

## Completing the EPIS Center Reporting Tool for PCCD-funded Grants Using Matchforce Reports

The latest data collection and analysis tool from Penn State EPIS is designed to use two reports from the Matchforce match management database. These instructions will direct you on where to find these resources in Matchforce and how to further customize the reports to reflect your agency's results.

### Step 1. Locate the reports in the public reports folder on Matchforce.

From the Reports screen, click on the Public Reports folder. Type "PCCD-EPIS" in the search bar to locate the two reports you will need to complete the data collection tool.

The screenshot shows the Matchforce Reports interface. At the top, there is a search bar containing "PCCD-EPIS". Below the search bar, there are buttons for "New Report", "New Report (Salesforce Classic)", and "New Folder". The main area displays a list of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are visible:

Report Name	Description	Folder	Created By	Created On	Subscribed
PCCD-EPIS Surveys Report	Annual/EOSY COS/YOS and SOR surveys due and completed for previous quarter, filtered by Affiliated Active Grant (grant tag)	Public Reports	Johnna Palm	5/31/2022, 4:14 PM	
PCCD-EPIS Match History	Provides all matches active at any point during the Closure Date (Begin Date) time period and Match Activation Date (End Date) time period determined by the filters for the length of the grant period. Filtered for Affiliated Active Grant (grant tag).	Public Reports	Johnna Palm	5/31/2022, 4:11 PM	

On the left sidebar, the "Public Reports" folder is highlighted with a red circle.

Click on PCCD-EPIS Survey Reports.

### Step 2. Adjust the report filters to reflect your agency's grant.

This report is formulated to report all C/YOS and child SOR surveys due during the previous quarter. The only filter that will need to be customized is the "Affiliated Active Grant" filter. Click on the funnel icon at the top of the report and change the Affiliated Active Grant filter to your agency's match tag for your PCCD grant.

The screenshot shows the "PCCD-EPIS Surveys Report" in Matchforce. At the top right, there is a funnel icon (filter) circled in red. Below the report title, there are statistics: "Total Records: 22" and "Total Completed: 6". The main table displays survey data with columns: Survey: Record Type, Program Type, Due Date, Completed, and Affiliated Active Grants. A red arrow points to the "Filters" panel on the right side of the screen. The filters panel is titled "Filters" and has a "Close Filter Panel" button. It contains several filter settings:

- Show Me: All accounts
- Last Activity: All Time
- INCLUDE ROWS MATCHING: 1 AND 2 AND (3 OR 4)
- 1 Due Date equals LAST QUARTER
- 2 Affiliated Active Grants contains BS VII
- 3 SOR Type equals Annual, EOSY
- 4 COS/YOS Type equals EOSY, Annual

**Step 3. Complete the survey fields on the Process PMs tab of the Penn State EPIS data collection tool.**

Click on the Process PM tab. You will be entering information for the fields highlighted in yellow. All other fields are auto-populated from Match History Data.

Process Performance Measures							BIG BROTHERS BIG SISTERS			
Agency	Insert Agency Name Here				Grant Number	Insert Grant Number				
Contact	Insert Contact Name Here				Grant Start Date	1/1/2021				
Email	Insert Email Here				Grant Year	Year 1: Jan 2022-Dec 2022				
Phone	Insert Phone Number Here				County	Insert County Here				
Quarter 1	Quarter 2	Quarter 3	Quarter 4		Location	Insert Location Here				
Jan-Mar 2021	Apr-Jun 2021	Jul-Sep 2021	Oct-Dec 2021	Cumulative	Performance Measure	PM #				
0	0				Number of YOS Surveys Due During the Reporting Quarter	P1				
					Number of YOS Surveys Completed During the Reporting Quarter	P2				
					Number of COS Surveys Due During the Reporting Quarter	P3				
					Number of COS Surveys Completed During the Reporting Quarter	P4				
					Number of SOR Surveys Due During the Reporting Quarter	P5				
					Number of SOR Surveys Completed During the Reporting Quarter	P6				
The following section is automatically calculated by reporting quarter using Match History Data										
15	19			34	Number of New Matches Made	P7				
44	9			53	Number of Matches Ended	P8				
The following section is automatically calculated using all records associated with the grant number from the Match History Data										
				204	Number of Matches Served - Community	P9	Total of all site-based and site-based facilitated matches associated with this grant			
				246	Number of Matches Served - Site					
				91	Match Retention: Reached 1 year					
				53	Match Retention: Reached 2 years	P12				
				45	Match Retention: Reached 3 years	P13				
				43	Match Retention: Reached 4 years	P14				
				69	Match Retention: Reached 5 or more years	P15				
Version 3 06-01-2022										

Use the PCCD-EPIS Surveys Report from Matchforce to complete PM# 1-6. PM# 1, 3, and 5 are the sum of both open and closed reports; PM# 2, 4, and 6 are completed/closed reports only.

