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.

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Big Brothe	rs Big Sis Home	Chatter Contacts 🗸 🗸	Accounts 🗸 E	nrollments	V Matches	 Match 	Support Contacts	Rep	oorts 🔨	 M 	lore	,	
Reports Recent 4 items			Q PCCD-	EPIS		New Rej	port New Report	(Salesfo	rce Clas	sic)	New	Folder) \$\$ *
REPORTS	Report Name 🗸	Description 🗸	Folder	~	Created By	~	Created On	~	Subs	cribed			
Recent		Annual/EOSY COS/YOS and											
Created by Me	PCCD-EPIS Surveys Report	SOR surveys due and com- pleted for previous quarter, filtered by Affiliated Active	Public Reports		Johnna Palm		5/31/2022, 4:14 PM						◄
Private Reports		Grant (grant tag)											
Public Reports		at any point during the											
All Reports		Closure Date (Begin Date) time period and Match											
FOLDERS	PCCD-EPIS Match History	Activation Date (End Date) time period determined by	Public Reports		Johnna Palm		5/31/2022, 4:11 PM						◄
All Folders Created by Me		the grant period. Filtered for Affiliated Active Grant (grant tag).											

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.

Big Brothers Big Sisters		Q Sear	ch]		*• = * ? + 👼
Big Brothers Big Sis	Home Chatter	Contacts 🗸	Accounts 🥆	🗸 Enrollments 🥆	Matches 🗸	Match Support Conta	icts 🗸	Reports 🗸 More 🔻 🖍
Report: Contacts with Surveys an PCCD-EPIS Surveys Re Annual/EOSY COS/YOS and SOR surv	nd Match eport eys due and complete	ed for previous	quarter, filtered	d by Affiliated Active Gra	ant (grant tag)	C	۹	Add Chart
Total Records Total Completed							Â	Filters Close Filter Panel
22 6								Show Me
Survey: Record Type ↑	Program Type 🕈 💌	Due Date 💌	Completed 💌	Affiliated Active Grants	•			All accounts
SOR (Child) (Strength of Relationship) (7)	Community (7)	1/23/2022		VPP (PCCD); BS VII				Last Activity All Time
		3/21/2022		VPP (PCCD); BS VII				
		3/29/2022		SEPA; BS VII				INCLUDE ROWS MATCHING
		1/21/2022		SEPA; BS VII				1 AND 2 AND (3 OR 4)
		1/2/2022		PCCD 13; SEPA; BS VII				
		1/24/2022		BS VII				1 Due Date equals LAST QUARTER
		1/29/2022		VPP (PCCD); BS VII				Affiliated Active Grants
	Subtotal		0					2 contains BS VII
Subtotal			0					SOR Type
SOR (Child)- Closed (4)	Community (4)	3/9/2022		SEPA; BS VII				³ equals Annual, EOSY
		1/4/2022		BS VII				4 COS/YOS Type
		2/26/2022		2013-2014 OJJDP JJ; BS VI	I			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.

