

# MSI Progress Updates Due Report

The MSI Progress Updates Due report shows Heads of Households who have an open entry to Multnomah Stability Initiative (MSI), calculated due dates for Progress Updates, Progress Updates that have been entered in ServicePoint, Exit Progress Update data, and a summary of Progress Updates Due vs. Progress Updates entered into the system.

**Folder path in ART:** Public Folder➤Multnomah County➤Reports by Program➤Multnomah Stability Initiative➤**MSI\_Progress Update Due\_v3\_6.12.2019** (this date may change if report gets updated)

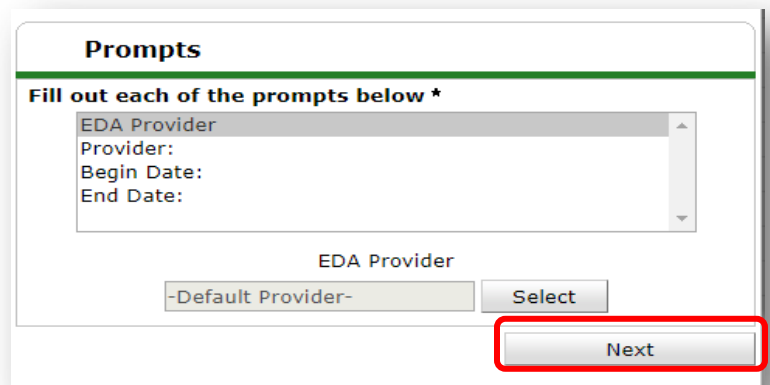
**Schedule the report with the following prompts:**

EDA Provider: *Skip this prompt*

Provider: *Use the Select button to remove other agencies*

Being Date: *First date of the timeframe you want to review*

End Date: *One day after the end of the timeframe you want to review. Set far into the future if you want to set this report up on a recurring basis*



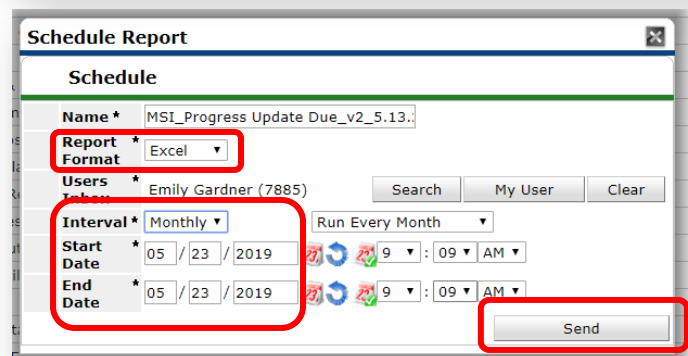
The 'Prompts' dialog box contains the following fields and controls:

- Header: Prompts
- Instruction: Fill out each of the prompts below \*
- Fields: EDA Provider (dropdown), Provider: (text), Begin Date: (text), End Date: (text)
- Buttons: EDA Provider, -Default Provider-, Select, Next (highlighted with a red box)

**Click Next**

- Choose Excel as Report Format
- Set Interval (one time or recurring) – for recurring reports, use the Begin and End Date fields below to establish how long you'd like to receive the reports for.

**Click Send** – report will arrive in your ART Inbox folder

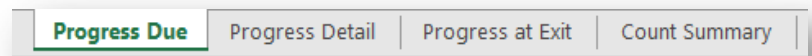


The 'Schedule Report' dialog box contains the following fields and controls:

- Header: Schedule Report
- Section: Schedule
- Fields: Name \* (MSI\_Progress Update Due\_v2\_5.13..), Report Format \* (Excel, highlighted with a red box), Users Taken \* (Emily Gardner (7885)), Interval \* (Monthly, highlighted with a red box), Start Date \* (05 / 23 / 2019, highlighted with a red box), End Date \* (05 / 23 / 2019, highlighted with a red box)
- Buttons: Search, My User, Clear, Send (highlighted with a red box)

**This report has 4 tabs:**

- **Progress Due:** Shows Entry Date with calculated Progress Update due dates every 6 months, for up to 3 years of program enrollment. Also shows Exit Date and Exit Progress Update due dates.
- **Progress Detail:** Shows Progress Updates that have been entered. One row for each Progress Update interval (Entry, 6-month, 12-month, etc).
- **Progress at Exit:** Shows Exit Progress Updates that have been entered.
- **Count Summary:** Shows a tally of how many Progress Updates are due vs. how many Progress Updates have been entered into ServicePoint.



## Reading the MSI Progress Updates Due Report

Use the **COUNT SUMMARY tab** to guide your work.

Client Uid	Relationship to HoH	Population at Entry	Entry Date	Exit Date	# Due	# Completed?
12345	Self (head of household)	Adult	8/27/2018	12/31/2018	1	1
23456	Self (head of household)	Adult	8/21/2018	3/31/2019	2	0
34567	Self (head of household)	Adult	2/7/2019	4/30/2019	1	1
45678	Self (head of household)	Adult	8/28/2018			

Compare the # Due column to the # Completed? column. Ideally, the two columns should match.

- If the # Due is more than the # Completed, you need to complete Progress Updates with those clients and get them entered into ServicePoint.

Use the **PROGRESS DUE tab** to see which clients have Progress Updates due each month; Columns L-Q display Progress Update due dates for all clients.

The screenshot shows the Excel interface with the 'Data' tab selected. The 'Filter' icon in the ribbon is highlighted with a red box. A dropdown menu is open for the '6-Month Progress Update Due' column, showing a list of dates from 10/12/19 to 10/21/19. The 'Select All' checkbox is unchecked, and the specific dates are checked. The spreadsheet below shows a list of clients with their due dates in column L.

Provider	Entry Exit Uid	Household Uid	Client Uid	Relationship to	6-Month Progress Update Due	12-Month Progress Update Due
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1749713	127151	251941	Self (head of household)	9/20/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1641104	189226	371499	Self (head of household)	3/19/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1659650	239802	468679	Self (head of household)	4/24/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1896677	256580	500100	Self (head of household)	4/17/20	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1821347	498211	516463	Self (head of household)	8/20/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1576585	265478	517097	Self (head of household)	12/6/18	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1602199	268049	521934	Self (head of household)	12/29/18	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1659386	471882	540913	Self (head of household)	4/23/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1833319	321364	618005	Self (head of household)	1/30/20	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1828705	329668	640656	Self (head of household)	1/15/20	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1665964	397404	660870	Self (head of household)	4/23/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1781419	492266	662011	Self (head of household)	11/16/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1887595	511638	665680	Self (head of household)	4/1/20	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1625688	460395	680338	Self (head of household)	2/7/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1896779	405413	723563	Self (head of household)	4/14/20	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1671985	390308	744471	Self (head of household)	5/16/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1636701	398951	754263	Self (head of household)	2/9/19	
IRCO: Multnomah Stability Initiative (MSI) - SP(5025)	1290597	402249	770075	Self (head of household)	3/26/17	9/27/17

Set a filter and click the arrow at the top of one column between Columns L-Q. Uncheck "Select All", then choose the specific days and months that you want to look at.\*

Go through each column from L-Q and build a list of all clients that have a Progress Update due for a specific month.

\*This does NOT delete your data, it just limits the view of the data to only folks who have a Progress Update due within a specific month.

**The Progress Detail tab** - Shows what you have already entered for each household. It can be used to review progress for an individual household.

**The Progress at Exit tab** - Shows only the responses to the Progress Update questions that are embedded in the program exit.