OUTCOMES – VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

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Video Companion Guide Overview

The purpose of this Video Companion Guide is to assist Users in their understanding of the material which is covered in the Video Resource Guides for System Administrators. This is NOT a standalone Guide.

This guide is largely the script which was created for the video. Please know that the examples used in the guide are *parallel* to those in the video, but the process is the same. *For example*, the video might show Cynthia Brown receiving a service while the guide shows screenshots for Claire Davis. The recording of the service for Claire will follow the same procedure as Cynthia.

Each guide correlates with an entire video series. Each section of the guide corresponds with an individual video in the series.

This guide may be used:

- while watching the videos
- for reference while taking the class independently
- for reference after the implementation process
- as a reference when documenting custom configuration

As CaseWorthy is continually growing and expanding, the Video Companion Guides for System Administrators will be updated to show changes before the videos. Information, which is not included in the video, but is current in the CaseWorthy application will appear similar to the text below:

UPDATE: Text that follows this icon will be updates to the material that are not yet available in video format.

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Overview of Outcomes

The CaseWorthy *Outcomes* video series includes information about the following topics:

- Overview of Outcomes
- Outcome Setup
- Outcome Assessments & Surveys
- Self-Sufficiency Matrix & Program Outcomes Report

This first video highlights important concepts about outcomes and the various ways they are used in the application.

Outcome functionalities use simple questions with scored answers which are used to obtain comparative data.

Outcomes can be collected using Assessments, Surveys, and the *Outcomes Matrix* form element. To learn more about the *Outcome Matrix* form element, see *the Form apBuilder – Create a Matrix Survey* video.

While the setup for assessments and surveys is the same, there are some main differences.

Outcome Assessments

The *Program Outcomes by Category* assessment, *All Program Outcomes* assessment, and *Self-Sufficiency Matrix* assessment behave like all assessments which are designed to capture data at specific points in time for the sake of comparison. The points in time are assessment events, such as, 'At Entry', 'During program enrollment', 'At Exit', 'Annually', and 'Post-Exit'.

Furthermore, assessment data is often required for program compliance and therefore assessments are incorporated into workflows to ensure their completion.

Outcome Survey

Surveys, on the other hand, can capture data at any point in time and are not limited to only being asked in relation to a Client's program enrollment.

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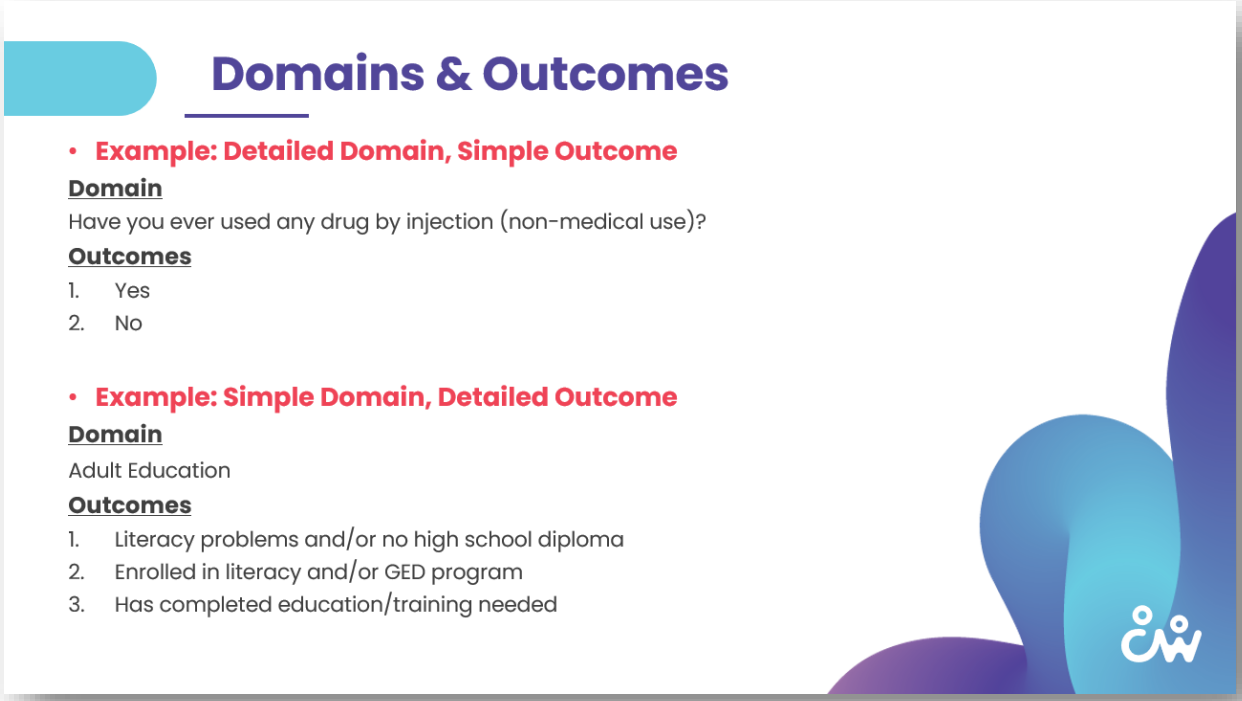
Domains & Outcomes Defined

It is important to understand terms used within outcomes functionality.

Domain Categories are the overarching groups that house Outcome Domains.



Outcome Domains are the questions and **Outcomes** are the answers which are tied to scores.

Questions can be more detailed with simple answers, or simple with the answers being more detailed.

The Self-Sufficiency Matrix

The *Self-Sufficiency Matrix* is a measurement tool that can serve as a way to consolidate outcomes for multiple Clients and report results for funders. It is set up in a similar fashion to Outcomes and is discussed in the last video of the series.

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Outcome Reports

Finally, compliance related Outcomes for reports which are generated by CaseWorthy are included in baseline.

The *Program Outcomes SSRS* report displays data about outcomes recorded for each program.

The next video in this series demonstrates how to set-up Outcome Assessments and Outcome Surveys.

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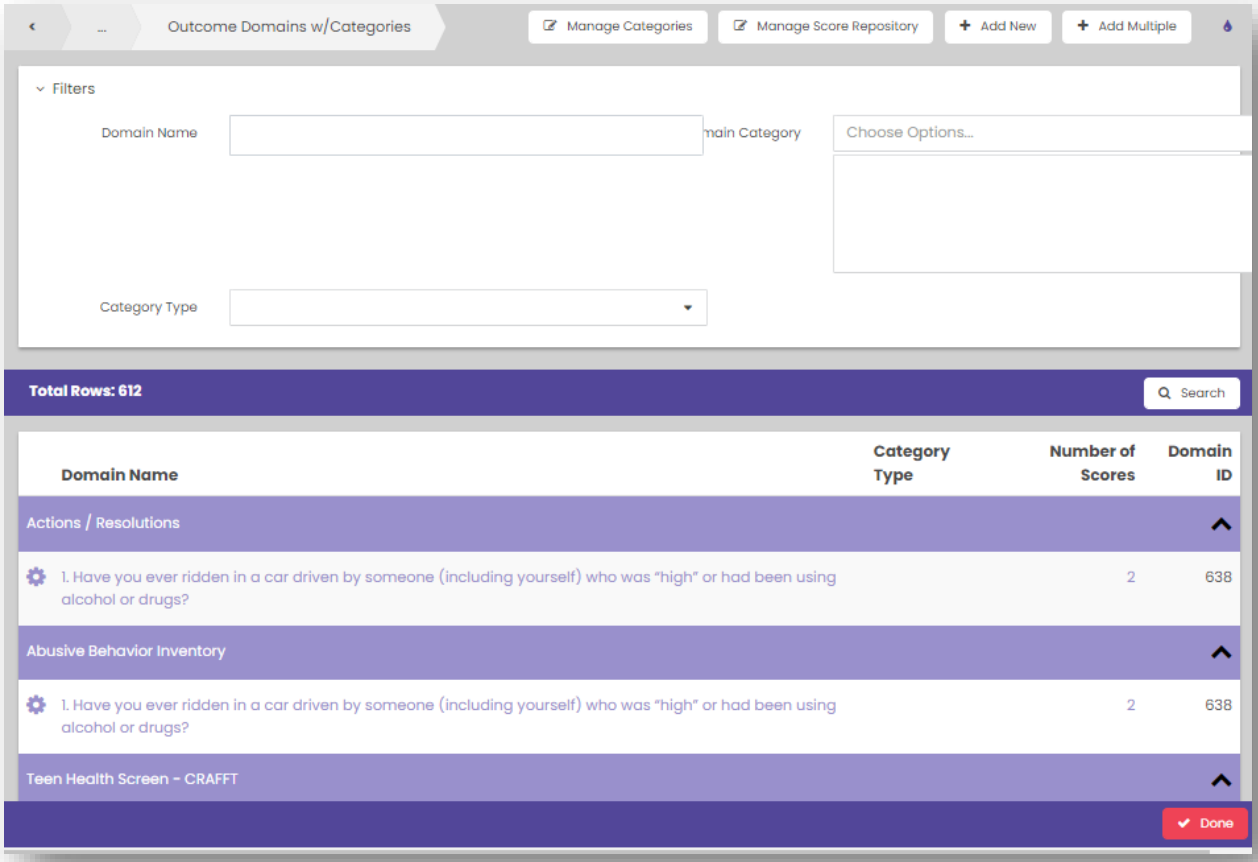
Outcome Setup

This second video of the *Outcomes* video series covers how to set up Outcome Assessments and Outcome Surveys.

Creating Domain Categories

Under Codes and Categories on the Administration tab, select **Outcomes with Categories**.



Outcomes <u>with</u> categories are used for the *Program Outcomes by Category* assessment, and Outcome Surveys.

Before developing Domains and Outcomes, we will need to first create Domain categories.

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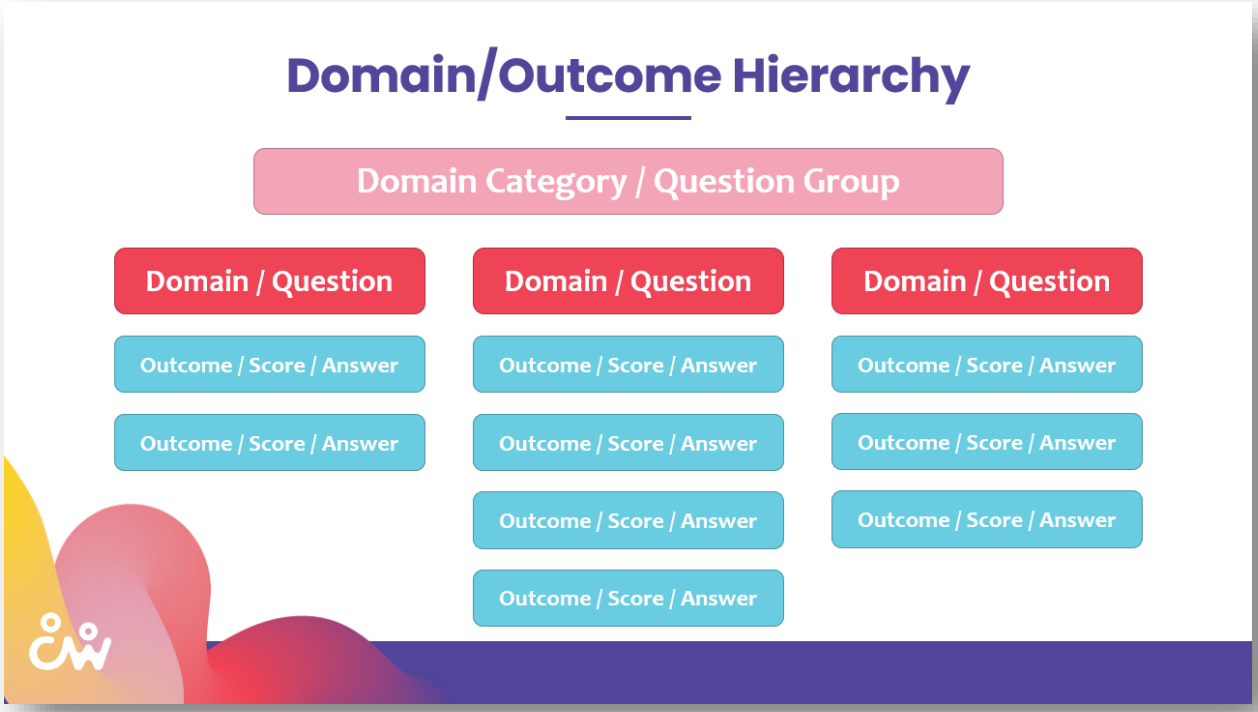
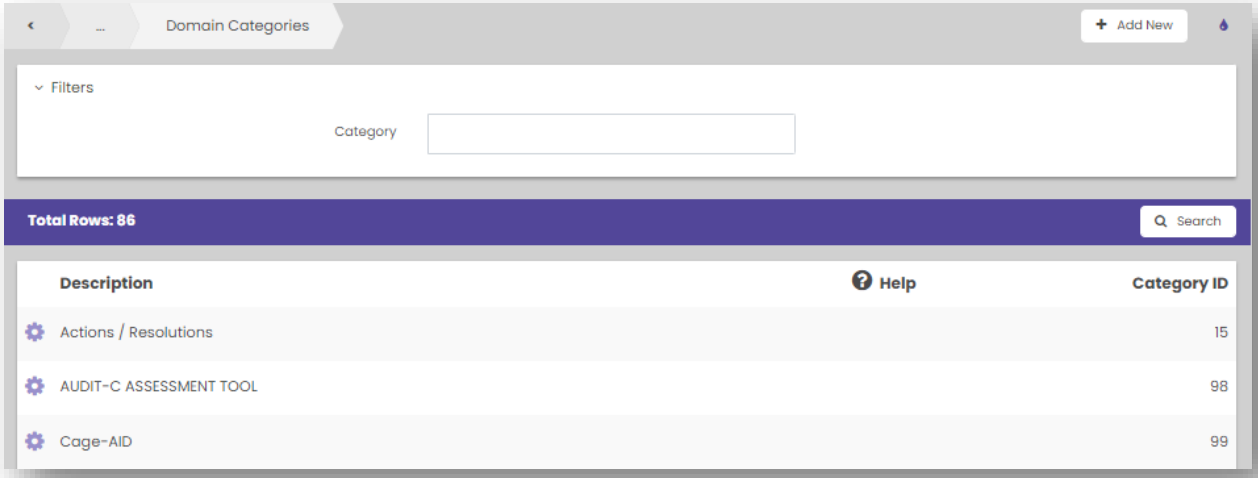


Begin by clicking MANAGE CATEGORIES.

Domain Categories are the overarching groups that house Outcome Domains which are the questions.

These categories can also be used to easily associate outcomes to domains and domains to programs.



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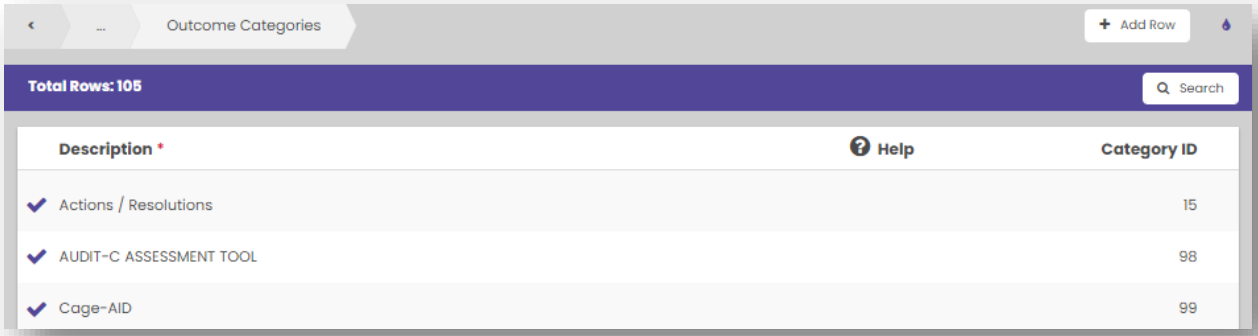
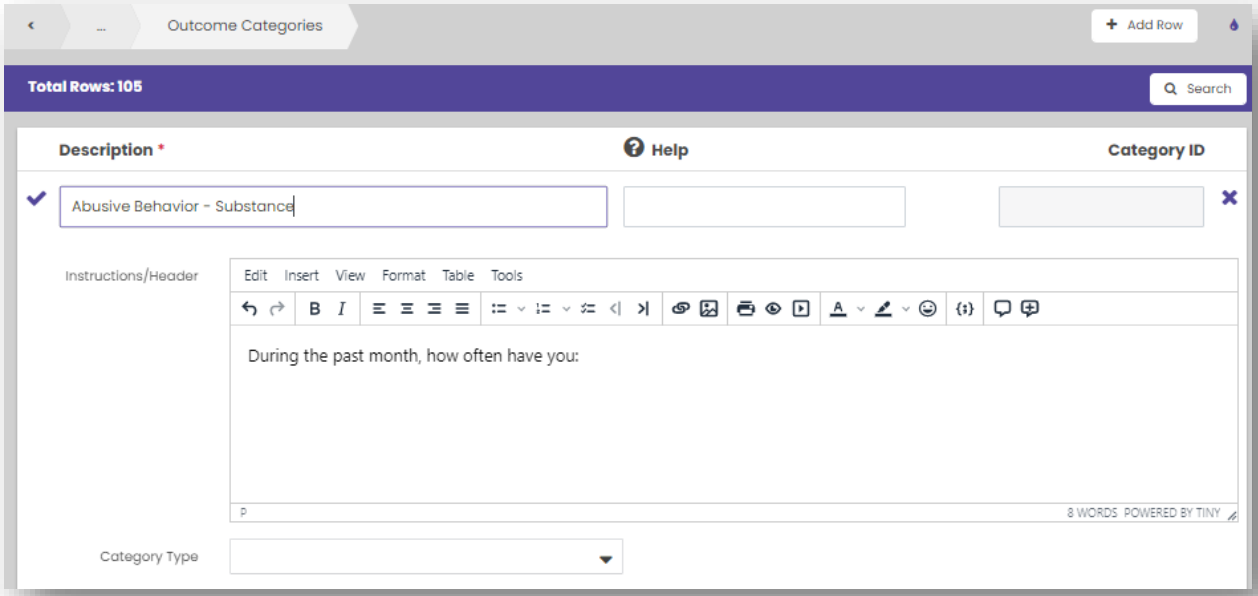
Click ADD NEW.