1	Process Perform	nance Measures	;		BIG BRO	THERS BIG SISTERS		
2								
3	Agency	Insert Agency N	ame Here			Grant Number Insert Grant Number		
4	Contact	Insert Contact N	ame Here			Grant Start 1/1/2021		
5	Email	Insert Email Her	e			Grant Year Year 1: Jan 2022-Dec 2022		
6	Phone	Insert Phone Nu	mber Here			County Insert County Here		
7	Quarter 1	Quarter 2	Quarter 3	Quarter 4		Location Insert Location Here		
8	Jan-Mar 2021	Apr-Jun 2021	Jul-Sep 2021	Oct-Dec 2021	Cumulative	Performance Measure	PM #	
9	0	0				Number of YOS Surveys Due During the Reporting Quarter	P1	
10						Number of YOS Surveys Completed During the Reporting Quarter	P2	
11						Number of COS Surveys Due During the Reporting Quarter	P3	
12						Number of COS Surveys Completed During the Reporting Quarter	P4	
13						Number of SOR Surveys Due During the Reporting Quarter	P5	
14						Number of SOR Surveys Completed During the Reporting Quarter	P6	
15	The following secti	on is automatically	calculated by report	ing quarter using M	atch History Data			
16	15	19			34	Number of New Matches Made	P7	
17	44	9			53	Number of Matches Ended	P8	
18					e following section is	s automatically calculated using all records associated with the grant number from the Match	History Da	
19					204	Number of Matches Served - Community	P9	f all site-based
20					246	Number of Matches Served - Site	and sit faciilita	e-based ted matches
21					91	Match Retention: Reached 1 year	grant	ated with this
22					53	Match Retention: Reached 2 years	P12	
23					45	Match Retention: Reached 3 years	P13	
24					43	Match Retention: Reached 4 years	P14	
25					69	Match Retention: Reached 5 or more years	P15	
26	Version 3 06-01	-2022						
	< >	nstructions	Process PMs	Demographics S	ummary Ma	atch History Data Sheet1 + :		

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.

Big Brothers Big Sisters		Q Sear	rch		
Big Brothers Big Sis	Home Chatter	Contacts 🗸	Accounts 🗸	🗸 Enrollments 🗸 Ma	ches 🗸
Report: Contacts with Surveys an PCCD-EPIS Surveys Re Annual/EOSY COS/YOS and SOR surv	nd Match E port eys due and complete	ed for previous	quarter, filtered	l by Affiliated Active Grant	(grant tag)
Total Records Total Completed 22 6					
Survey: Record Type ↑	Program Type 🕇 💌	Due Date 💌	Completed 💌	Affiliated Active Grants 💌	
SOR (Child) (Strength of Relationship) (7)	Community (7)	1/23/2022		VPP (PCCD); BS VII	
		3/21/2022		VPP (PCCD); BS VII	
		3/29/2022		SEPA; BS VII	
		1/21/2022		SEPA; BS VII	
		1/2/2022		PCCD 13; SEPA; BS VII	
		1/24/2022		BS VII	
		1/29/2022		VPP (PCCD); BS VII	
	Subtotal		0		
Subtotal			0		
SOR (Child)- Closed (4)	Community (4)	3/9/2022		SEPA; BS VII	
		1/4/2022		BS VII	
		2/26/2022		2013-2014 OJJDP JJ; BS VII	
		2/13/2022		VPP (PCCD); BS VII	
	Subtotal		4		
Subtotal			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 Bi	ig Sisters	Q Search				[★▼ 🖬 🇠 ?	· . 🧑
Big Brothe	rs Big Sis Home	Chatter Contacts 🗸 A	accounts 🗸 Enrollme	nts 🗸 Matches 🗸	Match Suppo	ort Contacts 🗸 Rep	oorts 🗸 More 🔻	
Reports Recent 4 items			Q PCCD-EPIS		New Report	New Report (Salesfo	rce Classic) New Fo	older 🔯 👻
REPORTS	Report Name 🗸 🗸	Description 🗸	Folder	✓ Created By	✓ Crea	ited On V	Subscribed	
Recent		Annual/EOSY COS/YOS and						
Created by Me	PCCD-EPIS Surveys Report	pleted for previous quarter, filtered by Affiliated Active	Public Reports	Johnna Palm	5/31	/2022, 4:14 PM		▼
Private Reports		Grant (grant tag)						
Public Reports All Reports		Provides all matches active at any point during the Closure Date (Begin Date) time period and Match						
FOLDERS	PCCD-EPIS Match History	Activation Date (End Date) time period determined by	Public Reports	Johnna Palm	5/31	/2022, 4:11 PM		•
All Folders		the filters for the length of the grant period. Filtered						
Created by Me		for Affiliated Active Grant (grant tag).						
Shared with Me		Annual/EOSY COS/YOS and						
FAVORITES	PCCD-EPIS Surveys Report	pleted for previous quarter,	Private Reports	Johnna Palm	5/26	/2022, 2:38 PM		•
All Favorites		filtered by Affiliated Active Grant (grant tag)						

