



# OUTCOMES – VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

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# Video Companion Guide Overview

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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.

# Overview of Outcomes

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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.

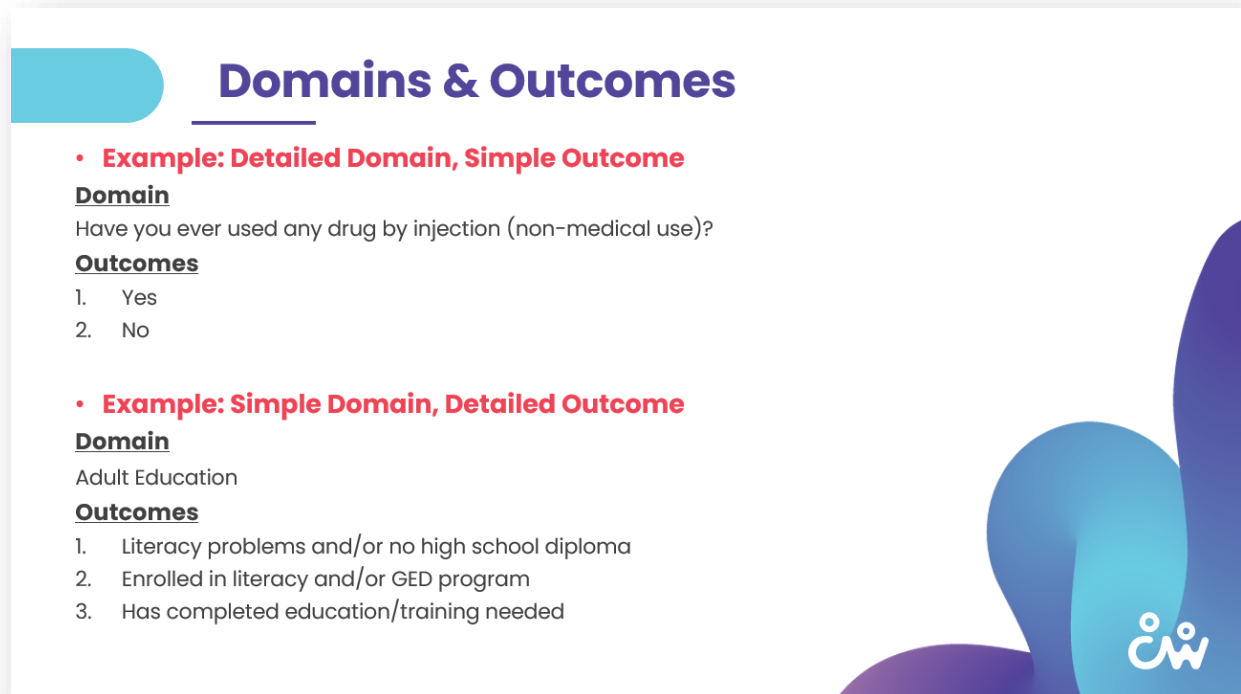
## Outcome Survey

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.

## Domains & Outcomes Defined

It is important to understand terms used within outcomes functionality.

**Domain Categories** are the overarching groups that house Outcome Domains.



### Domains & Outcomes

- **Example: Detailed Domain, Simple Outcome**  
**Domain**  
Have you ever used any drug by injection (non-medical use)?  
**Outcomes**
  1. Yes
  2. No
- **Example: Simple Domain, Detailed Outcome**  
**Domain**  
Adult Education  
**Outcomes**
  1. Literacy problems and/or no high school diploma
  2. Enrolled in literacy and/or GED program
  3. Has completed education/training needed

**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.

## 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.

# 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**.

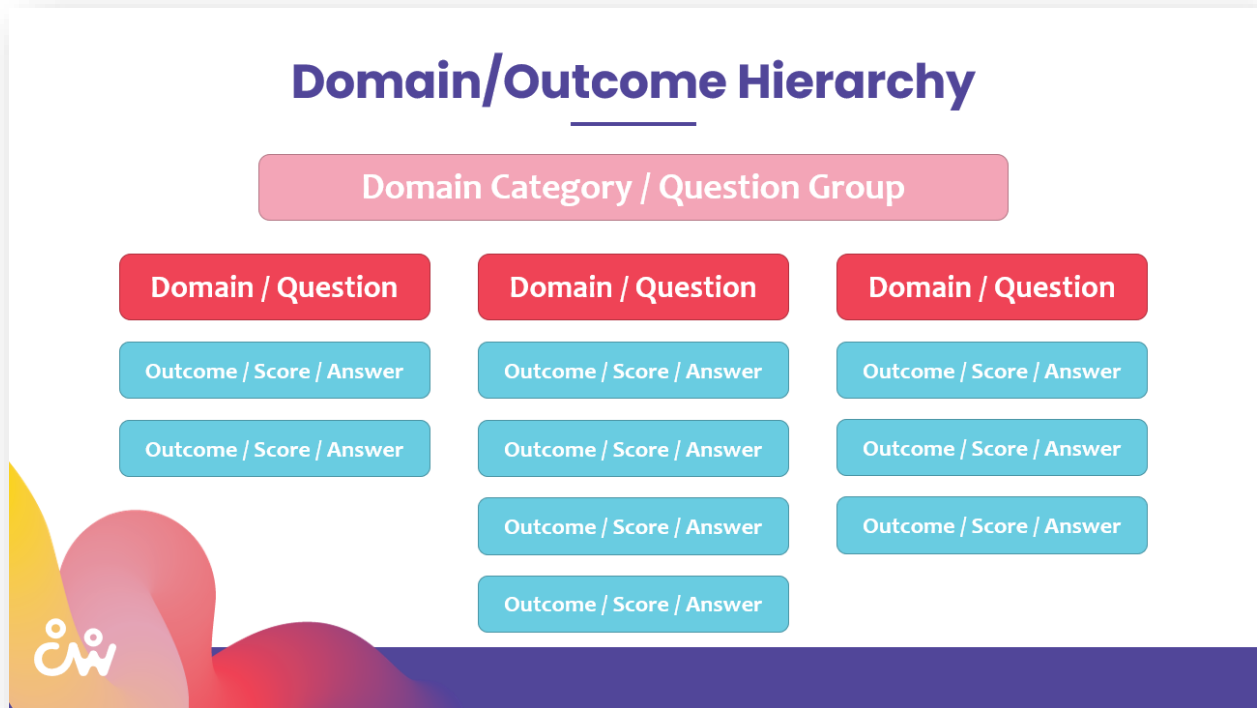
The screenshot shows a web interface for managing outcome domains. At the top, there's a breadcrumb 'Outcome Domains w/Categories' and buttons for 'Manage Categories', 'Manage Score Repository', 'Add New', and 'Add Multiple'. Below this is a 'Filters' section with input fields for 'Domain Name', 'Main Category' (with a 'Choose Options...' dropdown), and 'Category Type'. A status bar indicates 'Total Rows: 612' and a search bar. The main table has columns: 'Domain Name', 'Category Type', 'Number of Scores', and 'Domain ID'. It lists three categories: 'Actions / Resolutions', 'Abusive Behavior Inventory', and 'Teen Health Screen - CRAFFT'. Each category has a gear icon and a list of items, with the first item in each list being '1. Have you ever ridden in a car driven by someone (including yourself) who was "high" or had been using alcohol or drugs?'. The 'Number of Scores' for each item is '2', and the 'Domain ID' is '638'. A 'Done' button is at the bottom right.

Domain Name	Category Type	Number of Scores	Domain ID
Actions / Resolutions			⬆
1. Have you ever ridden in a car driven by someone (including yourself) who was "high" or had been using alcohol or drugs?		2	638
Abusive Behavior Inventory			⬆
1. Have you ever ridden in a car driven by someone (including yourself) who was "high" or had been using alcohol or drugs?		2	638
Teen Health Screen - CRAFFT			⬆

Outcomes with 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.





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.

