HMIS and LTH Matrix Pilot

HMIS data entry and using ART reports

WILDER
FOUNDATION

Today’s Webinar

- You can listen using your computer or calling in by phone
  - Phone: 773-945-1010, Access code: 370-622-529
- Use the bar on the right side to ask questions. We will respond either directly, as part of the webinar to the audience in general, or follow-up after with you.
  - The Matrix is new to us too, we may need to get back to you with some information.
- Please fill out survey at end

Today’s Webinar

- Webinar divided into two sections:
  - HMIS data entry and data checking
  - Understanding and using Matrix reports

HMIS Matrix Data Entry

- New section in HMIS activated for users at your agency
  - In grey bar between Assessments and Case Plans
  - Let Wilder know if you or other users in your agency don't have access

Matrix timeline

- Complete matrix at entry, every 6 months, and at exit
- Complete for all clients 18+ and youth on their own
- As part of initial roll out, clients already in the program as of July 1st 2010 will have an initial assessment completed looking back to their program entry date

Matrix Data Entry Basics

- Select same provider as Entry/Exit
- Select correct Point of Measurement (initial, interim, final)
- Date:
  - Initial: Program entry
  - Interim: 6 month increments after entry
  - Final: Program exit
- Clients must have initial matrix before other types can be entered

Matrix Data Entry Basics

- Click on circle to record appropriate response: complete all questions
  - NA only used for child-related questions if no children or no children of correct age
- Push “Save” at top or bottom of screen
- If you make mistakes, you must delete the assessment on main Matrix screen and start over
  - It is good to review your entry before pushing “Save”

Matrix Reminders

- Use the “Projected Follow-up Date” field to help the system remind you when next 6 month matrix is needed
  - Client will show up in “Follow-up List” section of ServicePoint Home page
- Once you have collected information for next matrix, go back and record “Actual Follow-up Date” and select “Yes” for “If Follow-up Made”
  - These are the only fields you can go back to once an Matrix is saved

Data Checking-ART

- All Matrix Reports are located in LTH folder
  - Sub-folder called “Matrix”
- Wilder has designed a report to help check data quality and provide reminders of matrix dates
- Make sure to run regularly as you enter information
- Running monthly can also help you check for clients needing 6-month follow-ups

Matrix Data Check Report

- Report prompts:
  - Start and end dates should cover the period of time you are interested in
    - Start date will need to include the first program entry date for clients you are recording matrix data for (ex: client entered in 2007)
    - Clients who exited before 7/1/2010 are excluded
  - Entry/Exit and Matrix provider prompts will both appear. Make sure to select the same provider for each prompt, even though it asks for two.

Matrix Data Check Report

- Three Tabs:
  - Matrix Data Check highlights matrix data entered for each client and clients without any matrix data
  - Entry Exit Check shows data from the Entry/Exit section with some matrix dates for comparison
  - Matrix Time Period Check highlights 6 month matrix due dates and summarizes most recent matrix entries
- Save reports as Excel (best) or PDF

Matrix Data Check Tab

- Section for each client: Client ID at top of section
  - If client has Entry/Exit but no Matrix, then only the top entry/exit table will have information-the matrix table is blank
    - Summary section on the right listing each matrix completed with IDs and count for reference
  - Make sure each client is on list with correct entry and exit date and these match to matrix initial and final dates

Matrix Data check tab

- Section for each client: Client ID at top of section (cont.)
  - Clients with Matrix data have section for each Matrix completed: separate table for initial, each interim, and exit matrix
  - Make sure data entered is correct; terms going along with number ratings are given

Entry/Exit Check Tab

- Lists entry/exit for each client
  - Highlights if age missing: Make sure to record so correct clients can be included in summary reports
  - Counts number of matrix records
  - Provides first and last matrix date to compare to entry and exit dates

Matrix Time Period Check Tab

- Top table helps identify matrix follow-up months for clients (without final matrix)
  - For each client, give initial date, then months for first and second 6 month follow-ups each year
- Second table lists most recent dates for initial, interim, and final along with how many of each
  - Help check for completeness and duplication of records

Understanding Matrix Summary Reports

Matrix reports

- Why report on Matrix data?
  - Tracking over time to understand both how clients are progressing and in context of overall environment
    - How do reports look from year to year?
      - Are things like the economy affecting clients and programs?
      - As funding may change how are clients and programs seeing impacts?

