LTH Matrix

Report Instructions

Matrix reports in ART:

Reports are located in ART→SSA Report Gallery (Funder Reports) →Matrix Reports. Refer to your matrix report notification from MHFA and/or DHS for the dates that correspond to the reporting period(s) that you should use for the below reports.

1. **Matrix Data Check report** - 3 tabs (run dates 1/1/1999 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
      Spring reports (4/01/previous year – 4/01/current year)
      Fall reports (4/01/current year - 10/1/current year)
   #3S Domains at Population Entry (1/01/1999 to 4/01/current year)
   #4S Domains at Population Exit
   Spring reports (4/01/previous year – 4/01/current year)
      Fall reports (4/01/current year - 10/01/current year)

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

Matrix Data Check Report: Run from 1/1/1999 to report end date

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. The report will exclude any clients exiting before 7/1/11.
- Four 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 1** 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.

- **Matrix Time Period Check 2** gives more details on matrix assessments completed such as date of most recent interim and final assessment in comparison to date of initial assessment.

Provider 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.

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).

- #1-2S 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

- 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).
- Review data to ensure it looks accurate for clients entering or exiting your program.

The Entry and Exit Reports are:

- #3S Domains at Population Entry
    - Includes initial matrix assessments only. It includes all clients with initial assessments and doesn't filter out anyone with final exits.   For sending reports to funders, select 1/1/1999 as the start date to capture all clients' initial assessments.   You can also run the report for your own information. 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.

- #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.