Review of the nFORM 2.0 Data Export

December 13, 2022
nFORM 2.0 Team
Mathematica

OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

OPRE

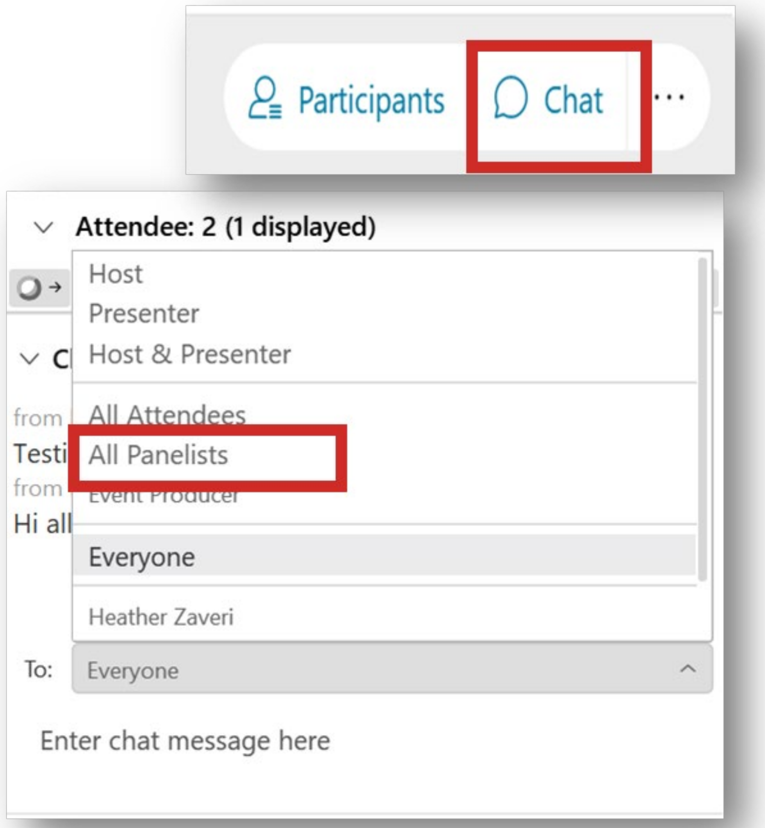
HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

Mathematica
Progress Together

BUILD
Building Usage, Improvement, & Learning with Data in HMRF Programs

Housekeeping

- **Use the chat to ask questions**
  - Select "All Panelists" to submit questions
- **Click on the link in the chat to access closed-captioning**



REMINDERS:

- **Never text or email personally identifiable information (PII) like client names – *including to the help desk***
  - Only refer to clients by their client ID number
- **Never take screenshots of client PII from nFORM**
- **Everyone who interacts with client data should:**

1. Watch the Keeping Data Secure training video on the HMRF Grantee Resource site
2. Review the Performance Measures and Data Collection Logistics Manual on the HMRF Grantee Resource site for more information on keeping data secure

Mathematica

Today's topics

Overview of the data export and data dictionary

Deep dive into each tab of the data export

Tips for using the data export and data dictionary

Overview of the data export and data dictionary

Data export

- A cumulative Excel file of data recorded in nFORM from the start of the grantee's use of nFORM through the data export processing time
- Does not include PII such as client names, contact information, service contact and referral notes
- Each tab of data export contains a different type of data recorded in nFORM
- As of December 1, the data export file includes various enhancements (to be discussed on each applicable tab)

Mathematica

Data identifiers

- **All client level data includes client ID to help grantees merge data with information in other tabs of the export and nFORM operational reports**
  - Other common variables on tabs with client-level information include location, population, enrollment date, service assignment name and category (if applicable), and current client status
- **Use client and couple ID, workshop ID, series ID, session ID, and other identifiers to link data across multiple tabs in the data export and operational reports**

The data export tabs include…

- Client Info
- Service Contacts
- Referrals
- Incentives – Program Supports
- Workshop Characteristics
- Series
- Series Facilitators
- Session Attendance
- Service Providers
- Survey Response Data
- Program Operations Survey

Mathematica

Site administrators can submit a request for a data export on the Reports tab of nFORM

QPR/PPR | Operational Reports | Query Tool | Data Export

Data Export

Request Data Export

Click the Submit Request button below to export data from nFORM into an Excel file. For security purposes, the file will not contain personally identifiable information. When your request has finished processing, the data file will appear in the Available File box below. Note that submitting a request will overwrite the current data file in the box.

Processing time for each data export request will vary. We recommend that you submit data export requests at the close of the business day before logging off of nFORM. Please see Module VIII of the nFORM User Manual for more information.