The *Outcome Categories* form displays all available categories. To create an additional category, click ADD ROW.



Since these Categories are the overarching grouping mechanism, the Domain Category **Description** should represent all domains, or questions that will be within it.

If necessary, **Help** can be included to indicate an associated functionality.

The **Instructions/Header** box can be used to add a high-level statement or set of instructions that will appear on the assessment or survey. For example,

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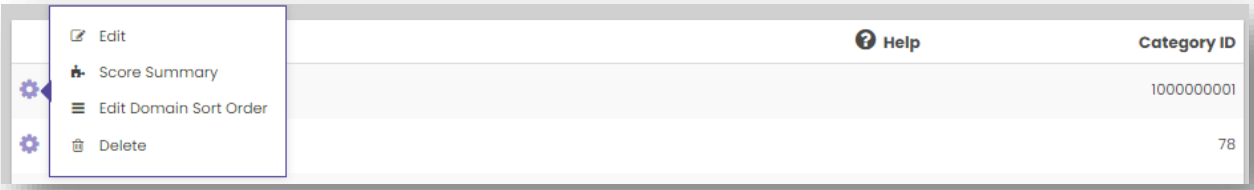
we can type, “During the past month, how often have you:” which will apply to all questions.

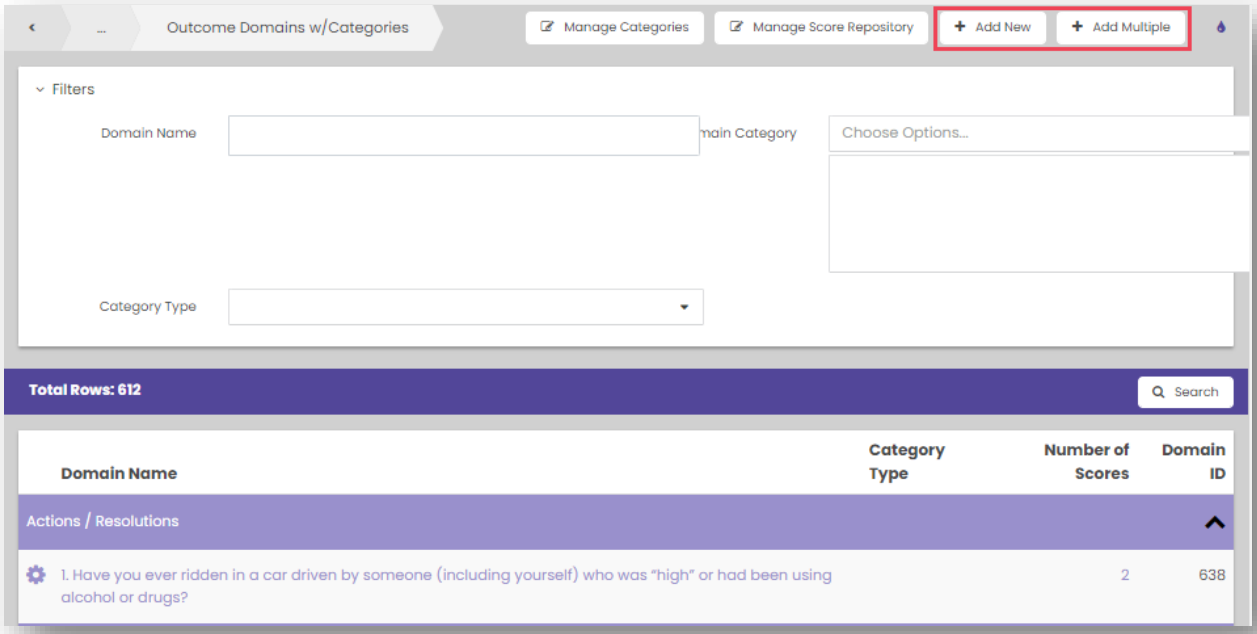
Add all necessary Domain Categories and click SAVE.



On the *Domain Categories* form, we can use the category’s action gear to add **Score Summaries**, **Edit the Domain** or question’s **Sort Order**, **Edit** the category, or **Delete** it.

Create Outcome Domains / Questions

Before we cover how to add score summaries or change domain sort order, we’ll need to create the Domains, or questions, by navigating back to the *Outcome Domains w/ Categories* form.



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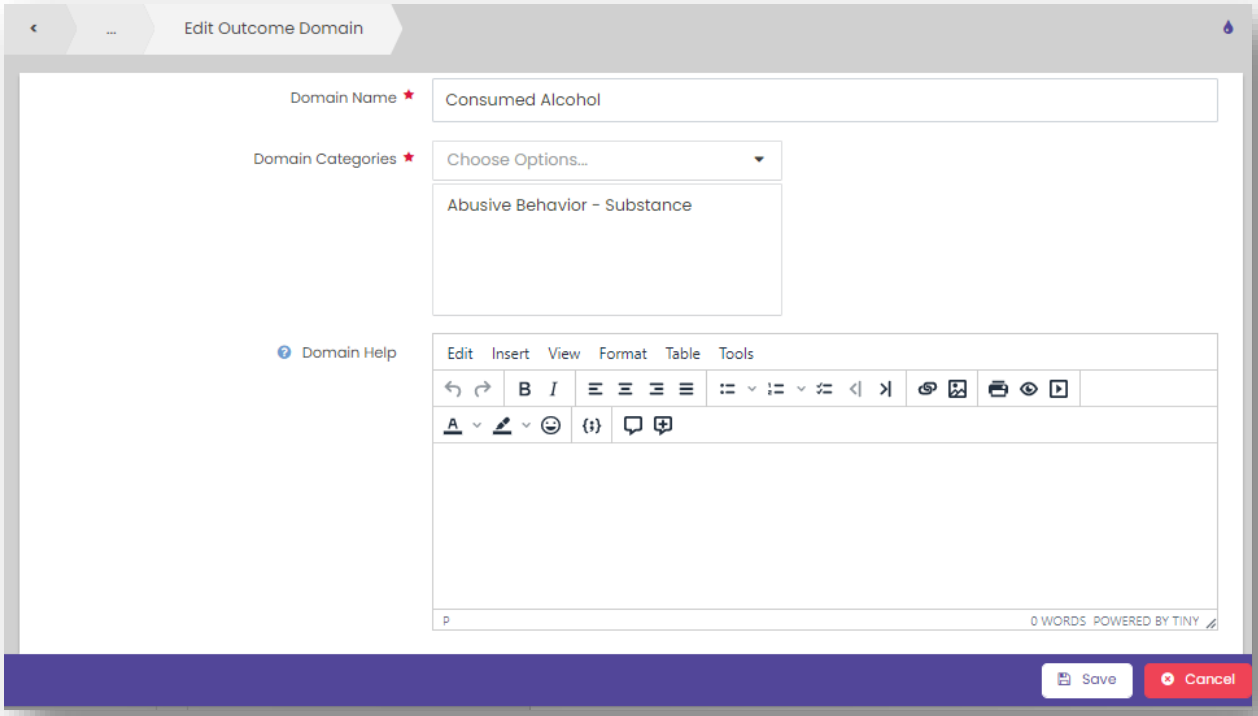
Here we can add one domain at a time by clicking ADD NEW or use ADD MULTIPLE to create several domains at once. (ADD NEW)



First, enter a **Domain Name**. Remember that Domains can be formatted in different ways: thorough questions with simple answers, or simple statements with more detailed responses.

Next, I'll select the **Domain Category** that we created in the previous step, but the domain can be linked to multiple categories by selecting them.

Domain Help is intended to be used when recording Outcome Assessments and Surveys. The help text entered here will display as alternative text beneath the domain name on those respective forms.

Click SAVE and repeat the process to add all necessary domains.

Create Outcomes / Answers

Now we have added all necessary domains, or questions, we will set up the necessary Outcomes, or answers, for each domain.

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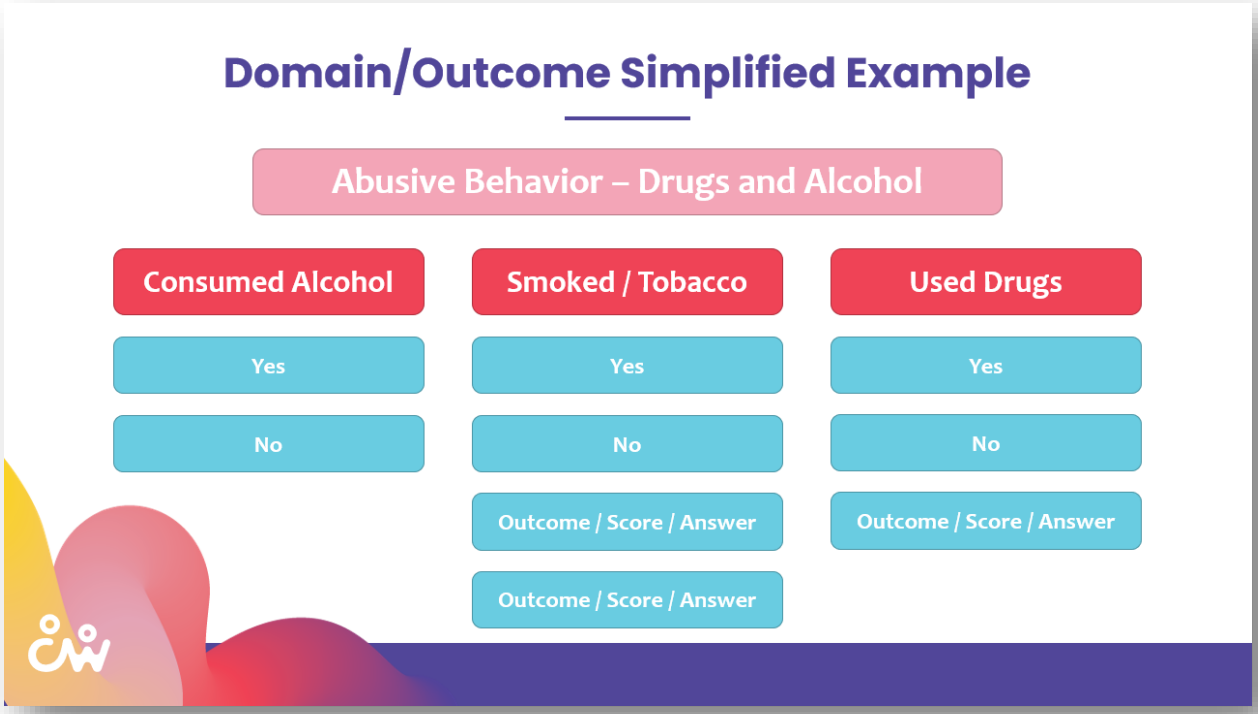

Score Repository

If the same outcomes, or answers, apply to multiple domains, it is best to create your outcomes in the **Score Repository**.

The Score Repository is used to house pre-configured Outcomes.

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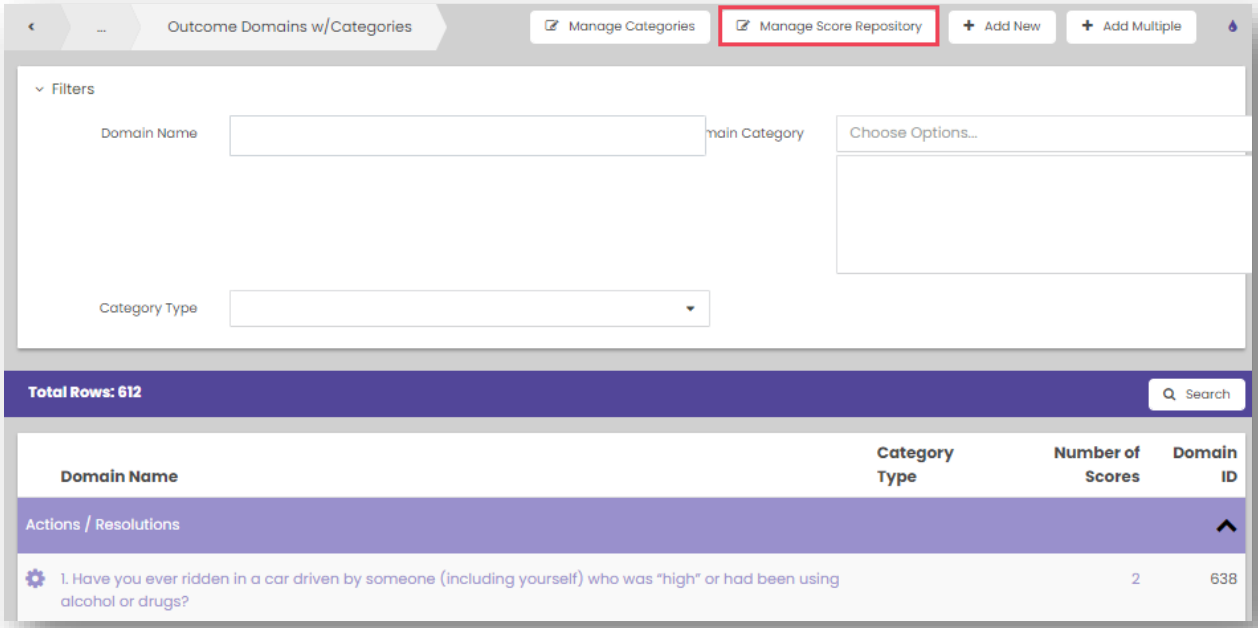
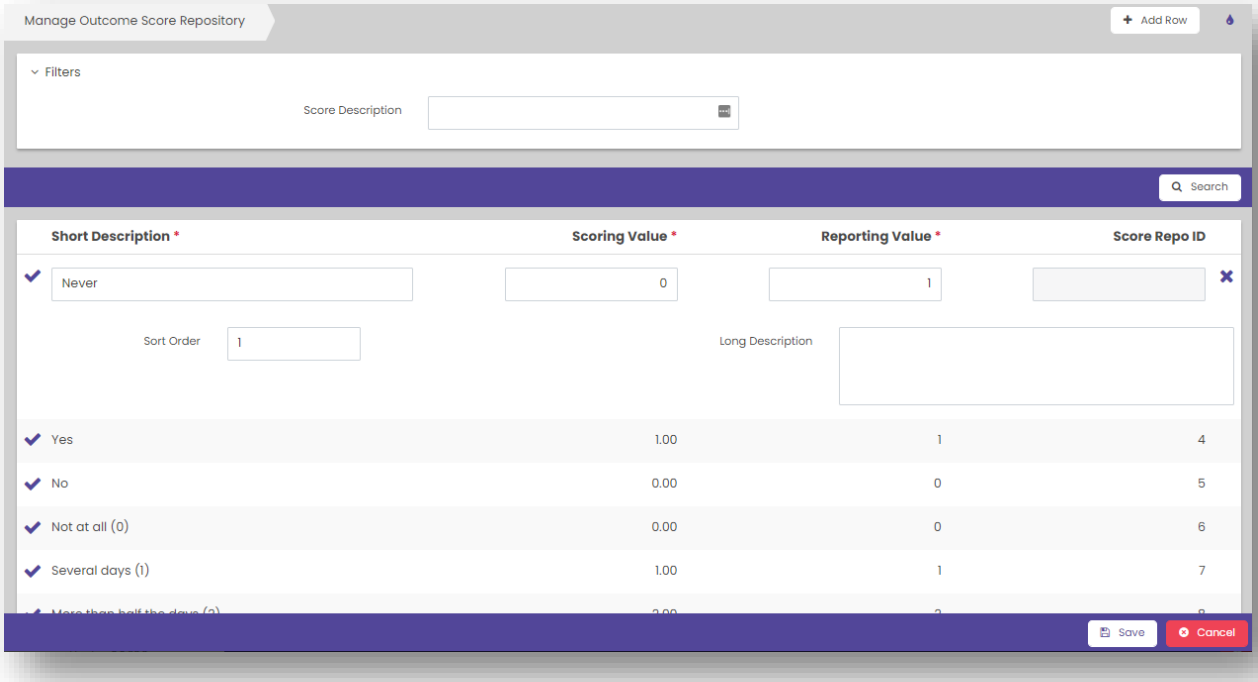
Click MANAGE SCORE REPOSITORY.



Baseline outcomes are listed along with their details which can be edited. To add to the list click ADD ROW.



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Enter a **Short Description**, which will be the outcome or answer which Users will select.

Entering a **Long Description** is an option, but please know that if a Long Description is added it will appear for the User in place of the Short Description.

Enter a **Scoring Value** which is any numeric value that signifies the weight for this specific outcome or answer.

Baseline outcomes will be configured with scoring values, but it is up to the System Administrator to associate meaning with the values. While **Reporting Value** is also available, it is only truly applicable for custom reports that use it.

Enter a **Sort Order** for the outcome which determines the order in which it will appear for selection on the assessment or survey.

Repeat the process to add the necessary pre-configured outcomes. When complete, click SAVE.

Linking Outcomes to Domains

Now we will need to link the outcomes to each of our domains or answers to questions.

Use the filters to search for the **Domain by name** or select the **Domain Category** it is in to filter results.