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

B	Big Brothers Big	Sisters	Q S	earch			*• 🖬 🗠 ? 单 🗑
	Big Brothers	Big Sis Home	Chatter Contacts	✓ Accounts ✓ Enrollments ✓ Mat	tches 🗸 Match Support Co	ontacts 🗸	Reports 🗸 More 🔻 🖍
Pro	Report: Matche PCCD-EPIS vides all matches a	s with Contacts and Programs Match History cctive at any point during th	s e Closure Date (Begir	Date) time period and Match Activation Date	e (End Date) time period dete	Q (Add Chart ♥ C Edit ▼ the filters for the length of the grant peri
То 95	tal Records						Filters Close Filter Panel
	Match ID 💌	Primary Big: Contact ID 💌	Little: Contact ID 💌	Little: Referral Detail: Inquiry Source Name 💌	Match Activation Date ↑	Closure I	Show Me All matches
1	a1v2J0000027T8M	0032J00003PWDwr	0032J00003PMtoB	School	9/12/2009	:	Match Activation Date
2	a1v2J0000027bxL	0032J00003PZZrp	0032J00003PMn13	Self - Self	5/15/2010	4,	
3	a1v2J0000027rpp	0032J00003PSPIW	0032J00003PNHN7	Self - Always Known	6/9/2010	7/	INCLUDE ROWS MATCHING
4	a1v2J0000028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor	5/31/2011	9,	1 AND 2 AND (3 OR 4) AND (5 AND 6)
5	a1v2J0000028sIn	0032J00003PWDxQ	0032J00003PLoN7	School	10/20/2011		AND 7
6	a1v2J0000027kE1	0032J00003PSD4w	0032J00003PPRWZ	Therapist/Counselor	9/8/2012		Record Exclude
7	a1v2J0000028th6	0032J00003PStGA	0032J00003PMtpT	School	11/8/2012	1/	1 equals No Preference, ""
8	a1v2J0000027tVs	0032J00003PZZsM	0032J00003PPXrj	Self - Self	12/7/2012	1,	Stage
9	a1v2J0000028sH7	0032J00003PVkld	0032J00003PNesM	School	12/18/2012		2 equals Active, Pending Closure, Closed
10	a1v2J0000027Vde	0032J00003PVkln	0032J00003PMtoe	Relative	1/12/2013	5	
11	a1v2J0000027hQ7	0032J00003PRwVK	0032J00003PR2aP	Relative	9/18		greater or equal Jul 1, 2021
12	a1v2J0000027wuW	0032J00003PV0WR	0032J00003PN2Jm	Self - Self	9/24/2013		Closure Date
13	a1v2J0000029hRy	0032J00003PUJdJ	0032J00003POmtB	School	11/13/2013		4 equals ""
14	a1v2J0000027ipA	0032J00003PRTAJ	0032J00003PM353	Self - Self	11/10 0014		5 Match Activation Date
15	a1v2J0000027nny	0032J00003PXgN3	0032J00003PMW9p	Self - Self	11/11/2014	5	less or equal Mar 31, 2022
16	a1v2J0000027gCX	0032J00003PTMYa	0032J00003POmtQ	School	11/18/2014		6 Exclude Reason
17	a1v2J0000028VGd	0032J00003PZZt3	0032J00003POPWA	Web Link - Agency Website	12/15/2014	1	cyudis
18	a1v2J0000027kH0	0032J00003PRy1I	0032J00003PPAgt	Web Link - Agency Website	12/30		7 Affiliated Active Grants contains BS VII
19	a1v2J0000028u8o	0032J00003PRy1H	0032J00003PPAh4	School	1/30/2015	F	

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.