A data dictionary describing the data in the exported file is available on the HMRF Grantee Resource Site tab.

Submit Request

Available File

File	Date Generated
DataExport_2022_10_28_080243.xlsx	10/28/2022 8:02:43 AM

Exports ready within 48 hours of request.

Best practice is to submit requests at COB to leverage overnight processing.

Mathematica

Data dictionary

- **Data dictionary lists all variables in the data export as "Field Names"**
  - Column name in data export may differ slightly from field name in data dictionary for some variables
- **Data dictionary shows the meaning of the numbers (or values) associated with each variable**
  - For example, the data export will show a client's population as a number 1 through 6 and the data dictionary tells you what population type is associated with each number
- **Recently updated to reflect data export enhancements—both old and new versions available on HMRF Grantee Resources site**

Mathematica

Data dictionary tabs

Enrollment and participation

Client surveys

Program operations

Survey item grid

Glossary

Mathematica

Cross-tab data export updates

READY4Life data exports no longer include couple ID

The “population” variable reflects either client or workshop participation

Mathematica

Deep dive into the data export

Client info tab

- **Provides a snapshot of each client's enrollment, survey completion and program participation data**
- **Grantees can use this tab to review key information for all client records ever created in nFORM**
  - Includes both applicant pending and enrolled clients
- **Key data points include:**
  - Referring organization and type
  - IPV screening outcome
  - Survey completion information
  - Number of service contacts, referrals and incentives provided
  - Number of workshop sessions attended
  - Assigned case manager(s)

Now includes survey completion language for each nFORM survey

Service contacts tab

- **Includes a row for each individual service contact (ISC) provided**
- **This tab allows grantees to review detailed information about service contact receipt and identify whether ISC provision aligns with service delivery plans**
- **Grantees can also identify trends in the types of issues and needs discussed during ISCs**
- **Key data points include:**
  - Case manager providing the ISC
  - Date, contact method, length of contact and whether it resulted in direct contact
  - Whether the ISC was provided to a couple (if applicable)
  - Additional participants included
  - Issues/needs covered during the ISC
- **ISC case notes in nFORM are not included**

The reminder contact variable is now the last column to help grantees easily identify those ISCs that included reminders

Mathematica

Referrals tab

- **Includes a row with detailed information for each referral provided during an ISC**
- **Grantees can use this tab to identify trends in the types of referrals being provided to clients**
- **Key data points include:**
  - Service contact ID and date the referral was provided on
  - Referral method, the service provider the client was referred to, and whether the referral was communicated directly to the service provider
  - Whether the referral was provided to a couple (if applicable)
  - Referral Type(s)
- **Referral case notes in nFORM are not included**

Mathematica

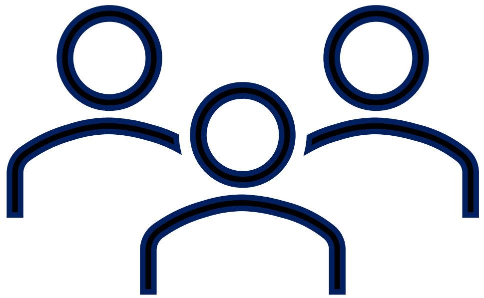
Incentives – program supports tab

- **Includes a row with detailed information for each incentive provided**
- **Grantees should use this tab to monitor whether incentives and program supports align with their ACF-approved incentive plan**
  - Grantees can merge incentive data with other tabs in the data export or operational reports to align with program milestone information (enrollment, participation/client milestone, or survey completion)
- **Key data points include:**
  - Whether the incentive or program support was provided during an ISC, workshop, or another time
  - Service contact ID (if applicable) and date the incentive or program support was provided
  - Whether the incentive or program support was provided to a couple (if applicable)
  - Incentive or program support amount, type, and category

Let’s pause for questions!

Workshop characteristics tab

- **Provides information about each workshop setup in nFORM**
- **Information from this tab allows grantees to determine whether their primary and optional workshop details align with their service delivery plan**
  - For example, does the total number of primary workshop hours offered equal the primary workshop hours target for each population a grantee serves?
- **Key data points include:**
  - Workshop name and description
  - Population the workshop is intended for
  - Whether the workshop uses the registration feature
  - Total workshop hours
  - Activities and elements
  - Workshop enrollment type (open, cohort, or other)
  - Workshop type (primary, optional, or not in use)
  - Curricula and workshop structure (single, blended, linked, or non-curricularized)