On the action gear of the domain, select **Outcomes.**

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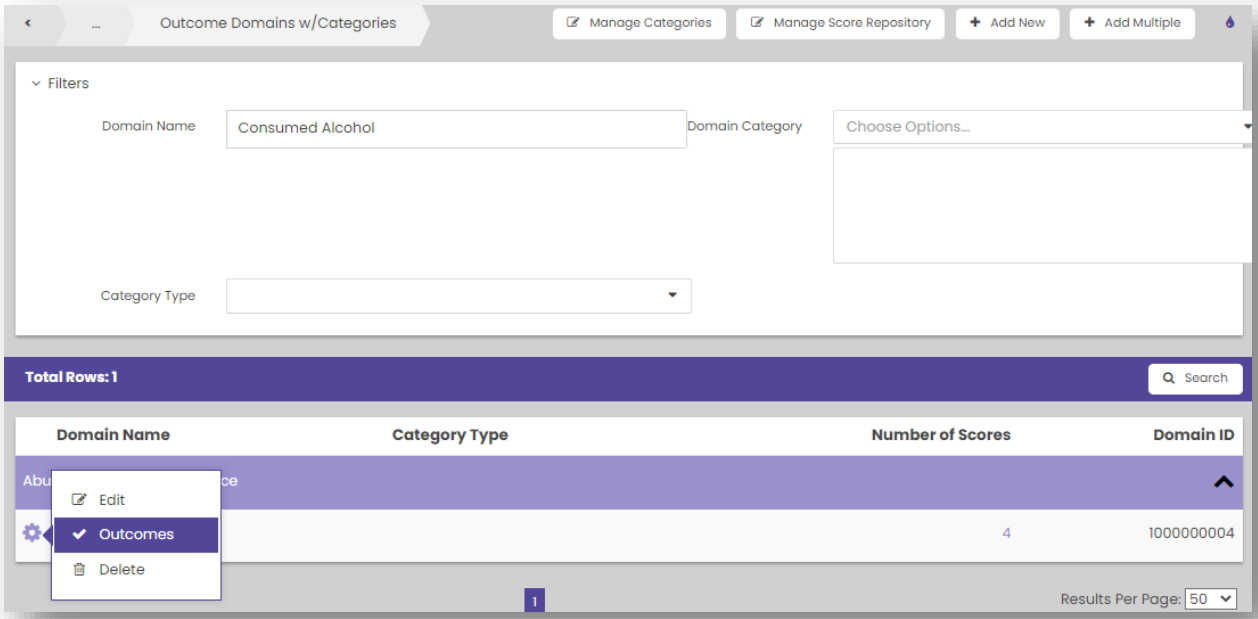
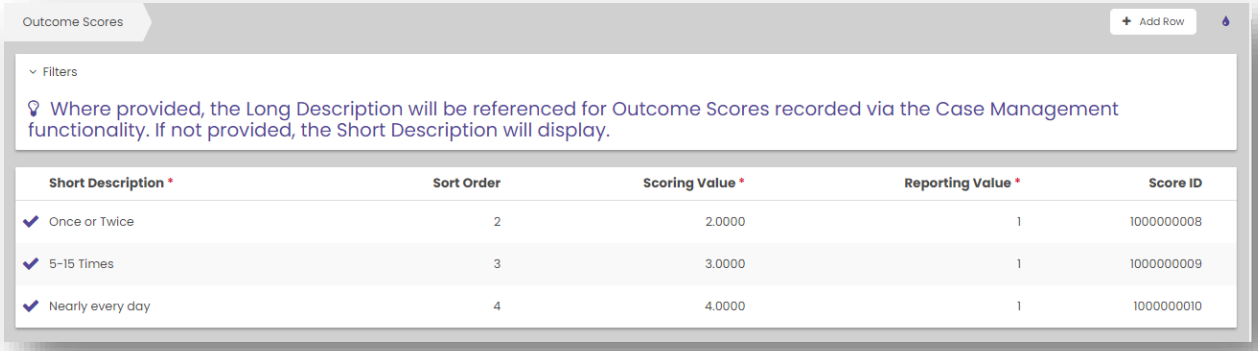


Click ADD ROW.



There are two options for associating outcomes to domains. You can do so manually, or you can use the pre-configured outcomes from the Score Repository.

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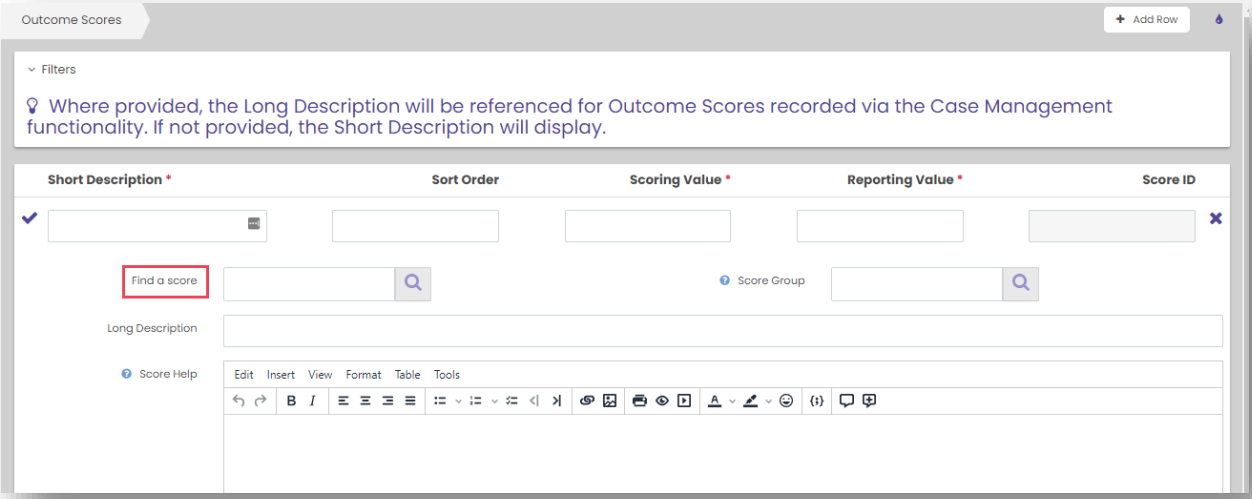
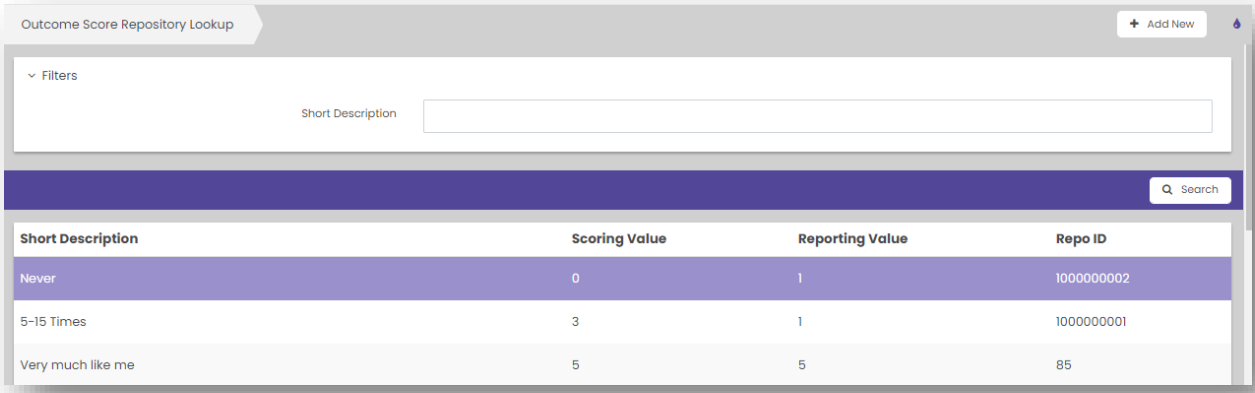


To create the outcome score, or answer, manually, enter the outcome's **Description**, **Sort Order** and **Values** as we did in the previous step.

Or, if you have pre-configured the outcomes in the Score Repository, use **Find a score** to search.

Select the score and associate the desired outcomes.



Using the Score Repository is helpful when multiple domains use the same outcomes.

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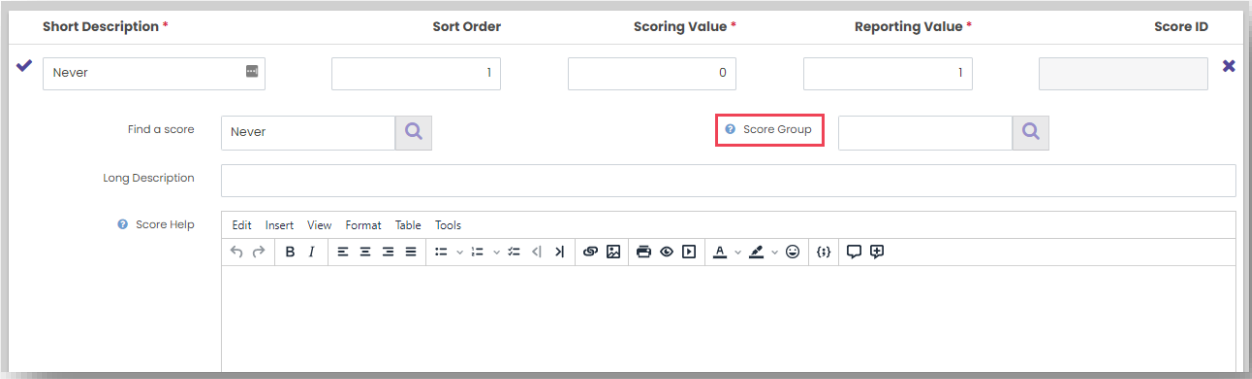
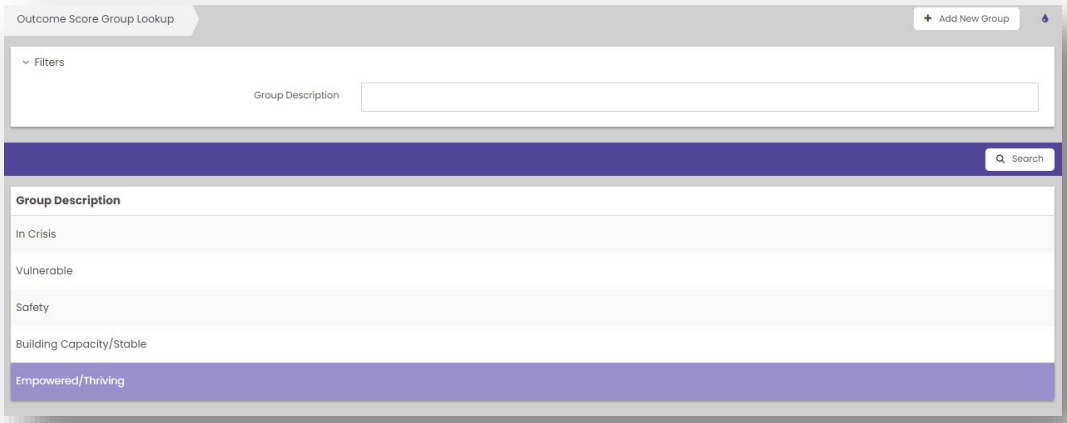


Score Groups are used in reporting to add additional meaning to a range of outcome scores. Baseline includes those used by the *CC USA Report*.

To associate the Outcome with a Score Group, use the lookup to select a baseline option or create a new score group by using ADD NEW GROUP.



Once all appropriate outcomes are associated with the domain, click the SAVE button. Repeat the process as necessary for each Domain.

Now that the Outcomes have been associated with each Domain, we are going to return to the Domain Category action gear.

Navigation: All Features role - Administration tab: Codes and Categories > Outcomes with Categories

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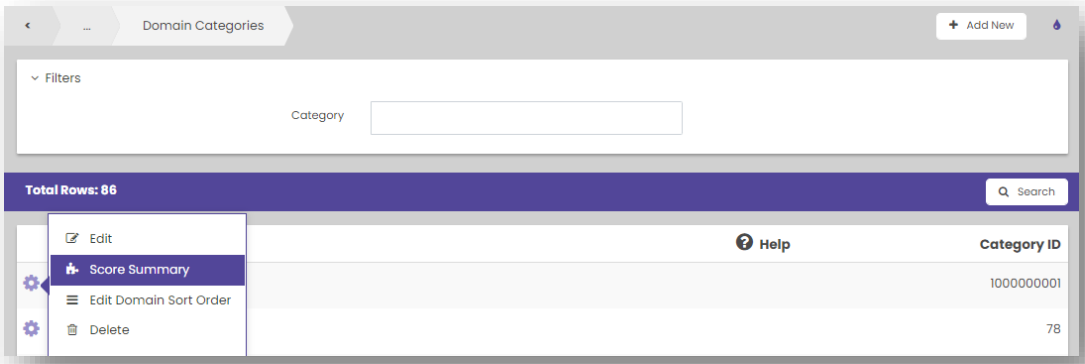
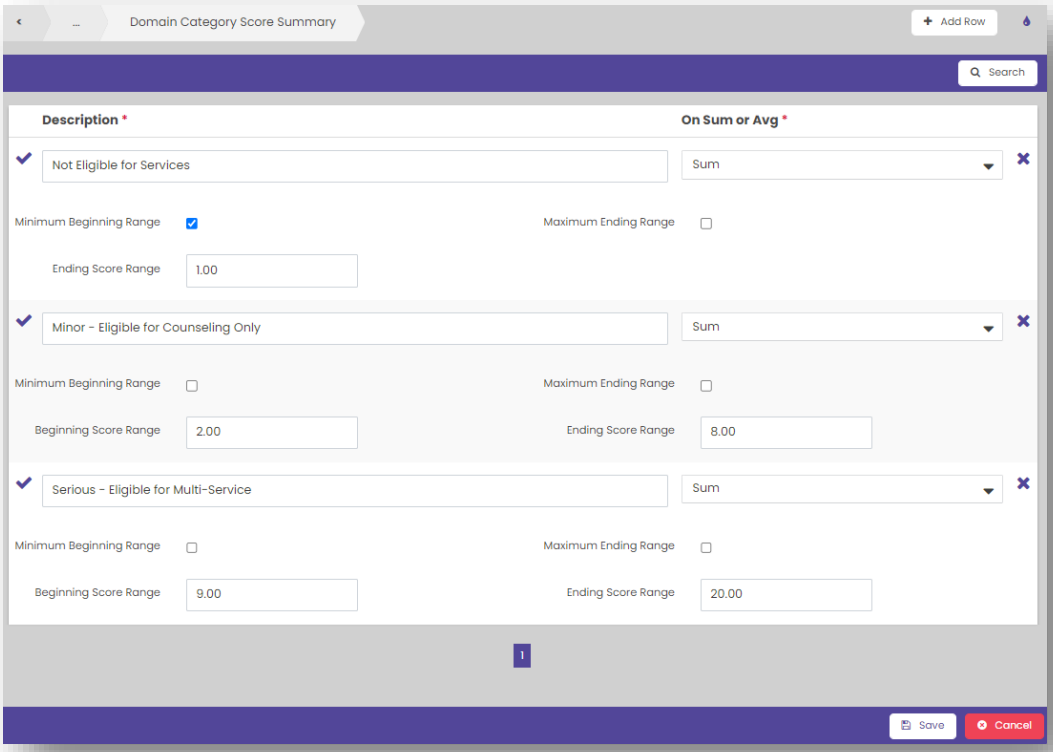
First, we are going to define the meaning of the score or range of scores for the User to reference once the *Outcome* assessment has been completed.

Click MANAGE CATEGORIES.

From a category's action gear, select **Score Summary.**



The *Domain Category Score Summary* form allows you to assign further meaning and possible next steps based on the Client's score.



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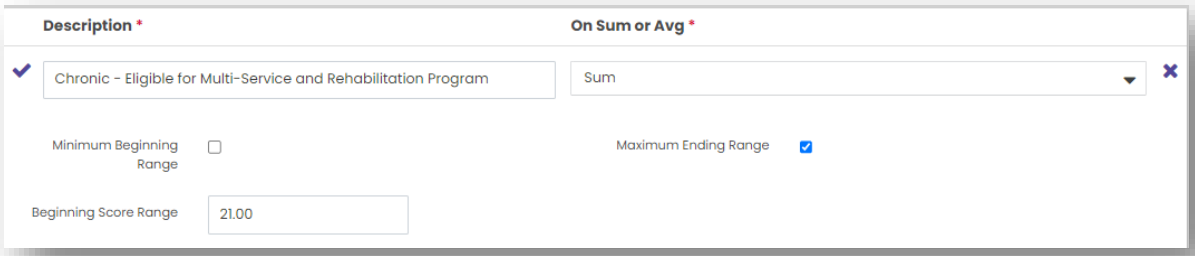
The score range **Description** will appear in the **Score Interpretation** field on the edit forms for *Outcome Assessments*, and the summary form for *Outcome Surveys* once the assessment or survey is saved.

Click the ADD ROW BUTTON.

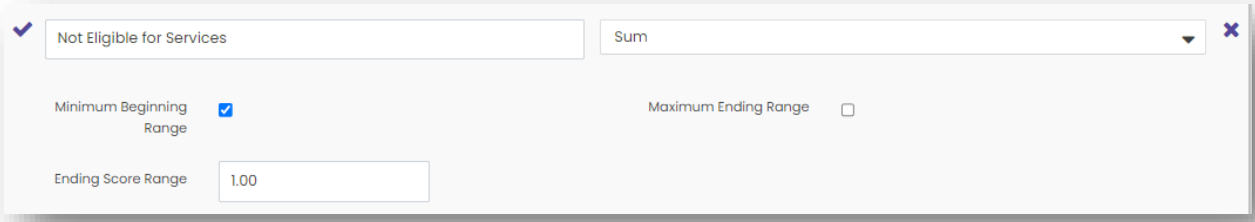


Enter a summary **Description**.