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	Big Brothers	Big Sis Home	Chatter Contacts	✓ Accounts ✓ Enrollments ✓ Mai	tches 🗸 Match Support Co	ontacts 🗸 Rep	oorts 🗸 M	ore 🔻 🖌
Pro Pro	Report: Matche PCCD-EPIS vides all matches a tal Records	s with Contacts and Programs Match History ctive at any point during th	s e Closure Date (Begir	Date) time period and Match Activation Dat	e (End Date) time period dete	Q 4 Add	Chart T	C ^a Edit Edit (Salesforce Classic) Save As Save
	Match ID	Primary Big: Contact ID 💌	Little: Contact ID 💌	Little: Referral Detail: Inquiry Source Name	Match Activation Date 🕇 💌	Closure Date 💌	Program: Prog	Subscribe
1	a1v2J0000027T8M	0032J00003PWDwr	0032J00003PMtoB	School	9/12/2009	5/2/2022	Community	Export
2	a1v2J0000027bxL	0032J00003PZZrp	0032J00003PMn13	Self - Self	5/15/2010	4/24/2022	Community	Delete
3	a1v2J0000027rpp	0032J00003PSPIW	0032J00003PNHN7	Self - Always Known	6/9/2010	7/15/2021	Community	Add to Dackhoard
4	a1v2J0000028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor	5/31/2011	9/27/2021	Community	Add to Dashboard
5	a1v2J0000028sIn	0032J00003PWDxQ	0032J00003PLoN7	School	10/20/2011	-	Site	

6	Big Brothers Big	Sisters	Q 5	Search				[*• • • • •	· 🌀
	Big Brothers	Big Sis Home	Chatter Contacts	✓ Accounts	V Enrolli	ments 🗸 Mat	ches 🗸 Match Support Cont	acts 🗸 Rep	oorts 🗸 More 🔻	1
Prov	Report: Matcher PCCD-EPIS vides all matches a	with Contacts and Program Match History ctive at any point during	ns the Closure Date (Begi	n Date) time pe	riod and Mate	h Activation Date	: (End Date) time period determ	Q 🚯 Add hined by the filt	Chart T C Edit ers for the length of the grar	► nt peri
Tot 95	al Records				Exp	oort				
	Match ID	Primary Big: Contact ID						re Date 💌	Program: Program Type 💌	Little: A
1	a1v2J0000027T8M	0032J00003PWDwr	Export View					5/2/2022	Community	
2	a1v2J0000027bxL	0032J00003PZZrp				Y		4/24/2022	Community	
3	a1v2J0000027rpp	0032J00003PSPIW	Formatted	Report	Deta	ails Only		7/15/2021	Community	-
4	a1v2J0000028wLW	0032J00003PUJcZ	Export the report	t including	Export only	the detail rows.		9/27/2021	Community	
5	a1v2J0000028sIn	0032J00003PWDxQ	the report header and filter se	, groupings, ttings,	Use this calculations	to do further or for uploading		-	Site	
6	a1v2J0000027kE1	0032J00003PSD4w			to oth	er systems.		-	Community	
7	a1v2J0000028th6	0032J00003PStGA						1/24/2022	Site	
8	a1v2J0000027tVs	0032J00003PZZsM	Format			Encoding		1/23/2022	Community	
9	a1v2J0000028sH7	0032J00003PVkld	Excel Format .xls		÷	ISO-8859-1 (Ge	neral US & Western Europea	-	Site	
10	a1v2J0000027Vde	0032J00003PVkln			•		•	5/23/2022	Community	
11	a1v2J0000027hQ7	0032J00003PRwVK						-	Community	
12	a1v2J0000027wuW	0032J00003PV0WR					Cancel	-	Community	
13	a1v2J0000029hRy	0032J00003PUJdJ							Site	
14	a1v2J0000027ipA	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.