Matrix reports

- Why report on Matrix data? (cont.)
  - Quantifying overall client progress as they are served over the years; understanding long-term program benefits
  - Identifying emerging/changing client needs
  - Help programs better understand their clients and outcomes
  - Help clients understand their progress over time
  - We also may discover new reasons reporting is helpful

Matrix Summary Reports

- Current summary reports designed by Bowman based on matrix reports needs by other HMIS systems
- Reports are best saved as PDFs

Matrix reports

- Two sets of reports
  - Clients with final matrix
  - Client’s with initial matrix
- Only includes data from Matrix Assessment
  - It is important to make sure all client’s entry/exits match up with Matrix data entered using data check report

Client level reports

- Client-level Achievement Report-with final Matrix
  - Looks at clients who have an initial matrix assessment and a final matrix assessment on or after the reports specified start date
  - Provides summary table and chart for each client comparing initial and final assessments
  - Also includes overall summary report for all clients with final matrix in that period
  - Does not look at any actual exit dates for clients, only final matrix information

Client level reports

- Client-level Progress Report
  - To be included in this report the client must have an initial matrix assessment and one interim assessment
    - One matrix must be in the report date range
  - Provides summary table and chart for each client comparing initial and most recent assessments (may be final matrix)
    - Calculates time period between in days
  - Also provides list of all matrix assessments completed, dates and scores for each client for reference

Summary reports

- Provide information for all clients in a specific time period of each Matrix domain
- Include a number of statistical terms to help describe the matrix data. We hope these provide some useful information, but general frequencies and charts may be all you need
- Only send summary reports to your funder
  - Don’t send client level reports

Statistical terms in reports

- Mean: The average of the scores for each matrix domain. It is calculated by adding the scores and then dividing by the number of scores.
- Median: The point that divides the your matrix scores in half. So there will be an even number of scores above and below this point.
- Mode: The most common matrix score for each domain.

Statistical terms in reports

- Range: The distance between the highest and lowest scores. Compares the minimum and maximum scores listed on the report.
- Variance and Standard Deviation: Both are calculations of how much the matrix scores vary (statistical normalcy).
  - Unless you already understand these, you can ignore them. We will discuss at a later meeting.

Statistics summary

- These measures provide a way to describe the distribution of each domain so that they can be more easily summarized and compared
- Measures of central tendency (mean, median and mode) describe the location of the center of the distribution, while measures of dispersion (range, variance and standard deviation) describe how the distribution is spread out
- Definitions are also included at the end of the summary reports

Summary reports

- Each matrix domain has it's own page on the reports. The two most useful sections will be:
  - Frequencies (table): listing the number of clients with each score
  - Histogram (chart): shows in a graph the number of people with each score.
  - Please remember 6=NA

Summary reports

- Last section includes client level summary information (by Client ID only).
  - Shows client ID and initial score
  - Provides a summary of clients with NA (notes as Other in report) or missing scores
    - Missing compares if they have a score at initial and do not have one for other matrix assessments
  - Best to use this along with Wilder data check report for complete understanding of matrix data quality

Summary reports

- Domains at Population Entry:
  - Focuses on initial matrix assessments only
  - Use prompt box to select time frame for report
    - Options to enter first assessment date and last assessment date for initial assessments
    - Will only report on clients with an initial assessment in the period you select
    - Select start date to include first program entry for clients you are collecting matrix data for (i.e. 2007)

Summary reports

- Domains at Population Exit:
  - Focuses on Final matrix assessments only
  - Use prompt box to select time frame for report
    - Options to enter first assessment date and last assessment date for final assessments
    - Will only report on clients with a final assessment in the period you select

Next steps

- Start collecting and entering information
- Run data check reports
- Run counting reports
- Contact state funders if you have questions on how to collect information correctly
- Contact Wilder if you have questions on how to enter data or about reports (HMIS@wilder.org)

Next steps

- Meeting in fall will include discussion of reports
  - Theses are only the first trial set. We can add to/modify to make sure we are reporting on what is really meaningful and have useful data check reports
  - Please bring questions, comments, and suggestions to the meeting
  - More information will come on specifics of meeting
- Report instruction documents will be available in the near future-webinar and PowerPoint posted as well