Performance Measures reporting specifications provided to HMIS Software Solutions Providers. Modification is not recommended.

## 7. 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 | OBJECT TYPE | FIELD NAME | LOCATION |
|---|---|---|---|
| Provider EE<br>resourcepoint_u | Result Objects: | Provider | Provider folder |
| | | CoC Code | Provider / HUD Standards Information / CoC Code folder |
| | | HUD Standards Information Program Type Code | Provider / HUD Standards Information |
| | | Federal Partner Program | Provider / HUD Standards Information / Federal Partner Funding Source folder |
| | | Grant Start Date | Provider / HUD Standards Information / Federal Partner Funding Source folder |
| | | Grant End Date | Provider / HUD Standards Information / Federal Partner Funding Source folder |
| BISData<br>ee cutoff_u | Result Objects: | Client Uid | Clients folder |
| | | Client Unique Id | Clients folder |
| | | Entry Exit Uid | Entry Exit folder |
| | | Entry Exit Provider Id | Entry Exit folder |
| | | Entry Exit Entry Date | Entry Exit folder |
| | | Entry Exit Exit Date | Entry Exit folder |
| | | Entry Exit Group Id | Entry Exit folder |
| | | Entry Exit Type | Entry Exit folder |
| | | Entry Exit Provider Program Type Code | Entry Exit / Entry Exit Provider Id folder |
| | | Income from Any Source | Entry Objects folder |
| | | Inactive | Entry Objects / Monthly Income folder |
| | | Recordset ID | Entry Objects / Monthly Income folder |
| | | Source of Income | Entry Objects / Monthly Income folder |
| | | Receiving Income Source | Entry Objects / Monthly Income folder |
| | | Start Date | Entry Objects / Monthly Income folder |
| | | End Date | Entry Objects / Monthly Income folder |
| | | Monthly Income Amount | Entry Objects / Monthly Income folder |
| | | Client Age at Entry | Clients / Entry Objects / Clients folder |
| | Filter Objects: | Client Inactive | Clients folder |
| | | Entry Exit Inactive | Entry Exit folder |

| | | | |
|---|---|---|---|
| Income Exit ecutoff_u | Result Objects: | Client Uid | Clients folder |
| | | Client Unique Id | Clients folder |
| | | Entry Exit Uid | Entry Exit folder |
| | | Entry Exit Provider Id | Entry Exit folder |
| | | Entry Exit Entry Date | Entry Exit folder |
| | | Entry Exit Exit Date | Entry Exit folder |
| | | Entry Exit Group Id | Entry Exit folder |
| | | Entry Exit Type | Entry Exit folder |
| | | Entry Exit Provider Program Type Code | Entry Exit / Entry Exit Provider Id folder |
| | | Income from Any Source | Exit Objects folder |
| | | Inactive | Exit Objects / Monthly Income folder |
| | | Recordset ID | Exit Objects / Monthly Income folder |
| | | Source of Income | Exit Objects / Monthly Income folder |
| | | Receiving Income Source | Exit Objects / Monthly Income folder |
| | | Start Date | Exit Objects / Monthly Income folder |
| | | End Date | Exit Objects / Monthly Income folder |
| | | Monthly Amount | Exit Objects / Monthly Income folder |
| Income Interim review_u | Result Objects: | Client Uid | Clients folder |
| | | Client Unique Id | Clients folder |
| | | Entry Exit Uid | Entry Exit folder |
| | | Entry Exit Review Id | Entry Exit Reviews folder |
| | | Entry Exit Review Inactive | Entry Exit Reviews folder |
| | | Entry Exit Review Type | Entry Exit Reviews folder |
| | | Entry Exit Review Point in Time Type | Entry Exit Reviews folder |
| | | Entry Exit Entry Date | Entry Exit folder |
| | | Entry Exit Exit Date | Entry Exit folder |
| | | Income from Any Source | Review Objects folder |
| | | Inactive | Review Objects / Monthly Income folder |
| | | Recordset ID | Review Objects / Monthly Income folder |
| | | Source of Income | Review Objects / Monthly Income folder |
| | | Receiving Income Source | Review Objects / Monthly Income folder |
| | | Start Date | Review Objects / Monthly Income folder |
| | | End Date | Review Objects / Monthly Income folder |
| | | Monthly Amount | Review Objects / Monthly Income folder |

## 8. REVISION HISTORY:

| Version | Description of Changes |
|---|---|
| VBeta | Original version –BETA |
| V1 | Revision: Addition of Alerter for multiple annual assessments per single provider on a client. |
| V2 | Revision: Alteration of universe for Stayers and Leavers count on 4.1-4.6; addition of DQ check for multiple Updates per single provider on a client; clarification of comparison between Current and Prior for different operating years. |
| V3 | Revision: Corrected mapping issue related to Exit query; corrected Prompt order in User Manual; added new Tab (D) to locate clients with Annual Assessments recorded too early or too late. |
| V3 (DOC Only) | Revision: Added notes in User Manual regarding Tab B and Tab D Input Controls. |