Domain Categories+ Add New

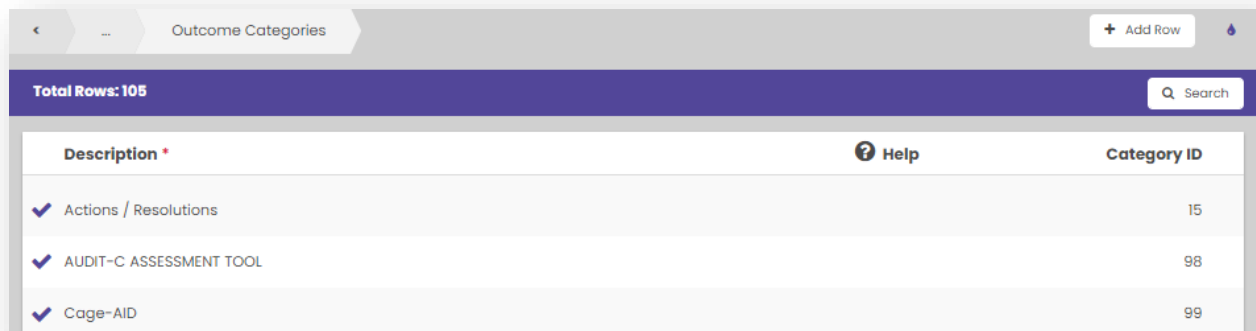
Filters

Category

Total Rows: 86Search

Description	Category ID
Actions / Resolutions	15
AUDIT-C ASSESSMENT TOOL	98
Cage-AID	99

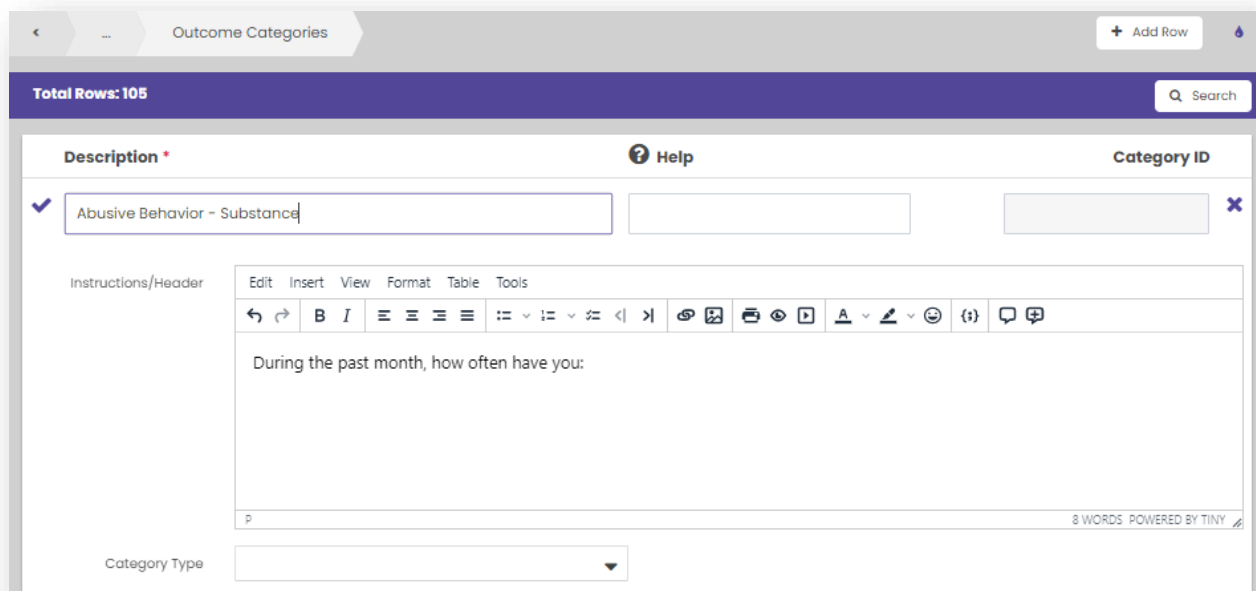
Click ADD NEW.



The screenshot shows a web application interface for 'Outcome Categories'. At the top, there is a navigation bar with a back arrow, a breadcrumb 'Outcome Categories', and an 'Add Row' button. Below this is a header bar indicating 'Total Rows: 105' and a search bar. The main content is a table with three columns: 'Description \*', 'Help', and 'Category ID'. The table contains three rows of data, each with a checkmark in the first column.

Description *	Help	Category ID
✓ Actions / Resolutions		15
✓ AUDIT-C ASSESSMENT TOOL		98
✓ Cage-AID		99

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



The screenshot shows the 'Outcome Categories' form for adding a new category. The interface includes a navigation bar with a back arrow, a breadcrumb 'Outcome Categories', and an 'Add Row' button. Below this is a header bar indicating 'Total Rows: 105' and a search bar. The form has three main sections: 'Description \*', 'Help', and 'Category ID'. The 'Description \*' section contains a text input field with the value 'Abusive Behavior - Substance'. Below this is a rich text editor with a toolbar and a text area containing the text 'During the past month, how often have you:'. The 'Category ID' section contains a text input field. At the bottom, there is a 'Category Type' dropdown menu.

Description *	Help	Category ID
✓ Abusive Behavior - Substance		

Instructions/Header

Edit Insert View Format Table Tools

During the past month, how often have you:

Category Type

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,

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

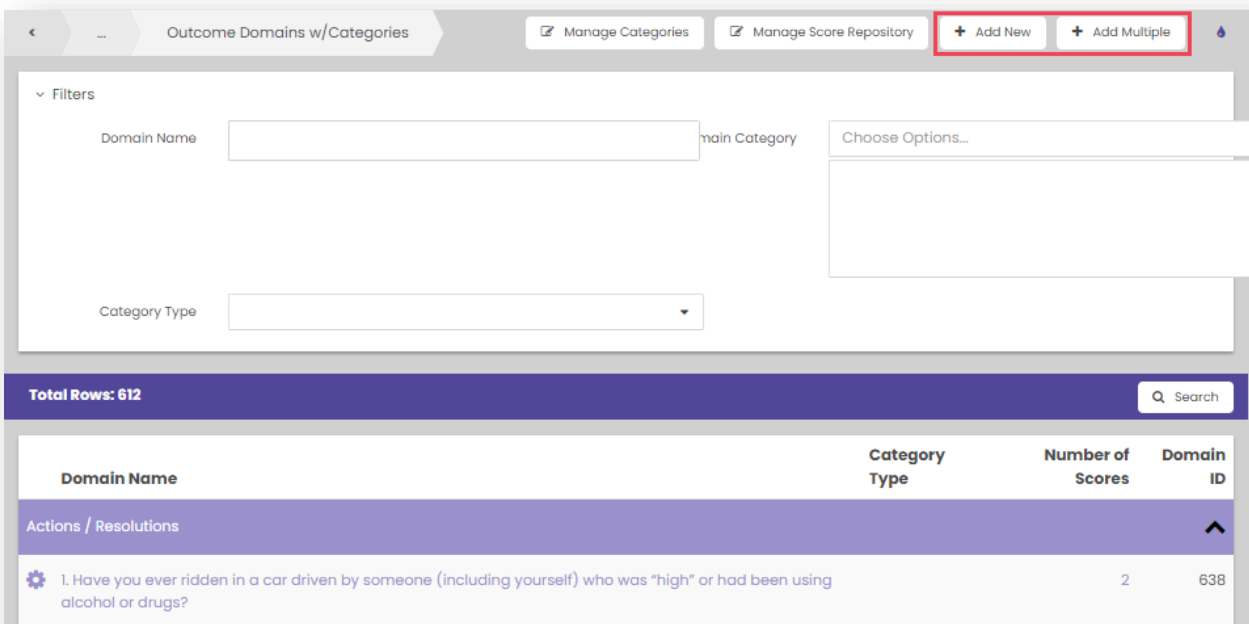
Add all necessary Domain Categories and click SAVE.



