

# PORTAL Data System Reporting

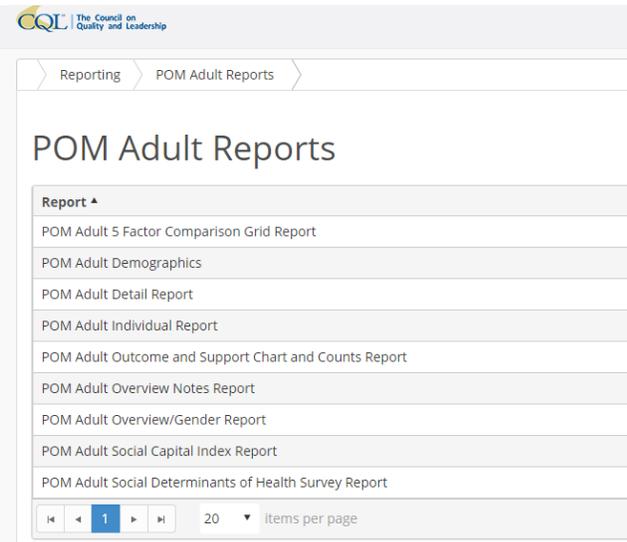
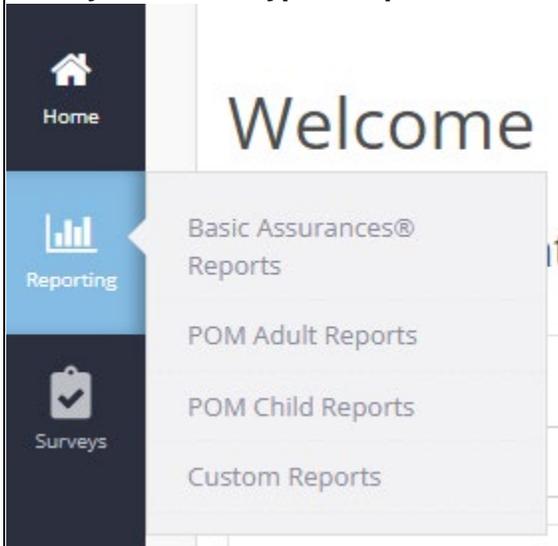
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## View CQL Templated Reports

Users who have permission can view CQL templated POM Adult, POM Child and/or Basic Assurances® reports.

Step	Action
1	Navigate to the <b>Reporting</b> icon.
2	Select <b>your desired type of Reports</b> . In this example we are using POM Adult.
3	Select your desired report.
4	Within the POM report a user can use the filter options to customize the specific information they would like to display.



### POM Adult Demographics Report

Survey Start Date MM/DD/YYYY	Survey End Date MM/DD/YYYY		
Owner Group Select All That Apply	Owner Select All That Apply	Provider Group Select All That Apply	Provider Select All That Apply
Minimum Age	Maximum Age	Interviewee Last Name Initial	Interviewee Select One
Question Text Search Select One	Question Answer Text	Operator	
Question 1 Select One	Question 1 Answer	Operator	
State/Province Select One	Certified <input type="checkbox"/>	Survey Text Search	Submit Clear

**Note:** Provider Group and Provider are based on the user's provider association.

**5** The following filters can be used on POM reports:

- **Survey Start Date and Date End:** By either typing in a date or using the date picker, a user can filter by the “Date of Interview” question in the POM surveys and “Review Date” in the BA survey. When selecting two dates, the data will display interviews that fall between those two dates. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)
- **Owner Group:** Based on user’s owner associations this dropdown will display any owner groups that the user is associated with. If an owner group is selected, it will narrow down the list available in the Owner dropdown. When the owner group filter is applied then the users will see all data associated with all of the owners in that group. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)
- **Owner:** Allows users who have access to view data for more than one owner to filter data for more than one owner at a time. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)
- **Provider Group:** Based on the user's provider associations this dropdown will display any groups of providers the user is associated with. If a provider group is selected, it will narrow down the list available in the Provider dropdown. When the provider group filter is applied then users will see all of the data associated with all of the providers in that group. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)
- **Provider:** Allows users who have access to view data for more than one provider to filter the data for one or more providers at a time. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)
- **Certified:** This checkbox is associated with the required question in the POM surveys to indicate the certification status of the interviewer. When checked the user will only see data associated with a survey that was conducted by a certified interviewer. (Applies only to Personal Outcome Measures® reporting)
- **Minimum Age and Maximum Age:** Allows users to enter an age range for the people who are interviewed. This number is calculated using the date of birth

	<p>question in the POM survey. (Applies only Personal Outcome Measures® reporting)</p> <ul style="list-style-type: none"> <li>• <b>Question Text Search:</b> Allows users to select a specific question from the Survey that has a free text response option. This filter can be used in conjunction with the multiple-choice Question(s) via use of the conditional And/Or dropdown. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting) <ul style="list-style-type: none"> <li>○ <b>Response Text:</b> Once the ‘Question Text Search’ is selected, a Response Text box will populate. Users can free type keywords or a string of text that should be contained within the Survey Response to that question. When used, the report results will be filtered down to only Survey’s that have that text contained within the response to the selected question. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)</li> </ul> </li> <li>• <b>Question:</b> Allows users to select a single question from the POM survey (i.e. People are safe: Outcome present). Allows up to 5 questions in total to be utilized for filtering with use of the And/Or conditional dropdown. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting) <ul style="list-style-type: none"> <li>○ <b>Response:</b> Once a ‘Question’ is selected, all the available responses will display on the multi-select dropdown. Users can pick and choose the response(s) to filter the data (i.e. Outcome Present- yes). (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)</li> </ul> </li> <li>• <b>State/Province:</b> Allows user to filter data by state/province.</li> <li>• <b>Interviewee Last Name Initial:</b> Dropdown containing every letter in the alphabet that once selected, will display the ‘Interviewee Name’ dropdown. If an ID was used instead of a name, the “other” option can be selected. (Applies only to Personal Outcome Measures® reporting)</li> <li>• <b>Interviewee Name:</b> Once a last name initial is selected from the ‘Interviewee Last Name Initial’ dropdown, this dropdown will populate displaying all the interviewees. (Applies only Personal Outcome Measures® reporting)</li> <li>• <b>Survey Text search:</b> The textbox allows users to type keywords or free text strings to filter the data based on those characters (i.e. “Abuse”). Once filtered, only Survey’s containing that text somewhere within <u>any</u> of the survey responses will display in the data below. (Applies to both Personal Outcome Measures® and Basic Assurances® reporting)</li> </ul>
6	<p>Once the desired filters are selected, click the Submit button to see the data that corresponds to filter options.</p>

### POM Adult Demographics Report

**Survey Start Date**  
**Survey End Date**

**Owner Group** 
**Owner** 
**Provider Group** 
**Provider**

**Minimum Age** 
**Maximum Age** 
**Interviewee Last Name Initial** 
**Interviewee**

<b>Question Text Search</b> Select One	<b>Question Answer Text</b>	<b>Operator</b>
<b>Question 1</b> Select One	<b>Question 1 Answer</b>	<b>Operator</b>

**State/Province** 
**Certified** 
**Survey Text Search**

**7** Reports can be exported to PDF, Excel and Word documents by clicking **Export** and choosing what type of file to export.

### POM Adult Demographics Report

<b>Question Text Search</b> Select One	<b>Question Answer Text</b>	<b>Operator</b>
<b>Question 1</b> Select One	<b>Question 1 Answer</b>	<b>Operator</b>

**State/Province** 
**Certified** 
**Survey Text Search**

Value	Counts	Percentage	Export
Demographics - Interviewer1 - Certification Status			<input type="button" value="Excel"/> <input type="button" value="PDF"/> <input type="button" value="Word"/>

**Note:** When exported, some applications display data in a default format (e.g. number, text) that may not include as much detail as displayed in PORTAL. Users may need to reformat columns within the export to display the data appropriately.

