Using nFORM 2.0 Data to Monitor Service Contacts and Referrals

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nFORM 2.0 Team
Mathematica

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

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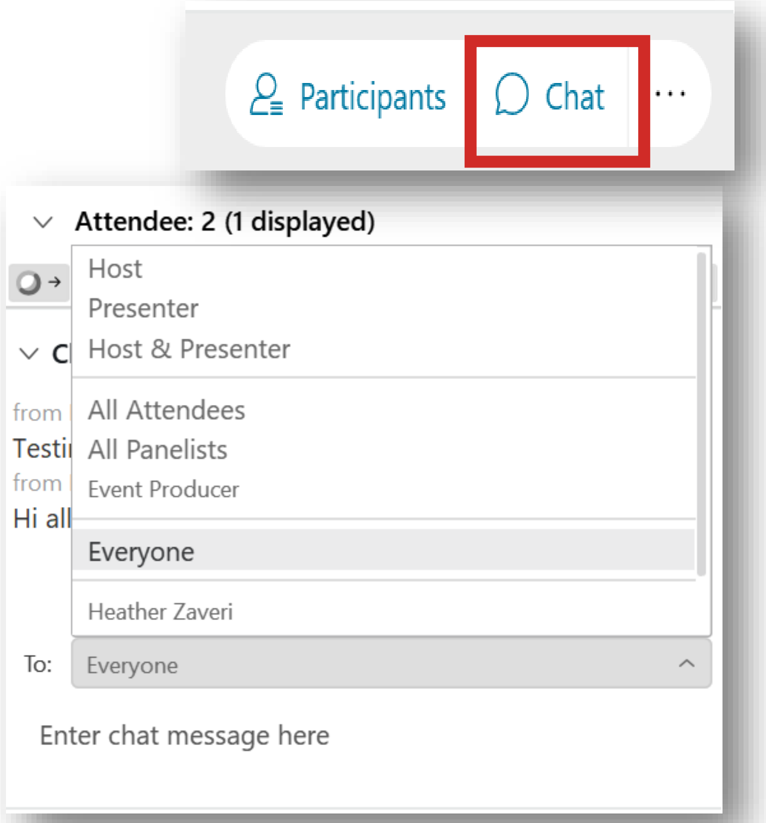
Building Usage, Improvement, & Learning with Data in HMRF Programs

Housekeeping

/ **Use the chat to ask 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 in emails 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 help page
  2. Review the Performance Measures and Data Collection Logistics Manual on the help page for more information on keeping data secure

Today's topics

- Overview of individual service contacts (ISCs) and referrals
- Tips for monitoring ISCs and referrals
- Texas A&M Agrilife Extension: Case management monitoring approach
- Deep dive: Using nFORM 2.0 data tools to analyze ISC and referral trends
- nFORM enhancements and resources