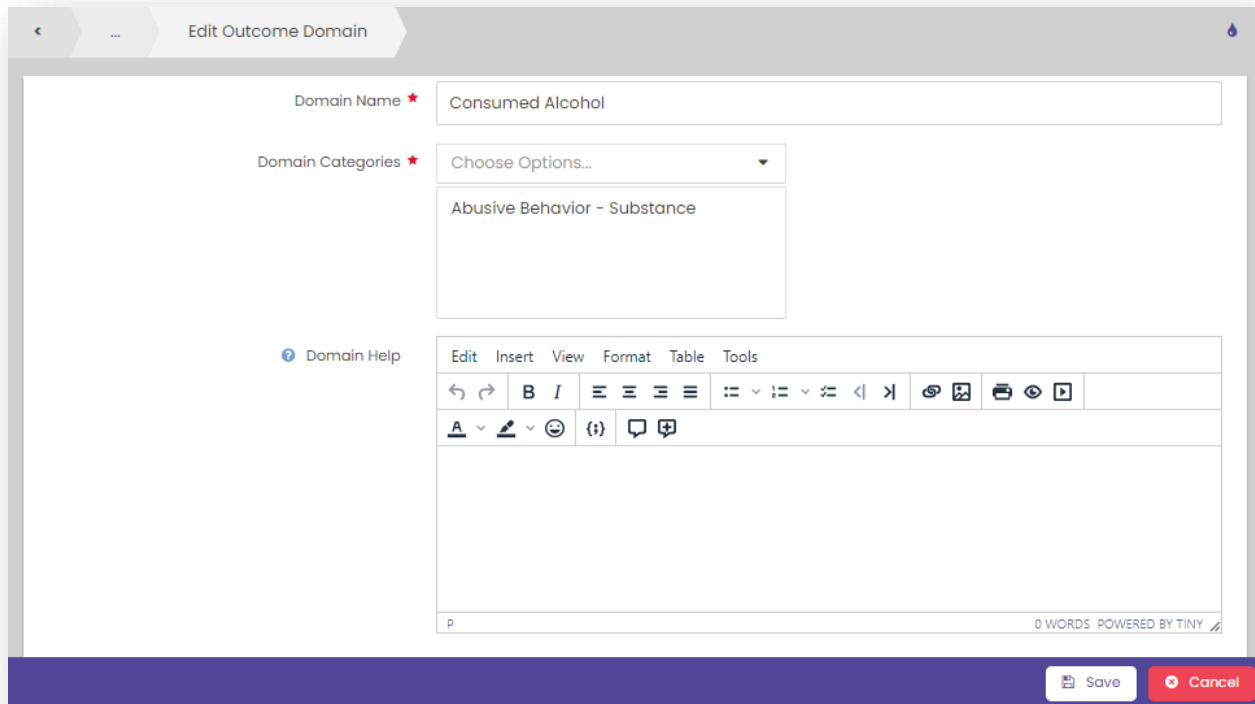
On the *Domain Categories* form, we can use the category’s action gear to add **Score Summaries**, **Edit the Domain** or question’s **Sort Order**, **Edit** the category, or **Delete** it.

## 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.



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.

## Domain/Outcome Simplified Example

### Abusive Behavior – Drugs and Alcohol

#### Consumed Alcohol

Yes

No

#### Smoked / Tobacco

Yes

No

Outcome / Score / Answer

Outcome / Score / Answer

#### Used Drugs

Yes

No

Outcome / Score / Answer



## Score Repository

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

#### Consumed Alcohol

Yes

No

#### Smoked / Tobacco

Yes

No

#### Used Drugs

Yes

No

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

Click MANAGE SCORE REPOSITORY.

Outcome Domains w/ Categories

Manage Categories Manage Score Repository Add New Add Multiple

Filters

Domain Name  Main Category Choose Options...

Category Type

Total Rows: 612 Search

Domain Name	Category Type	Number of Scores	Domain ID
Actions / Resolutions			
1. Have you ever ridden in a car driven by someone (including yourself) who was "high" or had been using alcohol or drugs?		2	638

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

Manage Outcome Score Repository Add Row

Filters

Score Description

Search

Short Description *	Scoring Value *	Reporting Value *	Score Repo ID
✓ Never	0	1	
Sort Order 1		Long Description	
✓ Yes	1.00	1	4
✓ No	0.00	0	5
✓ Not at all (0)	0.00	0	6
✓ Several days (1)	1.00	1	7
✓ More than half the days (2)	2.00	2	8

Save Cancel

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**.

Outcome Domains w/Categories

Manage Categories Manage Score Repository Add New Add Multiple

Filters

Domain Name Consumed Alcohol Domain Category Choose Options...

Category Type

Total Rows: 1 Search

Domain Name	Category Type	Number of Scores	Domain ID
Abuse		4	1000000004

Edit Outcomes Delete

Results Per Page: 50

Click ADD ROW.

Outcome Scores Add Row

Filters

Where provided, the Long Description will be referenced for Outcome Scores recorded via the Case Management functionality. If not provided, the Short Description will display.

Short Description *	Sort Order	Scoring Value *	Reporting Value *	Score ID
✓ Once or Twice	2	2.0000	1	1000000008
✓ 5-15 Times	3	3.0000	1	1000000009
✓ Nearly every day	4	4.0000	1	1000000010

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.



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.

Short Description	Scoring Value	Reporting Value	Repo ID
Never	0	1	1000000002
5-15 Times	3	1	1000000001
Very much like me	5	5	85

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

The screenshot shows a configuration window for a score group. At the top, there are five input fields: 'Short Description' (containing 'Never'), 'Sort Order' (containing '1'), 'Scoring Value' (containing '0'), 'Reporting Value' (containing '1'), and 'Score ID' (empty). Below these is a 'Find a score' search bar with 'Never' entered. A red box highlights a 'Score Group' button next to the search bar. Below the search bar is a 'Long Description' text area. At the bottom is a rich text editor with a toolbar containing various formatting options like bold, italic, and link.

**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.

The screenshot shows the 'Outcome Score Group Lookup' window. At the top right is a '+ Add New Group' button. Below it is a 'Filters' section with a 'Group Description' search bar. A 'Search' button is located to the right of the search bar. Below the search bar is a list of group descriptions: 'In Crisis', 'Vulnerable', 'Safety', 'Building Capacity/Stable', and 'Empowered/Thriving'. The 'Empowered/Thriving' option is highlighted with a purple background.

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

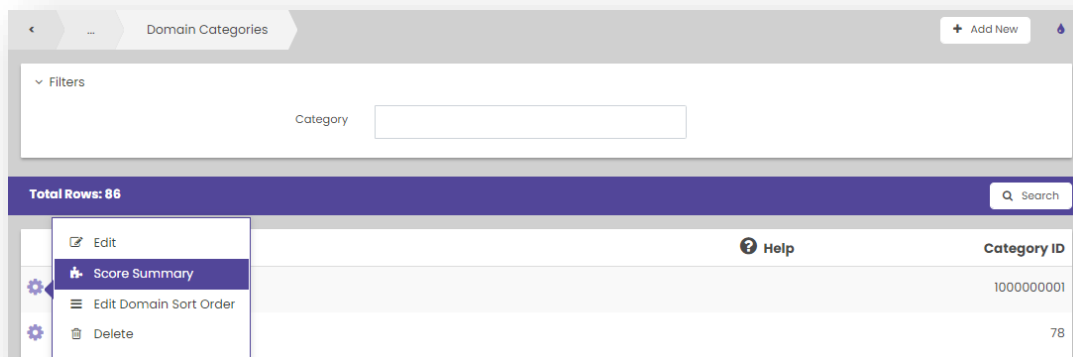
Now that the Outcomes have been associated with each Domain, we are going to return to the Domain Category action gear.

[Navigation:](#) All Features role – Administration tab: Codes and Categories > Outcomes with Categories

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.