## Custom Reports

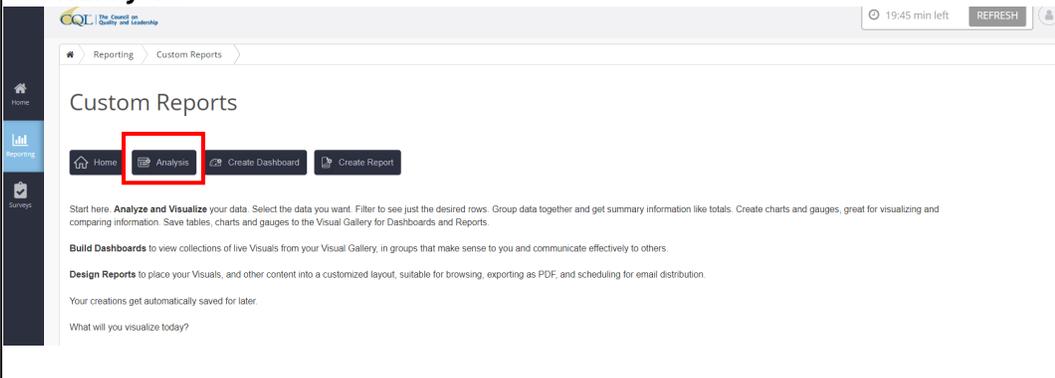
### Home

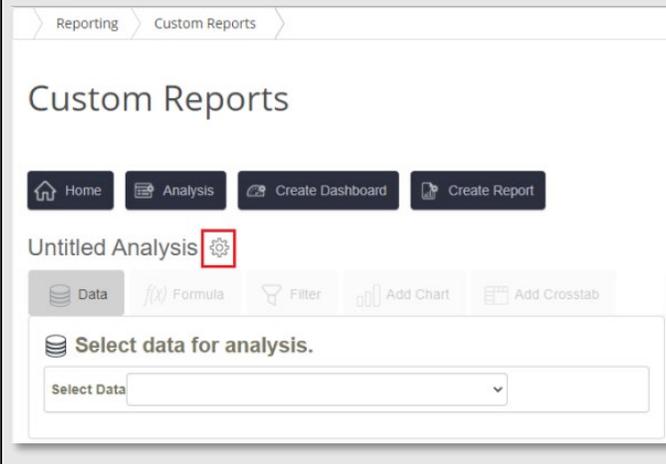
Users can access any custom Analysis, Dashboard, and Report set(s) from the Home screen. Users can navigate to the Home screen by clicking on the icon from any Analysis, Dashboard, or Report that the user has open.



### Create a new Custom Analysis

Custom Analysis provides users with a means to analyze data in ways beyond the templated reports provided in PORTAL. This feature allows users to choose which data they would like to build reports around, define the visualization(s) – or charts and graphs - that best represent the data, and then use those visualizations for dashboards and business reports.

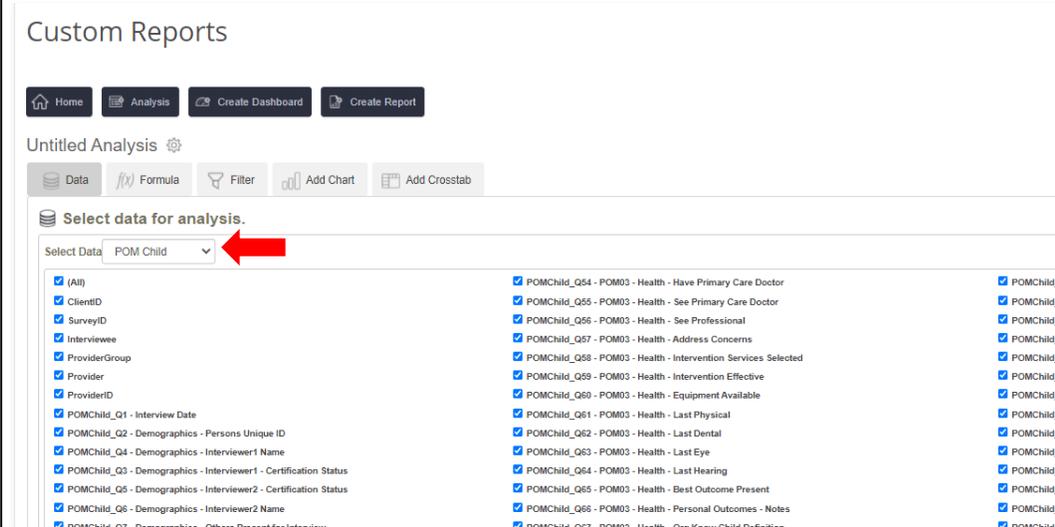
Step	Action
1	Navigate to the <b>Reporting</b> icon.
2	Select <b>Custom Reports</b> .
3	Click <b>Analysis</b> . 
4	Click the <b>Gear</b> symbol next to Untitled Analysis.



5 Click **Rename**.

6 Name the new Analysis and click **Save**.

7 The **Select Data** dropdown shows the data from the surveys you have access to in the system. Select the name of the data item that will be used as the data source for the analysis.



8 Click the check marks to deselect/select fields. By default, all fields are unselected. You can select the “All” checkbox to choose all selections if wanted. Then you can check just those data points you are interested in running analyses on.

9 Click **OK** to view the report.

10 Click a column name to see additional options such as sort and [filtering](#).



11 To hide columns not already hidden by [filtering](#), select the **gear icon**.

	
<b>12</b>	Click <b>OK</b> if any changes are made to see the updated report.
<b>13</b>	To add to the visual gallery for use in <a href="#">Creating Dashboards</a> and <a href="#">Reports</a> , select the <b>check box</b> icon.
	

## Exporting Custom Reports Analysis

To export the report, select the **down arrow** icon. Export options are Excel, CSV, and PDF.



## Add Formulas to Custom Reports

Formulas can be used to illustrate the relationship between different data points and conduct arithmetic functions to manipulate the data (i.e., Show the name of the day of the week an interview was conducted on or display all characters in uppercase letters). The Formula Help button can be selected for guidance in creating a formula. A formula will create an additional column in the report, similar to how an equation would be used in Excel.

Step	Action
<b>1</b>	Click the menu option for <b>Reporting</b> .
<b>2</b>	Select <b>Custom Reports</b> .
<b>3</b>	Click <b>Analysis</b> .
<b>4</b>	Select the desired analysis from the dropdown.
<b>5</b>	Click <b>Formula</b> .