Select whether you would like the summary to be based on the **'Sum'** of scores or the '**Average'** of the scores meaning the sum divided by the number of outcomes.

Next, indicate the range of numeric scores to which you would like the summary to apply. Because this score is the next level of scoring, I'll add a **Beginning Score Range** of 21 since my last score capped at 20. Since this will include the rest of my possible scores, I'll select **Maximum Ending Range**.

If this were the lowest range of score, I would instead select the **Minimum Beginning Range** and enter the **Ending Score Range**, like it is done for 'Not Eligible for Services'.



When you are done entering all Score Summaries, click the SAVE button.

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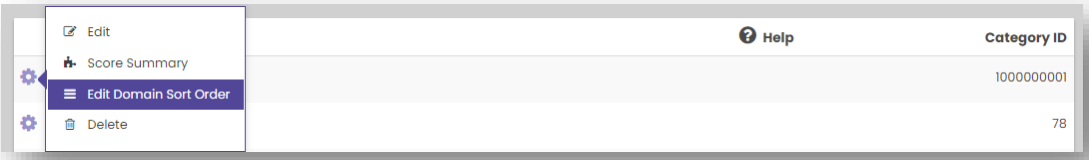
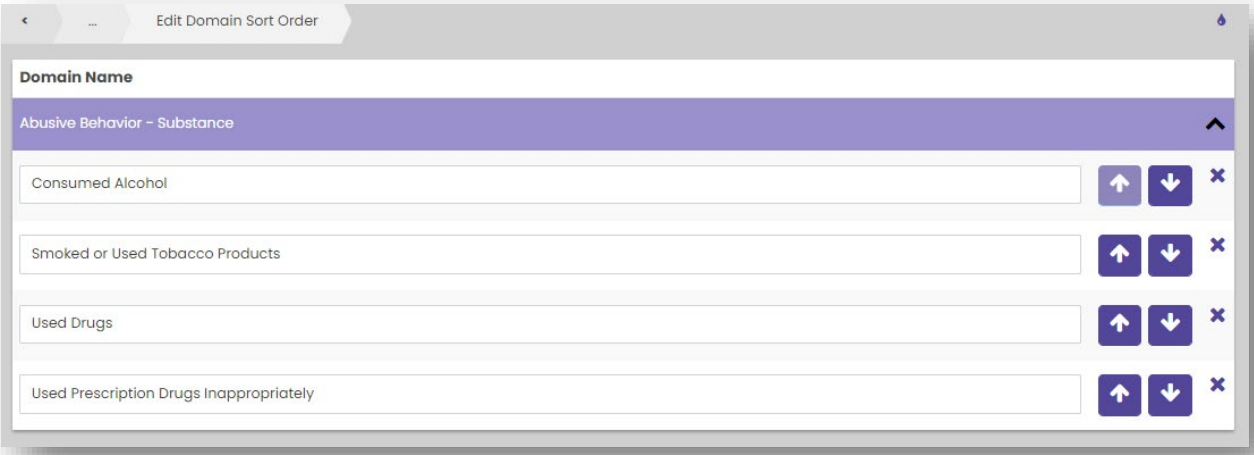
From the action gear again. If you need to edit the Domain Sort Order that you initially configured when creating Domains, select **Edit Domain Sort Order**.



This form shows the order which the domains will appear for the User.



Use the Up and Down Arrows to change the sort order and click the SAVE button.

Linking to a Program

The last step of setup is to link the *Outcome Assessment* and Domain Categories to a Program from the Program action gear.

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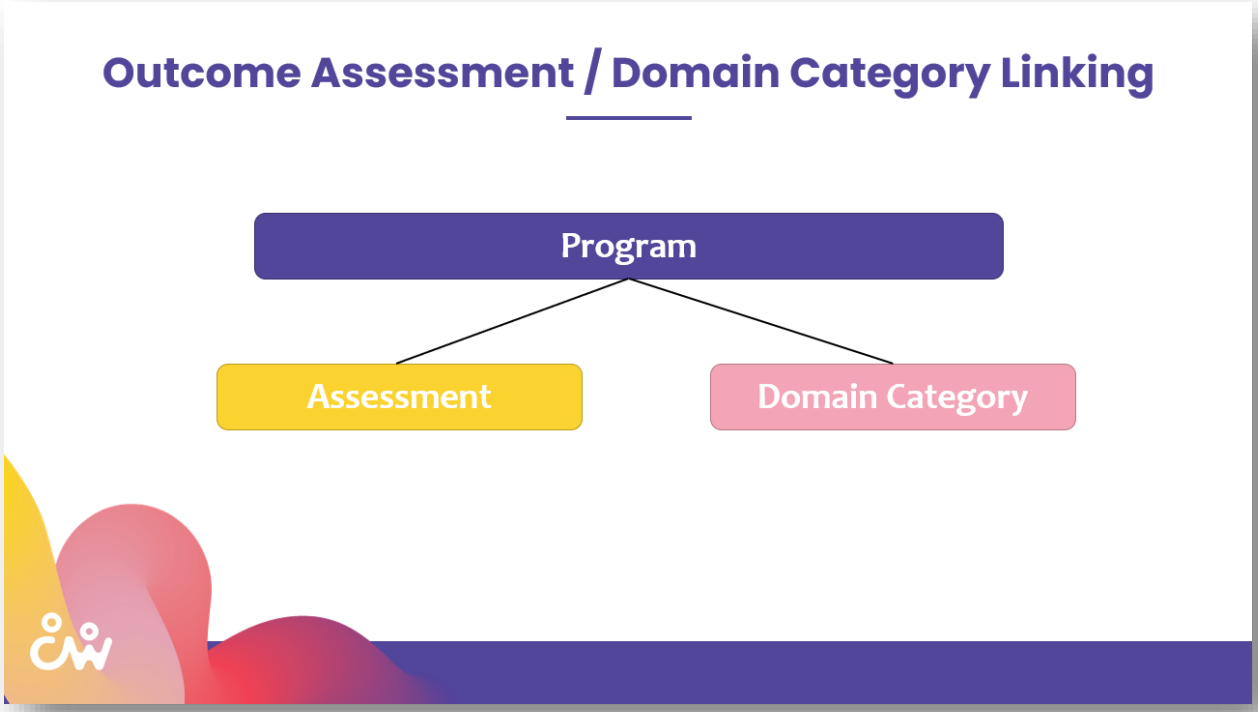
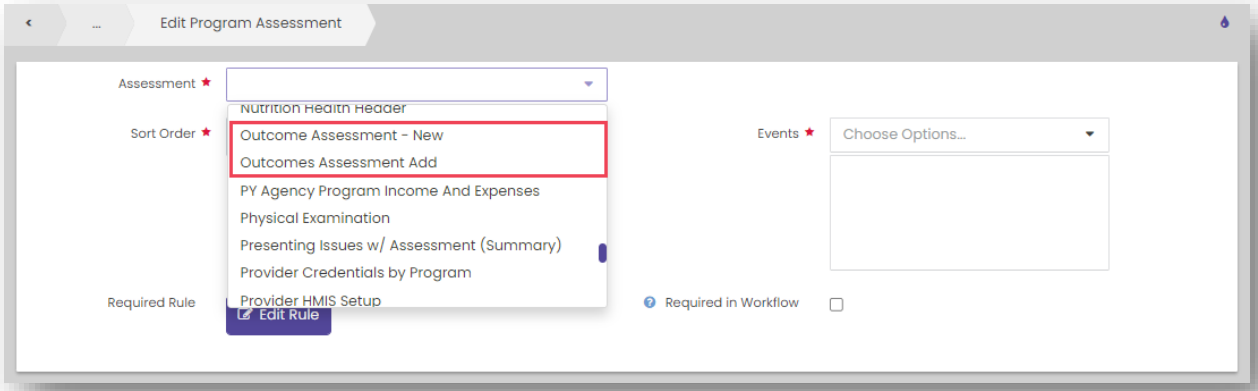


Program Assessment

On the Administration tab, select Setup, Programs and Accounts, and Programs. On the program's action gear, select **Assessments**.

Click ADD ASSESSMENT.



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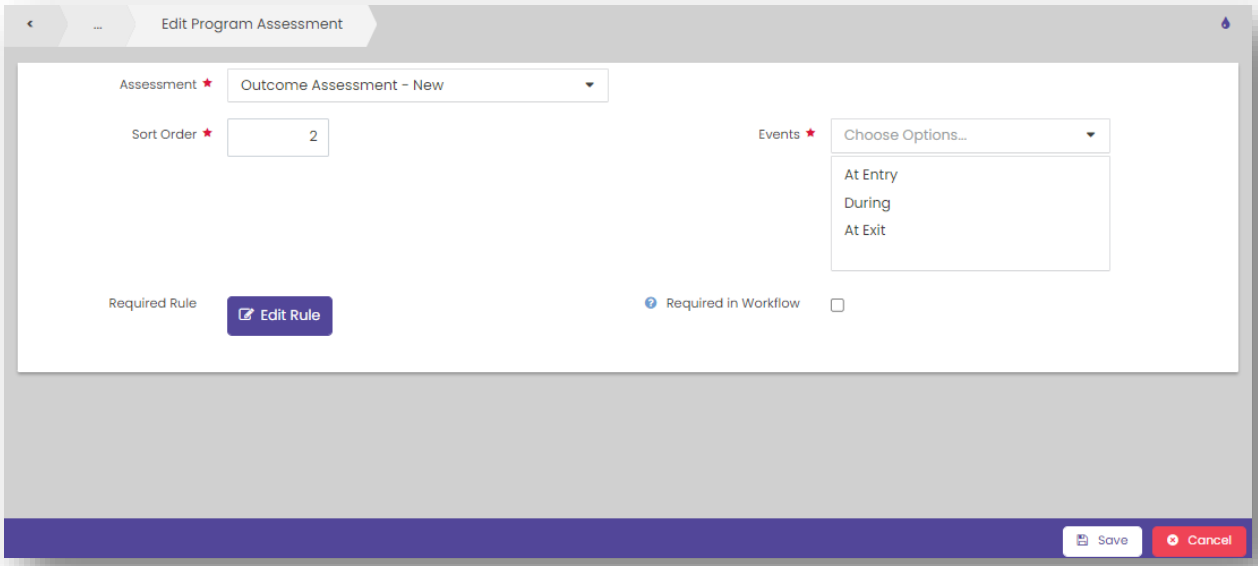
‘Outcome Assessment – New’ corresponds with the *Program Outcomes by Category* assessment and ‘Outcome Assessment Add’ corresponds with the *All Program Outcomes* assessment.

NOTE: ‘Outcome Assessment – New’ is used to record one Domain category at a time. ‘Outcome Assessment Add’ is used to record multiple Domain categories at a time.



Enter a **Sort Order**. This impacts when this assessment will present in a workflow.

Assessments are valuable because they obtain comparative data based on a point in time. The **Events** include: ‘At Entry’, ‘During’ which means generally during program enrollment, ‘At Exit’ from the program, ‘Annually’, and ‘Post-exit’. Multiple events can be entered. To learn more about associating assessments to programs, see the video series for *Programs* and for *Assessments*.

A **Required Rule** may be added if necessary.

Select the checkbox if the Assessment should be **Required in a Workflow** which includes free navigation for this program.

Click the SAVE button to add the assessment to the Program.

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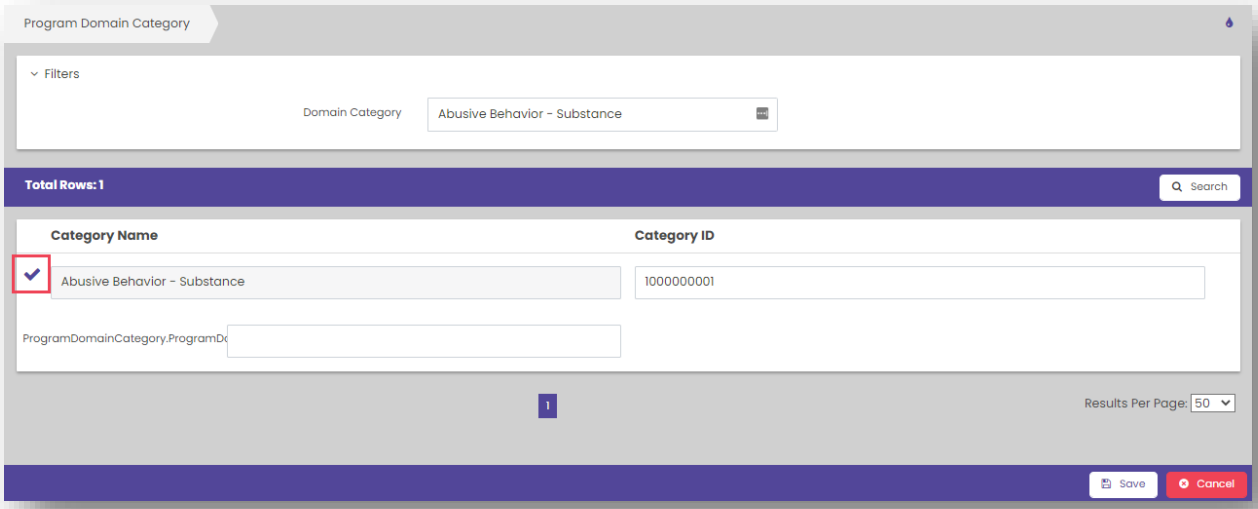
Program Domain Categories

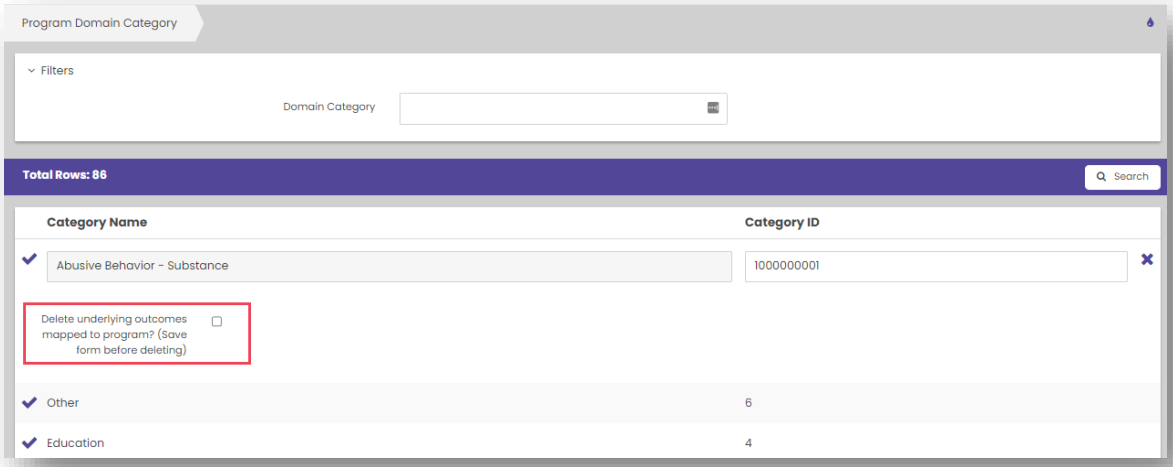
Next, we'll navigate back to the Program action gear to link the Domain Category. Select **Domain Categories**.

Use the **Domain Category** filter to find the category.



Select each desired category and click SAVE. This will add the entire category, domains and linked outcomes included, to the program.

Please note that when checked, if the category is removed from the *Program Domain Category* form, all domains and outcomes associated will also be removed from the program.



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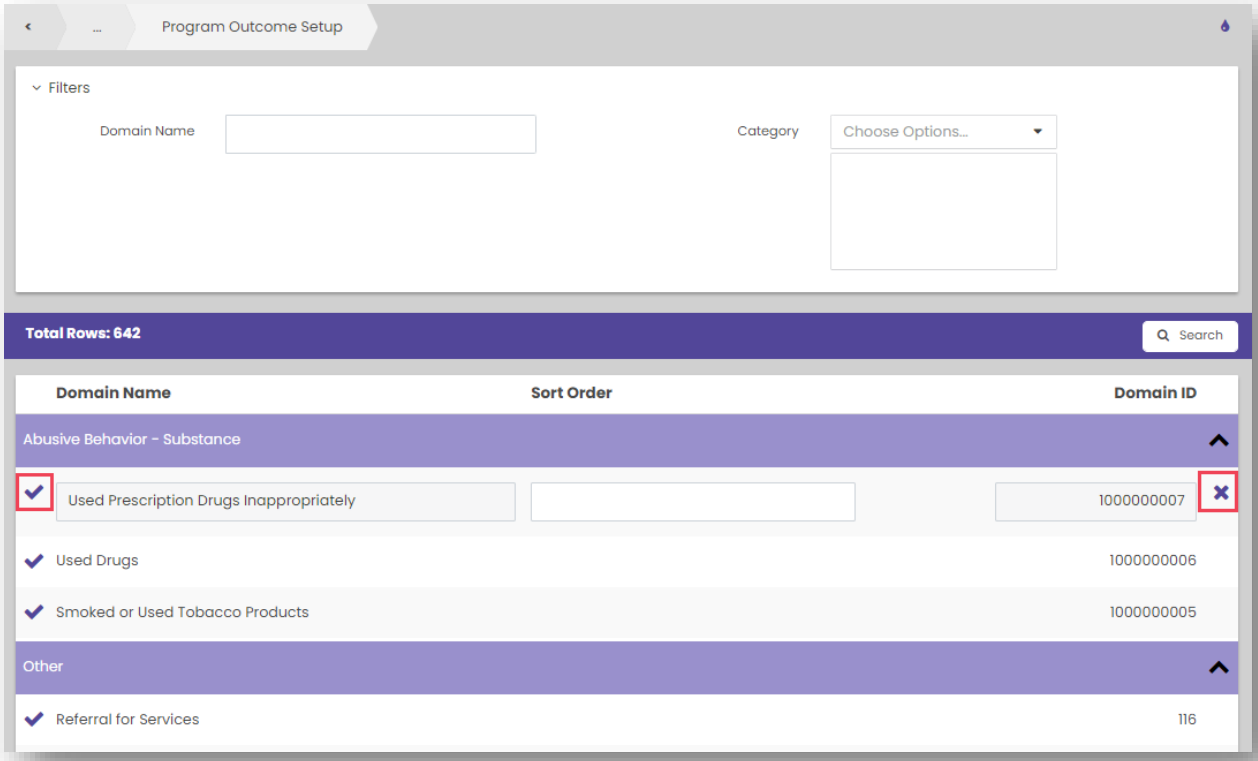
Program Outcomes

To view all domains and outcomes associated with a program, use the **Outcomes** option on the program action gear.