A screenshot of the 'Domain Category Score Summary' form. The form has a header 'Domain Category Score Summary' and an 'Add Row' button. Below is a 'Search' button. The form is divided into sections for 'Description' and 'On Sum or Avg'. The 'Description' section has three rows, each with a checkbox, a description, and a 'Sum' dropdown. The 'On Sum or Avg' section has three rows, each with a 'Sum' dropdown and a 'Score Range' input. The first row is 'Not Eligible for Services' with a 'Sum' dropdown and a 'Score Range' of 1.00. The second row is 'Minor - Eligible for Counseling Only' with a 'Sum' dropdown and a 'Score Range' of 2.00 to 8.00. The third row is 'Serious - Eligible for Multi-Service' with a 'Sum' dropdown and a 'Score Range' of 9.00 to 20.00. At the bottom, there are 'Save' and 'Cancel' buttons.

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.

The screenshot shows a form titled 'Description' with a sub-header 'On Sum or Avg'. The 'Description' field contains 'Chronic - Eligible for Multi-Service and Rehabilitation Program'. The 'On Sum or Avg' dropdown is set to 'Sum'. Below these, there are two checkboxes: 'Minimum Beginning Range' (unchecked) and 'Maximum Ending Range' (checked). At the bottom, the 'Beginning Score Range' is set to '21.00'.

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'.

The screenshot shows a form titled 'Description' with a sub-header 'On Sum or Avg'. The 'Description' field contains 'Not Eligible for Services'. The 'On Sum or Avg' dropdown is set to 'Sum'. Below these, there are two checkboxes: 'Minimum Beginning Range' (checked) and 'Maximum Ending Range' (unchecked). At the bottom, the 'Ending Score Range' is set to '1.00'.

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

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.

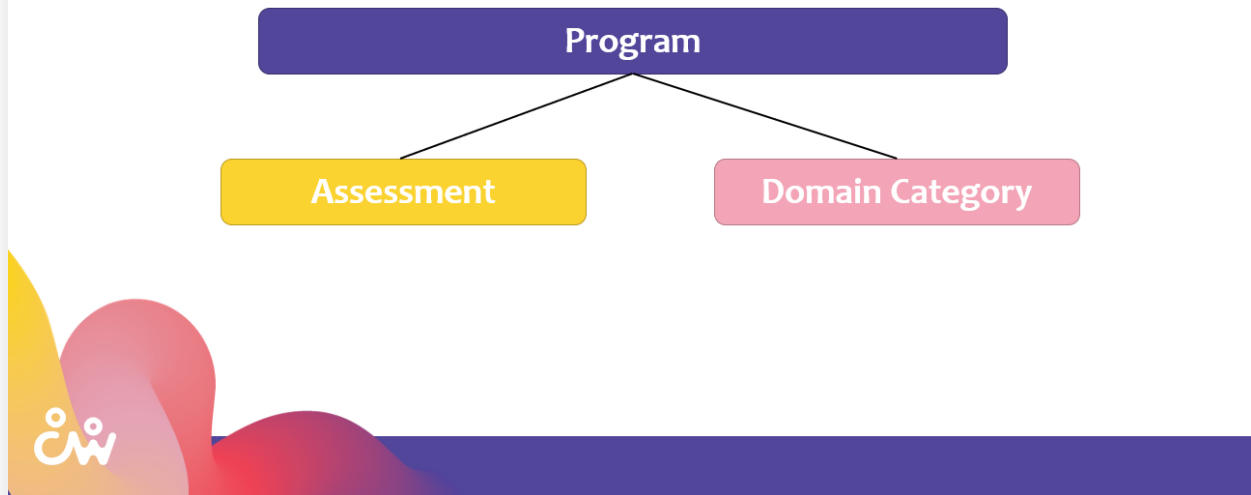
A screenshot of a web form titled 'Edit Domain Sort Order'. The form has a header 'Domain Name' and a sub-header 'Abusive Behavior - Substance'. Below this, there are four rows, each with a text input field and two buttons (up and down arrows) and a delete button (X). The text inputs are: 'Consumed Alcohol', 'Smoked or Used Tobacco Products', 'Used Drugs', and 'Used Prescription Drugs Inappropriately'. The up and down arrows are blue, and the delete button is red.

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.

## Outcome Assessment / Domain Category Linking



### Program Assessment

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

Click ADD ASSESSMENT.

The screenshot shows the 'Edit Program Assessment' form. The 'Assessment' dropdown menu is open, displaying a list of options. The first two options, 'Outcome Assessment - New' and 'Outcomes Assessment Add', are highlighted with a red border. The 'Sort Order' dropdown is also open, showing a list of options. The 'Events' dropdown is set to 'Choose Options...'. The 'Required Rule' section shows 'Provider HIMS Setup' as the selected rule, with an 'Edit Rule' button. The 'Required in Workflow' checkbox is unchecked.

'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.

## 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.

The screenshot shows the 'Program Domain Category' form. At the top, there's a 'Filters' section with a 'Domain Category' dropdown set to 'Abusive Behavior - Substance'. Below this, a table lists domain categories. The first row is selected, indicated by a blue checkmark in a red box. The table has columns for 'Category Name' and 'Category ID'. The selected row shows 'Abusive Behavior - Substance' with ID '1000000001'. Below the table, there's a 'ProgramDomainCategory:ProgramDk' field. At the bottom right, there are 'Save' and 'Cancel' buttons.

Category Name	Category ID
✓ Abusive Behavior - Substance	1000000001

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.

The screenshot shows the 'Program Domain Category' form with a 'Domain Category' dropdown. The table below lists three domain categories. The first row is selected. A red box highlights a checkbox labeled 'Delete underlying outcomes mapped to program? (Save form before deleting)'. The table has columns for 'Category Name' and 'Category ID'. The selected row shows 'Abusive Behavior - Substance' with ID '1000000001'. The other two rows are 'Other' with ID '6' and 'Education' with ID '4'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Category Name	Category ID
✓ Abusive Behavior - Substance	1000000001
✓ Other	6
✓ Education	4



## Program Outcomes

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

The screenshot shows the 'Program Outcome Setup' interface. At the top, there's a breadcrumb 'Program Outcome Setup'. Below it is a 'Filters' section with a 'Domain Name' input field and a 'Category' dropdown menu labeled 'Choose Options...'. The main area displays a table with 642 total rows. The table has three columns: 'Domain Name', 'Sort Order', and 'Domain ID'. The table is grouped into sections: 'Abusive Behavior - Substance', 'Other', and 'Referral for Services'. The first row under 'Abusive Behavior - Substance' is 'Used Prescription Drugs Inappropriately' with a checkbox checked and a red 'X' icon in the 'Domain ID' column. The second row is 'Used Drugs' with a checked checkbox and 'Domain ID' 1000000006. The third row is 'Smoked or Used Tobacco Products' with a checked checkbox and 'Domain ID' 1000000005. The 'Other' section has one row 'Referral for Services' with a checked checkbox and 'Domain ID' 116.