**6** Enter the **Name** which will appear as the new column header name in the report.

**7** Populate the **Formula** box by selecting from the available data in the **Insert a Column**, **Formula**, and **Operator** dropdowns. Users can also reference the **Formula Help** section for sample formulas and further formula explanation.  
**Note:** Users can hover over the name in the dropdown for a description of each Formula

**8** The Formula box will automatically populate based on the inserted column selection.

Data
Formula
Filter
Add Chart
Add Crosstab

**f(x) Add a new column from a formula.** Formula Help

Name:

Formula:

Data Type:

Display Format:

Insert a Column:

Formula:

Operator:

Add

**9** Select the **Data Type** and appropriate **Display Format**, if applicable.

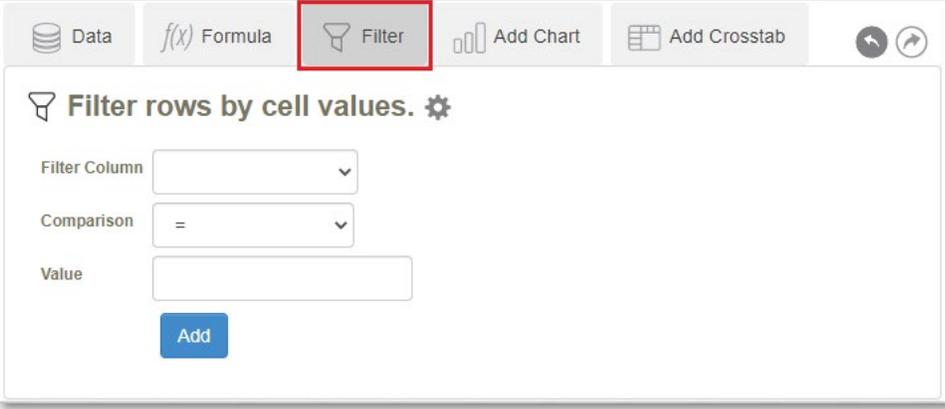
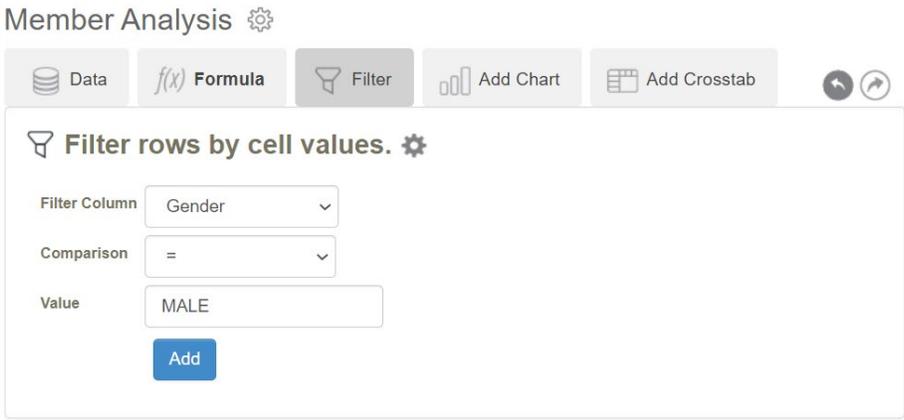
**10** Click **Add**. The inserted formula column will appear as the last column in the report.

MemberID	MemberGUID	InterfaceID	FirstName	LastName	Full Name
14549	4c1be012-3832-49d3-9dcb-4025fafafae7		John	Smith	JohnSmith
14550	42ffca5a-d145-4633-8a86-61c876538436		Joan	Jones	JoanJones

## Filtering Custom Reports

Custom Reports can be filtered by data point. Users can add date filters, character filters, and greater than/equal to/less than value filters.

Step	Action
<b>1</b>	Click the menu option for <b>Reporting</b> .
<b>2</b>	Select <b>Custom Reports</b> .
<b>3</b>	Click <b>Analysis</b> .
<b>4</b>	Select the desired analysis from the dropdown.
<b>5</b>	Click <b>Filter</b> .

	
6	Use the <b>Filter Column</b> dropdown to select the data to be filtered.
7	Choose a <b>Comparison</b> type (see <a href="#">Filter Comparison Types</a> for a table of options). <b>Note:</b> Comparison types may change based on the type of data selected.
8	<p>Add the desired <b>Value</b> to correspond with the Comparison type selected.</p>  <p><b>Note:</b> Value is based on the data set selected. Using the comparison dropdown users will need to meet the criteria based on the filter selection. Users can use the data table shown below to verify their data format prior to adding filters in the Value entry. See <a href="#">Filter Comparison Types</a> for specifics</p>

**Filter Comparison Types**

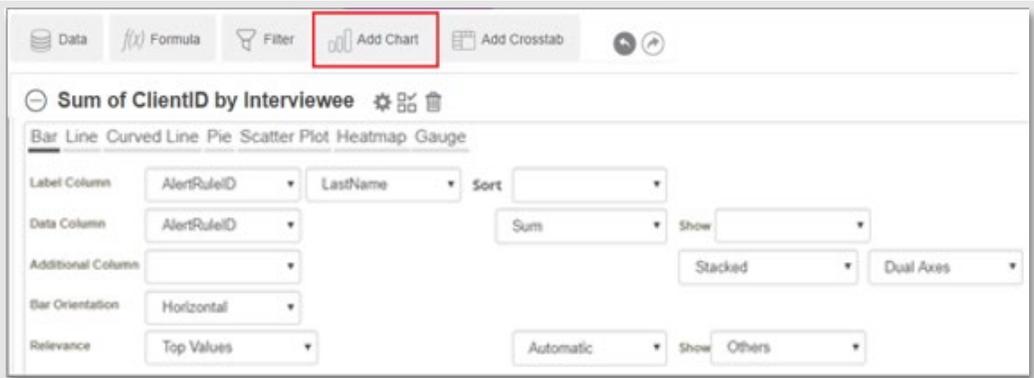
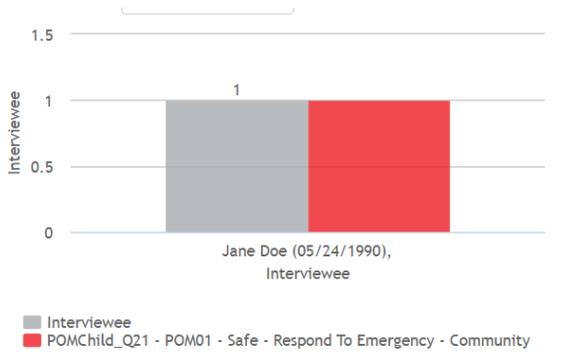
Comparison Type	Definition/Example
=	Equals: The exact data, number, character, value is listed. Gender = MALE would only display the Male people within the data set.
<	Less than: A numerical or date value is selected to display all data less than the number chosen. Age < 19 would display all people who are under the age of 19 (ages would range from 0-18).

<=	Less than or equal to: A numerical or date value is selected to display all data less than or the same as the number chosen. Age <=19 would display all people who are under the age of 20 (ages would range from 0-19).
>	Greater than: A numerical or date value is selected to display all data larger than the number chosen. Age > 19 would show all people who are over the age of 19 (ages would be from 20 and up).
>=	Greater than or equal to: A numerical or date value is selected to display all data larger than or the same as the number chosen. Age >= 19 would show all people who are 19 or older (ages would be from 19 and up).
Not =	Does not equal: This is to pull all data except the chosen value. Gender Not = MALE would produce a list of all non-male gender selections associated within your data set.
In List	In List: Allows users to select multiple data points. Values should be added to the “value” textbox should be added with a comma separating each data value. Example: If a user was filtering to analyze people with a specific POM Support in Place, they could add the following text in the value textbox: “YES- Supports in Place, NO- Developing Plans”
Not In List	Not In List: Allows users to select multiple data points they do not want to see in their data set. Values should be added to the “value” textbox with a comma separating each data value. Example: If a user was filtering to analyze people with a specific POM Support in Place, they could add the following text in the value textbox “YES,- Supports in Place, NO- Developing Plans” and they would no longer see those responses.
Starts with	Starts With: Data begins with the filtered value. Last Name Starts with “Smi” will produce a list of people whose last name begin with “Smi”- data would contain Values like Smith, Smidt, etc.  Note: This can be used on any alpha or numeric value
Contains	Data set contains: Data contains the filtered value anywhere. Last Name contains “Smi” will produce a list of people whose last names contain the letters “Smi”. Data would contain Smith, Massmit, etc.  <b>Note:</b> This can be used on any alpha or numeric value
Not Starts with	Does not start with: Data excludes any data that starts with the filtered value. Last Name Not Starts with “Smi” will produce a list of people whose last name do not begin with “Smi”- data would contain Values like Thompson, Doe, Etc.  <b>Note:</b> This can be used on any alpha or numeric value
Not Contains	Not Contain: Data excludes any data that contains the filtered value anywhere. Last Name contains “Smi” will produce a list of people whose last names that do not include the letters “Smi”. Data would exclude data values like Smith, Massmit, etc.  <b>Note:</b> This can be used on any alpha or numeric value