Survey: Record Type	Program Type	Due Date	Completed	Affiliated Active Grants
<input type="checkbox"/> SOR (Child) (Strength of Relationship) (7)	Community (7)	1/23/2022	<input type="checkbox"/>	VPP (PCCD); BS VII
		3/21/2022	<input type="checkbox"/>	VPP (PCCD); BS VII
		3/29/2022	<input type="checkbox"/>	SEPA; BS VII
		1/21/2022	<input type="checkbox"/>	SEPA; BS VII
		1/2/2022	<input type="checkbox"/>	PCCD 13; SEPA; BS VII
		1/24/2022	<input type="checkbox"/>	BS VII
		1/29/2022	<input type="checkbox"/>	VPP (PCCD); BS VII
	<b>Subtotal</b>		0	
<b>Subtotal</b>			0	
<input type="checkbox"/> SOR (Child)- Closed (4)	Community (4)	3/9/2022	<input checked="" type="checkbox"/>	SEPA; BS VII
		1/4/2022	<input checked="" type="checkbox"/>	BS VII
		2/26/2022	<input checked="" type="checkbox"/>	2013-2014 OJJDP JJ; BS VII
		2/13/2022	<input checked="" type="checkbox"/>	VPP (PCCD); BS VII
	<b>Subtotal</b>		4	
<b>Subtotal</b>			4	

Sections highlighted in green are added together to answer PM #5. Section highlighted in blue answers PM #6.

## Step 4. Retrieve Match History data from Matchforce

From the Matchforce Reports screen, click on the Public Reports folder. Type "PCCD-EPIS" in the search bar to locate the two reports you will need to complete the data collection tool. (or click the back arrow button to return you to your original search list). Click on PCCD-EPIS Match History.

Big Brothers Big Sisters

Search...

Home Chatter Contacts Accounts Enrollments Matches Match Support Contacts Reports More

Reports

Recent

4 items

Q PCCD-EPIS

New Report New Report (Salesforce Classic) New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent						
Created by Me	PCCD-EPIS Surveys Report	Annual/EOSY COS/YOS and SOR surveys due and completed for previous quarter, filtered by Affiliated Active Grant (grant tag)	Public Reports	Johnna Palm	5/31/2022, 4:14 PM	
Private Reports						
Public Reports						
All Reports						
FOLDERS	PCCD-EPIS Match History	Provides all matches active at any point during the Closure Date (Begin Date) time period and Match Activation Date (End Date) time period determined by the filters for the length of the grant period. Filtered for Affiliated Active Grant (grant tag).	Public Reports	Johnna Palm	5/31/2022, 4:11 PM	
All Folders						
Created by Me						
Shared with Me						
FAVORITES	PCCD-EPIS Surveys Report	Annual/EOSY COS/YOS and SOR surveys due and completed for previous quarter, filtered by Affiliated Active Grant (grant tag)	Private Reports	Johnna Palm	5/26/2022, 2:38 PM	
All Favorites						

You will need to adjust three filters for this report: Closure Date, Match Activation Date, and Affiliated Active Grant.

Big Brothers Big Sisters

Search...

Home Chatter Contacts Accounts Enrollments Matches Match Support Contacts Reports More

Report: Matches with Contacts and Programs

**PCCD-EPIS Match History**

Provides all matches active at any point during the Closure Date (Begin Date) time period and Match Activation Date (End Date) time period determined by the filters for the length of the grant per...