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					_ /							Blac
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4 a1v2J000002/rpp	0032J00003PSPIW	0032J00003PNHN7	Self - Always Know	'n	6	/9/2010	//15/2021	Community		20 Mai	le	Blac
5 a1v2J0000028wLW	0032100003PU1cZ	0032100003PPA00	Therapist/Counsel	or	5/	31/2011	9/27/2021	Community		18 Mal	e	Cau
6 a1v2l0000028sin	0032100003PWDxO	0032100003PLoN7	School		10/	20/2011	5/2//2022	Site		18 Fen	nale	Oth
7 a1v2J0000027kE1	0032J00003PSD4w	0032J00003PPRWZ	Therapist/Counsel	or	9	/8/2012		Community		20 Mal	le	Whi
8 a1v2J0000028th6	0032J00003PStGA	0032J00003PMtpT	School		11	/8/2012	1/24/2022	Site		20 Ma	le	Blac
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11 a1v2J0000027Vde	0032J00003PVkIn	0032J00003PMtoe	Relative		1/	12/2013	5/23/2022	Community		21 Fen	nale	Blac
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12 a1v2J0000027hQ7	0032J00003PRwVK	0032J00003PR2aP	Relative		9/:	18/2013		Community		17 Fen	nale	Cau
13 a1v2J0000027wuW	/ 0032J00003PV0WR	0032J00003PN2Jm	Self - Self		9/:	24/2013		Community		16 Fen	nale	Hisp
14 a1v2J0000029hRy	0032J00003PUJdJ	0032J00003POmtB	School		11/	13/2013		Site		16 Mal	le	Whi
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15 a1v2J0000027ipA	0032J00003PRTAJ	0032J00003PM353	Self - Self		11/	10/2014	4/24/2022	Community		17 Fen	nale	Cau
16 a1v2J0000027nny	0032J00003PXgN3	0032J00003PMW9p	Self - Self		11/	11/2014	9/27/2021	Community		19 Mal	le	Whi
17 a1v2J0000027gCX	0032J00003PTMYa	0032J00003POmtQ	School		11/	18/2014		Community		16 Fen	nale	Oth
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20 a1v2J0000028u8o	0032J00003PRy1H	0032J00003PPAh4	School		1/	30/2015		Site		13 Fen	nale	Blac
21 a1v2J0000027eu0	0032J00003PRy1M	0032J00003POmtM	Self - Self		2	/4/2015	1/26/2022	Community		16 Mal	le	Oth
22 a1v2J0000028sIG	0032J00003PTpt9	0032J00003PLoO5	School		2/:	27/2015	4/11/2022	Site		15 Fen	nale	Oth
23 a1v2J000002uUAo	0032J00003PWQkx	0032J00003PN2Jr	Web Link - BBBS Na	ational Site	3	/3/2015	8/4/2021	Community		19 Fen	nale	Whi
24 a1v2J0000028EGA	0032J00003PY94S	0032J00003PMA2g	Web Link - BBBS Na	ational Site	3/:	13/2015	8/23/2021	Community		14 Mal	le	Blac
25 a1v2J0000028rUb	0032J00003PTdUG	0032J00003PLoNo	Special Event - Bov	vl For Kids Sake	3/:	20/2015	7/19/2021	Community		20 Mal	le	Oth
26 a1v2J0000028VuH	0032J00003PZZtB	0032J00003POmtK	Self - Self		4	/2/2015	10/19/2021	Community		15 Mal	le	Oth
27 a1v2J0000028FYX	0032J00003PVYWt	0032J00003PM34I	Web Link - BBBS Na	ational Site	4/:	10/2015		Community		16 Fen	nale	Oth
28 a1v2J0000028syR	0032J00003PTqfh	0032J00003PQIoA	School		4/:	28/2015		Site		15 Fen	nale	Hisp
29 a1v2J0000027geA	0032J00003PS8zp	0032J00003PPI1L	Self - Self		5	/1/2015		Community		15 Mal	le	Blac
30 a1v2J0000027wUs	0032J00003PUbTx	0032J00003PPRWs	Self - Self		5/:	13/2015		Community		14 Fen	nale	Whi
31 a1v2J0000027a60	0032J00003PUnik	0032J00003PPAgy	Therapist/Counsel	or	5/:	18/2015		Community		17 Mal	le	Whi
32 a1v2J0000028Mm9	0032J00003PUnil	0032J00003PPoKu	Therapist/Counsel	or	8/:	22/2015		Community		18 Ma	e	Whi 🔽
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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.