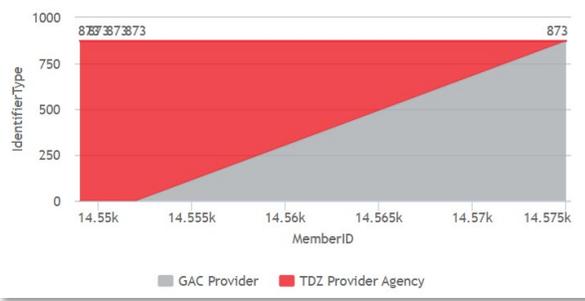
Range	Can only be applied to numerical type data sets. Data will only include numbers that fall in between the selected numbers.
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## Add Charts to Custom Reports

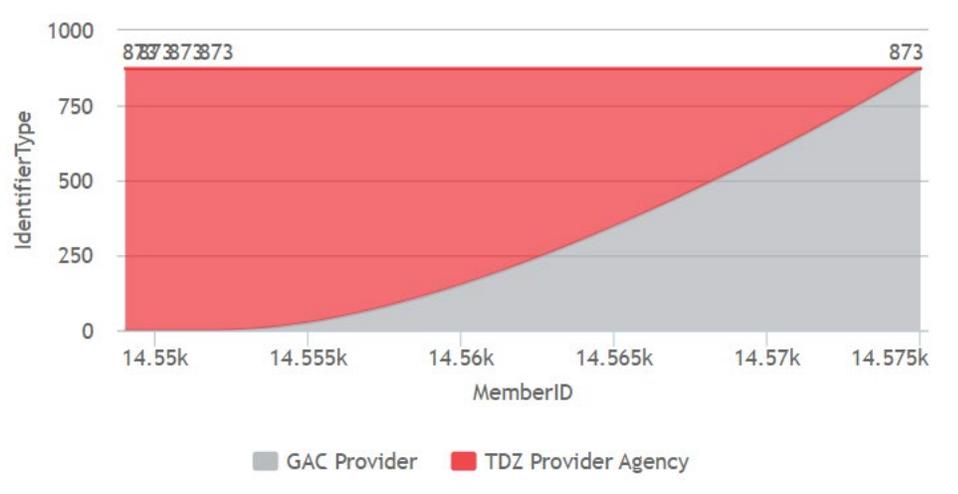
Data from a report can be aggregated into several different chart formats. Adding a chart can make it easier to visually interpret different sets of data.

Step	Action
1	Click the menu option for <b>Reporting</b> .
2	Select <b>Custom Reports</b> .
3	Click <b>Analysis</b> .
4	Select the desired analysis.
5	Click <b>Add Chart</b> . 
6	Select one of the chart types at the top: <b>Bar:</b> 

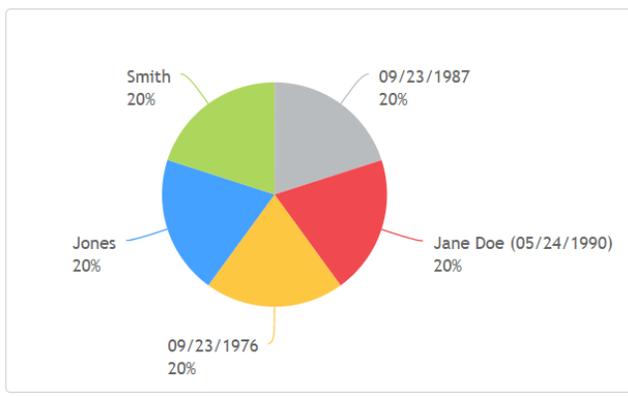
**Line:**



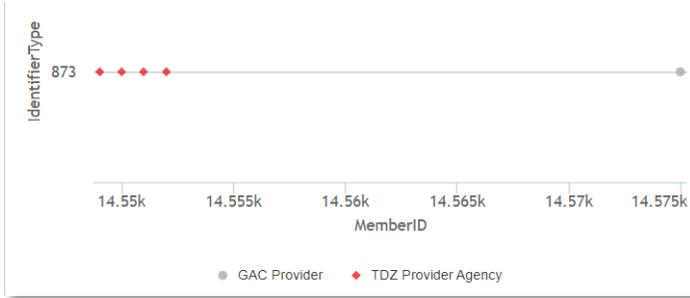
**Curved Line:**



**Pie:**



**Scatter Plot:**



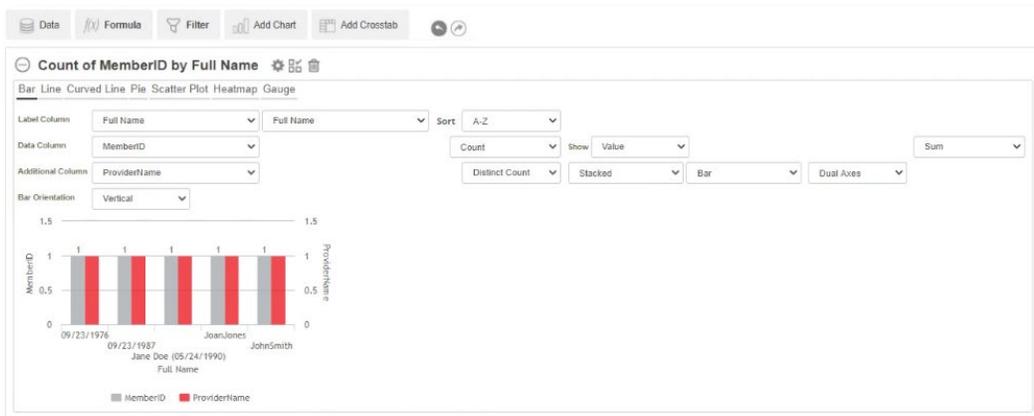
**Heatmap:**



**or Gauge:**



**7** After selecting the chart type, select the specific data elements and how the data should be aggregated and organized on the chart.

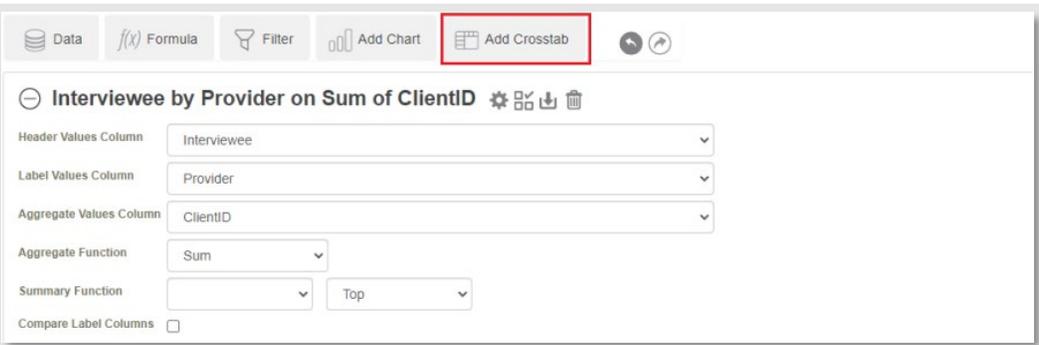
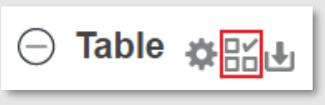


**8** To add to the visual gallery for use in [Creating Dashboards](#) and [Reports](#), select the **check box** icon. Users can also delete a Chart by selecting the trash icon.



