

2023 OR IDA Data Dictionary At-a-Glance (for Outcome Tracker)

This short version of the Data Dictionary names the questions to enter into Outcome Tracker for all Oregon IDA Initiative participants. These are fields that Neighborhood Partnerships needs for evaluation or program management.

The long version of the Data Dictionary provides additional detail on each question. For comments or questions, please contact Amy Stuczynski at astuczynski@neighborhoodpartnerships.org.

Intake Part 1: Eligibility	
Name Address City State Zipcode County at Application Phone Email Birthdate Assets for Net Worth Calculation: Cash Amt in Savings Accounts Amt in Checking Accounts Home or Condo 1 Value Home or Condo 2 Value Vehicle 1 Value Vehicle 2 Value Vehicle 3 Value Retirement Accounts Other Investments All Other Assets Total Assets (auto-calculates)	Debts for Net Worth Calculation: Home or Condo 1 Loan Home or Condo 2 Loan Vehicle 1 Loan Vehicle 2 Loan Vehicle 3 Loan Credit Cards Student Loans Balance Medical Debt Unpaid Taxes Child Support Payments Other Debts Total Debts (auto-calculates) Full Net Worth (auto-calculates) ORIDA Eligible Net Worth (auto-calculates) Public Benefit Certifying Eligibility Total Household Income Number of Adults in the Household Number of Children in the Household Total Household Size (auto-calculates) Asset Goal at Intake (new April 2023) <i>Must be on application but not required in OT:</i> Currently have an IDA at another organization? Related to a staff or board member at this organization?

Intake Part 2: Client Info	Intake & Exit: Financial Experiences (aka FCS: Financial Capability Scale)
<p>Date Completed</p> <p>Language at Home</p> <p>Language Preference Speaking</p> <p>Language Preference Reading</p> <p>English Proficiency</p> <p>Racial Identity (Open-Ended)</p> <p>Racial Categories (Multi Option)</p> <p>Deaf or difficulty hearing</p> <p>Blind or difficulty seeing</p> <p>Difficulty walking or climbing stairs</p> <p>Difficulty concentrating, remembering</p> <p>IDA Gender</p> <p>IDA Gender fill in</p> <p>Served in Military</p> <p>Been in Foster Care</p> <p>Education completed</p> <p>Parents' College Education (<i>Education savers only</i>)</p> <p>Federal Housing Assistance (<i>Home savers only</i>)</p>	<p>Date FCS Completed</p> <p>Participant Declines</p> <p>Budget</p> <p>Confidence—Goal</p> <p>Confidence—Emergency</p> <p>Auto Deposit</p> <p>Spending Less than Income</p> <p>Late Fee</p> <p>Credit Record</p> <p>Current Goal</p> <p>Total FCS Score (auto-calculates)</p> <p><i>Business savers only:</i></p> <p> Self-employed?</p> <p> Business sales</p> <p> Business profits</p>

IDA Accounts	Exit
Agency/Collaborative Partner	Mailing address
Financial Institution, Account Number	City
Account Description (<i>enter financial institution name for non-custodial accounts</i>)	State
	Zip code
Account Status	Email address
Application Date	Financial Education Completed?
Enrollment Date	Financial Education Completed Date
Opened Date	
Matching Start Date, Matching End Date	
Match Source Groups	
Intended Use	
IDA Match Rate	
IDA Account Total Match Limit	
IDA Account Annual Match Limit	
Max Annual Savings Matched (<i>may be used for accounts opened before March 2022</i>)	
Max Total Savings Matched (<i>may be used for accounts opened before March 2022</i>)	
Closed Date	
Closed Reason	
Transaction dates	
Transaction types	
Transaction amounts	
Withdraw Use (for matched withdrawals)	