Т 15 Р	'o report on your performance measures to PCCD, upload this Excel spreadsheet as an attachment in E-grants. Before submitting your 'erformance Measures in Egrants, you will need to complete the following steps:			
₁₆ 1.	. Review the Process tab to assure your data looks logical and accurate.			
17 2.	2. Review the Match History Data tab to make sure no identifying information is included.			
4	Instructions Process PMs Demographics Summary Match History Data Sheet1		Þ]]
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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.

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M	atch ID	Primary Big: Contact !	P. Little: Contact IP.	Little: Referral Detail: Inquiry Sou	rce Match Act	ivation Dates C	losure Date, Program: Program Typ	- Little: Ac- Little: Gen	nder-
1416	*	Finally big. contact	· Little. contact II	Name	* Watch Act		Program. Program ty		- T
a1v2J00	00027T8M	0032J00003PWDwr	0032J00003PMtoB	School		9/12/2009	5/2/2022 Community	19 Female	W
01/2100	00027byl	0022100002077rp	0022100002014=12	solf solf		E/1E/2010	4/24/2022 Community	10 Mala	BI
a1v2J00	000270XL	0032100003P221p	0022100003P101115	Self - Always Known		6/9/2010	7/15/2021 Community	20 Malo	
a1v2000	000271pp	0032300003F3F1W	00323000032101107	Sell - Always Known		0/ 5/ 2010	7/15/2021 Community	20 Wate	BI
a1v2J00	00028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor		5/31/2011	9/27/2021 Community	18 Male	C
a1v2J00	00028sIn	0032J00003PWDxQ	0032J00003PLoN7	School		10/20/2011	Site	18 Female	0
a1v2J00	00027kE1	0032J00003PSD4w	0032J00003PPRWZ	Therapist/Counselor		9/8/2012	Community	20 Male	w
a1v2J00	00028th6	0032J00003PStGA	0032J00003PMtpT	School		11/8/2012	1/24/2022 Site	20 Male	В
a1v2J00	00027tVs	0032J00003PZZsM	0032J00003PPXrj	Self - Self		12/7/2012	1/23/2022 Community	16 Female	В
a1v2J00	00028sH7	0032J00003PVkId	0032J00003PNesM	School		12/18/2012	Site	17 Female	BI
a1v2J00	00027Vde	0032J00003PVkIn	0032J00003PMtoe	Relative		1/12/2013	5/23/2022 Community	21 Female	Bl
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a1v2J00	00027hQ7	0032J00003PRwVK	0032J00003PR2aP	Relative		9/18/2013	Community	17 Female	Ca
a1v2J00	00027wuW	0032J00003PV0WR	0032J00003PN2Jm	Self - Self		9/24/2013	Community	16 Female	Hi
a1v2J00	00029nRy	0032100003P01d1	0032J00003POmtB	School		11/13/2013	Site	16 Male	W
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a1v2J00	00027kH0	0032J00003PRy1I	0032J00003PPAgt	Web Link - Agency Website		12/30/2014	1/19/2022 Community	15 Female	Ca
a1v2J00	00028u8o	0032J00003PRy1H	0032J00003PPAh4	School		1/30/2015	Site	13 Female	BI
a1v2J00	00027eu0	0032J00003PRy1M	0032J00003POmtM	Self - Self		2/4/2015	1/26/2022 Community	16 Male	0
a1v2J00	00028sIG	0032J00003PTpt9	0032J00003PLoO5	School		2/27/2015	4/11/2022 Site	15 Female	0
a1v2J00	0002uUAo	0032J00003PWQkx	0032J00003PN2Jr	Web Link - BBBS National Site		3/3/2015	8/4/2021 Community	19 Female	W
a1v2J00	00028EGA	0032J00003PY94S	0032J00003PMA2g	Web Link - BBBS National Site		3/13/2015	8/23/2021 Community	14 Male	BI
a1v2J00	00028rUb	0032J00003PTdUG	0032J00003PLoNo	Special Event - Bowl For Kids Sake		3/20/2015	7/19/2021 Community	20 Male	0
a1v2J00	00028VuH	0032J00003PZZtB	0032J00003POmtK	Self - Self		4/2/2015	10/19/2021 Community	15 Male	0
a1v2j00	00028FYX	0032J00003PVYWt	0032100003PM341	School		4/10/2015	Site	16 Female	01
1 2100	ooog -	003200003P1410	0032100005PQI0A			4/20/2015	one u	15 Female	- Al
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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.