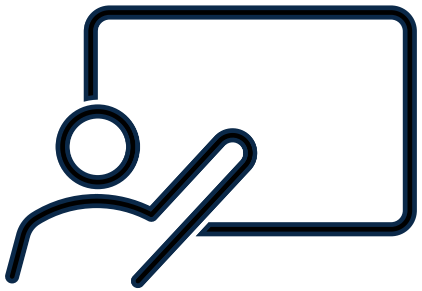
Series tab

- **Displays detailed information about each workshop series**
- **Grantees can use this tab to review whether workshop series are being set up with the expected schedule and total workshop hours**
- **Key data points include:**
  - Workshop information
  - Workshop location and agency providing the series
  - Series start and end dates
  - Total number of sessions and minutes
  - Session start and end times, session duration, and schedule
  - Number of assigned facilitators

Consider whether there are participation trends based on series characteristics

Series facilitators tab

- **Shows the facilitator(s) assigned to lead each workshop series**
- **Grantees can merge facilitator information with other tabs to monitor workshop participation trends**
- **Key data points include:**
  - Workshop name, population and whether it uses the registration feature
  - Total workshop hours
  - Session series name
  - Assigned facilitator(s)



Let’s pause again for questions!

Menti Poll Question: What types of questions would you like to be able to answer using the data export?

Mathematica

Session attendance tab

- **Provides client-level information on workshop series session attendance**
  - Each row provides data about a single session a client attended
- **Grantees can analyze this data to monitor workshop participation across all workshops by client and identify participation trends**
- **Tab now includes workshop type so that grantees can identify whether a session that a client attended was in a primary or optional workshop**

- **Key data points include**:
  - Workshop information
  - Session series name
  - Session name (if applicable) and date
  - Day of the week the session occurred on
  - Session start and end time and total duration
  - Whether the client registered beforehand and attended, or attended as a drop-in
  - Make up date (if applicable)

Mathematica

Service providers tab

- **Includes all service provider information entered into nFORM**
- **Grantees can review all of their service providers to determine whether current list covers all client issues and needs addressed through referrals**
- **Key data points include:**
  - Service provider address and contact information
  - Whether the provider is a partner agency or not
  - All services provided
  - Primary contact(s) name, email address and phone number

Survey response data tab

- **Provides client-level survey responses to the Applicant Characteristics, Entrance and Exit surveys**
- **Grantees can use this tab to monitor survey completion, data quality (i.e. missing responses), and client outcome trends**
  - Can also merge applicant characteristic information from the ACS to support other analyses (i.e. enrollment or workshop participation)
- **Key data points include:**
  - ACS, Entrance and Exit survey completion date, mode, refusal reason (if applicable), and survey completion language (new variable as of December 1)
  - All survey responses a client provided
- **Now includes the other (specify) option for Gender on the ACS**

Program operations survey tab

- **Displays the responses to each program operations survey submitted**
  - Includes each survey’s due date
- **Grantees can use their program’s survey information in many ways including**
  - To analyze a client’s responses in conjunction with participation, outcomes, or other data
  - To track trends in responses between surveys

Menti Poll Question: What types of questions would you like to be able to answer using the data export?

Tips for using the data export

Mathematica

Tips for using the data export (1)

- **Remember that the data in the export will reflect the time you submitted your request**
- **Explore data to identify any considerations for analyses**
  - For example, exclude any duplicate client records from analyses
- **Conduct analyses either in Excel or another statistical software such as SPSS, Stata, R, etc.**

Tips for using operational reports (2)

- **For grantees serving couples, remember that both members of a couple**
  - Must have enrolled together to count towards a grantee’s enrollment target
  - Attended or made up the same workshop sessions for their attendance to count towards primary workshop participation targets
- **Remember that there is no PII in the data export (client names, address or contact information, or case notes)**

Mathematica

Upcoming nFORM enhancements and TA resources

Mathematica

Upcoming nFORM enhancements

- **ACS, Entrance, and Exit Survey passcodes**
  - Will be re-usable up to 10 times within a 96-hour period (will be implemented this month)
- **Recording and updating incentives**
  - Based on ACF's updated incentive guidance, nFORM will only identify clients who have received more than the total maximum incentive amount ($350) and no longer track incentive category maximums (available this winter)
  - The current maximum incentives report is also being revised so that grantees can monitor all incentives provided to clients
  - Will be available this winter

Mathematica

nFORM TA resources

- **QPR/PPR progress narrative templates now available on the HMRF Grantee Resources site**
- **Similar to downloading the narrative from nFORM, users must save the file to their desktop first before opening**

View HM QPR Narrative PDF

Right-click to "Save as…" and open file from your desktop

Questions?

Mathematica