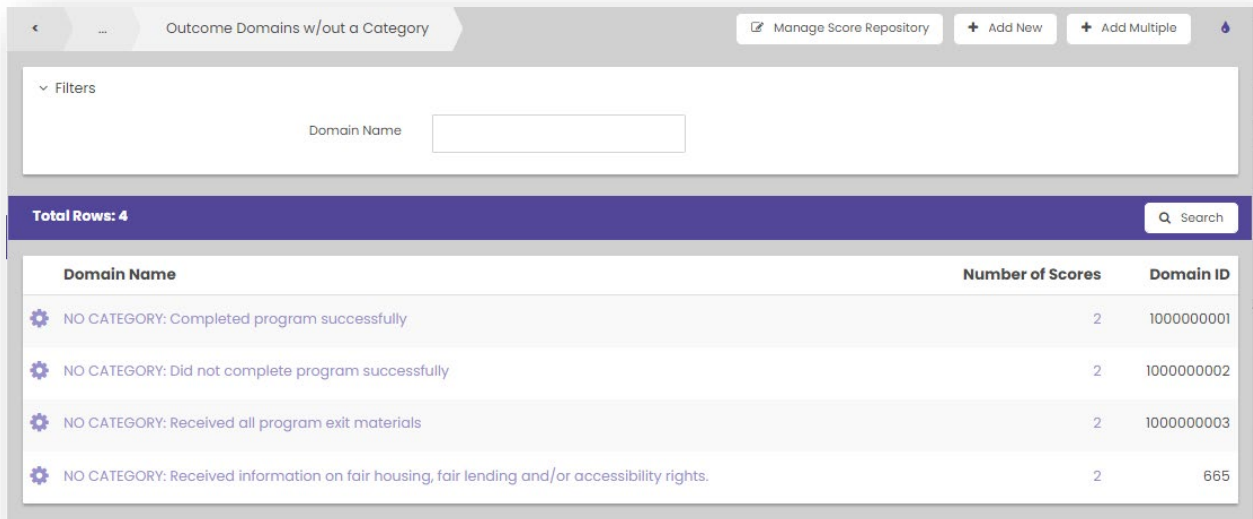
Domain Name	Sort Order	Domain ID
Abusive Behavior - Substance		
<input checked="" type="checkbox"/> Used Prescription Drugs Inappropriately		1000000007 <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Used Drugs		1000000006
<input checked="" type="checkbox"/> Smoked or Used Tobacco Products		1000000005
Other		
<input checked="" type="checkbox"/> Referral for Services		116

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

Additionally, if a domain is created after 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.

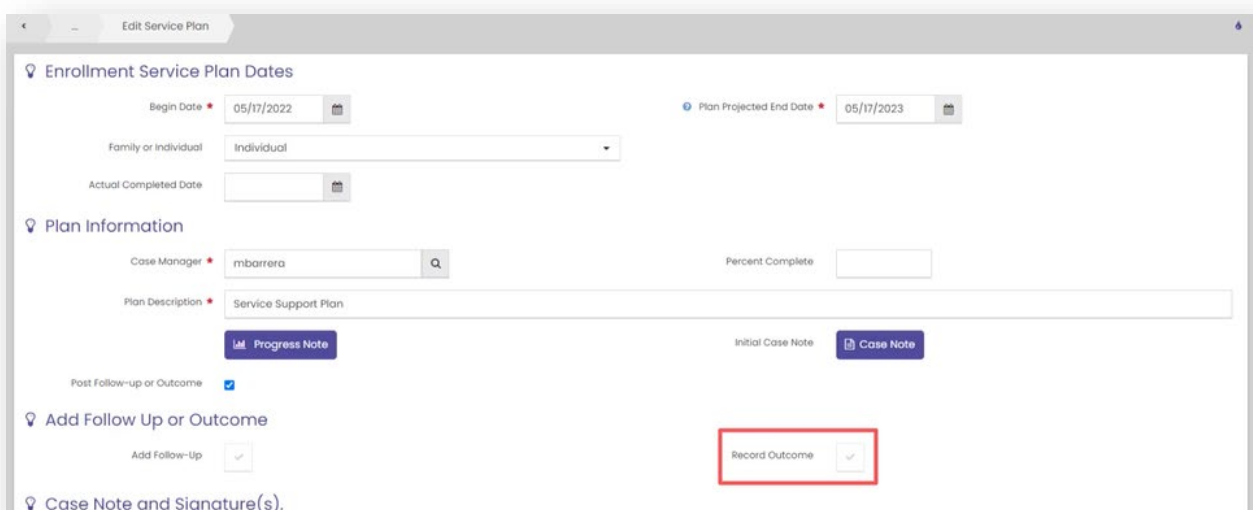
## Outcomes Without Categories

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



Domain Name	Number of Scores	Domain ID
NO CATEGORY: Completed program successfully	2	1000000001
NO CATEGORY: Did not complete program successfully	2	1000000002
NO CATEGORY: Received all program exit materials	2	1000000003
NO CATEGORY: Received information on fair housing, fair lending and/or accessibility rights.	2	665

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.



**Enrollment Service Plan Dates**

Begin Date: 05/17/2022 Plan Projected End Date: 05/17/2023

Family or Individual: Individual

Actual Completed Date:

**Plan Information**

Case Manager: mbarrera

Plan Description: Service Support Plan

Percent Complete:

Progress Note Initial Case Note Case Note

Post Follow-up or Outcome: ☒

**Add Follow Up or Outcome**

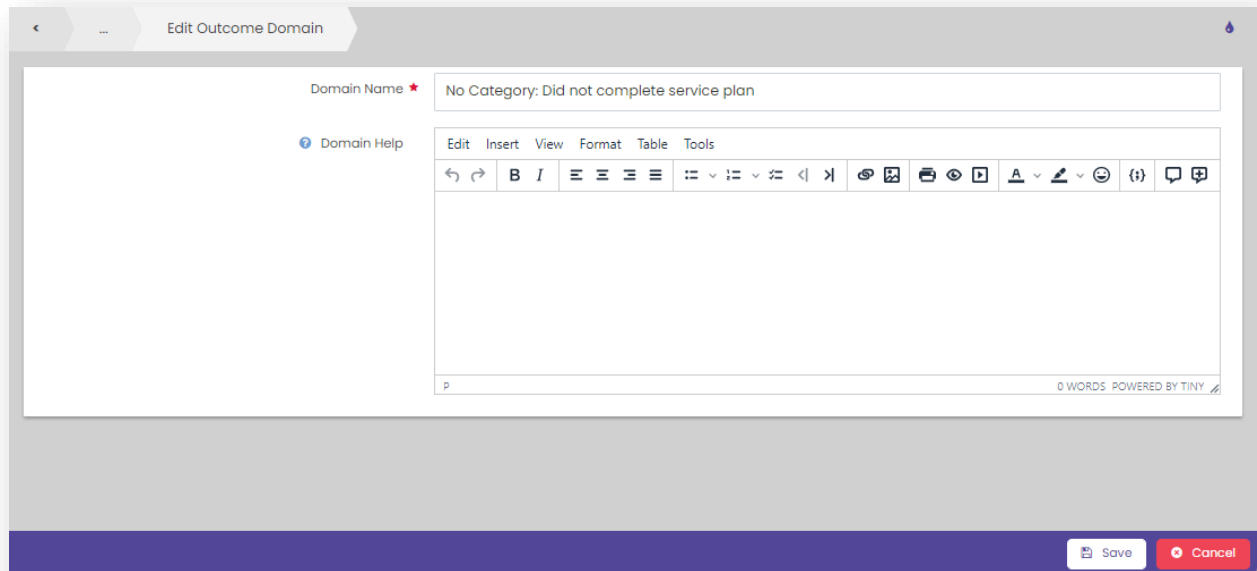
Add Follow-Up: ☐

Record Outcome: ☒

**Case Note and Signature(s).**

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.



Domain Name ★ No Category: Did not complete service plan

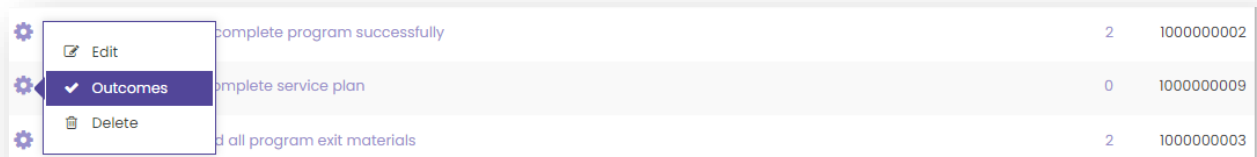
Domain Help

Edit Insert View Format Table Tools

0 WORDS POWERED BY TINY

Save Cancel

Link Outcomes from the action gear.



complete program successfully	2	1000000002
complete service plan	0	1000000009
all program exit materials	2	1000000003

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.