Overview of individual service contacts and referrals

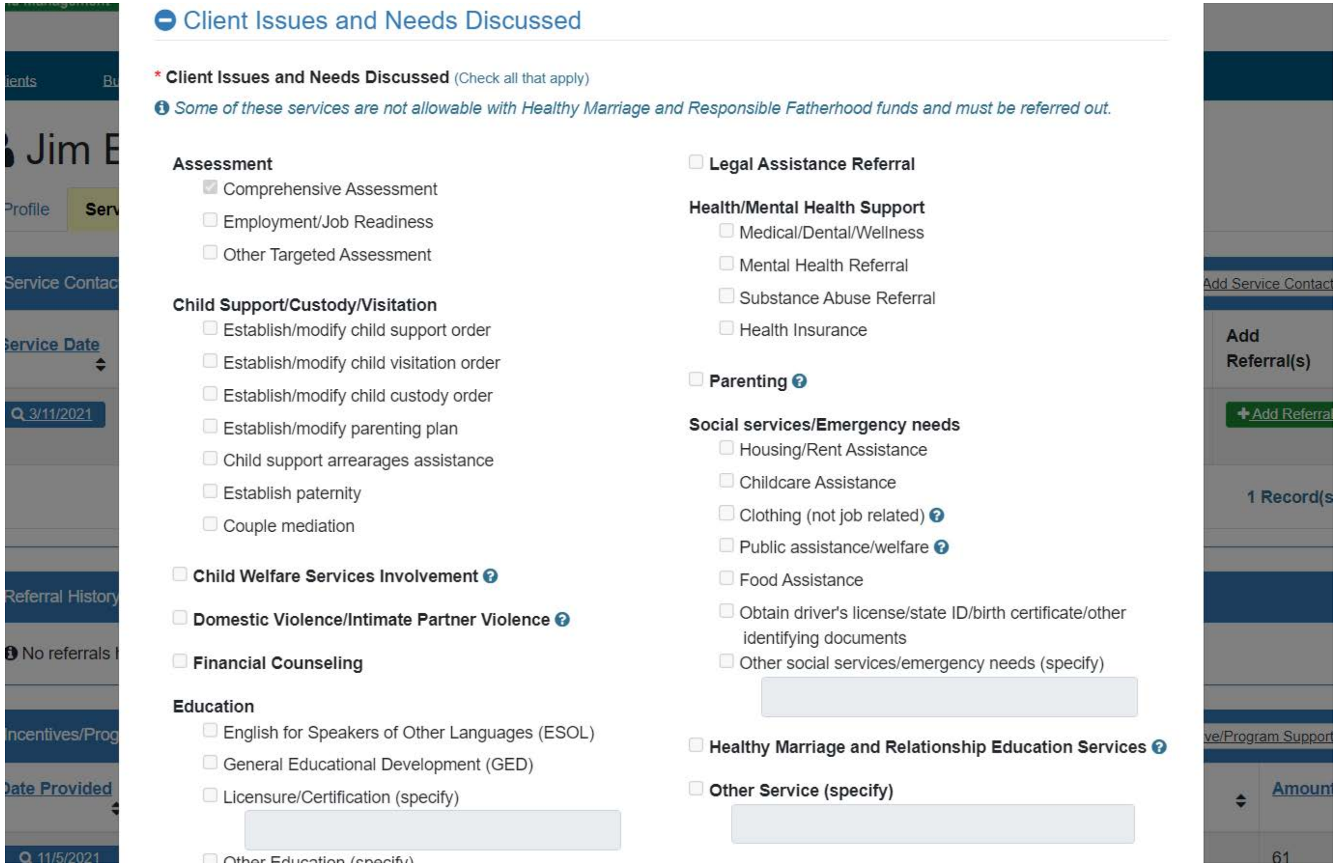
Individual service contacts (ISCs)

- **Grantee staff must record in nFORM all HMRF-funded services provided to a client or couple**
- **Each ISC in nFORM includes date, case manager, contact method, length of contact, whether there was direct client contact, and the issues/needs discussed**
  - Grantees serving couples must also note whether the ISC was provided to one partner or the couple together
  - Staff can record whether anyone else was included in the contact