Total Records: 95

	Match ID	Primary Big: Contact ID	Little: Contact ID	Little: Referral Detail: Inquiry Source Name	Match Activation Date	Closure I
1	a1v2J0000027T8M	0032J00003PWDwr	0032J00003PMtoB	School	9/12/2009	
2	a1v2J0000027bXL	0032J00003PZZrp	0032J00003PMn13	Self - Self	5/15/2010	4,
3	a1v2J0000027rpp	0032J00003PSPiW	0032J00003PNHN7	Self - Always Known	6/9/2010	7,
4	a1v2J0000028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor	5/31/2011	9,
5	a1v2J0000028sln	0032J00003PWDxQ	0032J00003PLoN7	School	10/20/2011	
6	a1v2J0000027KE1	0032J00003PSD4w	0032J00003PPRWZ	Therapist/Counselor	9/8/2012	
7	a1v2J0000028th6	0032J00003PStGA	0032J00003PMtpT	School	11/8/2012	1,
8	a1v2J0000027Vs	0032J00003PZZsM	0032J00003PPXrj	Self - Self	12/7/2012	1,
9	a1v2J0000028sH7	0032J00003PVkld	0032J00003PNesM	School	12/18/2012	
10	a1v2J0000027Vde	0032J00003PVkln	0032J00003PMtoe	Relative	1/12/2013	5,
11	a1v2J0000027hQ7	0032J00003PRwVK	0032J00003PR2aP	Relative	9/18/2013	
12	a1v2J0000027wuW	0032J00003PV0WR	0032J00003PN2Jm	Self - Self	9/24/2013	
13	a1v2J0000029hRy	0032J00003PUJdJ	0032J00003POmtB	School	11/13/2013	
14	a1v2J0000027ipA	0032J00003PRTAJ	0032J00003PM353	Self - Self	11/10/2014	
15	a1v2J0000027nny	0032J00003PXgN3	0032J00003PMW9p	Self - Self	11/11/2014	5,
16	a1v2J0000027gCX	0032J00003PTMYa	0032J00003POmtQ	School	11/18/2014	
17	a1v2J0000028Vgd	0032J00003PZZt3	0032J00003POPWA	Web Link - Agency Website	12/15/2014	
18	a1v2J0000027kH0	0032J00003PRy1I	0032J00003PPAgt	Web Link - Agency Website	12/30/2014	
19	a1v2J0000028u8o	0032J00003PRy1H	0032J00003PPAh4	School	1/30/2015	

Filters

Show Me: All matches

Match Activation Date: All Time

INCLUDE ROWS MATCHING

1 AND 2 AND (3 OR 4) AND (5 AND 6) AND 7

- Record Exclude equals No Preference, ""
- Stage equals Active, Pending Closure, Closed
- Closure Date greater or equal Jul 1, 2021
- Closure Date equals ""
- Match Activation Date less or equal Mar 31, 2022
- Exclude Reason equals ""
- Affiliated Active Grants contains BS VII

Click on "Closure Date," and adjust the calendar date to greater than or equal to the first date of your grant.

Click on "Match Activation Date," and adjust the calendar date to less than or equal to the last day of the reporting period.

Click on "Affiliated Active Grant," and adjust to your agency's match tag.

Adjusting these filters will show all matches made under the grant from the beginning of the grant to the end of the reporting quarter.

Export the filtered report in "Details Only" format.

Report: Matches with Contacts and Programs  
**PCCD-EPIS Match History**  
Provides all matches active at any point during the Closure Date (Begin Date) time period and Match Activation Date (End Date) time period determined by the filters for the length of the grant period.

Total Records: 95

Match ID	Primary Big: Contact ID	Little: Contact ID	Little: Referral Detail: Inquiry Source Name	Match Activation Date	Closure Date	Program: Program Type	
1	a1v2J0000027T8M	0032J00003PWDwr	0032J00003PMtoB	School	9/12/2009	5/2/2022	Community
2	a1v2J0000027bxL	0032J00003PZZrp	0032J00003PMn13	Self - Self	5/15/2010	4/24/2022	Community
3	a1v2J0000027rpp	0032J00003PSPIW	0032J00003PNHN7	Self - Always Known	6/9/2010	7/15/2021	Community
4	a1v2J0000028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor	5/31/2011	9/27/2021	Community
5	a1v2J0000028sln	0032J00003PWDxQ	0032J00003PLoN7	School	10/20/2011	-	Site

Report: Matches with Contacts and Programs  
**PCCD-EPIS Match History**  
Provides all matches active at any point during the Closure Date (Begin Date) time period and Match Activation Date (End Date) time period determined by the filters for the length of the grant period.

