

Using nFORM 2.0 Data Quality Indicators to Support Program Monitoring (Part 2)

October 8, 2024
nFORM 2.0 Team
Mathematica

OFFICE OF FAMILY ASSISTANCE

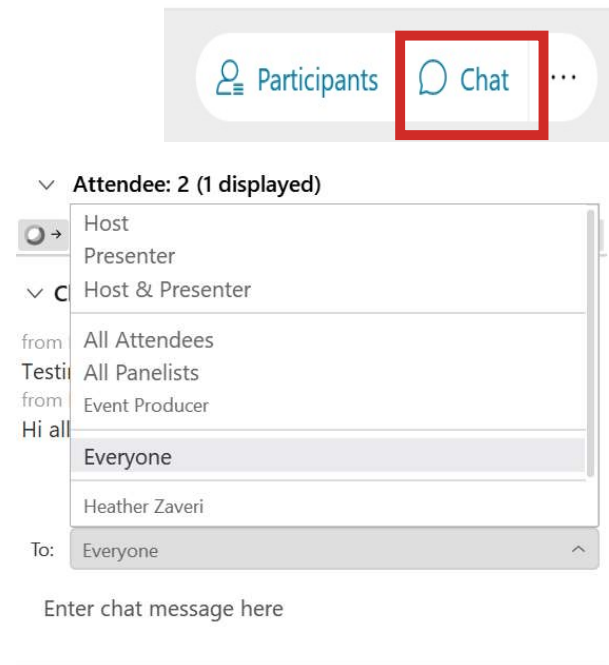
An Office of the Administration for Children & Families





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 resources site
 2. Review the Performance Measures and Data Collection Logistics Manual on the resources site for more information on keeping data secure



Today's topics



**Refresher
on high
quality data**



**Monitoring
workshop
setup**



**Reviewing
workshop
participation**



Announcements



Refresher on high quality data



What is high quality data and why is it important?

- / Timely, accurate, complete, and secure**
- / Essential for program services and operations, CQI, and local evaluations**
- / Review and update data collection plans to ensure all the necessary details are documented, and train staff**
- / Review September 2024 office hours on monitoring the quality of HMRF client and survey data**
- / Today we'll cover data quality for workshops**



Tools for monitoring data quality for workshops

Query tool

- Grant Year Overview tab
- Primary Workshop Participation tab

Operational reports

- Session Series Attendance
- Primary Workshop Participation Detail reports
- Caseload Detail report

Data export

- Workshop Characteristics
- Series



Monitoring workshop setup



What types of data quality questions can I consider when setting up workshops?

Do workshops and session series accurately reflect program offerings?

Are workshops, series and sessions set up properly?

Do total workshop and series hours align with primary workshop participation (PWP) hours targets?

Are session series titles descriptive and easy to interpret?



Workshop and session series setup

- / Module VI of nFORM user manual describes how to set up workshops, session series, and occurrences (classes)**
- / Review nFORM screens or data export to ensure workshop setup aligns with your program design**





Workshop setup

- / W1 (Workshops): Does each workshop represent a distinct program component and curriculum? For each workshop, are target population, registration requirements, open or cohort enrollment, primary or optional, and total hours correct? Do primary workshop hours match your target?**
- / W2 (Add/Edit Workshop): Review further details for each workshop, including activities/elements and specific curricula, and make any needed updates to workshop setup**



W1. Workshops

Workshops

+ Add Workshop Items per page 10

Workshop Name	Population	Registration Required	Enrollment	Type	Total Hours
CI Nurturing Fathers	Community individual	Yes	Cohort	Primary	12
CI Relationship Workshop	Community individual	Yes	Cohort	Primary	20
RI Nurturing Fathers	Reentering individual	Yes	Cohort	Optional	15
RI Relationship Workshop	Reentering individual	Yes	Cohort	Primary	15
Q_WMR	Community individual	Yes	Open	Primary	16

5 Record(s)

Review workshop details and make any needed updates

W2. Add/Edit Workshop

W2. Add/Edit Workshop

* Indicates required field(s)

Program: Fatherhood FIRE

* Population: --Select population

* Workshop Name:

Description:

Workshop Details

* Registration Required: Yes No
This selection cannot be changed once it is saved.

* Enrollment: --Select

* Total Hours to be Offered:

* Activities (Check all that apply):
 Economic stability
 Promote or sustain marriage
 Responsible parenting

* Type: Primary Optional Not in Use
This selection cannot be changed once it is saved.