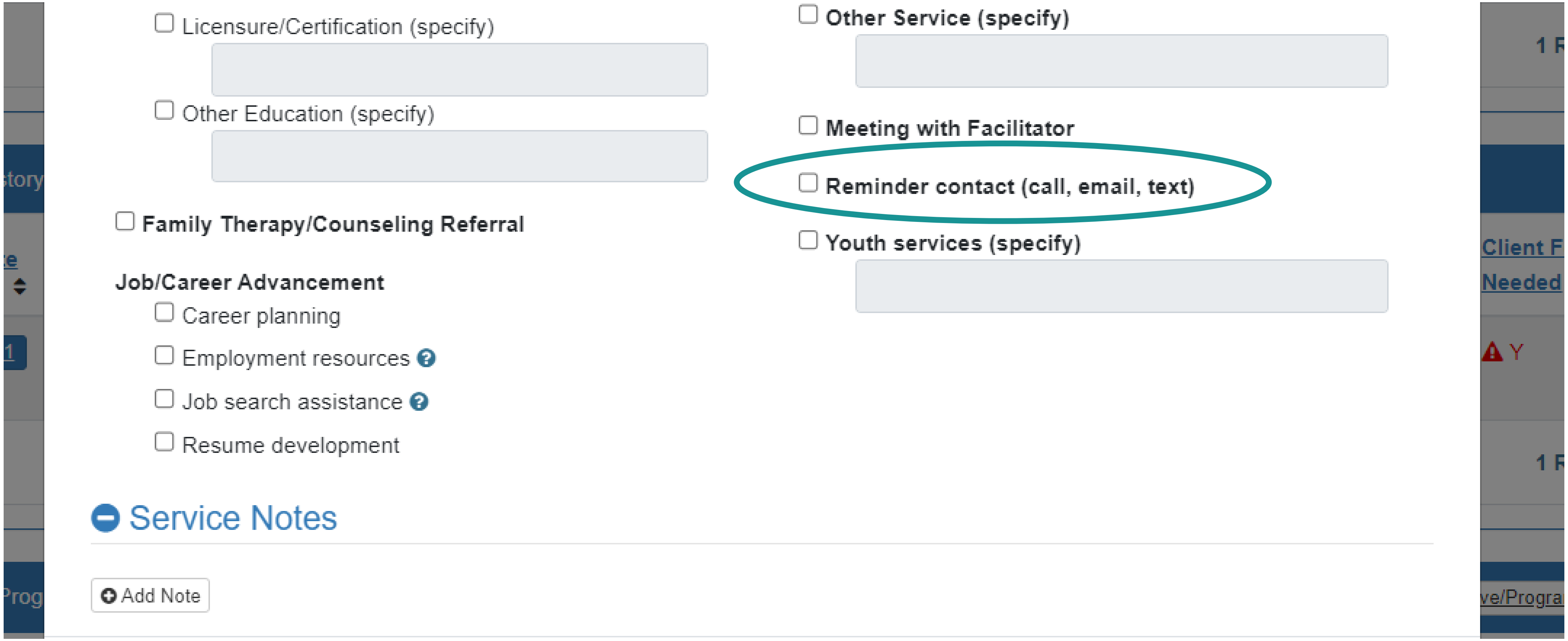
ISC issues/needs

- **Staff can record if the ISC included a reminder or was a “reminder-only” contact**
- **If the contact covered issues/needs beyond reminders, check all that were discussed**
- **Provide additional details by entering service notes**

  - ISC notes can only be viewed in the client’s profile and are not included in any nFORM data tools or reports



ISC issues/needs – reminder contact



Types of ISCs

Substantive

- Lasts 15 minutes or longer
- Involves direct client contact
- Covers issues/needs beyond reminder contacts

Reminder-only

- Serve only as a reminder to a client about an outstanding or upcoming service
- Only issue/need recorded is “Reminder contact”

Other

- Includes all ISCs that do not meet the substantive or reminder-only ISC criteria

ACF requires Fatherhood FIRE grantees to provide each client with at least 8 substantive ISCs

Grantees should also record referrals provided during service contacts

- **nFORM referral records include: service provider referred to, how referral was provided, whether referral was also communicated to service provider, type(s) of referral, and whether referral was provided to couple (if applicable)**
- **Referral type options match issues/needs on service contact menu**
- **Notes can be added to further expand on the referral provided**
  - As with ISC notes, referral notes are not included in any nFORM data tools or reports

Tips for monitoring ISCs and referrals

nFORM data tools for monitoring ISCs and referrals

Type	PPR	Query Tool	Operational Reports	Data Export
All ISCs	n/a	√	n/a	√
Substantive ISCs	√	n/a	√	√
Reminder-only ISCs	n/a	n/a	√	√
Other ISCs	n/a	n/a	n/a	√
Referrals	√	√	√ (follow-ups only)	√

Using the PPR to monitor ISCs and referrals

- **PPR Section C-04.3 reports on the cumulative number of substantive ISCs provided to clients**
  - Table 3a reports how many clients in each population have received different levels of substantive ISCs since program enrollment began
  - Table 3b shows the average number of substantive ISCs clients received by grant year enrolled and population type
  - Designed to help Fatherhood FIRE grantees monitor progress towards ACF's requirement
  - Also helps FRAMEworks and READY4Life grantees monitor substantive ISCs provided in comparison to their service delivery plan
- **PPR Section C-06 reports on the number of referrals provided in the grant year and how many clients followed up**
- **QPR does not report counts of service contacts or referrals**