## Add Crosstabs to Custom Reports

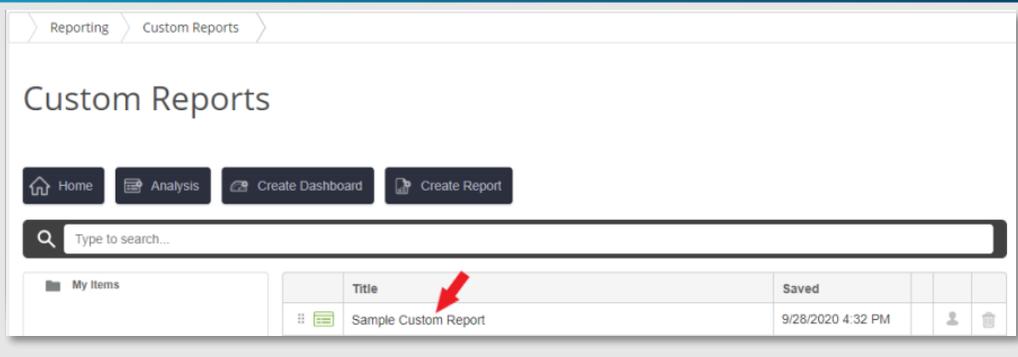
A Crosstab can be added to the current data set to analyze two different sets of data within the same graph.

Step	Action
1	Click the menu option for <b>Reporting</b> .
2	Select <b>Custom Reports</b> .
3	Click <b>Analysis</b> .
4	Select the desired analysis.
5	Click <b>Add Crosstab</b> . 
6	Select from the dropdowns which data elements should be included in the Header Values Column (crosstab column) and in the Label Values Column (crosstab row).
7	Select how the data should be compared and calculated in the Aggregate Values Column, Aggregate Function, and Summary Function dropdowns.
8	To add to the visual gallery for use in <a href="#">Creating Dashboards</a> , select the <b>check box</b> icon. 

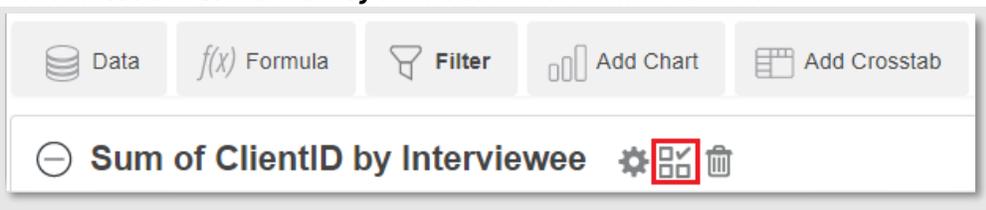
## Add Custom Data to the Visual Gallery

Items are added to the Visual Gallery so they can be used later to create Dashboards and Reports. Visual Gallery items can include both data tables and various charts. Each user has a Visual Gallery that only they can access and edit.

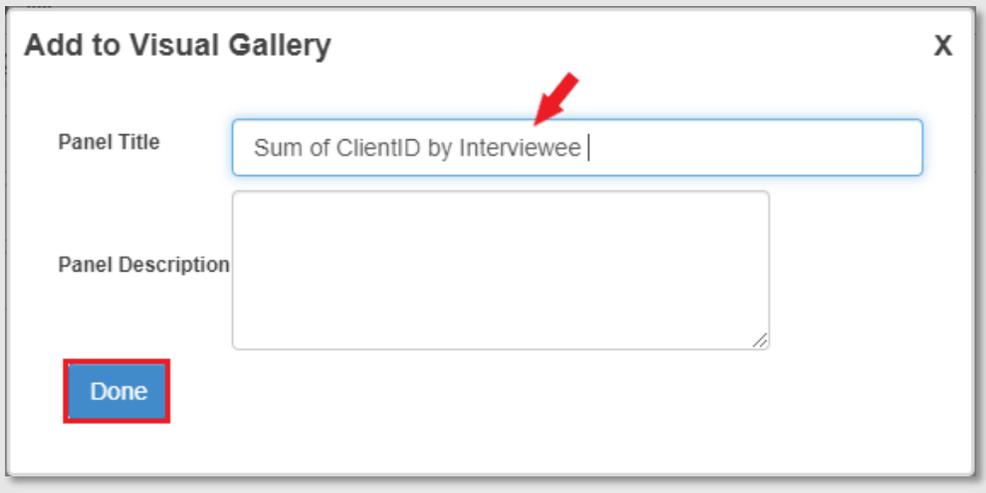
Step	Action
1	Click the <b>Reporting</b> icon.
2	Select <b>Custom Reports</b> .
3	Click the title of the Analysis to be added to the Visual Gallery.



**4** Click the **Add to Visual Gallery** icon next to the desired table or chart.



**5** Title the Visual Gallery item and then click **Done**.



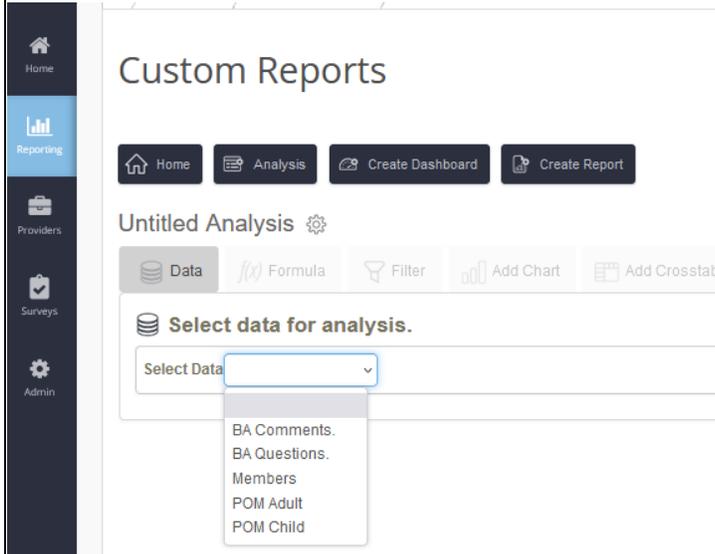
**Note:** Users can add Visual Gallery items to [Dashboards](#) and [Reports](#).

## Bulk Data Export

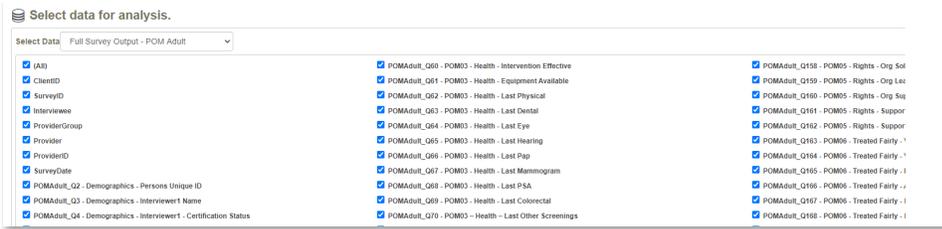
User can export and view a list of all the possible survey data sets within PORTAL.