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2 a	1v2J0000029i5V	0032J00003PVI62	0032J00003POmB8	School	9/11/2008	9/27/2021	Community	19 Fe	emale \	Nhite or Caucasian	
3 a	1v2J0000027Yso	0032J00003PSPku	0032J00003PNeA3	Therapist/Counselor	2/12/2009	3/3/2021	Community	21 M	ale (Other	
4 a	1v2J0000027T8M	0032J00003PWDwr	0032J00003PMtoB	School	9/12/2009	5/2/2022	Community	19 Fe	emale \	Nhite or Caucasian	
5 a	1v2J0000027bxL	0032J00003PZZrp	0032J00003PMn13	Selt - Selt	5/15/2010	4/24/2022	Community	18 M	ale E	Black or African American;	
6 a	1v2J0000027rpp	0032J00003PSPIW	0032J00003PNHN7	Self - Always Known	6/9/2010	7/15/2021	Community	20 M	ale E	Black or African American	
7 a	1v2J0000028IE8	0032J00003PSbyj	0032J00003POugR	Relative	3/16/2011	6/30/2021	Community	21 M	ale I	lispanic	
8 a	1v2J0000028wLW	0032J00003PUJcZ	0032J00003PPA00	Therapist/Counselor	5/31/2011	9/27/2021	Community	18 M	ale E	3lack or African American; 1	
9 a	1v2J0000028sIn	0032J00003PWDxQ	0032J00003PLoN7	School	10/20/2011		Site	18 Fe	emale (Other	
10 a	1v2J000002944X	0032J00003PV0WN	0032J00003PLVhg	School	4/26/2012	6/30/2021	Community	19 Fe	emale \	White or Caucasian	
11 a	1v2J0000027kE1	0032J00003PSD4w	0032J00003PPRWZ	Therapist/Counselor	9/8/2012		Community	20 M	ale \	Nhite or Caucasian	
12 a	1v2J0000028th6	0032J00003PStGA	0032J00003PMtpT	School	11/8/2012	1/24/2022	Site	20 M	ale E	Black or African American	
13 a	1v2J0000027tVs	0032J00003PZZsM	0032J00003PPXrj	Self - Self	12/7/2012	1/23/2022	Community	16 Fe	emale E	Black or African American	
14 a	1v2J0000028sH7	0032J00003PVkId	0032J00003PNesM	School	12/18/2012		Site	17 Fe	emale B	3lack or African American	
15 a	1v2J0000027Vde	0032J00003PVkIn	0032J00003PMtoe	Relative	1/12/2013		Community	21 Fe	emale E	Black or African American	
16 a	1v2J0000027hQ7	0032J00003PRwVK	0032J00003PR2aP	Relative	9/18/2013		Community	17 Fe	emale E	Black or African American; 1	
17 a	1v2J0000027wuW	0032J00003PV0WR	0032J00003PN2Jm	Self - Self	9/24/2013		Community	16 Fe	emale H	Hispanic	
18 a	1v2J0000029hRy	0032J00003PUJdJ	0032J00003POmtB	School	11/13/2013		Site	16 M	ا ale	White or Caucasian	
19 a	1v2J0000028ujr	0032J00003PYLmR	0032J00003POugd	School	11/19/2013	8/3/2021	Community	18 M	ale \	White or Caucasian	
20 a	1v2J00000285na	0032J00003PUbTp	0032J00003PMneM	Self - Self	11/19/2013		Community	16 Fe	emale E	Black or African American; '	
21 a	1v2J0000028cfh	0032J00003PWhBt	0032J00003POmCg	Self - Always Known	12/18/2013		Community	17 M	ale B	Black or African American	