Tips for monitoring and analysis

- **Remember that the data in nFORM data tools reflect the time you run them and the filters selected, such as enrollment dates**
- **Don’t forget to keep data secure!**
  - Delete client names from operational reports when not needed
- **Use client ID, couple ID, and session ID to link data across multiple data sources**
- **For grantees serving couples, consider how ISCs provided to a couple display differently in summary- and detailed-level reports**

Monitoring ISCs provided to couples

Scenario	PPR (Section C-04.3)	ISC count in summary ISC operational report	ISC count in detailed ISC operational report	Data export (Service Contacts tab)
Minnie participates in an ISC. Mickey does not participate in an ISC.	If substantive, 1 ISC is added in the total and average substantive ISC count	If substantive or reminder-only,1 ISC is added in the total and applicable category counts for Minnie	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie	For any type of ISC, 1 ISC row is added for Minnie
Minnie and Mickey each participate in an ISC (i.e. they each participate in an individual session)	If substantive, 2 ISCs are added in the total and average substantive ISC count	If substantive or reminder-only, 2 ISCs are added to the total and applicable category counts, 1 each for Minnie and Mickey	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie and for Mickey	For any type of ISC, 1 ISC row is added for Minnie, and 1 ISC row is added for Mickey
Minnie and Mickey participate in an ISC as a couple	If substantive, 1 ISC is added in the total and average substantive ISC count	If substantive or reminder-only, 1 ISC is added to the total and applicable category counts for Minnie and Mickey	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie and for Mickey	For any type of ISC, 1 ISC row is added for Minnie, and 1 ISC row is added for Mickey

Texas A&M: Case management monitoring approach

Texas A&M experiences with using nFORM data for monitoring ISCs

- Overview of Texas A&M's READY4Life program
- Description of Texas A&M's program monitoring needs
- Texas A&M's process for reviewing nFORM data on service contacts

Texas A&M ISC Tracker

C	D	E	F	G	H	I	J
Office Location	Program	Population	Application Date	Enrollment Date	Current Client Status	Client Status Change Date	Applicant Characteristics Survey Completion Date

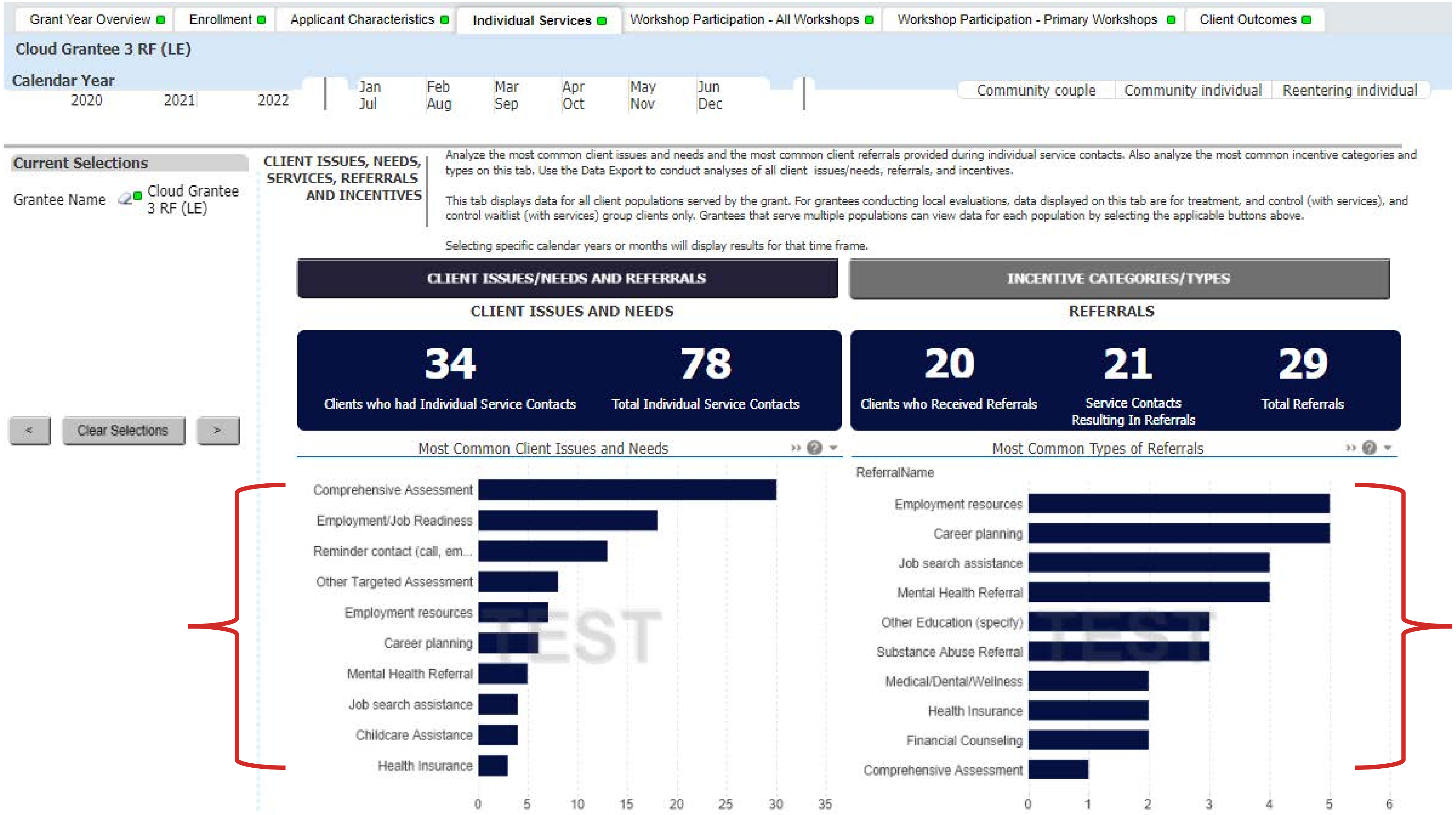
K	L	M	N	O	P	Q	R
Entrance Survey Completion Date	Exit Survey Completion Date	Number Of Service Contacts	Number Of Referrals	Number Of Incentives	Number of Workshop Sessions Attended	Assigned Case Manager 1	Assigned Case Manager 2