Total Records: 95

### Export

**Export View**

**Formatted Report**  
Export the report, including the report header, groupings, and filter settings.

**Details Only**  
Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format: Excel Format .xls      Encoding: ISO-8859-1 (General US & Western Europe)

Cancel      **Export**

Match ID	Primary Big: Contact ID	Little: Contact ID	Little: Referral Detail: Inquiry Source Name	Match Activation Date	Closure Date	Program: Program Type	Little: Agency
1	a1v2J0000027T8M	0032J00003PWDwr	0032J00003PMtoB	School	9/12/2009	5/2/2022	Community
2	a1v2J0000027bxL	0032J00003PZZrp	0032J00003PMn13	Self - Self	5/15/2010	4/24/2022	Community
3	a1v2J0000027rpp	0032J00003PSPIW	0032J00003PNHN7	Self - Always Known	6/9/2010	7/15/2021	Community
4	a1v2J0000028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor	5/31/2011	9/27/2021	Community
5	a1v2J0000028sln	0032J00003PWDxQ	0032J00003PLoN7	School	10/20/2011	-	Site
6	a1v2J0000027kE1	0032J00003PSD4w				-	Community
7	a1v2J0000028th6	0032J00003PSiGA				1/24/2022	Site
8	a1v2J0000027ivs	0032J00003PZZsM				1/23/2022	Community
9	a1v2J0000028sH7	0032J00003PVkld				-	Site
10	a1v2J0000027Vde	0032J00003PVkln				5/23/2022	Community
11	a1v2J0000027hQ7	0032J00003PRwVK				-	Community
12	a1v2J0000027wuW	0032J00003PV0WR				-	Community
13	a1v2J0000029hRy	0032J00003PUJdJ				-	Site
14	a1v2J0000027pA	0032J00003PRTAJ	0032J00003PM353	Self - Self	11/10/2014	4/24/2022	Community
15	a1v2J0000027nny	0032J00003PXgN3	0032J00003PMW9p	Self - Self	11/11/2014	9/27/2021	Community

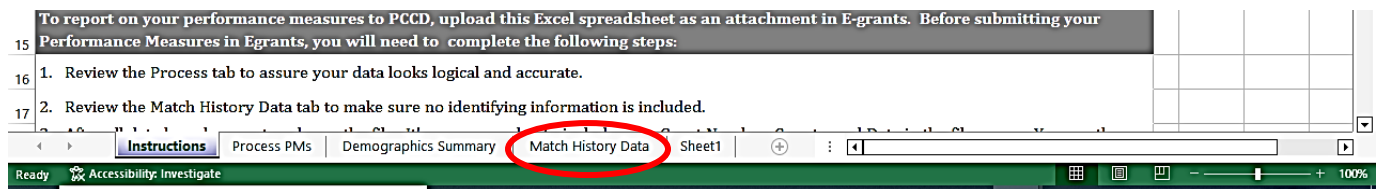
Open your Excel report once the download has completed.

The Excel report automatically downloads in protected view. To work with your Excel spreadsheet, you will need to enable editing by clicking on the “Enable Editing” button.