If you wish to disassociate a domain from the program, click the checkbox and then the X.

Additionally, if a domain is created <u>after</u> the category is linked to the program, it will need to be selected on this form if it should also be linked to the program.

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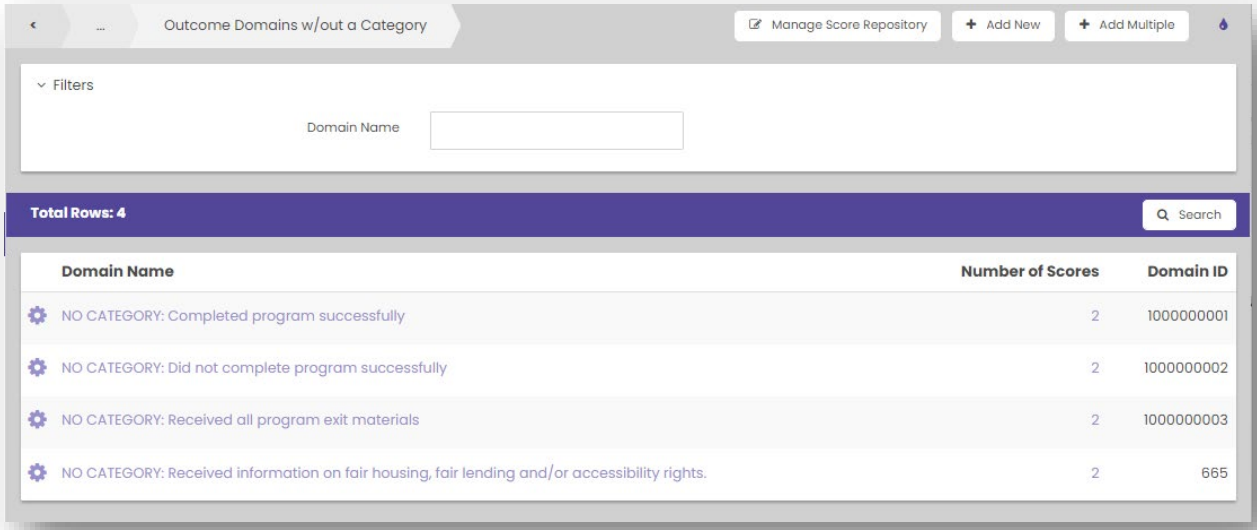
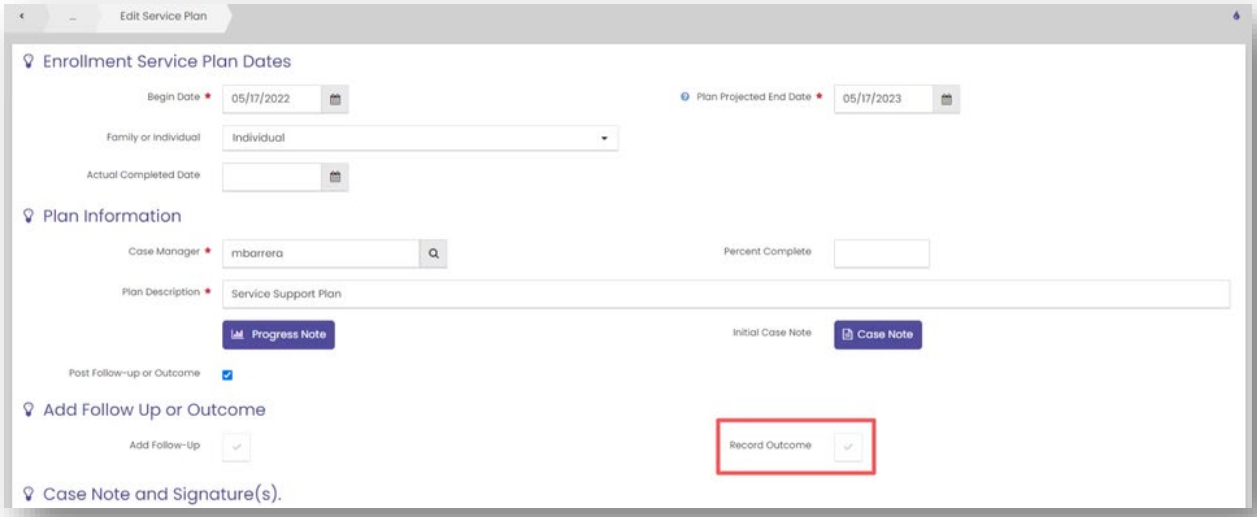
Outcomes Without Categories

Let's navigate back to Codes and Categories. Select **Outcomes w/Out Categories**.



Creating Outcomes without categories is also an option and is useful when recording an outcome for a Service Plan. See the *Service Plans* video series to learn how to setup and manage a service plan.



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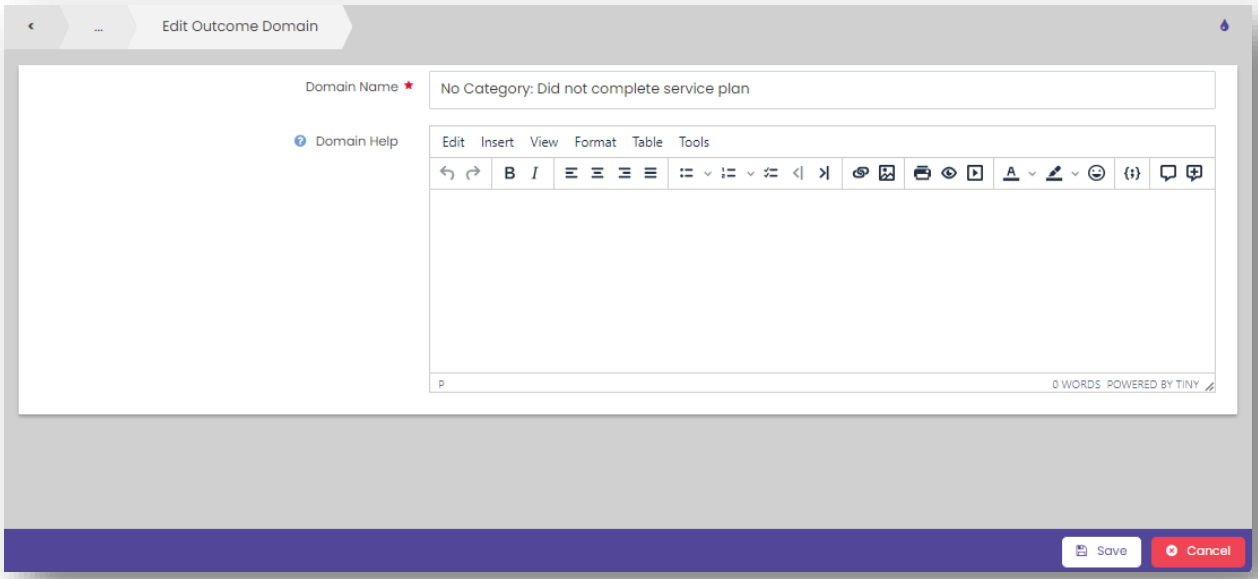
Here, much of the same set up process is required, excluding the creation of a category.

Create a domain by clicking ADD NEW or ADD MULTIPLE. MANAGE THE SCORE REPOSITORY in the same way.



Link Outcomes from the action gear.

Next, associate an outcome without a category to a Program by navigating to the *Program's Edit* form.

The **Outcome Domains** field displays both Outcomes with categories and Outcomes without categories.

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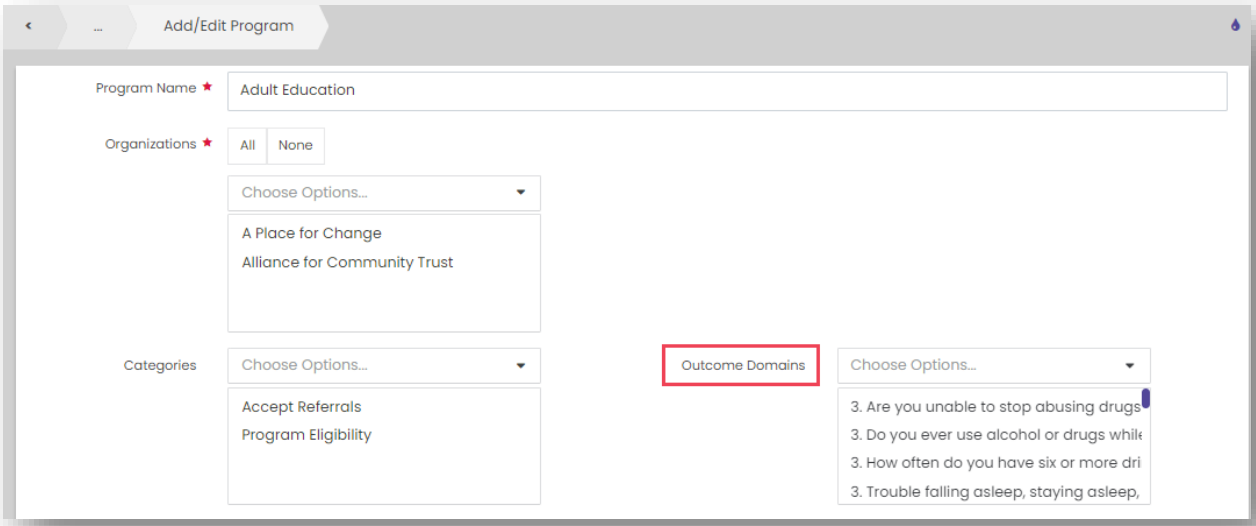

Select all applicable outcomes and click ADD SELECTED. SAVE the form.

Next in the series, the *Outcome Assessments & Surveys video* details how to use the assessments and surveys found on the Case Management tab.

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Outcome Assessments & Surveys

This third video details the *Program Outcomes by Category* assessment, the *All Program Outcomes* assessment, *Outcome Surveys, and the Outcomes Summary* form.

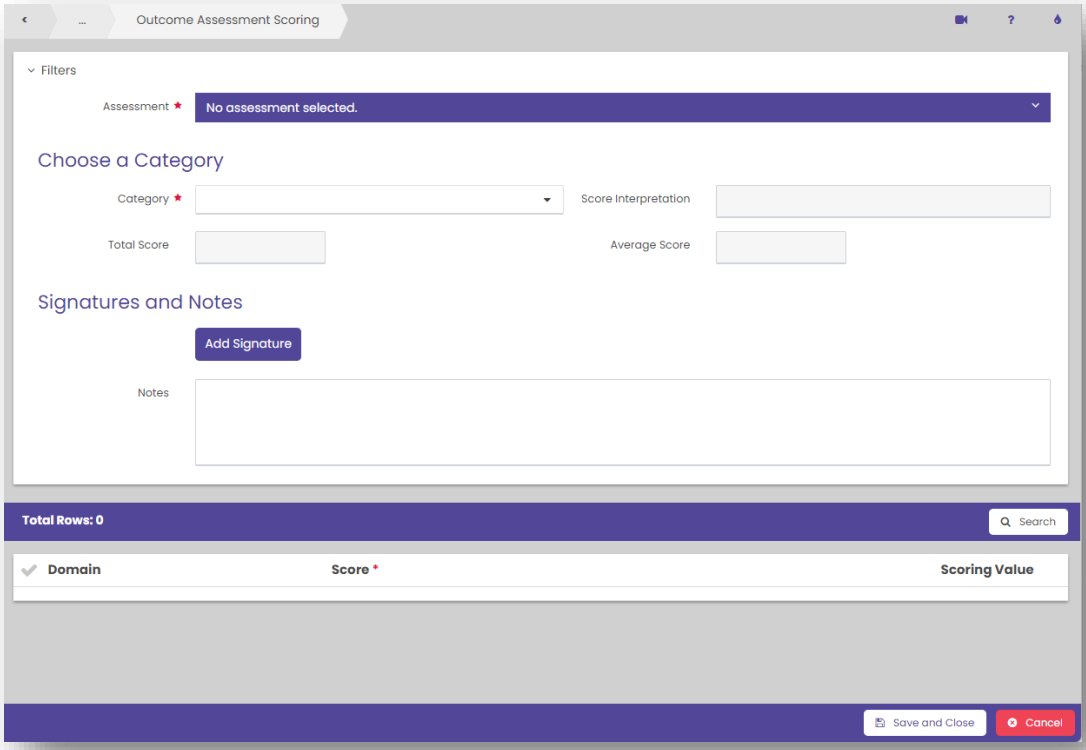
Access Assessments on the Case Management tab.

Program Outcomes by Category Assessment

The *Program Outcomes by Category* assessment is used to record outcomes (or answers) to domains (or questions) belonging to one category at a time.

NOTE: This is titled 'Outcome Assessment – New' when associating to the program.

Click into **Program Outcomes By Category**, select ADD NEW.



Each category for which the assessment is recorded obtains comparative data at a certain point in time for the active Client. As assessments are so

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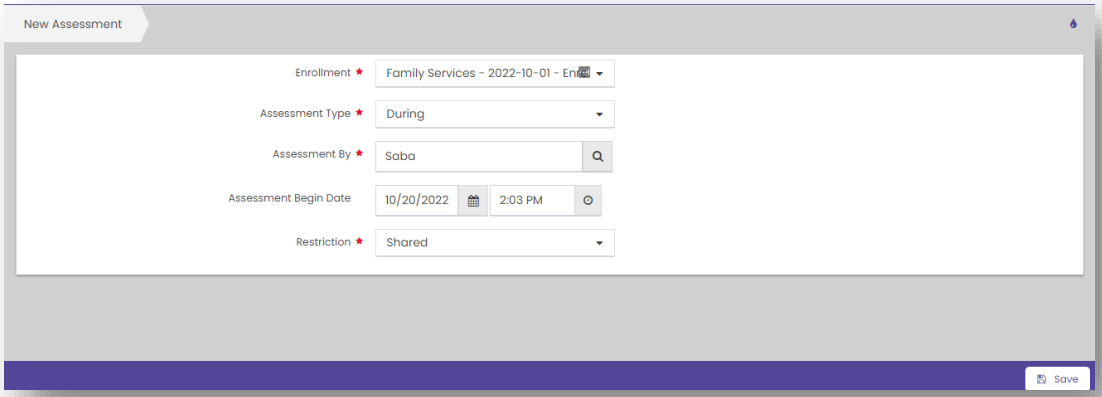
valuable for capturing the same data at different points in time, they all use the Assessment Manager which records the specifics of the point in time.

You can either create a new assessment event or add the outcome assessment to an existing event by selecting it in the Assessment Manager. For complete details on how to use the assessment manager, see the *Assessments* video series.

I'm going to record a new outcome assessment, by clicking the plus icon.



Select the appropriate program **Enrollment**. Select when the assessment is being asked in terms of the enrollment in **Assessment Type**. The active User will default in **Assessment By** but can be changed if necessary. The current date and time are defaulted. Lastly, enter a **Restriction** in terms of Organization level sharing and SAVE.

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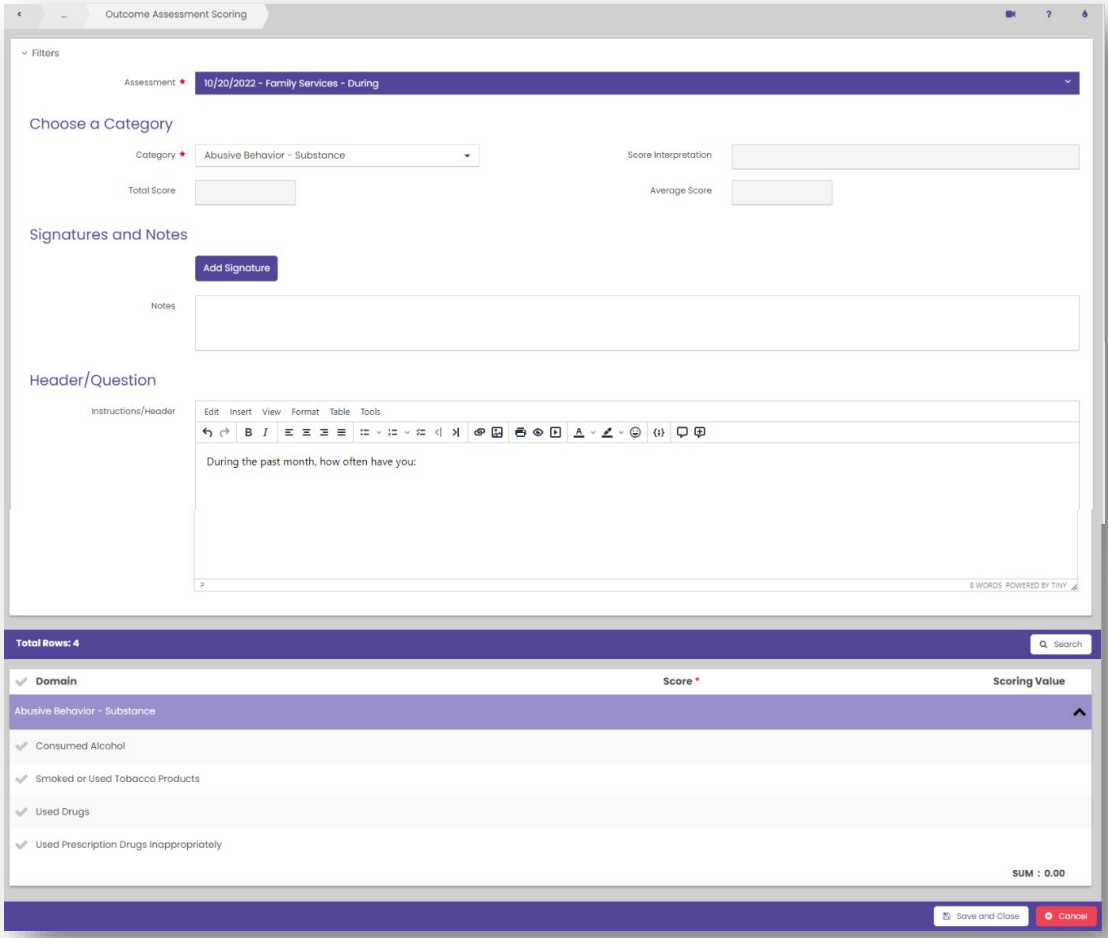
Now you can record the outcomes on the assessment below.