* Structure: Single Blended Linked Non-curricularized

* Curriculum or other group service #1: --Select Hours:
(Enter all that apply)

Specify:



Session series setup

- / W4 (Session Series): Do session series for each workshop have correct number of sessions? Is each series of a workshop clearly labeled? Are series locations and facilitators up to date?**
- / W5 (Add/Edit Session Series): Review further details for each series, including maximum number of clients and recurring session days/times, and make any needed updates**



W5. Add/Edit Session Series

W4. Session Series

Session Series

Filter Criteria

Workshop: --Select workshop

+ Add Session Series Items per page 10

Series Name	Workshop	Location	Facilitators	# of Sessions	Start Date	Registration
Fall 2024 Tuesday Evening Cohort	101a Relationships	Headquarters	Hannah McInerney	6	10/8/2024	Manage
LateNightToday	101a Relationships	Fake location	Test	12	7/23/2024	View
New test	101a Relationships	Fake location	Test	5	7/23/2024	View

Review session series details and make any needed updates



W5. Add/Edit Session Series

* Indicates required field(s)

Workshop Name: 101a Relationships

Registration Required: Yes No Total Hours to be Offered: 12

Enrollment: Cohort

Type: Primary Structure: Single

Curriculum or other group service: On Our Shoulders (English and Spanish); OTHER (carryon)

Description: workshop on this form test

Session Series Details

* Session Series Name: Fall 2024 Tuesday Evening Cohort

* Agency Providing: 101a Relationships

* Max # of Clients: N/A No Limit

Location

* Location Name: Headquarters

* Street: 2 Alexander Park Drive * City: Princeton

* State: GA * Zip: 11111 Phone: (222) 333-1233

Facilitators: 1 (# of Facilitators)

* Enter Facilitator (Enter all that apply): Facilitator #1

Hannah McInerney

+ Add Facilitator

Date & Time

* # of Sessions: 6

* Session Start Date: 10/8/2024

* Session Start Time: 6:00 PM

* Session End Time: 8:00 PM

Session Duration: 2 hour(s) and 0 minutes

Recur Every (Select all that apply): Sun Mon Tue Wed Thur Fri Sat



Workshop Characteristics and Series tabs of data export are also useful for reviewing workshop setup

	A	B	C	D	E	F	G	H	
1	Workshop Name	Workshop ID	Workshop Description	Population	Registration Required	Total Hours	Session Series Name	Series ID	Ac Pr
	Blue- Financial Education	235	This workshop is designed to aid individuals in money management.		5	1	Blue- Money Management	18580	
2	Blue- Financial Education	235	This workshop is designed to aid individuals in money management.		5	1	32 Another series	21757	
3	Blue- Financial Education	235	This workshop is designed to aid individuals in money management.		5	1	32 Yet another series	21773	

Navigation: Workshop Characteristics | Incentives - Program Supports | **Series** | Series Facilitators | Session Attendance

	A	B	C	D	E	F	G
	Workshop Name	Workshop ID	Workshop Description	Population	Registration Required	Total Hours	Activities - Divorce reduction
1	Blue- Financial Education	235	This workshop is designed to aid individuals in money management.	5	1	32	0
2	Blue- Relationship Workshop	234	This workshop is designed to help couples enhance their relationship	4	1	36	1

Navigation: Incentives - Program Supports | **Workshop Characteristics** | Series | Series Facilitators | Session Attendance

	R	S	T	U	V	W	X	Y	Z	AA
1	# of Sessions	Series Start Date	Series End Date	Series Duration	Session Start Time	Session End Time	Session Duration	Recur Every - Sun	Recur Every - Mon	Recur Every - Tue
	5	2/11/2021	3/11/2021	1950	10:00:00	11:00:00	60	0	0	0
2	15	2/13/2022	5/22/2022	2250	10:00:00	12:30:00	150	1	0	0
3	15	2/15/2022	5/24/2022	2250	10:00:00	12:30:00	150	0	0	1

Navigation: Workshop Characteristics | Incentives - Program Supports | **Series** | Series Facilitators | Session Attendance | Service Provi... (+)



Reviewing workshop participation



What types of data quality questions can I consider when reviewing attendance?

Has all workshop attendance been recorded?

Are all session occurrence details accurate?

Does progress towards primary workshop participation benchmarks align with expectations?

Are there any clients who need makeup participation recorded?



Workshop session occurrence details

/ **Review nFORM screens to ensure individual session details are correct**

- W7 (Sessions): Do any sessions need to be rescheduled because the date falls on a holiday? Does attendance need to be recorded for any past sessions?
- W10 (Session Occurrence Details): Review all details for each upcoming session; make any needed updates on or before the session date
- W9 (Track Session Attendance): Record attendance for completed sessions; adjust session details if needed after the session—for example, if the session started and ended late, or had a substitute facilitator

/ **Session Attendance tab of data export includes details of individual sessions attended**



W7. Sessions

Sessions

⚠ 2015 sessions are pending attendance.