What are your questions for Texas A&M?

Enter your questions into the chat, or let us know if you would like to ask aloud!

Deep dive: Using nFORM 2.0 data tools to monitor ISC and referral trends

Start with the query tool to review trends in ISCs and referral types



Use the data export to dive deeper into ISC and referral type trends

Analysis goals:

1. Understand how patterns in the types of issues/needs discussed during ISCs align with the program's case management plan

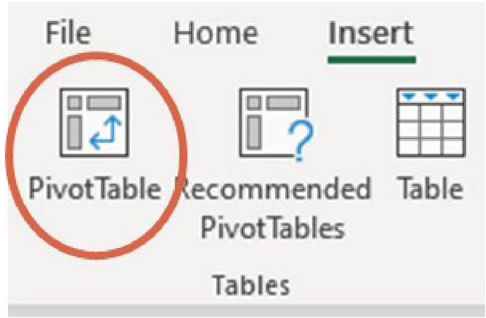
2. Identify trends in referral types to determine whether additional service providers are needed

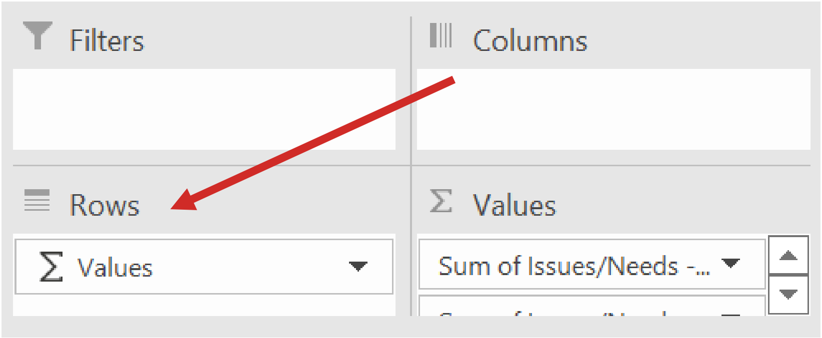
/ Analysis overview

- Using the data export, create a pivot table to analyze the prevalence of each ISC issue/need discussed
- Insert an additional pivot table to monitor patterns in referral types and referrals made to specific service providers

Analysis steps

- **Step 1: Generate an up-to-date version of your grantee's data export and save it to a secure local folder.**
- **Step 2: Use the data from the Service Contacts tab to insert a pivot table.**
- **Step 3: Add each issues/needs category to the values field.**
  - Make sure to display the <u>sum</u> of issues/needs
  - Move the Values from the columns field to the rows field





Analysis steps (cont.)