Match ID	Primary Big: Contact ID	Little: Contact ID	Little: Referral Detail: Inquiry Source Name	Match Activation Date	Closure Date	Program: Program Type	Little: Age	Little: Gender
a1v2J0000027T8M	0032J00003PWDwr	0032J00003PMt0B	School	9/12/2009	5/2/2022	Community	19	Female
a1v2J0000027bXL	0032J00003PZZrp	0032J00003PMn13	Self - Self	5/15/2010	4/24/2022	Community	19	Male
a1v2J0000027rpp	0032J00003PSPIW	0032J00003PNHN7	Self - Always Known	6/9/2010	7/15/2021	Community	20	Male
a1v2J0000028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor	5/31/2011	9/27/2021	Community	18	Male
a1v2J0000028sln	0032J00003PWDxQ	0032J00003PLoN7	School	10/20/2011		Site	18	Female
a1v2J0000027kE1	0032J00003PSD4w	0032J00003PPRWZ	Therapist/Counselor	9/8/2012		Community	20	Male
a1v2J0000028th6	0032J00003PStGA	0032J00003PMtpT	School	11/8/2012	1/24/2022	Site	20	Male
a1v2J0000027tVs	0032J00003PZZsM	0032J00003PPXrj	Self - Self	12/7/2012	1/23/2022	Community	16	Female
a1v2J0000028sH7	0032J00003PVkld	0032J00003PNesM	School	12/18/2012		Site	17	Female
a1v2J0000027Vde	0032J00003PVkIn	0032J00003PMtoe	Relative	1/12/2013	5/23/2022	Community	21	Female
a1v2J0000027hQ7	0032J00003PRwVK	0032J00003PR2aP	Relative	9/18/2013		Community	17	Female
a1v2J0000027wuW	0032J00003PV0WR	0032J00003PN2jm	Self - Self	9/24/2013		Community	16	Female
a1v2J0000029hRy	0032J00003PUJdJ	0032J00003POmtB	School	11/13/2013		Site	16	Male
a1v2J0000027ipA	0032J00003PRTAJ	0032J00003PM353	Self - Self	11/10/2014	4/24/2022	Community	17	Female
a1v2J0000027nny	0032J00003PXgN3	0032J00003PMW9p	Self - Self	11/11/2014	9/27/2021	Community	19	Male
a1v2J0000027gCX	0032J00003PTMYa	0032J00003POmtQ	School	11/18/2014		Community	16	Female
a1v2J0000028VGd	0032J00003PZZt3	0032J00003POPWA	Web Link - Agency Website	12/15/2014	1/31/2022	Community	15	Female
a1v2J0000027kH0	0032J00003PRy1I	0032J00003PPAgT	Web Link - Agency Website	12/30/2014	1/19/2022	Community	15	Female
a1v2J0000028u8o	0032J00003PRy1H	0032J00003PPAh4	School	1/30/2015		Site	13	Female
a1v2J0000027eu0	0032J00003PRy1M	0032J00003POmtM	Self - Self	2/4/2015	1/26/2022	Community	16	Male
a1v2J0000028sIg	0032J00003PTpt9	0032J00003PLoO5	School	2/27/2015	4/11/2022	Site	15	Female
a1v2J000002uUAo	0032J00003PwQkx	0032J00003PN2Jr	Web Link - BBBS National Site	3/3/2015	8/4/2021	Community	19	Female
a1v2J0000028EGA	0032J00003PY94S	0032J00003PMA2g	Web Link - BBBS National Site	3/13/2015	8/23/2021	Community	14	Male
a1v2J0000028rUb	0032J00003PTdUG	0032J00003PLoNo	Special Event - Bowl For Kids Sake	3/20/2015	7/19/2021	Community	20	Male
a1v2J0000028vUH	0032J00003PZZtB	0032J00003POmtK	Self - Self	4/2/2015	10/19/2021	Community	15	Male
a1v2J0000028FYX	0032J00003PVYwt	0032J00003PM34I	Web Link - BBBS National Site	4/10/2015		Community	16	Female
a1v2J0000028syR	0032J00003PTqfh	0032J00003PQIoA	School	4/28/2015		Site	15	Female
a1v2J0000027geA	0032J00003PS8zp	0032J00003PPI1L	Self - Self	5/1/2015		Community	15	Male
a1v2J0000027wUs	0032J00003PubTx	0032J00003PPRWs	Self - Self	5/13/2015		Community	14	Female
a1v2J0000027a60	0032J00003PUnik	0032J00003PPAgY	Therapist/Counselor	5/18/2015		Community	17	Male
a1v2J0000028Mm9	0032J00003PUnil	0032J00003PPoKu	Therapist/Counselor	8/22/2015		Community	18	Male

**Step 5: Transfer Match History data to the Penn State EPIS data collection tool.**

On the data collection tool, click on the Match History Data tab.



The columns in your Matchforce Match History report correspond to the column headings on the reporting tool (columns A through O).

The easiest way to transfer information from the Matchforce report to the data collection tool is by copying and pasting the entire report, as follows.

Highlight the entire Matchforce report by clicking on the small triangle in the upper left corner of your spreadsheet. Then click the Copy icon.