First, select a Domain **Category** by which to filter the Domains that appear in the grid below. The Program may be associated with multiple domain categories but only one category may be captured at a time.

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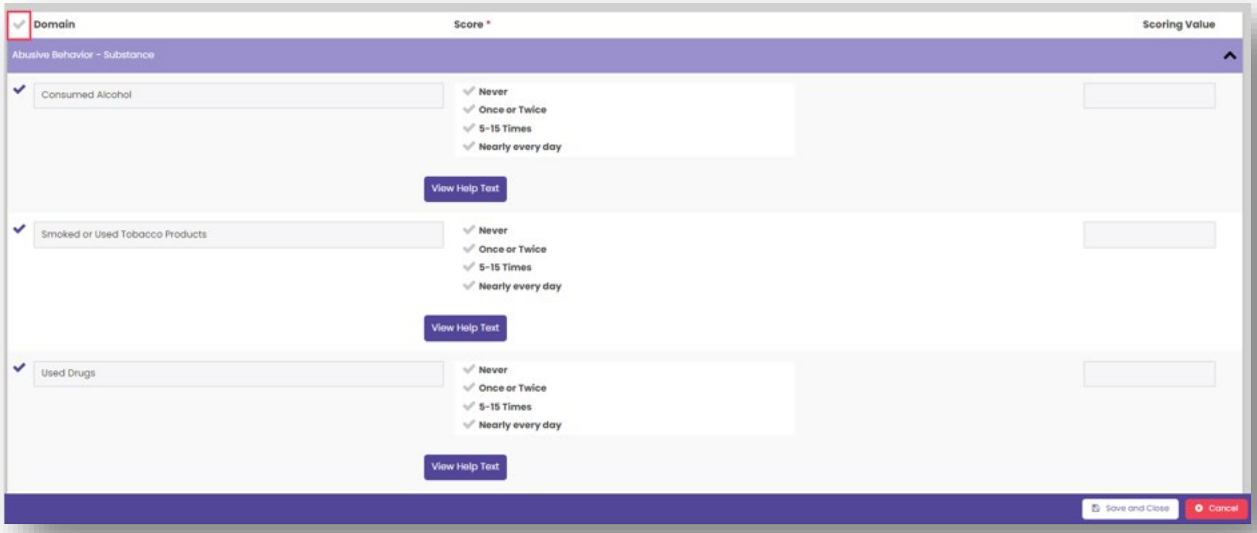
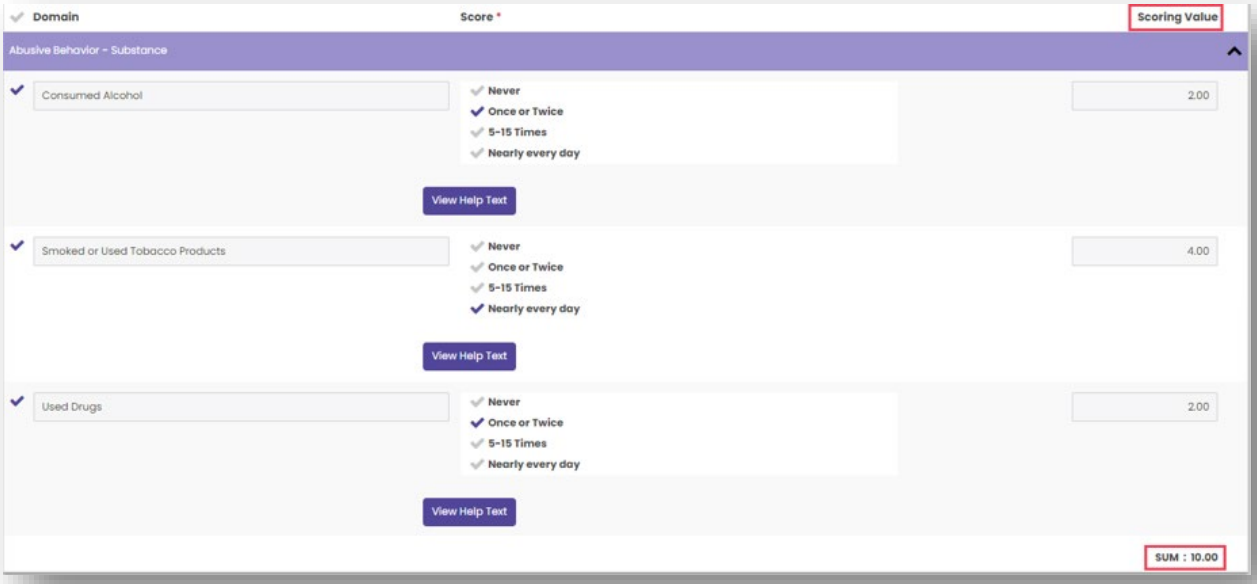
Select a single **Domain** to view and record its outcomes or select all the domains by clicking the checkmark. Next, select the checkbox for the outcome, or answer, that best suits the Client. If a domain is not applicable to the Client, simply deselect it.



Once a **Score** is indicated for each selected domain, a **Scoring Value** appears, and the **SUM** is automatically calculated.



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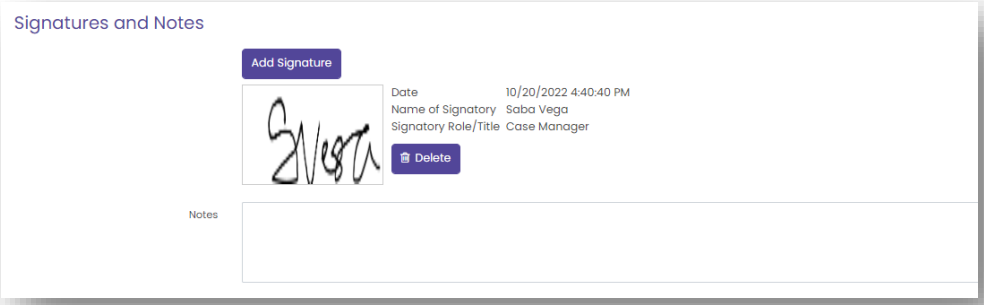
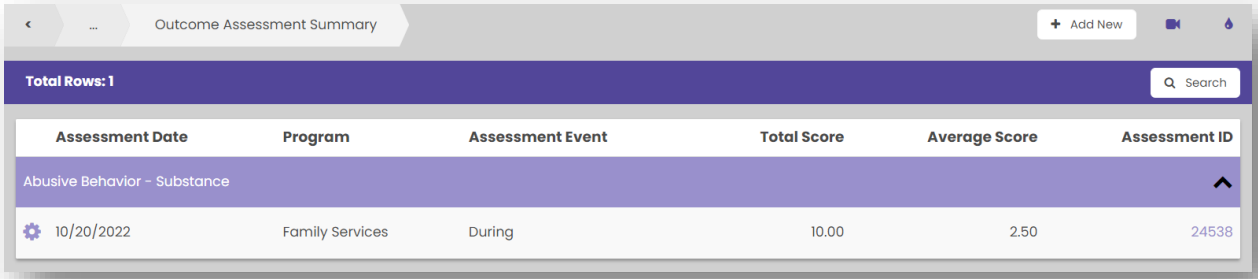
Lastly, add the appropriate signatures. Add any applicable notes.



Total Score, **Average Score,** and **Score Interpretation** all appear after the assessment has been saved.

Click SAVE AND CLOSE.



Repeat the process as necessary for each Domain Category. You can use the same assessment event for all of them as is appropriate.

The summary form displays Assessments categorized by Domains Categories. If one assessment captures outcomes from multiple categories, the assessment will be listed here multiple times. The records are grouped by Domain category.

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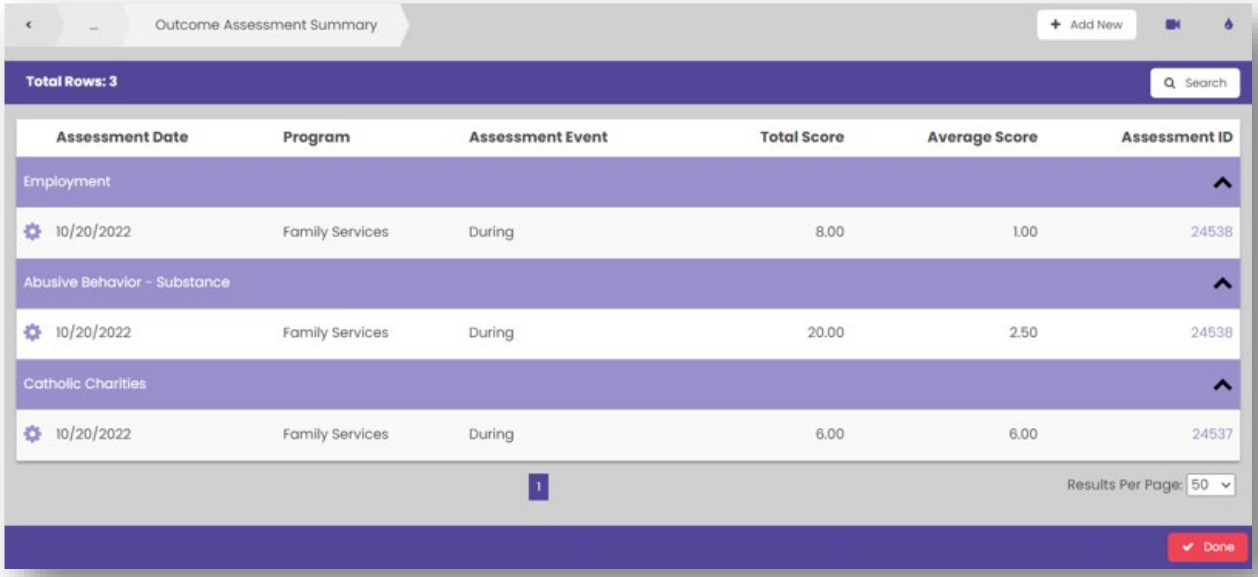
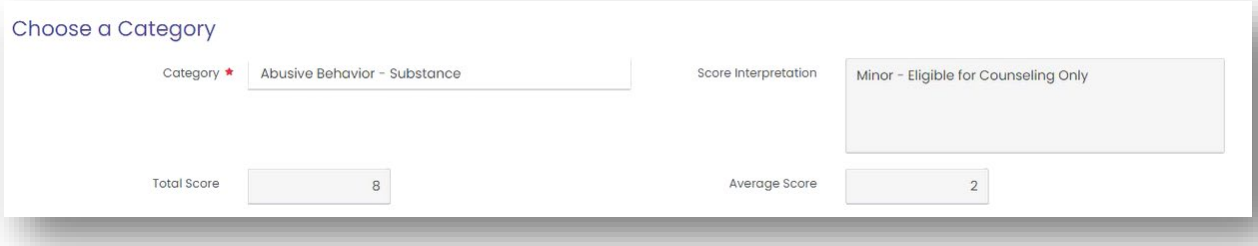


Use the action gear to **Edit** the details of the assessment if necessary. The edit form also displays the **Total Score**, **Average Score**, and **Score Interpretation** which do not appear on the add form.



All Program Outcomes Assessment

The *All Program Outcomes* assessment is used to record any outcomes mapped directly to the program, categorized or non-categorized, at a specific point in time.

NOTE: This is titled 'Outcome Assessment Add' when associating to the program.

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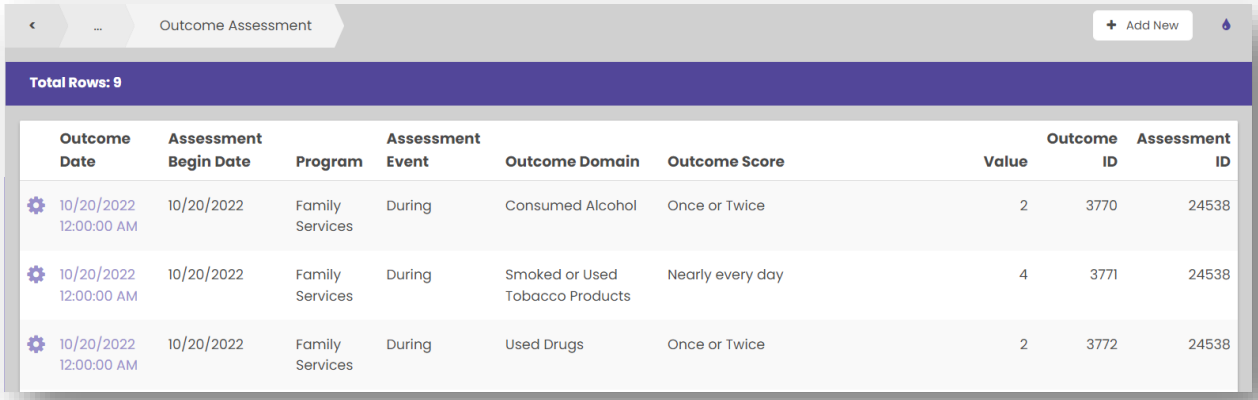
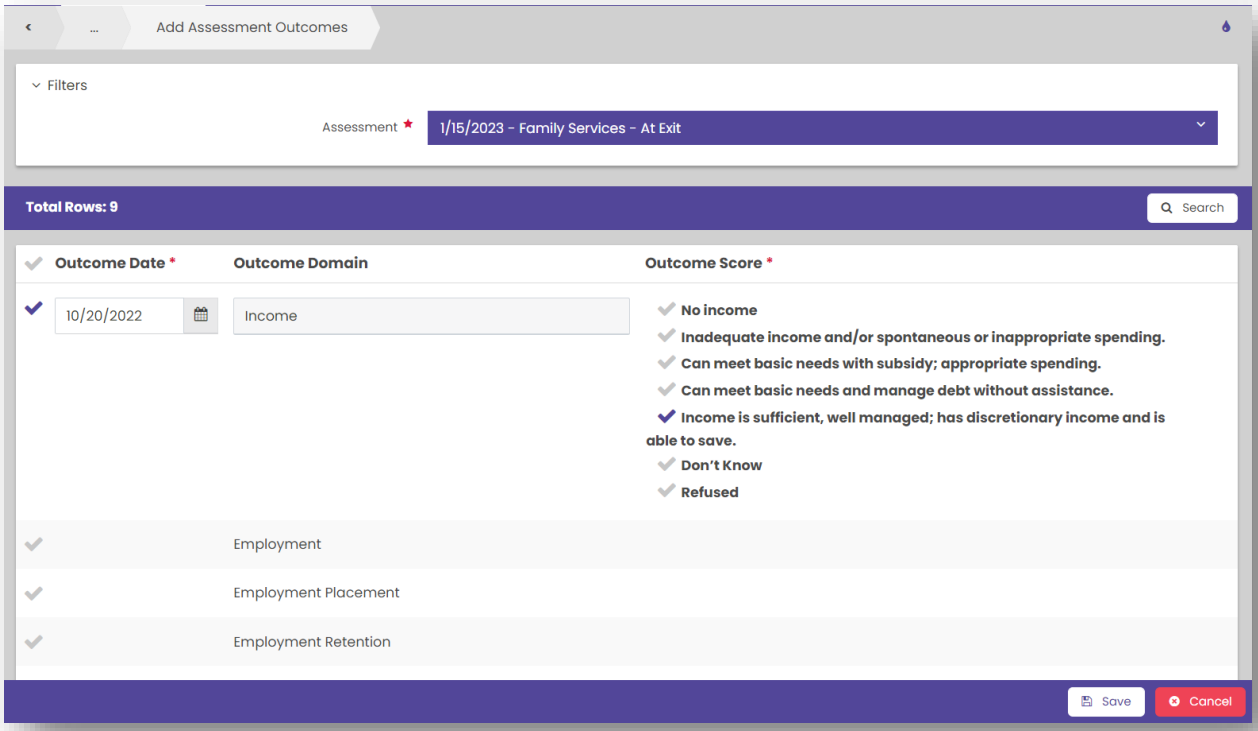


Outcome Date	Assessment Begin Date	Program	Assessment Event	Outcome Domain	Outcome Score	Value	Outcome ID	Assessment ID
10/20/2022 12:00:00 AM	10/20/2022	Family Services	During	Consumed Alcohol	Once or Twice	2	3770	24538
10/20/2022 12:00:00 AM	10/20/2022	Family Services	During	Smoked or Used Tobacco Products	Nearly every day	4	3771	24538
10/20/2022 12:00:00 AM	10/20/2022	Family Services	During	Used Drugs	Once or Twice	2	3772	24538

Select ADD NEW

You can either create a new **Assessment** event or add the outcome assessment to an existing event by selecting it in the Assessment Manager.



