LTH Matrix Report Instruction Basics

Matrix reports in ART:
Located in the Matrix folder. Please note, we have added numbers to the reports to better identify them. For this reporting period please run the following reports:

1. **Matrix Data Check report- 3 tabs (run dates: earliest assessment date to report end date)**

2. **Provider level Reports (contain client level information-do not email):**
   #1P Client Level Progress
   #2P Client Level Achievement with Final Matrix

3. **Summary Reports:**
   #1-2S Self Sufficiency Matrix Progress Summary (run 7/1/11 to 1/1/12)
   #3S Domains at Population Entry (run earliest assessment date to 1/1/12)
   #4S Domains at Population Exit (run 7/1/11 to 1/1/12)

   ***Summary reports to send to funder:** **<u>Please send in Excel format</u>**

Matrix Data Check report: Run from earliest assessment date to 1/1/12
Important: Run the Matrix Data Check report first to make sure that all clients are included in the other matrix reports.

- The report start and end dates should include the period of time clients you are currently serving have been in the program, not just the report period. If the earliest client currently being served entered in January 2009, this is your report start date. The end date can be the current date or end of the report period. Even if you pick an earlier date, it will exclude any clients exiting before 7/1/11. Note pilot agencies should run the pilot specific data check reports to include clients in the pilot program starting 7/1/10.
- Three Tabs:
  - **Matrix Data Check** links client entry/exit information with matrix data. Clients without any matrix data will only display entry/exit information. Look for clients without matrix data and record the client ID so that you can update their information in ServicePoint.
  - **Entry Exit Check** shows data from the Entry/Exit section with some matrix dates for comparison. Check to make sure the matrix dates are accurate (initial data check should be close to program entry date, interims should be in 6 month increments, finals should be close to exit date)
  - **Matrix Time Period Check** highlights 6 month matrix due dates and summarizes most recent matrix entries. Use this to make sure that you have the right number and type of matrix assessments for each client (initial, interim and final). This can also help you track what month interim assessments need to be completed based on the initial assessment date.

A. Client level reporting: These reports include matrix information for each client. As it is private client data, it should never be emailed or shared publicly. You can use this information to confirm the data is correctly entered for each client. You can also share it with clients or other program staff within your agency.

Use the ***standard report period*** date range for client level reports. Client level reports are best saved as a PDF.

- ***#1P Client-level Progress Report***
    - Includes clients with an initial matrix assessment and at least one interim assessment within the report range. Clients with only an initial matrix will not show up in the report.
    - Provides a table and chart for each client comparing their initial and most recent assessments (the most recent assessment may be their final matrix).
    - Also provides a list of all matrix assessments completed, dates and scores for each client for reference.

- ***#2P Client-level Achievement Report-with final assessment***
    - Includes clients with a final assessment during the specified date range.
    - Provides a summary table and chart for each client comparing their initial and final assessments.
    - Tab B: Includes an overall summary report for all clients who have a final matrix within the reporting period. Shows results by each provider if more than one provider is selected.

B. Summary reports to send to funder: There are a total of three summary reports to send to your funder. One is a summary progress report similar to the client level reports, but with only overall counts. Two other reports focus on summarizing each matrix area at entry and at exit. Save these reports in Excel to send to your funder (unlike other summary reports).

1) Summary Report: #1-2S Self Sufficiency Outcomes Matrix Progress Report

- Report is similar to the client level data reports, but has averages scores for the entire program, not by client.
- To be included in this report the client must have an initial matrix assessment and one interim or final assessment. One matrix date must be also be in the report range. Clients with only the initial matrix will not show up in the report.
- Divided up into three sections:
    - Table one compares the initial assessment to the most recent assessment in the date range.
    - Table two is broken down into more detail with the initial assessment compared to both the most recent interim assessment or to the final assessment.
    - Table three includes only clients with a final matrix, comparing initial and final assessments.

Entry and Exit reports (see #2 and #3 below):

- Each of the 17 matrix domains has its own page on the reports. The two most useful sections will be:
    - Frequencies (table): lists the number of clients with each score
    - Histogram (chart): shows in a graph the number of people with each score.
        - Please remember 6=NA
- Last section includes client level summary information (by Client ID only).

2) Summary Report: #3S Domains at Population Entry

- Includes initial matrix assessments only. For the report start and end dates, select the time frame you would like to see initial assessments for, such as all initial assessments in a fiscal year. It includes all clients with initial assessments and doesn't filter out anyone with final exits.
- If you would like to see initial assessments for clients currently being served, you would need to use the first date of their initial assessments. This will be the earliest program entry date for clients you are currently working with. You should make sure to send reports including all current clients to your funder.

3). Summary Report: #4S Domains at Population Exit

- Includes only final matrix assessments which are completed at program exit.
- Run the report for the time period you would like to see exits for, usually the same as standard reporting periods.