- **Step 4: Create a new blank tab in the data export. Copy and paste the pivot table onto the new tab.**
- **Step 5: Sort on the total number of service contacts during which an issue/topic was discussed.**

Number of sessions that cover an ISC issue/need	
Comprehensive Assessment	112
Establish/modify child support order	2
Other Targeted Assessment	45
Employment/Job Readiness	61

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Comprehensive Assessment	112
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Establish/modify child support order	2

Consider how the most common issues/needs discussed during ISCs align with the objectives and details of your grantee's case management plan

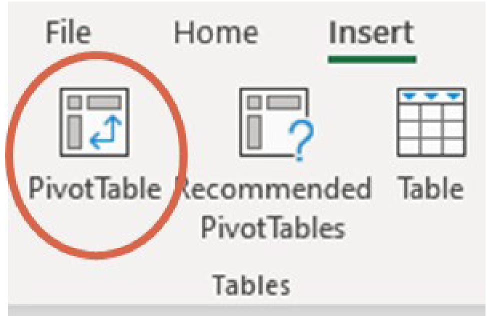
Take your analysis a step further by including other variables

Step 6: Insert a variable into the columns field to compare ISC issues/needs covered between groups

- For example, insert grantee location, service assignment, or case manager providing service into the columns field as part of step 3
- Grantees can also merge in variables found on other tabs in the data export to the service contacts tab, and include them in the pivot table as well. For example, merge in applicant characteristic information from the survey response data tab.

Number of sessions that cover an ISC issue/need	Northside	Southside	Central
Comprehensive Assessment	23	4	24
Establish/modify child support order	0	0	0
Other Targeted Assessment	11	2	9
Employment/Job Readiness	11	4	13

Repeat the same process to analyze referral trends



- **Step 1: Insert a pivot table using data from data export's Referrals tab**
- **Step 2: Add each referral type category to the values field**
  - Make sure to display the sum of referral types
  - Move the Values from the columns field to the rows field
- **Step 3: Add in the service provider ("Referred to") variable to the columns field to compare referral trends across providers**
  - Refer to the Service Providers tab of the data export to map the service provider ID to the provider's name
- **Step 4: Copy and paste the pivot table to sort on the total number of service contacts during which each type of referral was provided**

Example referral type pivot table

Number of referral types provided	Education Unlimited	Princeton Place	Grand Total
English for Speakers of Other Languages (ESOL)	0	5	5
Other Education	2	5	7
Licensure/Certification	0	0	0
General Educational Development (GED)	1	2	3
Grand Total	3	12	15

Review how many referrals are being made to each service provider by referral type