Outcome Domains that appear are those that were associated to the Program.

Select all that are applicable and select an **Outcome Score**. SAVE.

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The summary form displays all Outcomes with their details that were recorded during an assessment. An average score appears at the bottom of the **Value** column.

Outcome Assessment

+ Add New

Total Rows: 14

Outcome Date	Assessment Begin Date	Program	Assessment Event	Outcome Domain	Outcome Score	Value	Outcome ID	Assessment ID
10/20/2022 12:00:00 AM	1/15/2023	Family Services	At Exit	Income	Refused	1	3779	24539
10/20/2022 12:00:00 AM	1/15/2023	Family Services	At Exit	Employment	Employed full-time with adequate pay and benefits	1	3780	24539
10/20/2022 12:00:00 AM	1/15/2023	Family Services	At Exit	Employment Placement	Placed in employment	1	3781	24539
10/20/2022 12:00:00 AM	1/15/2023	Family Services	At Exit	Employment Retention	90 Day Retention	3	3782	24539
10/20/2022 12:00:00 AM	1/15/2023	Family Services	At Exit	Access to Services (Self Sufficiency Matrix)	No longer in crisis, no longer needs services or is receiving a full range of services to meet needs	10	3783	24539
10/20/2022 12:00:00 AM	10/20/2022	Family Services	During	Consumed Alcohol	Once or Twice	2	3770	24538
10/20/2022 12:00:00 AM	10/20/2022	Family Services	During	Smoked or Used Tobacco Products	Nearly every day	4	3771	24538
10/20/2022 12:00:00 AM	10/20/2022	Family Services	During	Access to Services (Self Sufficiency Matrix)	Knows what they need; knows how to learn about the services available to meet their need; but, only one option for service provision.	6	3774	24537
						AVG : 2.57		

1

Results Per Page: 50

Done

Outcomes may be edited or deleted using options on the action gear.

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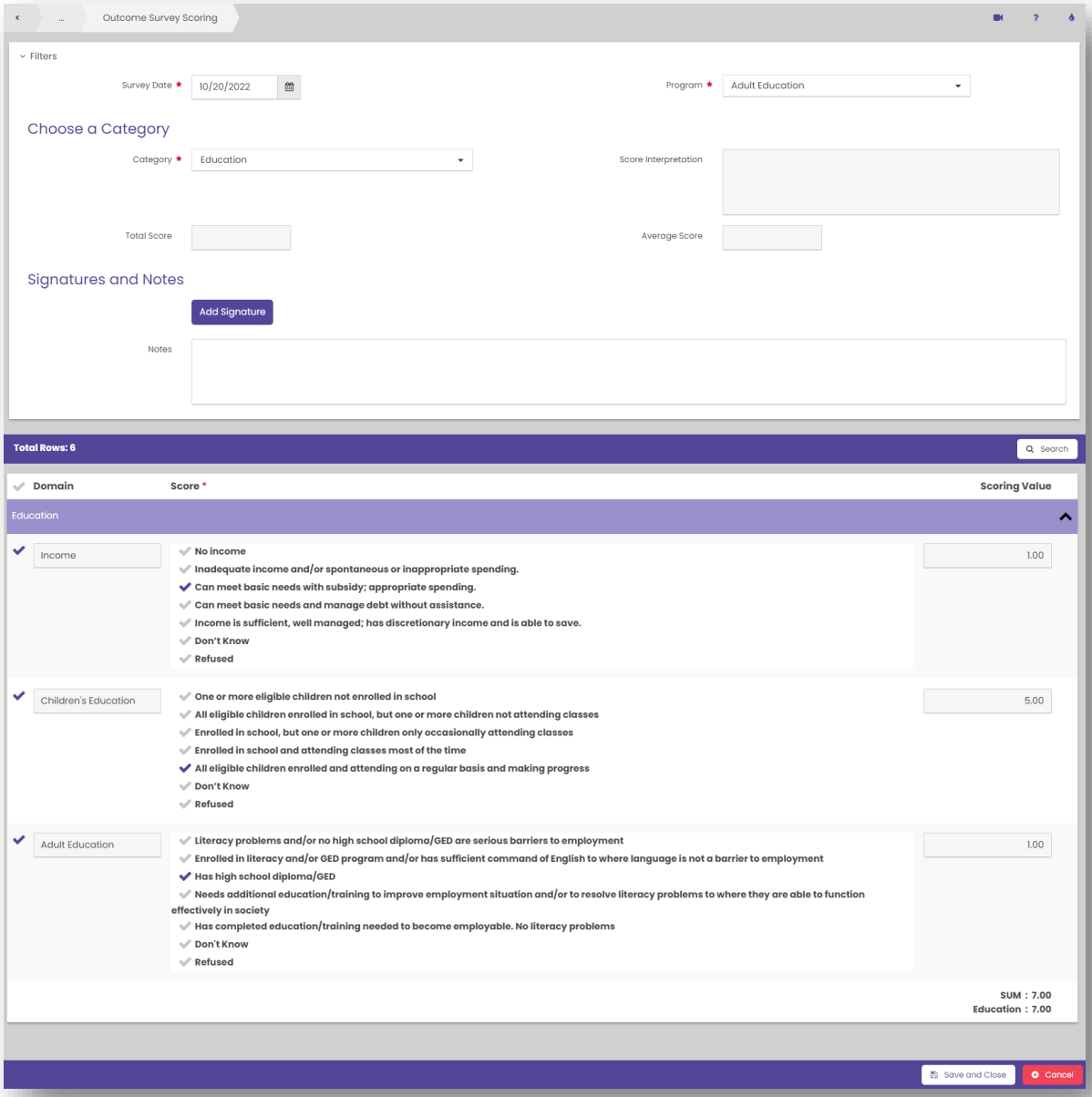
Outcome Surveys

Navigate to Outcome Surveys: Case Management, then Outcome Surveys.

Outcome Surveys are similar but are not intended to be used for a specific point in time or for a specific program. Adding a new survey allows the User to select any Program regardless of enrollment, and select a category tied to the program. The domains and outcomes appear.



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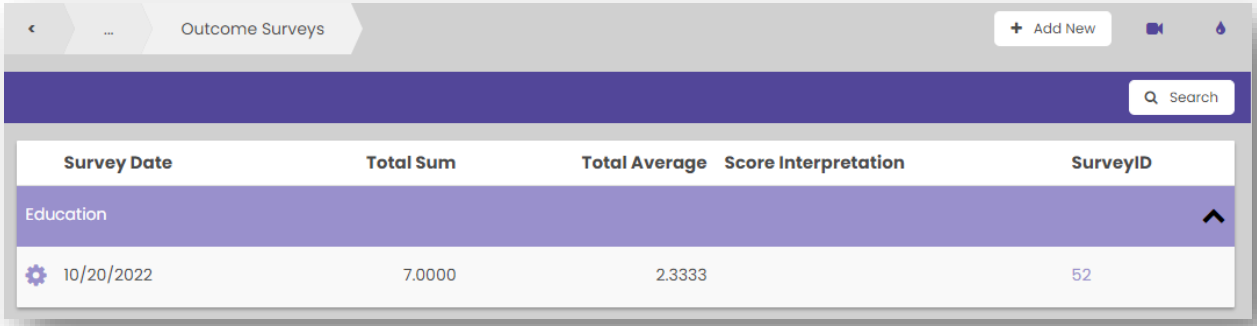
Select outcomes for each applicable **Domain** and SAVE.

Once the form is saved the can be viewed on the summary form.

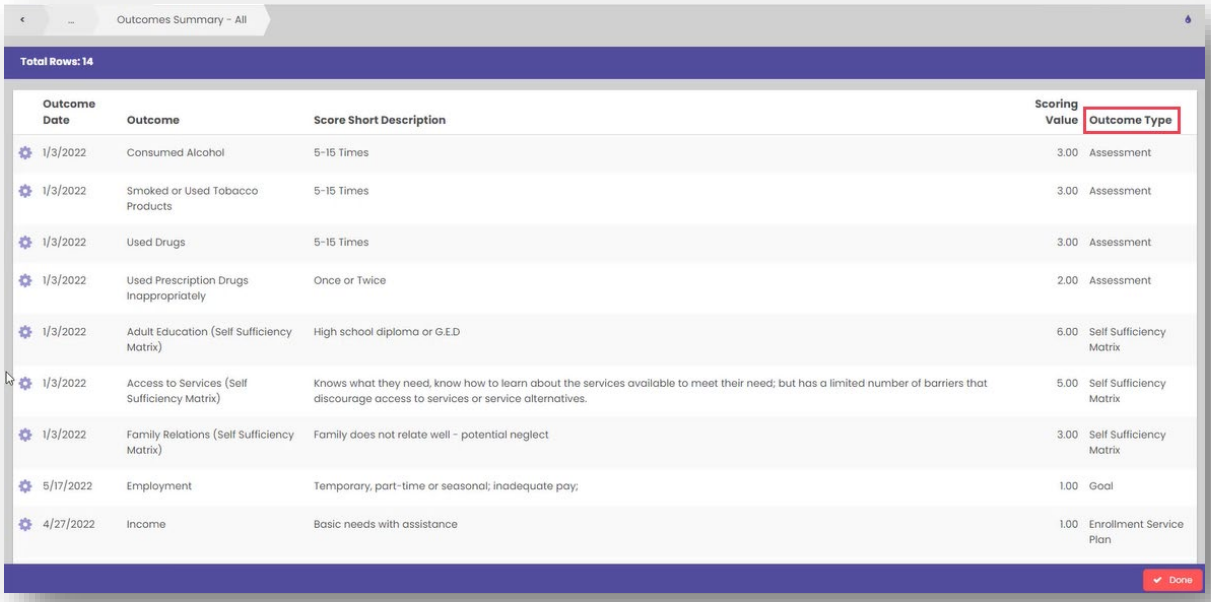


Outcomes may be edited or deleted using options on the action gear.

Outcomes Summary

Navigate to Outcomes Summary: Case Management, then Outcomes Summary.

The *Outcomes Summary* form displays information about all Outcome related records. These types include Assessment, Outcome Survey (entity survey), Self Sufficiency Matrix, Goal and Enrollment Service plan.



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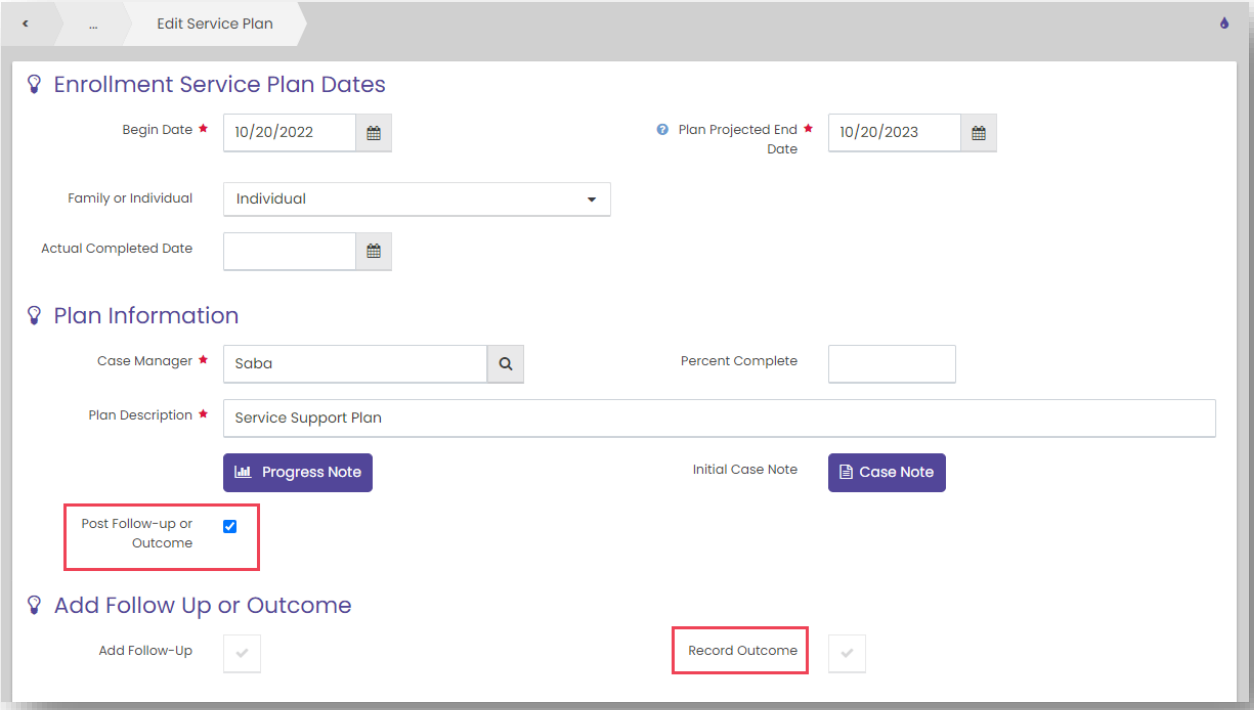
Outcomes may be edited or deleted from this form.

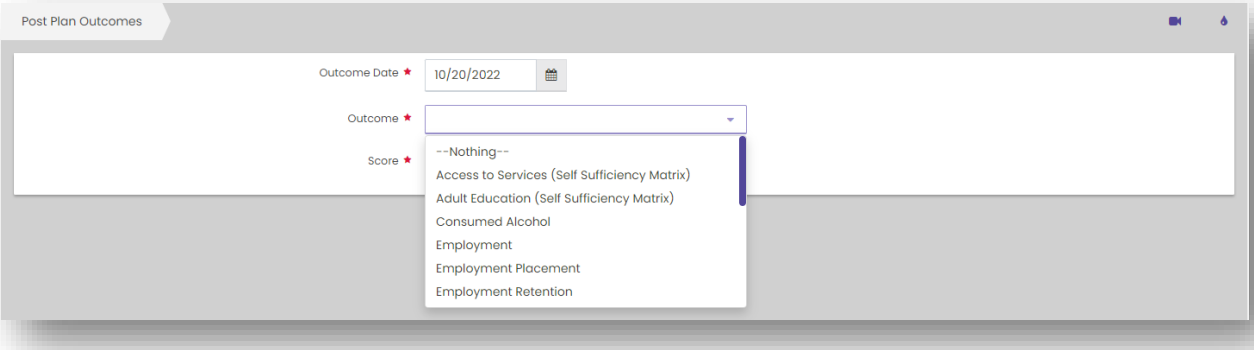
Outcomes without Categories – Service Plans

Lastly, outcomes without categories can be used to record an outcome for a Service Plan. Navigate to the service plan and select **Edit**.

Select **Post Follow-Up or Outcome**, and then **Record Outcome**.



All outcomes, including those that have no category, appear for selection.



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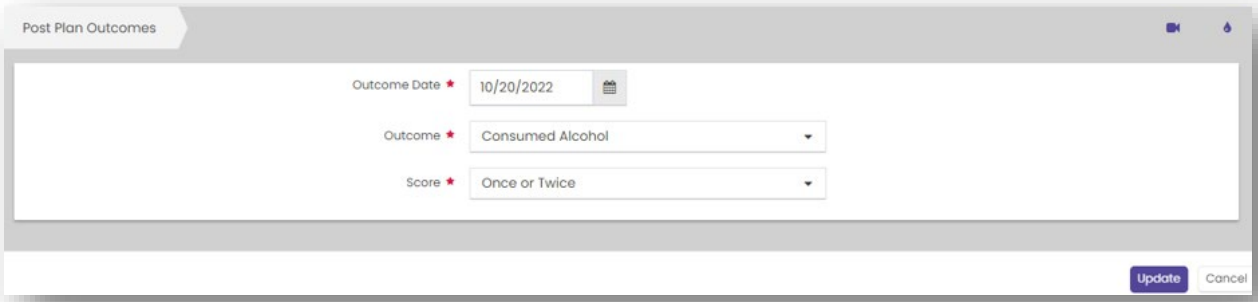
Select a **Score** and save the form.



See the *Service Plans* video series to learn more about how to create and manage Service Plans.

Next in the series, the *Self-Sufficiency Matrix and Outcomes Report video* details other Outcome related functionality in the application.

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Self-Sufficiency Matrix and Program Outcomes Report

This fourth video discusses the *Self-Sufficiency Matrix* and the *Program Outcomes Report* that are also available as options to collect and report outcomes data.