Step	Action
1	Click the <b>Reporting</b> icon.
2	Select <b>Custom Reports</b> .
3	Click <b>Analysis</b> .
4	Click the <b>Select Data</b> drop down to choose from the following three data sets. <ul style="list-style-type: none"> <li>• BA Comments</li> <li>• BA Questions</li> </ul>

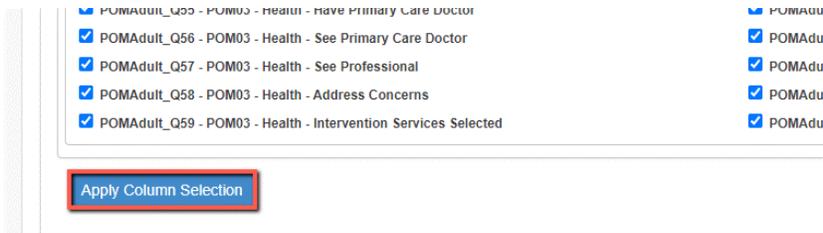
- POM Adult
- POM Child



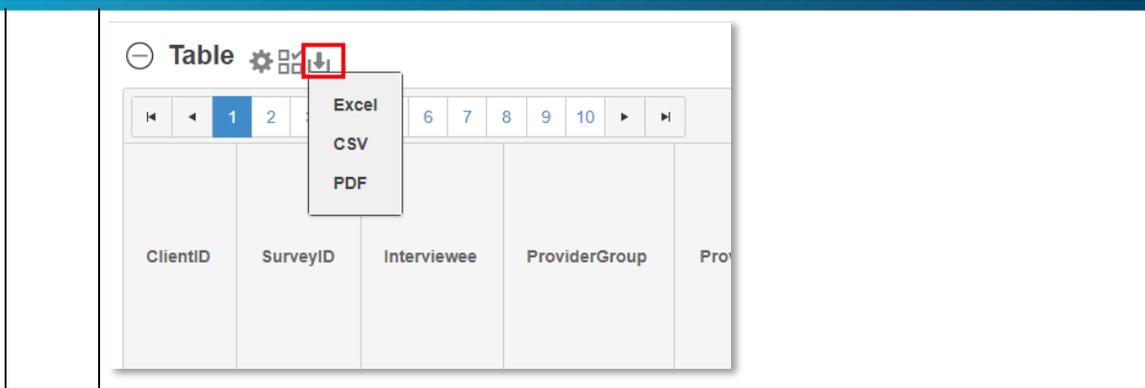
5 A complete list of entities tied to the surveys will display. The user can choose all of the items or choose to a select which ever to build the export.



Once entities are selected the user will click Apply Colum Selection



5 The data can then be exported to either an Excel, CSV or PDF file by clicking the down arrow icon.

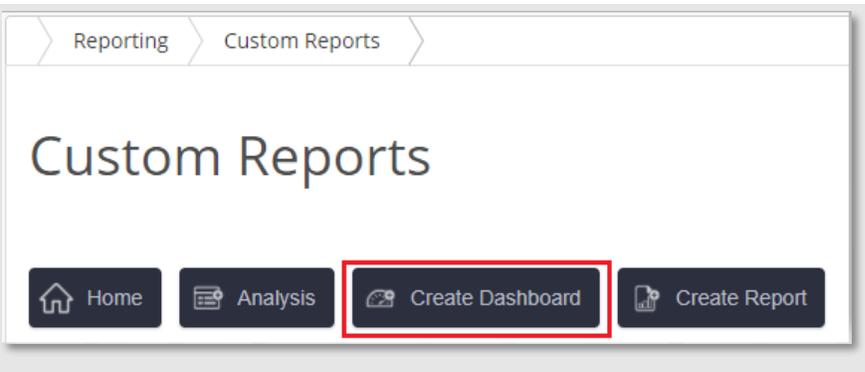


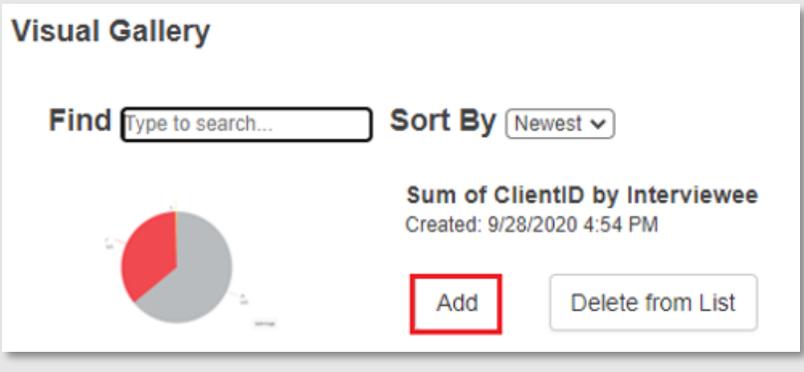
## Managing Dashboards

Dashboards are used to compile a group of items that have already been added to the Visual Gallery. Dashboards can be shared and are a tool to improve efficiency when evaluating data. Dashboards are designed to remain in PORTAL and cannot be exported.

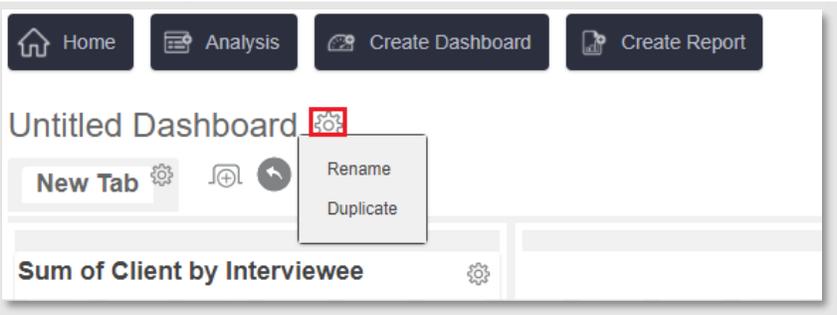
**Note:** If there are no items in the Visual Gallery, follow the instructions in [Create a New Custom Analysis](#) to create them before creating Dashboards.

## Creating Dashboards

Step	Action
1	Navigate to the home page.
2	Click the <b>Reporting</b> icon.
3	Select <b>Custom Reports</b> .
4	Click <b>Create Dashboard</b> : 
5	The user's Visual Gallery list will automatically be displayed, allowing the user to select any existing Visual Gallery items to be displayed on the Dashboard they are creating. Users can select the desired Gallery items to be displayed on the new Dashboard by clicking <b>Add</b> :

	 <p><b>Note:</b> If there are no items in the Visual Gallery list, follow the instructions in <a href="#">Create a New Custom Analysis</a> to create them.</p>
6	Click <b>Done</b> and the Dashboard will be displayed.
7	Users can rearrange and resize items on a Dashboard by clicking and dragging.

## Rename or Duplicate a Dashboard

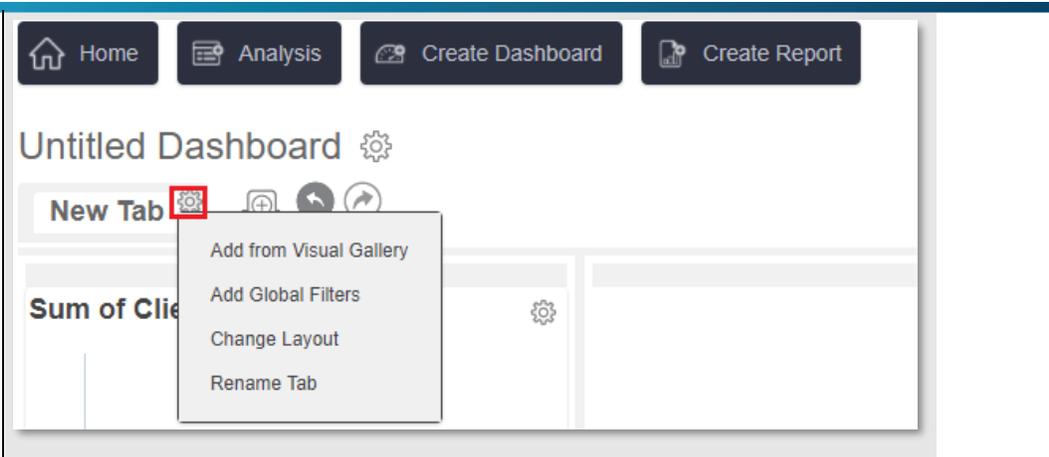
Step	Action
1	Click the <b>Gear</b> symbol next to the dashboard name, then select the applicable action. 