The screenshot displays the Microsoft Excel interface with a spreadsheet titled 'report1654028172208'. The ribbon is set to 'Home', and the 'Clipboard' group is active. A red arrow points to the small triangle in the upper-left corner of the data range, which is used to select the entire report. The spreadsheet contains a table with the following columns: Match ID, Primary Big: Contact, Little: Contact ID, Little: Referral Detail: Inquiry Source Name, Match Activation Date, Closure Date, Program: Program Type, Little: Age, and Little: Gender. The data rows are numbered 1 through 28. The status bar at the bottom indicates 'Average: 18799.30655 Count: 1388 Sum: 6316567'.

Match ID	Primary Big: Contact	Little: Contact ID	Little: Referral Detail: Inquiry Source Name	Match Activation Date	Closure Date	Program: Program Type	Little: Age	Little: Gender
a1v2j0000027f8M	0032j00003PWDwr	0032j00003PMtoB	School	9/12/2009	5/2/2022	Community	19	Female
a1v2j0000027bxL	0032j00003PZZrp	0032j00003PMn13	Self - Self	5/15/2010	4/24/2022	Community	19	Male
a1v2j0000027rpp	0032j00003PSPiW	0032j00003PNHN7	Self - Always Known	6/9/2010	7/15/2021	Community	20	Male
a1v2j0000028wLW	0032j00003PUJcZ	0032j00003PPA00	Therapist/Counselor	5/31/2011	9/27/2021	Community	18	Male
a1v2j0000028sn	0032j00003PWXxQ	0032j00003PLoN7	School	10/20/2011		Site	18	Female
a1v2j0000027kE1	0032j00003PSD4w	0032j00003PPRWZ	Therapist/Counselor	9/8/2012		Community	20	Male
a1v2j0000028th6	0032j00003PStGA	0032j00003PMtpT	School	11/8/2012	1/24/2022	Site	20	Male
a1v2j0000027Vvs	0032j00003PZZsM	0032j00003PPXrj	Self - Self	12/7/2012	1/23/2022	Community	16	Female
a1v2j0000028sH7	0032j00003PVkId	0032j00003PNesM	School	12/18/2012		Site	17	Female
a1v2j0000027Vde	0032j00003PVkin	0032j00003PMtoe	Relative	1/12/2013	5/23/2022	Community	21	Female
a1v2j0000027hQ7	0032j00003PRwVK	0032j00003PR2aP	Relative	9/18/2013		Community	17	Female
a1v2j0000027wuW	0032j00003PV0WR	0032j00003PN2Jm	Self - Self	9/24/2013		Community	16	Female
a1v2j0000029hRy	0032j00003PUJdJ	0032j00003POmtB	School	11/13/2013		Site	16	Male
a1v2j0000027ipA	0032j00003PRTAJ	0032j00003PM353	Self - Self	11/10/2014	4/24/2022	Community	17	Female
a1v2j0000027nny	0032j00003PXgN3	0032j00003PMW9p	Self - Self	11/11/2014	9/27/2021	Community	19	Male
a1v2j0000027gCX	0032j00003PTMYa	0032j00003POmtQ	School	11/18/2014		Community	16	Female
a1v2j0000028Vgd	0032j00003PZZt3	0032j00003POPWA	Web Link - Agency Website	12/15/2014	1/31/2022	Community	15	Female
a1v2j0000027kH0	0032j00003PRy1I	0032j00003PPAgt	Web Link - Agency Website	12/30/2014	1/19/2022	Community	15	Female
a1v2j0000028u8o	0032j00003PRy1H	0032j00003PPAh4	School	1/30/2015		Site	13	Female
a1v2j0000027eu0	0032j00003PRy1M	0032j00003POmtM	Self - Self	2/4/2015	1/26/2022	Community	16	Male
a1v2j0000028siG	0032j00003PTpt9	0032j00003PLoO5	School	2/27/2015	4/11/2022	Site	15	Female
a1v2j000002uUAo	0032j00003PWQkx	0032j00003PN2Jr	Web Link - BBBS National Site	3/3/2015	8/4/2021	Community	19	Female
a1v2j0000028EGA	0032j00003PY94S	0032j00003PMA2g	Web Link - BBBS National Site	3/13/2015	8/23/2021	Community	14	Male
a1v2j0000028rUb	0032j00003PTdUG	0032j00003PLoNo	Special Event - Bowl For Kids Sake	3/20/2015	7/19/2021	Community	20	Male
a1v2j0000028VvH	0032j00003PZZtB	0032j00003POmtK	Self - Self	4/2/2015	10/19/2021	Community	15	Male
a1v2j0000028FYX	0032j00003PVYWT	0032j00003PM34I	Web Link - BBBS National Site	4/10/2015		Community	16	Female
a1v2j0000028syR	0032j00003PTqfh	0032j00003PQIoA	School	4/28/2015		Site	15	Female

Open the Match History Data tab on the Penn State EPIS data collection tool. Highlight the entire report by clicking on the small triangle in the upper left corner of your spreadsheet. Then click the Paste icon.