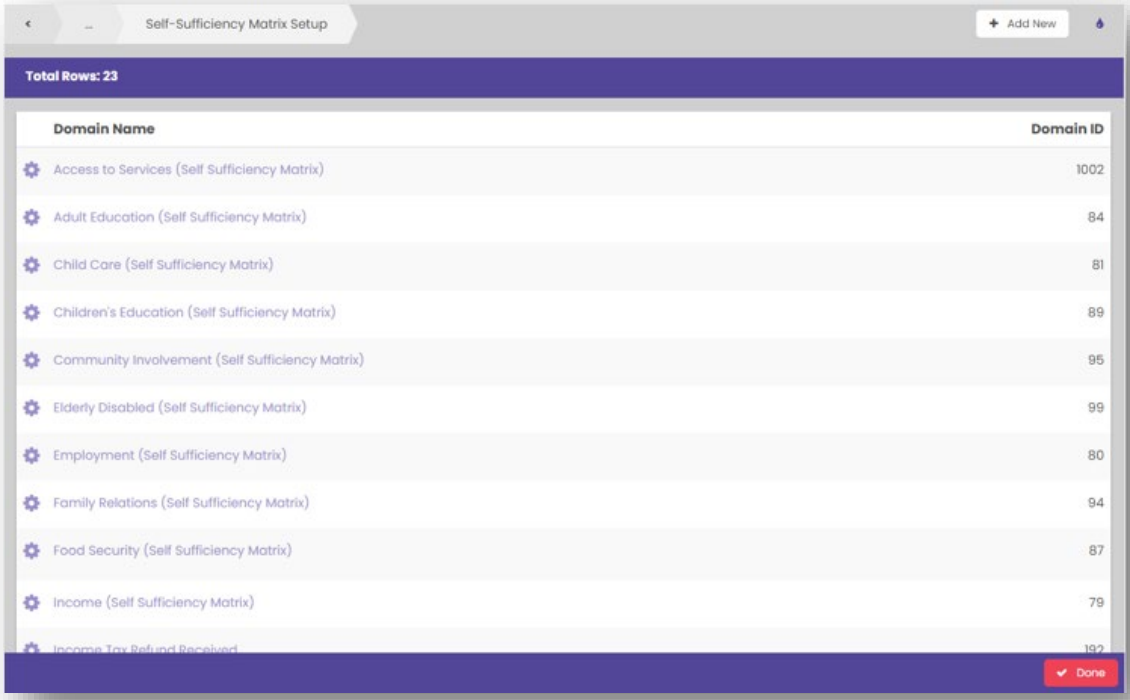
Self-Sufficiency Matrix

Self Sufficiency Matrix items are types of outcomes which System Administrators link to programs to present on the *Self Sufficiency Assessment*. Self Sufficiency related outcomes are linked separately from other outcomes.

Self Sufficiency Matrix Domains and Outcome

Like Outcome setup, Self Sufficiency Matrix Domain and Outcome items are created and managed under Codes and Categories.

Navigation: All Features role - Administration tab: Codes & Categories > Self Sufficiency Matrix



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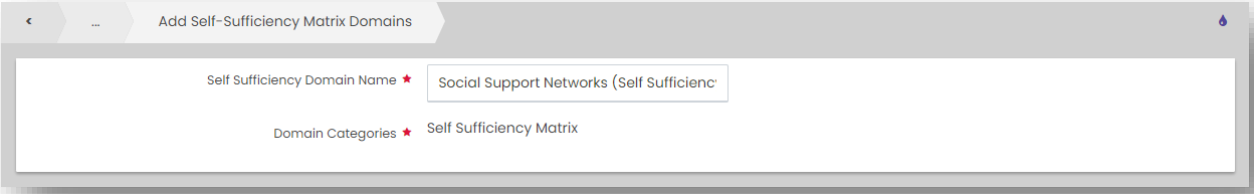
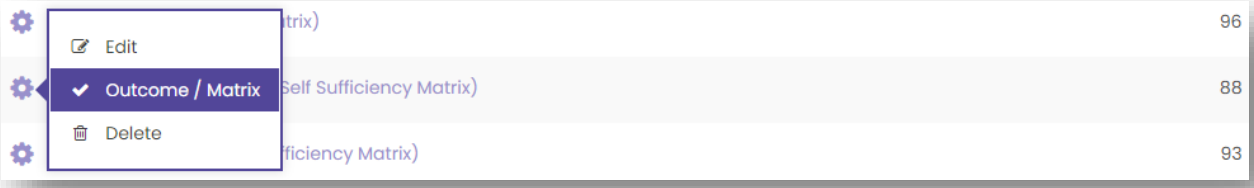
Many baseline matrices exist; however, it is simple to create new ones.

Begin by clicking ADD NEW to create a new Domain. The category of 'Self Sufficiency Matrix' is defaulted in each time.



Add Outcomes for each Domain using **Outcomes/Matrix** on the action gear.



Manually add details about each Outcome as outlined in the *Outcomes Setup* video. If you wish to use pre-configured Outcomes, they will need to be created in the Score Repository as also detailed in *Outcome Setup* video.

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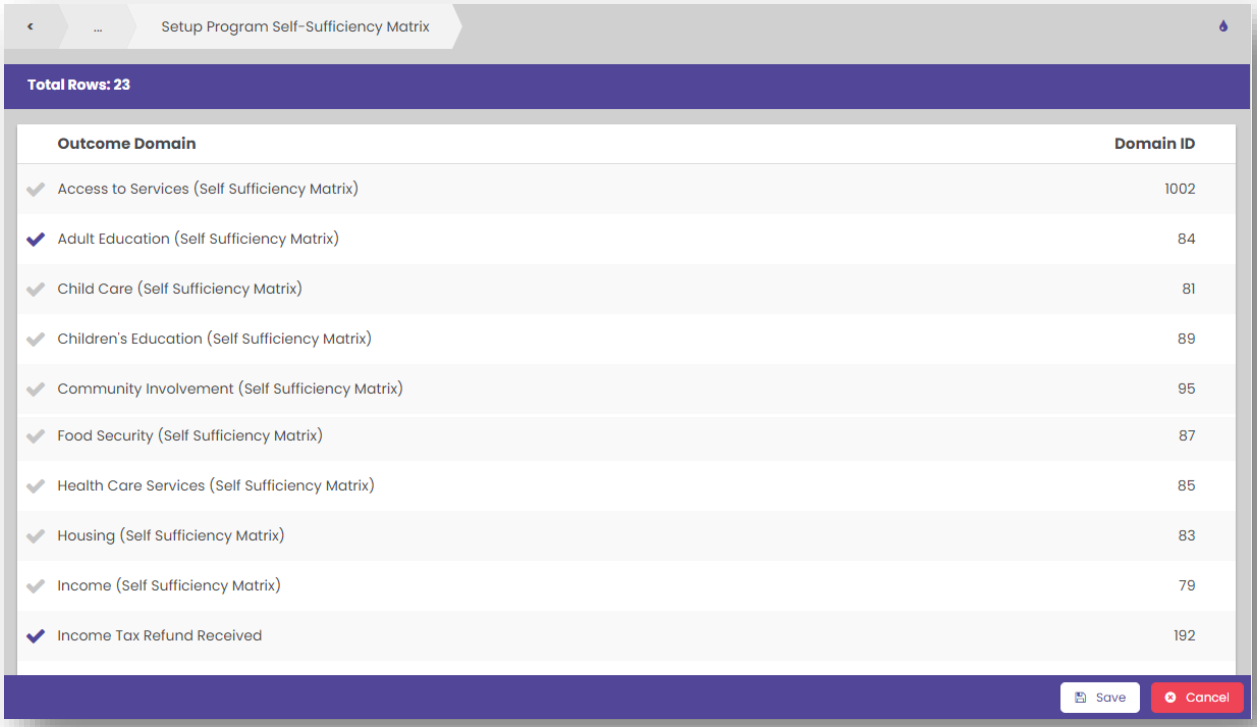
Program Matrices

The last piece of setup is to link the Matrix Domains to the Program. Select the **Self Sufficiency Matrix** option on the Program's action gear.



Select each Matrix domain you wish to link to the program and SAVE.

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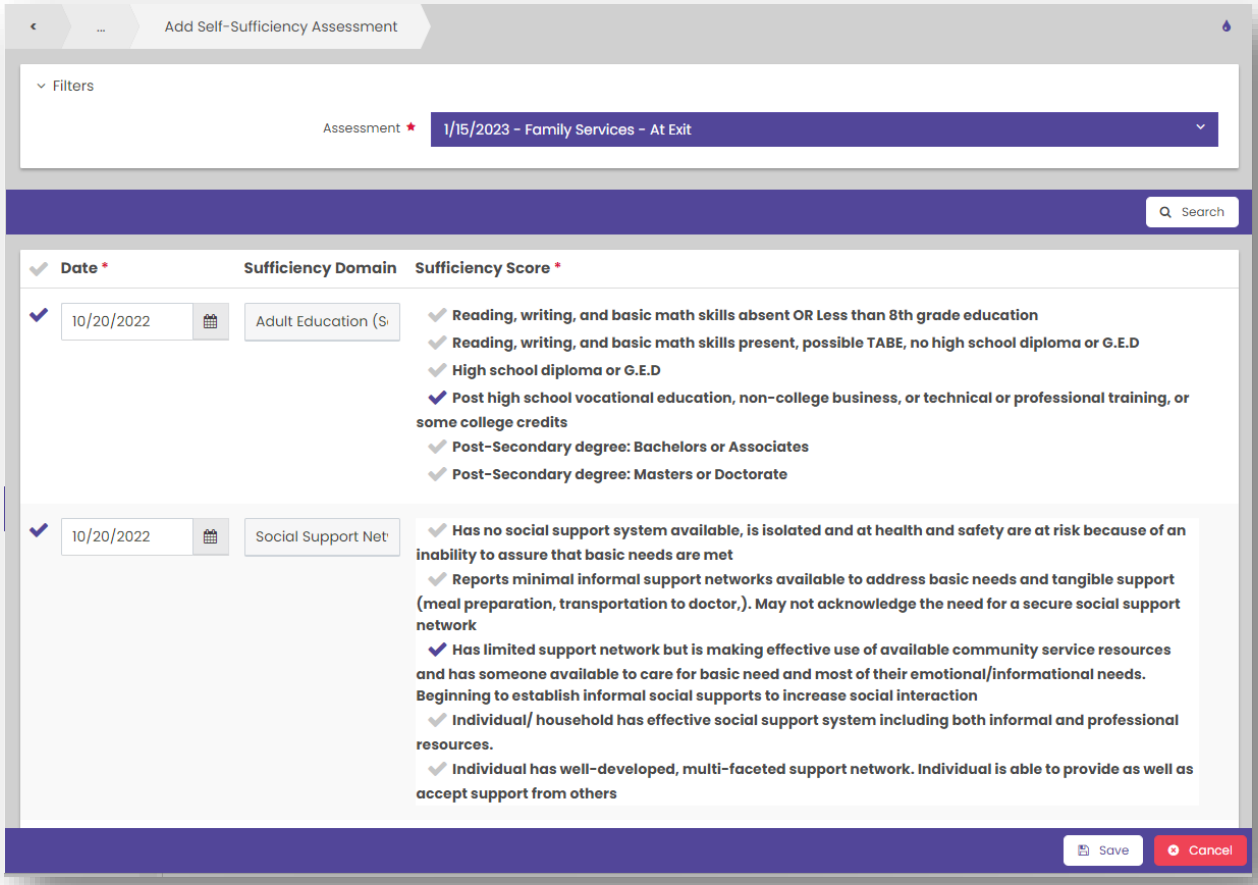
Self Sufficiency Matrix Assessment

The *Self Sufficiency Matrix* assessment is located on the *Assessments* dashboard.



Select or create an assessment using the assessment manager. All Matrix domains that have been linked to the program appear below. To select all domains, click this checkmark. Select a **Sufficiency Score** for each selected domain and save the assessment.

The summary form displays each recorded domain categorized by date.

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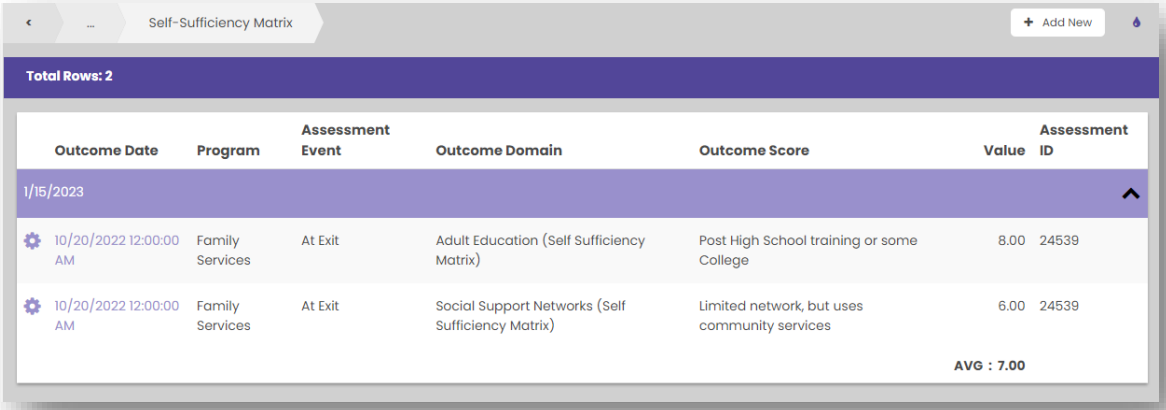
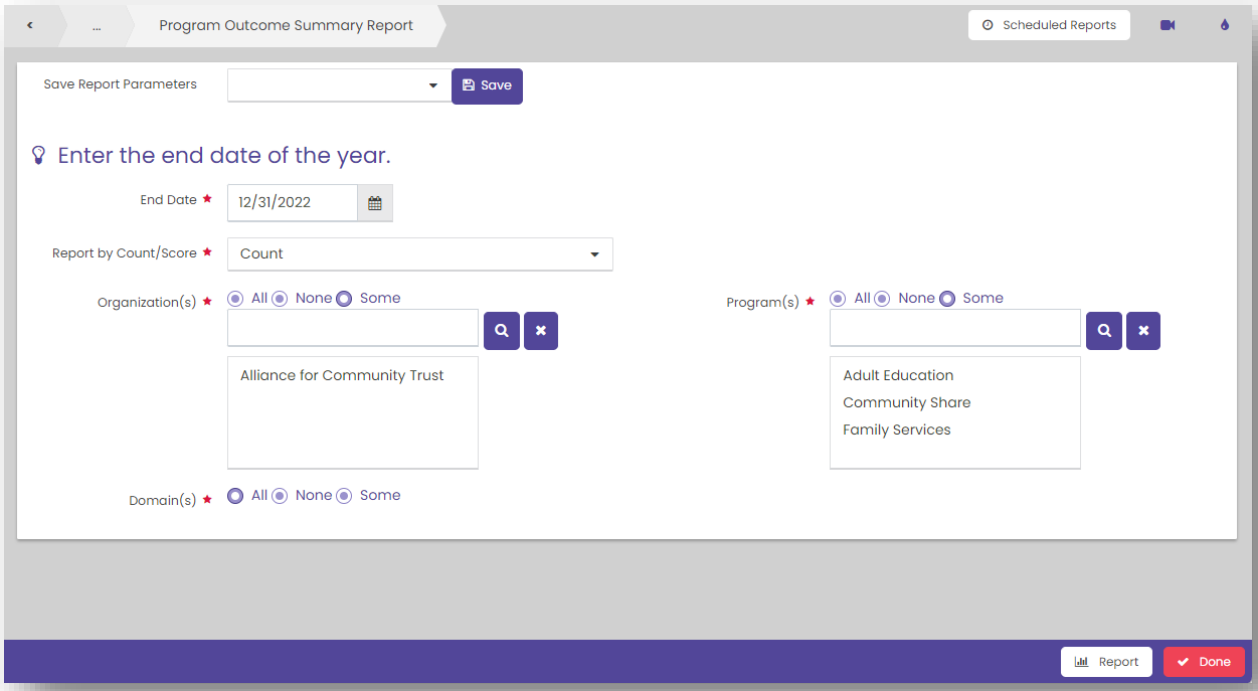


Program Outcomes Report

The *Program Outcomes* SSRS report is available to provide data about outcomes and is located on the Reporting tab's *Operational Reports* dashboard.

It can be run for either the **Count** of outcomes completed, or for **Scores**.



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The report will include the details for the 12-month period of time ending on the entered **End Date**. Additionally, it can be filtered by outcome **Domains** meaning the outcome questions, and by specific **Programs**.

The main report includes visual graphs and data about all outcome domains by program.

Program Outcome Summary

CaseWorthy

Run by **Saba** on **10/20/2022** at **1:41 PM**

End Date :	12/31/2022	Organization(s) :	Select All
Program(s) :	Select All	Domain(s) :	Select All
Count / Score :	Count		

Top 10 Outcomes - by Total Count

Top 10 Outcomes - by Monthly Count

CaseWorthy

Domain ID	Total	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022
Adult Education	3					1		2					
Children's Education	1							1					
Consumed Alcohol	2			1		1							
Employment	4			1		1			2				
Income	9			1		2		1	5				
Smoked or Used Tobacco Products	2			1		1							
Used Drugs	2			1		1							
Used Prescription Drugs Inappropriately	2			1		1							
Total	**25**			**6**		**8**		**4**	**7**				

Program Outcome Summary Page 1 of 3

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The first sub-report shows which programs the outcome domain was associated with as well as the total count break out per month.

Income Outcome - Detail by Count

CaseWorthy

Run by **Saba** on **10/20/2022** at **1:42 PM**

End Date :	12/31/2022	Organization(s) :	CaseWorthy
Program(s) :	Select All	Domain(s) :	Income
Count / Score :	Count		

CaseWorthy

Programs	Totals	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022
Adult Education	3			1		1		1					
Family Services	6					1			5				
Total for: Income	**9**			**1**		**2**		**1**	**5**				

Income Outcome - Detail by Count Page 1 of 1

The second sub-report provides data on specific Clients that make up the count for the program and outcome.

Adult Education Program - Client Detail

CaseWorthy

Run by **Saba** on **10/20/2022** at **1:43 PM**

End Date :	12/31/2022	Organization(s) :	CaseWorthy
Program(s) :	Adult Education	Domain(s) :	Income
Count / Score :	Count		

CaseWorthy First Name

Client ID	Last Name	First Name	Outcome Date	Totals	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022
24439	Brooks	Jordan	05/17/22	1					1.00							
24400	Brown	Trevor	05/18/22	1					1.00							
24425	Flores	Sandra	07/05/22	1							1.00					
	Total for: Income			**3**					**2**		**1**					

Adult EducationProgram - Client Detail Page 1 of 1

To view more details of the report, see the *Operational Reports – Programs – Program Outcomes* video.

This concludes the *Outcomes* video series.

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