The screenshot shows a web form titled "Add/Edit Program". It contains several sections:

- Program Name:** A text input field containing "Adult Education".
- Organizations:** A section with two radio buttons labeled "All" and "None". Below them is a dropdown menu labeled "Choose Options..." with a list of organizations: "A Place for Change" and "Alliance for Community Trust".
- Categories:** A dropdown menu labeled "Choose Options..." with a list of categories: "Accept Referrals" and "Program Eligibility".
- Outcome Domains:** A section with a red box around the label "Outcome Domains" and a dropdown menu labeled "Choose Options..." with a list of domains: "3. Are you unable to stop abusing drugs", "3. Do you ever use alcohol or drugs while", "3. How often do you have six or more dri", and "3. Trouble falling asleep, staying asleep".

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.


# 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.

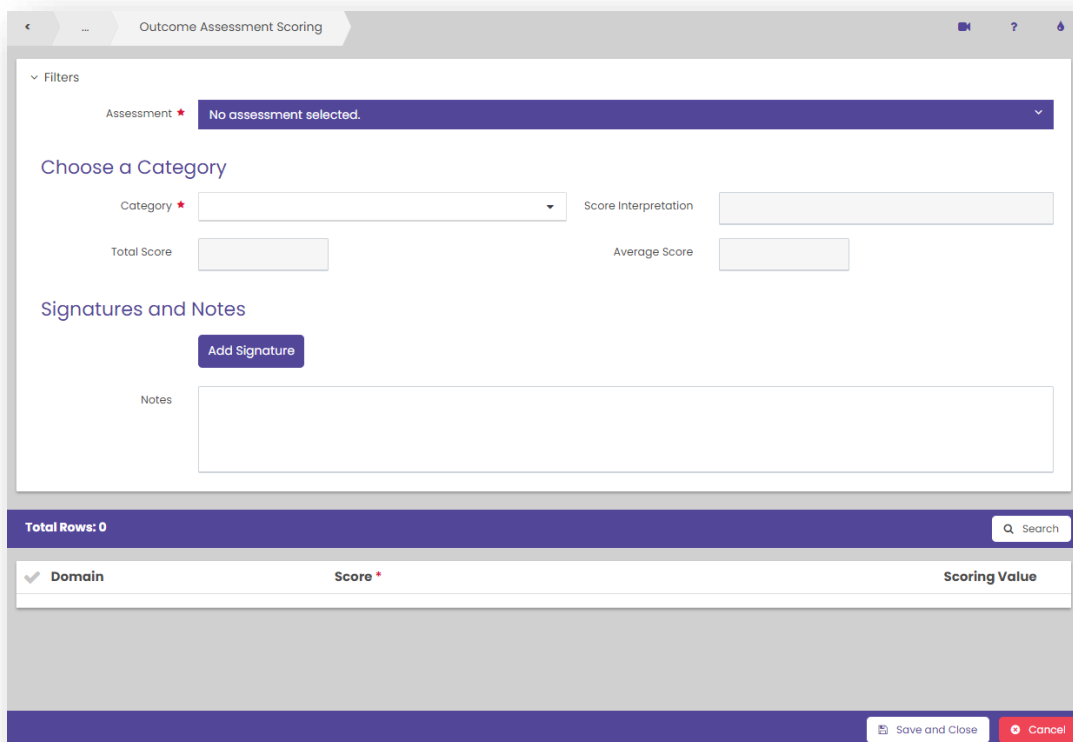
Access Assessments on the Case Management tab.

## 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.



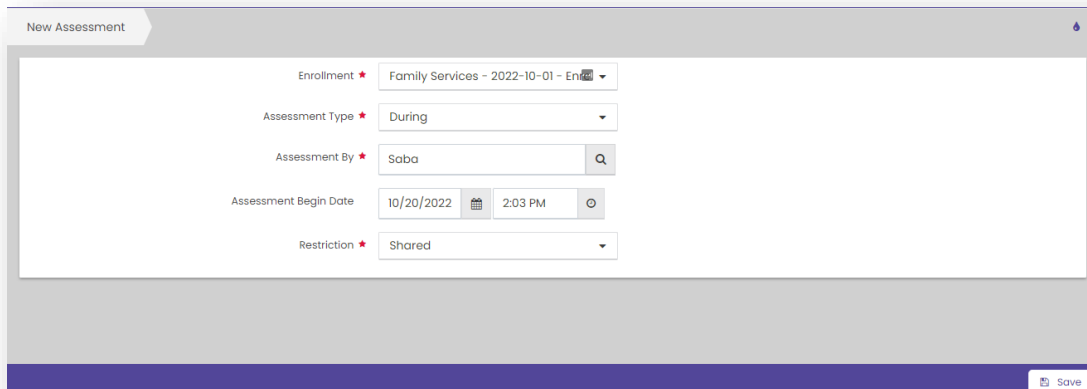
The screenshot shows a web application window titled "Outcome Assessment Scoring". The interface includes a "Filters" section with an "Assessment" dropdown menu currently set to "No assessment selected.". Below this is a "Choose a Category" section with a "Category" dropdown menu, a "Score Interpretation" text input field, a "Total Score" text input field, and an "Average Score" text input field. The "Signatures and Notes" section contains an "Add Signature" button and a "Notes" text area. At the bottom, there is a table with the header "Total Rows: 0" and a search bar. The table has columns for "Domain", "Score", and "Scoring Value". The table is currently empty. At the bottom right, there are "Save and Close" and "Cancel" buttons.

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

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.

Now you can record the outcomes on the assessment below.

Outcome Assessment Scoring

Filters

Assessment \* 10/20/2022 - Family Services - During

Choose a Category

Category \* Abusive Behavior - Substance

Total Score

Score Interpretation

Average Score

Signatures and Notes

Add Signature

Notes

Header/Question

Instructions/Header

Edit Insert View Format Table Tools

During the past month, how often have you:

8 WORDS POWERED BY TINY

Total Rows: 4

Search

Domain	Score *	Scoring Value
Abusive Behavior - Substance		
Consumed Alcohol		
Smoked or Used Tobacco Products		
Used Drugs		
Used Prescription Drugs Inappropriately		

SUM : 0.00

Save and Close Cancel

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.

Choose a Category

Category \*

--Nothing--

Abusive Behavior - Substance

Catholic Charities

Education

Employment

Housing

Other

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.

Domain	Score *	Scoring Value
Consumed Alcohol	<input checked="" type="checkbox"/> Never <input type="checkbox"/> Once or Twice <input type="checkbox"/> 5-15 Times <input type="checkbox"/> Nearly every day	
Smoked or Used Tobacco Products	<input checked="" type="checkbox"/> Never <input type="checkbox"/> Once or Twice <input type="checkbox"/> 5-15 Times <input type="checkbox"/> Nearly every day	
Used Drugs	<input checked="" type="checkbox"/> Never <input type="checkbox"/> Once or Twice <input type="checkbox"/> 5-15 Times <input type="checkbox"/> Nearly every day	

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

Domain	Score *	Scoring Value
Consumed Alcohol	<input checked="" type="checkbox"/> Never <input checked="" type="checkbox"/> Once or Twice <input type="checkbox"/> 5-15 Times <input type="checkbox"/> Nearly every day	2.00
Smoked or Used Tobacco Products	<input checked="" type="checkbox"/> Never <input type="checkbox"/> Once or Twice <input type="checkbox"/> 5-15 Times <input checked="" type="checkbox"/> Nearly every day	4.00
Used Drugs	<input checked="" type="checkbox"/> Never <input checked="" type="checkbox"/> Once or Twice <input type="checkbox"/> 5-15 Times <input type="checkbox"/> Nearly every day	2.00

SUM : 10.00



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

Signatures and Notes

Add Signature

Date 10/20/2022 4:40:40 PM  
Name of Signatory Saba Vega  
Signatory Role/Title Case Manager

Delete

Notes

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

Click **SAVE AND CLOSE**.