AutoSave  Off BBBS DRAFT3 copy (2) Search (Alt+Q) Johnna Palm JP

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number Styles Cells Editing Analysis Sensitivity

Match ID

	A	B	C	D	E	F	G	H	I	J
1	Match ID	Primary Big: Contact ID	Little: Contact ID	Little: Referral Detail: Inquiry Source Name	Match Activation Date	Closure Date	Program: Program Type	Little: Age	Little: Gender	Little: Race/Ethnicity
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
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Ready Accessibility: Investigate Match History Data Sheet1 Count: 15 100%

Your report should go from this...

To this:

Match ID	Primary Big: Contact ID	Little: Contact ID	Little: Referral Detail: Inquiry Source Name	Match Activation Date	Closure Date	Program: Program Type	Little: Age	Little: Gender	Little: Race/Ethnicity	
1	a1v2j0000029i5V	0032j00003PVI62	0032j00003PomB8	School	9/11/2008	9/27/2021	Community	19	Female	White or Caucasian
2	a1v2j0000027yso	0032j00003PSPku	0032j00003PNeA3	Therapist/Counselor	2/12/2009	3/3/2021	Community	21	Male	Other
3	a1v2j000002778M	0032j00003PWDwr	0032j00003PMtoB	School	9/12/2009	5/2/2022	Community	19	Female	White or Caucasian
4	a1v2j0000027bxL	0032j00003PZZrp	0032j00003PMn13	Self - Self	5/15/2010	4/24/2022	Community	18	Male	Black or African American;
5	a1v2j0000027pp	0032j00003PSPiW	0032j00003PNHn7	Self - Always Known	6/9/2010	7/15/2021	Community	20	Male	Black or African American
6	a1v2j0000028iE8	0032j00003PSbyj	0032j00003POuGR	Relative	3/16/2011	6/30/2021	Community	21	Male	Hispanic
7	a1v2j0000028wLW	0032j00003PZJcZ	0032j00003PPA00	Therapist/Counselor	5/31/2011	9/27/2021	Community	18	Male	Black or African American;
8	a1v2j0000028sin	0032j00003PWDxQ	0032j00003PLoN7	School	10/20/2011		Site	18	Female	Other
9	a1v2j000002944X	0032j00003PVOWN	0032j00003PLVhg	School	4/26/2012	6/30/2021	Community	19	Female	White or Caucasian
10	a1v2j0000027kE1	0032j00003PSD4w	0032j00003PRWZ	Therapist/Counselor	9/8/2012		Community	20	Male	White or Caucasian
11	a1v2j0000028th6	0032j00003PStGA	0032j00003PMtpT	School	11/8/2012	1/24/2022	Site	20	Male	Black or African American
12	a1v2j0000027Vvs	0032j00003PZzXr	0032j00003PPXrj	Self - Self	12/7/2012	1/23/2022	Community	16	Female	Black or African American
13	a1v2j0000028SH7	0032j00003PVkid	0032j00003PNesM	School	12/18/2012		Site	17	Female	Black or African American
14	a1v2j0000027vde	0032j00003PVklm	0032j00003PMtoe	Relative	1/12/2013		Community	21	Female	Black or African American
15	a1v2j0000027hQ7	0032j00003PRwVK	0032j00003PR2aP	Relative	9/18/2013		Community	17	Female	Black or African American;
16	a1v2j0000027wuW	0032j00003PVOWR	0032j00003PNZjm	Self - Self	9/24/2013		Community	16	Female	Hispanic
17	a1v2j0000029hRy	0032j00003PUjdj	0032j00003PomtB	School	11/13/2013		Site	16	Male	White or Caucasian
18	a1v2j0000028ujr	0032j00003PYLmR	0032j00003POugd	School	11/19/2013	8/3/2021	Community	18	Male	White or Caucasian
19	a1v2j00000285na	0032j00003PUbTp	0032j00003PMneM	Self - Self	11/19/2013		Community	16	Female	Black or African American;
20	a1v2j0000028cfh	0032j00003PWhBt	0032j00003PomCg	Self - Always Known	12/18/2013		Community	17	Male	Black or African American
21	a1v2j0000027ipA	0032j00003PRTAJ	0032j00003PM353	Self - Self	11/10/2014	4/24/2022	Community	17	Female	Black or African American;
22	a1v2j0000027nny	0032j00003PXgN3	0032j00003PMW9p	Self - Self	11/11/2014	9/27/2021	Community	19	Male	White or Caucasian
23	a1v2j0000027gCX	0032j00003PTMYa	0032j00003PomtQ	School	11/18/2014		Community	16	Female	Other
24	a1v2j0000028Vgd	0032j00003PZz13	0032j00003POPWA	Web Link - Agency Website	12/15/2014	1/31/2022	Community	15	Female	Black or African American;
25	a1v2j0000028W9W	0032j00003PScet	0032j00003PLudD	Web Link - BBBS National Site	12/16/2014	2/16/2022	Community	17	Male	Hispanic
26	a1v2j0000027kH0	0032j00003PRy1I	0032j00003PPAgT	Web Link - Agency Website	12/30/2014	1/19/2022	Community	15	Female	Black or African American;
27	a1v2j0000028u8o	0032j00003PRy1H	0032j00003PPAh4	School	1/30/2015		Site	13	Female	Black or African American
28	a1v2j0000027eu0	0032j00003PRy1M	0032j00003PomtM	Self - Self	2/4/2015	1/26/2022	Community	16	Male	Other
29	a1v2j0000028SiG	0032j00003PTpt9	0032j00003PLoO5	School	2/27/2015	4/11/2022	Site	14	Female	Other
30	a1v2j000002uUAo	0032j00003PWQkx	0032j00003PNZjr	Web Link - BBBS National Site	3/3/2015	8/4/2021	Community	19	Female	White or Caucasian
31	a1v2j0000028hNg	0032j00003PStHh	0032j00003PNesZ	Self - Self	3/10/2015		Community	16	Male	Black or African American;
32	a1v2j0000028EGA	0032j00003PY945	0032j00003PMA2g	Web Link - BBBS National Site	3/13/2015	8/23/2021	Community	14	Male	Black or African American