22 a	1v2J0000027ipA	0032J00003PRTAJ	0032J00003PM353	Self - Self	11/10/2014	4/24/2022	Community	17 Fe	emale B	Black or African American; '	
23 a	1v2J0000027nny	0032J00003PXgN3	0032J00003PMW9p	Self - Self	11/11/2014	9/27/2021	Community	19 M	ale \	White or Caucasian	
24 a	1v2J0000027gCX	0032J00003PTMYa	0032J00003POmtQ	School	11/18/2014		Community	16 Fe	emale (Other	
25 a	1v2J0000028VGd	0032J00003PZZt3	0032J00003POPWA	Web Link - Agency Website	12/15/2014	1/31/2022	Community	15 Fe	emale B	Black or African American;	
26 a	1v2J0000028W9W	0032J00003PScet	0032J00003PLudD	Web Link - BBBS National Site	12/16/2014	2/16/2022	Community	17 M	ale I	Hispanic	
27 a	1v2J0000027kH0	0032J00003PRy1I	0032J00003PPAgt	Web Link - Agency Website	12/30/2014	1/19/2022	Community	15 Fe	emale E	Black or African American;	
28 a	1v2J0000028u8o	0032J00003PRy1H	0032J00003PPAh4	School	1/30/2015		Site	13 Fe	emale B	Black or African American	
29 a	1v2J0000027eu0	0032J00003PRy1M	0032J00003POmtM	Self - Self	2/4/2015	1/26/2022	Community	16 M	ale (Dther	
30 a	1v2J0000028sIG	0032J00003PTpt9	0032J00003PLoO5	School	2/27/2015	4/11/2022	Site	14 Fe	emale (Other	
31 a	1v2J000002uUAo	0032J00003PWQkx	0032J00003PN2Jr	Web Link - BBBS National Site	3/3/2015	8/4/2021	Community	19 Fe	emale N	White or Caucasian	
32 a	1v2J0000028hNg	0032J00003PStHh	0032J00003PNesZ	Self - Self	3/10/2015		Community	16 M	ale B	Black or African American; I	
33 a	1v2J0000028EGA	0032J00003PY94S	0032J00003PMA2g	Web Link - BBBS National Site	3/13/2015	8/23/2021	Community	14 M	ale E	Black or African American	
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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 Perform	mance Measure	5		BIG BR	OTHERS BIG SISTERS						
Agency	Insert Agency Name Here				Grant Number Insert Grant Number						
Contact	Insert Contact Name Here				Data 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	Cumulativ	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 Hyperpreta											
15	19			34	Number of New Matches Made	P7					
44	9			53	Number of Matches Ended	P8					
			is automatically calculated using all records associated with the grant number from the Matc	h History De							
				204	Number of Matches Served - Community	P9					
				246	N mber of Matches Served - Site	P10					
				91	M tch Retention: Reached 1 year	P11					
				53	N tch Retention: Reached 2 years	P12					
				45	Tatch 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	1-2022										
4 F	Instructions	Process PMs	Demographics 5	Summary	latch History Data Sheet1 (+)						