Outcome Assessment Summary

+ Add New

Total Rows: 1

Search

Assessment Date	Program	Assessment Event	Total Score	Average Score	Assessment ID
10/20/2022	Family Services	During	10.00	2.50	24538

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.

Outcome Assessment Summary					
Total Rows: 3					
Assessment Date	Program	Assessment Event	Total Score	Average Score	Assessment ID
Employment					
10/20/2022	Family Services	During	8.00	1.00	24538
Abusive Behavior - Substance					
10/20/2022	Family Services	During	20.00	2.50	24538
Catholic Charities					
10/20/2022	Family Services	During	6.00	6.00	24537
1					
Results Per Page: 50					Done

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.

Choose a Category

Category \*

Abusive Behavior - Substance

Score Interpretation

Minor - Eligible for Counseling Only

Total Score

8

Average Score

2

## 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.

Outcome Assessment								
Total Rows: 9								
	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.

Add Assessment Outcomes		
<div> <div>Filters</div> <div> Assessment <span>★</span> 1/15/2023 - Family Services - At Exit </div> </div>		
<div>Total Rows: 9</div> <div> <div> <div>Outcome Date *</div> <div>10/20/2022</div> <div>📅</div> </div> <div> <div>Outcome Domain</div> <div>Income</div> </div> <div> <div>Outcome Score *</div> <div> <input checked="" type="checkbox"/> No income  <input checked="" type="checkbox"/> Inadequate income and/or spontaneous or inappropriate spending.  <input checked="" type="checkbox"/> Can meet basic needs with subsidy; appropriate spending.  <input checked="" type="checkbox"/> Can meet basic needs and manage debt without assistance.  <input checked="" type="checkbox"/> Income is sufficient, well managed; has discretionary income and is able to save.  <input checked="" type="checkbox"/> Don't Know  <input checked="" type="checkbox"/> Refused </div> </div> </div>		
<div> <div>✓</div> <div>Employment</div> </div>		
<div> <div>✓</div> <div>Employment Placement</div> </div>		
<div> <div>✓</div> <div>Employment Retention</div> </div>		
<div>Save</div>		<div>Cancel</div>

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

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



# 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.

Outcome Survey Scoring

Filters

Survey Date \* 10/20/2022

Program \* Adult Education

Choose a Category

Category \* Education

Score Interpretation

Total Score

Average Score

Signatures and Notes

Add Signature

Notes

Total Rows: 6

Domain	Score *	Scoring Value
Education		
Income	<ul style="list-style-type: none"><li>✓ No income</li><li>✓ Inadequate income and/or spontaneous or inappropriate spending.</li><li>✓ Can meet basic needs with subsidy; appropriate spending.</li><li>✓ Can meet basic needs and manage debt without assistance.</li><li>✓ Income is sufficient, well managed; has discretionary income and is able to save.</li><li>✓ Don't Know</li><li>✓ Refused</li></ul>	1.00
Children's Education	<ul style="list-style-type: none"><li>✓ One or more eligible children not enrolled in school</li><li>✓ All eligible children enrolled in school, but one or more children not attending classes</li><li>✓ Enrolled in school, but one or more children only occasionally attending classes</li><li>✓ Enrolled in school and attending classes most of the time</li><li>✓ All eligible children enrolled and attending on a regular basis and making progress</li><li>✓ Don't Know</li><li>✓ Refused</li></ul>	5.00
Adult Education	<ul style="list-style-type: none"><li>✓ Literacy problems and/or no high school diploma/GED are serious barriers to employment</li><li>✓ Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment</li><li>✓ Has high school diploma/GED</li><li>✓ Needs additional education/training to improve employment situation and/or to resolve literacy problems to where they are able to function effectively in society</li><li>✓ Has completed education/training needed to become employable. No literacy problems</li><li>✓ Don't Know</li><li>✓ Refused</li></ul>	1.00
SUM : 7.00		Education : 7.00

Save and Close Cancel

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

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

Outcome Surveys				
+ Add New				
Search				
Survey Date	Total Sum	Total Average	Score Interpretation	SurveyID
Education				
10/20/2022	7.0000	2.3333		52

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.

Outcomes Summary - All				
Total Rows: 14				
Outcome Date	Outcome	Score Short Description	Scoring Value	Outcome Type
1/3/2022	Consumed Alcohol	5-15 Times	3.00	Assessment
1/3/2022	Smoked or Used Tobacco Products	5-15 Times	3.00	Assessment
1/3/2022	Used Drugs	5-15 Times	3.00	Assessment
1/3/2022	Used Prescription Drugs Inappropriately	Once or Twice	2.00	Assessment
1/3/2022	Adult Education (Self Sufficiency Matrix)	High school diploma or G.E.D	6.00	Self Sufficiency Matrix
1/3/2022	Access to Services (Self Sufficiency Matrix)	Knows what they need, know how to learn about the services available to meet their need; but has a limited number of barriers that discourage access to services or service alternatives.	5.00	Self Sufficiency Matrix
1/3/2022	Family Relations (Self Sufficiency Matrix)	Family does not relate well - potential neglect	3.00	Self Sufficiency Matrix
5/17/2022	Employment	Temporary, part-time or seasonal; inadequate pay;	1.00	Goal
4/27/2022	Income	Basic needs with assistance	1.00	Enrollment Service Plan

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**.

**Edit Service Plan**

**Enrollment Service Plan Dates**

Begin Date ★ 10/20/2022

Plan Projected End Date ★ 10/20/2023

Family or Individual Individual

Actual Completed Date

**Plan Information**

Case Manager ★ Saba

Percent Complete

Plan Description ★ Service Support Plan

Progress Note

Initial Case Note

Case Note

Post Follow-up or Outcome ☒

**Add Follow Up or Outcome**

Add Follow-Up ☐

Record Outcome ☐

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

**Post Plan Outcomes**

Outcome Date ★ 10/20/2022

Outcome ★

Score ★

- Nothing--
- Access to Services (Self Sufficiency Matrix)
- Adult Education (Self Sufficiency Matrix)
- Consumed Alcohol
- Employment
- Employment Placement
- Employment Retention

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



The screenshot shows a web form titled "Post Plan Outcomes". It contains three input fields: "Outcome Date" with a date picker set to "10/20/2022", "Outcome" with a dropdown menu showing "Consumed Alcohol", and "Score" with a dropdown menu showing "Once or Twice". At the bottom right, there are two buttons: "Update" (in a purple box) and "Cancel" (in a white box with a grey border).

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.



