nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Options for Administering Surveys Virtually

Clients in HMRF grant programs take three web-based surveys that are typically administered in grantees' service locations. These surveys are the Applicant Characteristics Survey at enrollment, the Entrance Survey at the first workshop, and the Exit Survey at the last workshop. Because of the COVID-19 public health emergency, many clients cannot take surveys in person. In this tip sheet, we give three ACF-approved ways to administer surveys to clients remotely, along with the practices to follow for each method. Please note that your program should plan to resume normal survey administration practices when COVID-19 restrictions are fully lifted and in-person programming starts up.

Give clients the survey over the phone

- **Create a plan for data collection by phone.** Schedule calls to coincide with the points in the program when clients need to take their surveys (enrollment, first workshop, and last workshop). Use nFORM's reports to identify the clients who need to take surveys.
- **Draft an introduction script for staff.** Let clients know you are calling them to complete a survey and thank them in advance for participating. Make sure clients are not driving or doing anything distracting when you call and that they have enough privacy so others will not hear their answers. Ask clients if they have any questions before starting.
- **Create a contact strategy.** Tell clients you will call back if you get disconnected. If clients need to stop or cannot do the survey when you call, then arrange a time to call them back. Try contacting clients multiple times if they are unavailable.
- **Use the web survey on calls and enter answers as clients respond.** Read everything in the survey exactly as it is written and in a neutral tone—including the introduction script, all parts of questions, and all response options—and enter every answer verbatim. nFORM has skip patterns programmed to direct clients to the right questions based on their previous responses, so administering the web surveys is critical for data quality.

Video call clients to give them the survey

- **Use officially authorized videoconferencing platforms.** Review the options on the [HMRF FastTRAC site](#).
- **Follow the best practices for calling clients on the phone (shown at left),** including creating a plan and schedule for calling clients, drafting an introduction script, creating a contact strategy, and using the web surveys on calls.
- **Ensure staff and clients have strong, reliable Internet connections that can support video calls.** Staff should also make sure their Internet connection can support their taking a web survey at the same time they are on the video call.
- **Make sure your background is appropriate, well lit, and free of distractions.** Consider using a blurred background or background image.
- **Use neutral body language so as not to convey any judgment about clients' answers to questions.**

Email links to clients so they can take the survey themselves

- **Only email links if the phone or video call methods are not feasible. (If email is not feasible, and your client has given permission, then you may text them instead.)**
- **Send a password-protected zip file containing the information a client needs to access the survey (survey link, passcode, and client ID number).** Give clients the password to the zip file in a separate email, text, or phone call. If you cannot use password-protected zip files, you should send the three pieces of information in three separate emails, one with the survey link, one with the passcode, and one with the client ID number. Or use different methods (email, text, or call) for each. Never send the survey link, passcode, or client ID number in a password-protected Word document. Do not use your organization's email encryption; this is not an ACF-approved process.
- **Never include client names in emails or texts when sending client ID numbers and survey passcodes,** *unless* **they are in a password-protected zip file.** If the client's email address includes the client's name, use a method other than email to send the client ID number.
- **Ask clients to complete the surveys when they can access the Internet safely and when they can have complete privacy so others cannot see their screen.**
- **Plan to generate and send new passcodes if the first ones expire after 96 hours.**

Contact the nFORM help desk at nform2helpdesk@mathematica-mpr.com with any questions. We are happy to help!