## Edit a Dashboard

### Add Visual Gallery Items

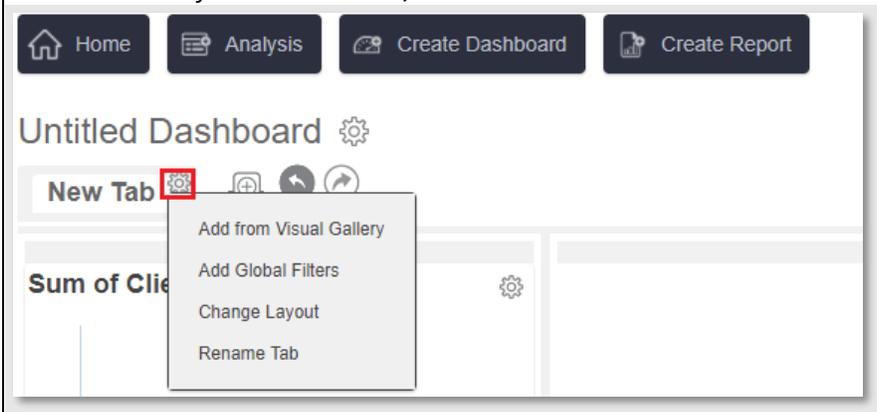
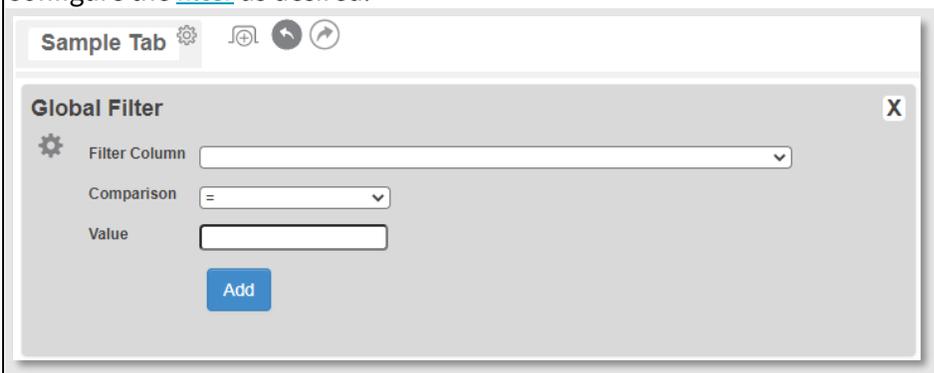
Existing dashboards can be renamed, expanded with additional “Visual Gallery” items, and filtered. To modify an existing dashboard:

Step	Action
1	Click the <b>Gear</b> symbol on the tab, then select <b>Add from Visual Gallery</b> :

	
2	Click <b>Add</b> on any of the desired gallery items.
3	Click <b>Done</b> to complete.

### Add Global Filters

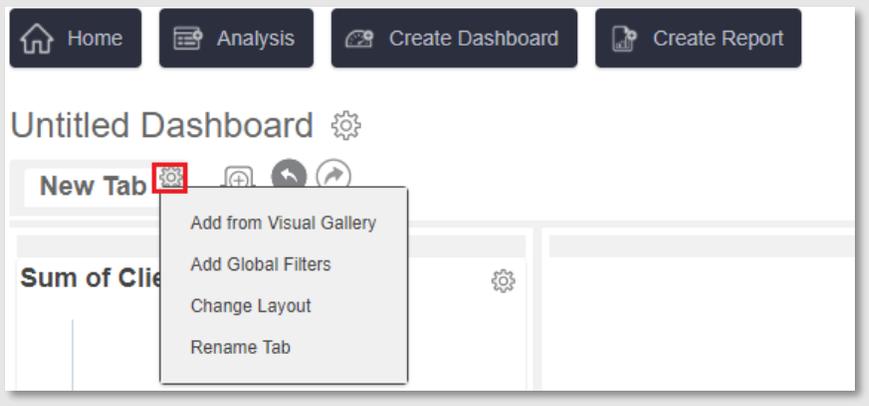
Global Filters can be applied to every chart or table displayed on the dashboard to filter on every set of data within the dashboard. Once applied the dashboard will refresh and users will see the filter added to all sets of data in each item added from a user's Visual Gallery.

Step	Action
1	Click the <b>Gear</b> symbol on the tab, then select <b>Add Global Filters</b> : 
2	Configure the <a href="#">filter</a> as desired: 

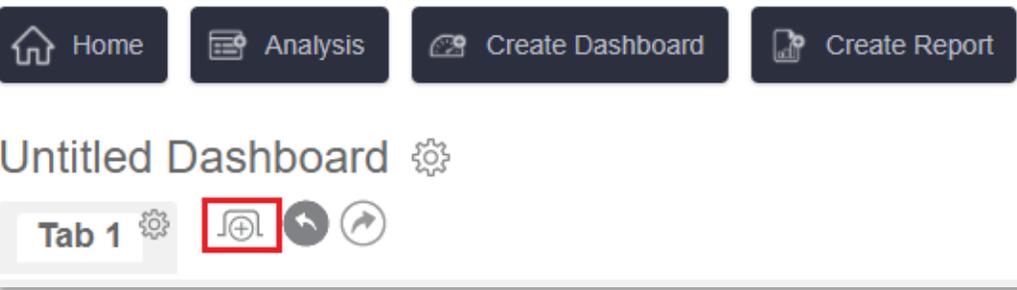
<b>3</b>	Click <b>Add</b> to apply the filter to the dashboard.
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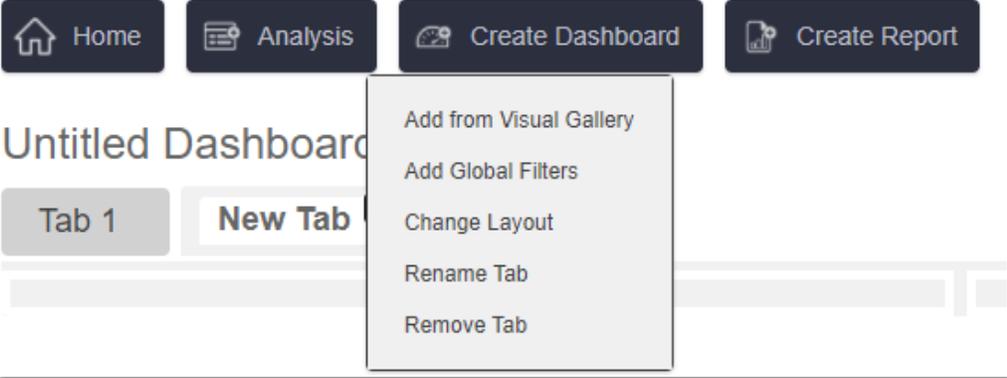
### Change Dashboard Layout

The number of panel columns displayed in the tab can be changed and the charts and tables can be rearranged.

Step	Action
<b>1</b>	<p>Click the <b>Gear</b> symbol on the tab, then select <b>Change Layout</b>:</p>  <p>The screenshot shows a dashboard with a navigation bar containing 'Home', 'Analysis', 'Create Dashboard', and 'Create Report'. Below the navigation bar is the title 'Untitled Dashboard' with a gear icon. A tab labeled 'New Tab' is visible, and a context menu is open over it, listing options: 'Add from Visual Gallery', 'Add Global Filters', 'Change Layout', and 'Rename Tab'. The 'Change Layout' option is highlighted.</p>
<b>2</b>	<p>Select the desired number of columns from the Number of Panel Columns dropdown:</p>  <p>The screenshot shows a dialog box titled 'Tab Layout' with a close button 'X'. Inside the dialog, there is a label 'Number of Panel Columns:' followed by a dropdown menu currently showing the number '3'. A blue 'Done' button is located at the bottom of the dialog.</p>
<b>3</b>	Click <b>Done</b> and the dashboard will update.