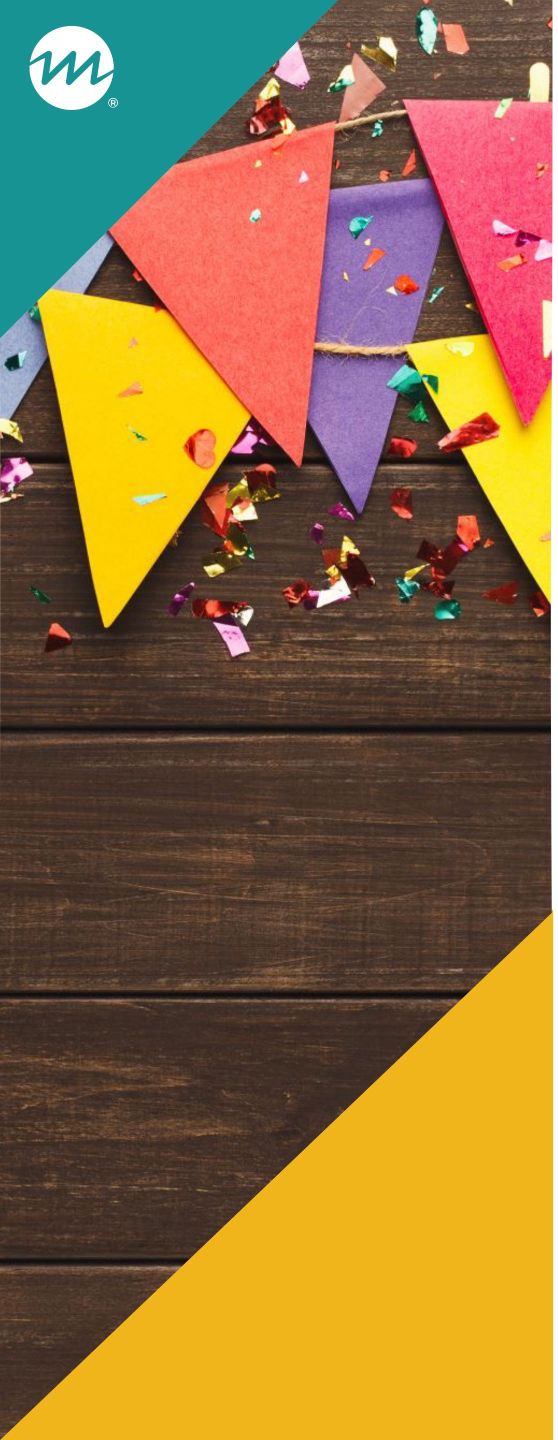
Compare data collected from other sources (i.e. entrance and exit survey data) about the types of issues/needs clients report experiencing to determine whether additional strategies are needed to match clients to the types of services they need

What are your tips?

What recommendations, tips, or considerations do you have for monitoring ISC and referral data with nFORM?

Add your thoughts or suggestions to the chat, or let us know if you would like to share aloud!

nFORM enhancements and resources



nFORM incentive enhancements

- **Recording and updating incentives – coming soon!**
  - nFORM will continue to flag clients who receive more than the total maximum incentive amount ($350); incentive category maximums will be removed
  - Survey participation incentives relabeled to survey completion, in line with ACF guidance
  - Operational report will track all incentives, not just those exceeding maximums
- **ACF incentive guidance now available on the HMRF Grantee Resources site**

https://www.hmrfgrantresources.info/resource/acf-guidance-program-incentives

Incentives Summary Report Data

Grantee 1							
Incentives Summary Report							
Clients Enrolled [selected date] – [present date]							
Grantee	**Client Grantee Location**	**Population**	A Number of clients who received any incentive	B Number of clients with incentives exceeding $350 max	C Number of clients who received an Enrollment incentive	D Number of clients who received a Participation/ Client Milestone incentive	E Number of clients who received a Survey Completion incentive
Grantee 1	*All*	*All*	*30*	*5*	*30*	*20*	*20*
		Community Individual	15	*3*	15	*10*	10
		Community Couple	15	*2*	15	*10*	10
	Location 1	*All*	*30*	*5*	*30*	*20*	*20*
		Community Individual	15	3	15	10	10
		Community Couple	15	2	15	10	10

Review number of clients who have received any incentives, those whose total incentive amounts exceed $350, and distribution of incentives compared to your FPS-approved plan

Incentives Detail Report Data

Client Grantee Location	Population	Client ID	Couple ID	Client Last Name	Client First Name	Current Client Status	Enrollment Date	A Total Incentives	B Enrollment	C Participation/ Client Milestone	D Survey Completion
								Amount Received to date:	Amount Received to date:	Amount Received to date:	Amount Received to date:
Location 1	Community Individual	1212121		Dumpty	Humpty	Active	10/10/2021	$ 400	$ 50	$ 200	$ 150
Location 1	Community Couple	3333333	2222	White	Snow	Drop out	11/13/2021	$ 50	$ 50		

Follow up on total incentives over the allowed maximum

Resources

- **Reminder: "Welcome to nFORM: Tips for New nFORM Users" includes step-by-step information for new users on preparing to collect, enter, and monitor data in nFORM**
  - Data managers training new staff should highlight which resources are most applicable based on a person's nFORM user account type and permissions
  - Current nFORM users can also refer to this resource as a reminder of available resources
  - Available at https://www.hmrfgrantresources.info/resource/welcome-nform-tips-new-users
- **Coming soon: Interactive snapshots highlight findings from cross-site analyses of HMRF grantees in 2015 cohort**

Questions?