Last step, click back to the Process PMs tab and make sure the cells not highlighted in yellow have populated. That's it! Save it to be attached to your quarterly Egrants report.

Process Performance Measures										BIG BROTHERS BIG SISTERS									
Agency				Insert Agency Name Here				Grant Number		Insert Grant Number									
Contact				Insert Contact Name Here				Grant Start Date		1/1/2021									
Email				Insert Email Here				Grant Year		Year 1: Jan 2022-Dec 2022									
Phone				Insert Phone Number Here				County		Insert County Here									
Quarter 1		Quarter 2		Quarter 3		Quarter 4		Location		Insert Location Here									
Jan-Mar 2021	Apr-Jun 2021	Jul-Sep 2021	Oct-Dec 2021	Cumulative	Performance Measure					PM #									
0	0				Number of YOS Surveys Due During the Reporting Quarter					P1									
					Number of YOS Surveys Completed During the Reporting Quarter					P2									
					Number of COS Surveys Due During the Reporting Quarter					P3									
					Number of COS Surveys Completed During the Reporting Quarter					P4									
					Number of SOR Surveys Due During the Reporting Quarter					P5									
					Number of SOR Surveys Completed During the Reporting Quarter					P6									
The following section is automatically calculated by reporting quarter using Match History Data																			
15	19			34	Number of New Matches Made					P7									
44	9			53	Number of Matches Ended					P8									
The following section is automatically calculated using all records associated with the grant number from the Match History Data																			
				204	Number of Matches Served - Community					P9									
				246	Number of Matches Served - Site					P10									
				91	Match Retention: Reached 1 year					P11									
				53	Match Retention: Reached 2 years					P12									
				45	Match Retention: Reached 3 years					P13									
				43	Match Retention: Reached 4 years					P14									
				69	Match Retention: Reached 5 or more years					P15									