# 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.

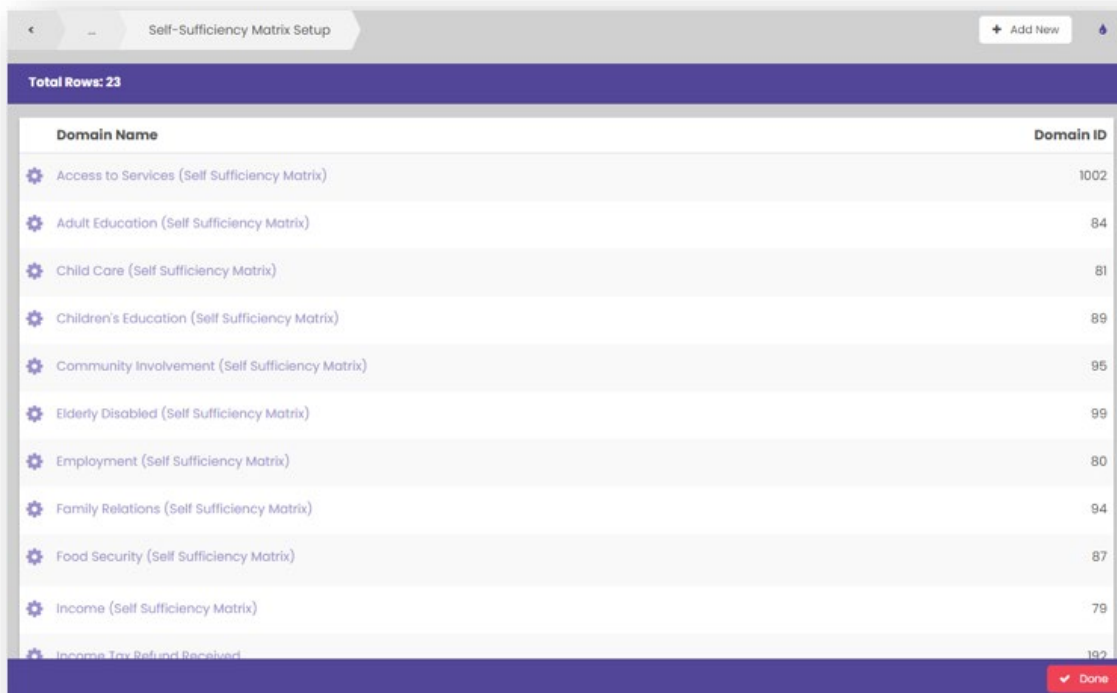
## Self-Sufficiency Matrix

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

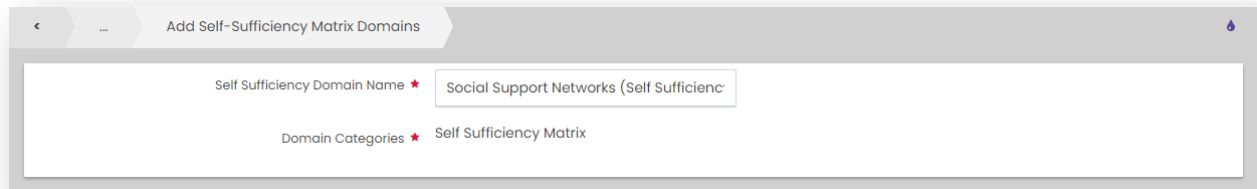


The screenshot shows the 'Self-Sufficiency Matrix Setup' interface. At the top, there is a breadcrumb trail and a tab labeled 'Self-Sufficiency Matrix Setup'. A '+ Add New' button is in the top right corner. Below the header, a purple bar indicates 'Total Rows: 23'. The main content is a table with two columns: 'Domain Name' and 'Domain ID'. The table lists various domains, each with a gear icon for editing. The domains listed are: Access to Services (Self Sufficiency Matrix) with ID 1002, Adult Education (Self Sufficiency Matrix) with ID 84, Child Care (Self Sufficiency Matrix) with ID 81, Children's Education (Self Sufficiency Matrix) with ID 89, Community Involvement (Self Sufficiency Matrix) with ID 95, Elderly Disabled (Self Sufficiency Matrix) with ID 99, Employment (Self Sufficiency Matrix) with ID 80, Family Relations (Self Sufficiency Matrix) with ID 94, Food Security (Self Sufficiency Matrix) with ID 87, Income (Self Sufficiency Matrix) with ID 79, and Income Tax Refund Received with ID 192. A red 'Done' button is at the bottom right of the table.

Domain Name	Domain ID
Access to Services (Self Sufficiency Matrix)	1002
Adult Education (Self Sufficiency Matrix)	84
Child Care (Self Sufficiency Matrix)	81
Children's Education (Self Sufficiency Matrix)	89
Community Involvement (Self Sufficiency Matrix)	95
Elderly Disabled (Self Sufficiency Matrix)	99
Employment (Self Sufficiency Matrix)	80
Family Relations (Self Sufficiency Matrix)	94
Food Security (Self Sufficiency Matrix)	87
Income (Self Sufficiency Matrix)	79
Income Tax Refund Received	192

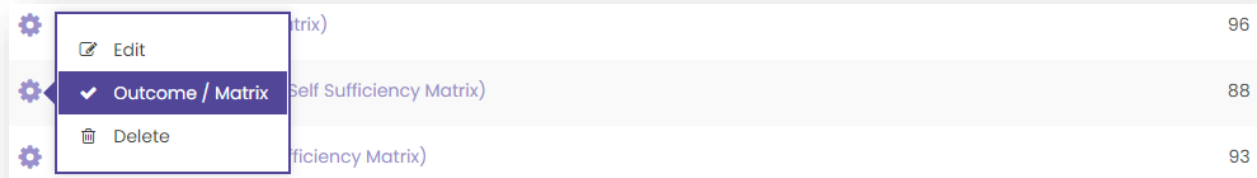
Many baseline matrices exist; however, it is simple to create new ones.

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



The screenshot shows a web form titled "Add Self-Sufficiency Matrix Domains". It has two main input fields: "Self Sufficiency Domain Name" with a red asterisk, containing the text "Social Support Networks (Self Sufficiency Matrix)", and "Domain Categories" with a red asterisk, containing the text "Self Sufficiency Matrix".

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.

## 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.

Setup Program Self-Sufficiency Matrix

Total Rows: 23

Outcome Domain	Domain ID
✓ Access to Services (Self Sufficiency Matrix)	1002
✓ Adult Education (Self Sufficiency Matrix)	84
✓ Child Care (Self Sufficiency Matrix)	81
✓ Children's Education (Self Sufficiency Matrix)	89
✓ Community Involvement (Self Sufficiency Matrix)	95
✓ Food Security (Self Sufficiency Matrix)	87
✓ Health Care Services (Self Sufficiency Matrix)	85
✓ Housing (Self Sufficiency Matrix)	83
✓ Income (Self Sufficiency Matrix)	79
✓ Income Tax Refund Received	192

Save Cancel

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

## Self Sufficiency Matrix Assessment

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

✓ Date *	Sufficiency Domain	Sufficiency Score *
✓ 10/20/2022	Adult Education (S)	<ul style="list-style-type: none"><li>✓ Reading, writing, and basic math skills absent OR Less than 8th grade education</li><li>✓ Reading, writing, and basic math skills present, possible TABE, no high school diploma or G.E.D</li><li>✓ High school diploma or G.E.D</li><li>✓ Post high school vocational education, non-college business, or technical or professional training, or some college credits</li><li>✓ Post-Secondary degree: Bachelors or Associates</li><li>✓ Post-Secondary degree: Masters or Doctorate</li></ul>
✓ 10/20/2022	Social Support Net	<ul style="list-style-type: none"><li>✓ Has no social support system available, is isolated and at health and safety are at risk because of an inability to assure that basic needs are met</li><li>✓ Reports minimal informal support networks available to address basic needs and tangible support (meal preparation, transportation to doctor,). May not acknowledge the need for a secure social support network</li><li>✓ Has limited support network but is making effective use of available community service resources and has someone available to care for basic need and most of their emotional/informational needs. Beginning to establish informal social supports to increase social interaction</li><li>✓ Individual/ household has effective social support system including both informal and professional resources.</li><li>✓ Individual has well-developed, multi-faceted support network. Individual is able to provide as well as accept support from others</li></ul>

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.

Self-Sufficiency Matrix						
Total Rows: 2						
Outcome Date	Program	Assessment Event	Outcome Domain	Outcome Score	Value	Assessment ID
1/15/2023						
10/20/2022 12:00:00 AM	Family Services	At Exit	Adult Education (Self Sufficiency Matrix)	Post High School training or some College	8.00	24539
10/20/2022 12:00:00 AM	Family Services	At Exit	Social Support Networks (Self Sufficiency Matrix)	Limited network, but uses community services	6.00	24539
					AVG : 7.00	

## 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**.

Program Outcome Summary Report

Scheduled Reports

Save Report Parameters

Save

Enter the end date of the year.

End Date

12/31/2022

Report by Count/Score

Count

Organization(s)

All

None

Some

Alliance for Community Trust

Search

Close

Domain(s)

All

None

Some

Program(s)

All

None

Some

Adult Education

Community Share

Family Services

Search

Close

Report

Done

44

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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.