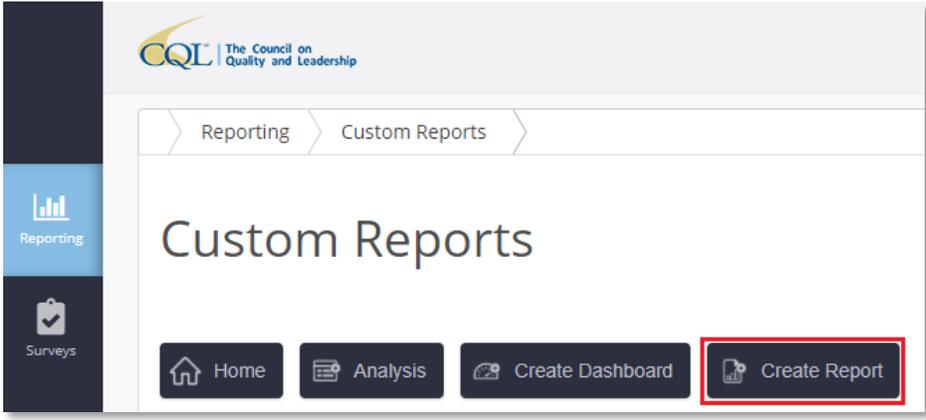
### Add/Remove a Tab

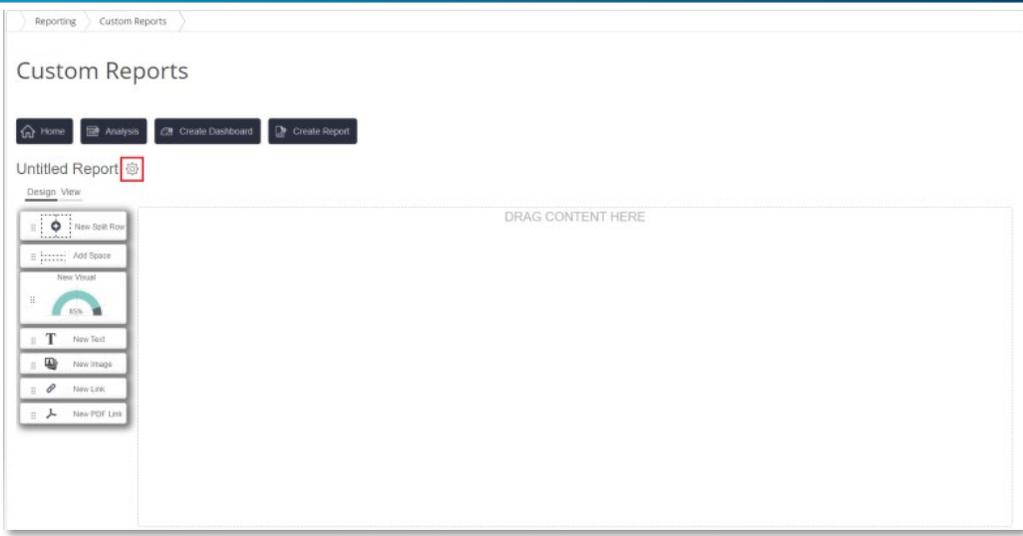
Step	Action
<b>1</b>	<p>Click the <b>Add Tab</b> symbol.</p>  <p>The screenshot shows the same dashboard interface as in the previous steps. The navigation bar and dashboard title are visible. A tab labeled 'Tab 1' is present, and a red box highlights the 'Add Tab' symbol (a plus sign inside a square) located to the right of the tab name.</p>

2	Users will be prompted to select from the Visual Gallery. Click <b>Add</b> to select a table or chart. Once all visualizations have been selected, click <b>Done</b> .
3	<p>To remove a tab, click the <b>gear</b> icon and select Remove Tab.</p> 

## Create Report

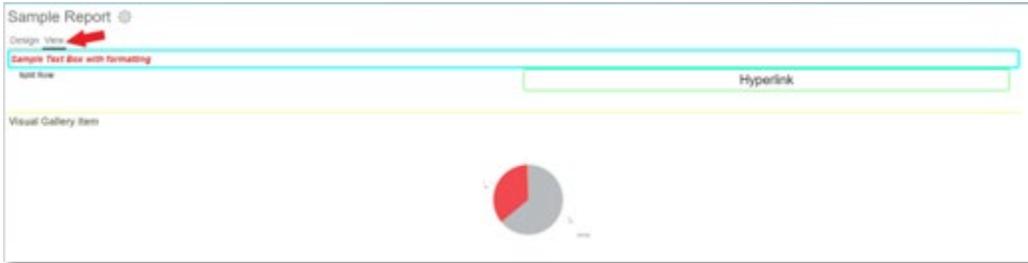
Users can create reports containing previously created items in their personal Visual Gallery.

Step	Action
1	Navigate to the <b>Reporting</b> icon.
2	Select <b>Custom Reports</b> .
3	<p>Click <b>Create Report</b>.</p> 
4	Click the <b>Gear</b> symbol next to Untitled Report.

	
5	Click <b>Rename</b> .
6	Name the new Report and click <b>Save</b> .
7	<p>Use the toolbar to drag and drop items into the white space to build the Report. Available toolbar items include:</p> <ul style="list-style-type: none"> <li>• <b>New Split Row:</b> Adds two columns per row to the section it is dropped into.</li> <li>• <b>Add Space:</b> Adds extra room above and below the various elements.</li> <li>• <b>New Visual:</b> Charts and Tables previously added to a user's Visual Gallery.</li> <li>• <b>New Text:</b> Text areas can be used for headings or descriptions.</li> <li>• <b>New Image:</b> Add an image from a URL or from the user's computer.</li> <li>• <b>New Link:</b> Displays text that allows users to click and be sent to a new webpage.</li> <li>• <b>New PDF Link:</b> Allows the user viewing the report to download as PDF.</li> </ul>
8	 <p>Items added to the Report can be edited or removed by clicking on the <b>Gear</b> icon.</p>



**9** Click **View** to view the Report.



**10** The report is saved as it is built and can be accessed, shared with other users, or deleted in the **Home** section.



## Share A Report, Analysis, or Dashboard

Users can share custom analyses, reports, or dashboards with users within their provider organization.

Step	Action
1	Navigate to the <b>Reporting</b> icon.
2	Select <b>Custom Reports</b> .
3	From the Custom Reports screen, click on the person icon to the right of the analysis, report, or dashboard to be shared.

<p><b>4</b></p>	<p>The Share Report dialog appears with a list of users with whom the analysis, report, or dashboard may be shared. Click on any name to share the report.</p>
<p><b>5</b></p>	<p>A list of users with whom the item has been shared appears at the bottom of the Share Report dialog. Sharing may be rescinded at any time by clicking on the trash can icon.</p>

### Share Outcomes Report

Find  All ▾

	David Sharp	dsharp@provider.org	Provider
	Melanie Quinn	mquinn@provider.org	Provider
	Sarah Fox	sfox@provider.org	Provider
	Matt Silver	msilver@provider.org	Provider

1 2 3 4 5 6 7 8 ▶ ▶▶

Shared With

dsharp@provider.org

- 6** Analyses, reports, and dashboards that have been shared with you by another user appear in the ‘Shared with Me’ folder on the Custom Reports Home screen and may be shared with further users via the person icon or removed by clicking the trash can icon.

Reporting > Custom Reports

## Custom Reports

[Home](#)
[Analysis](#)
[Create Dashboard](#)
[Create Report](#)

🔍 Type to search...

My Items

Shared with Me

	Title	Saved		
📄	Employment Analysis	10/1/2020 9:20 PM		
📊	Status Dashboard	10/1/2020 9:20 PM		
📄	Outcomes Report	10/1/2020 9:20 PM		