Filter Criteria

Workshop:

Session Series:

Session Status:

Filter by session status to identify those that are pending attendance

Items per page 10

Occurrence	Session Series	Facilitators	Status	Info	Roster	Attendance
Sat 8/3/2024 9:05 PM	LateNightToday	Test	Pending Attendance	Cancel	Generate	Record
Fri 8/2/2024 9:05 PM	LateNightToday	Test	Session Complete	Cancel	Generate	View/Edit
Thu 8/1/2024 9:05 PM	LateNightToday	Test	Session Complete	Cancel	Generate	View/Edit
Wed 7/31/2024 9:05 PM	LateNightToday	Test	Pending Attendance	Cancel	Generate	Record



W10. Session Occurrence Details

Click “Edit” then click “Save” at the bottom of the screen to update session details before or on the session date

W10. Session Occurrence Details ✕

* Indicates required field(s)

Session Series Name: Fall 2024 Tuesday Evening Cohort

Agency Providing: 1HM Agency 4

Max # of Clients: N/A No Limit

Workshop Total Hours: 12 hours

Current Series Duration: 12 hour(s) and 0 minutes

Occurrence Details

Session Name: [Empty]

* Session Date: 10/22/2024

* Session Start Time: 6:00 PM

* Session End Time: 8:00 PM

Session Duration: 2 hour(s) and 0 minutes

* Location Name: Headquarters

* Street: 2 Alexander Park Drive

* City: Princeton * State: GA

* Zip: 11111 Phone: (222) 333-1233

* Enter Facilitator (Enter all that apply): Facilitator #1
Hannah McInerney





W9. Track session attendance screen

W9. Track Session Attendance ×

* Indicates required field(s)

Workshop Name: 101a Relationships
Session Series Name: LateNightToday

Workshop Total Hours: hours

Current Series Duration: hour(s) and minutes

Occurrence Details Edit

Session Name:

* Session Date:

* Session Start Time:

* Session End Time:

Session Duration: hour(s) and minutes

* Location Name:

Click "Edit" next to Occurrence Details then click "Save" at the bottom of the screen to update session details

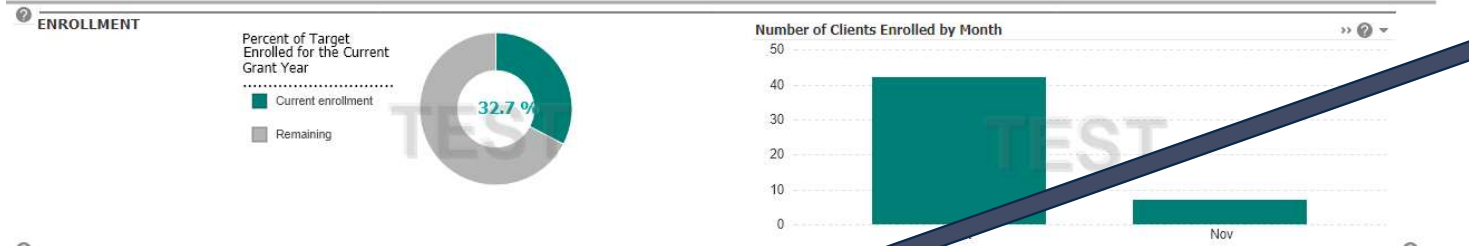


Monitor workshop attendance and participation on query tool Grant Year Overview tab

Grant Year Overview | Enrollment | Applicant Characteristics | Individual Services | Workshop Participation - All Workshops | Workshop Participation - Primary Workshops | Client Outcomes

Cloud Grantee 1 RF (LE)

2024 GRANT YEAR
This dashboard highlights key indicators for the current grant year for each client population served by the grant. Grant years run from September 30 through September 29 of the following calendar year. Grant recipients that serve multiple populations should view data for one population at a time using the population buttons to the right. For grant recipients conducting local evaluations, data displayed on this tab are for treatment and control (with services) group clients only. To explore additional aspects of program and client performance, click on the Enrollment, Applicant Characteristics, Individual Services, Workshop Participation, or Client Outcomes tabs.
Community individual | Community couple | Reentering individual



Have clients enrolled in the current grant year received the expected hours of primary workshop programming to date?

Are the expected numbers of clients hitting participation benchmarks?

Has attendance been recorded for all prior workshop sessions?



Drill down on workshop attendance data

/ **Use Series Session Attendance Report to review session-level attendance data**

- Has attendance been fully recorded for each session?
- Have all clients who were registered for a session been recorded as either having attended or not attended?

/ **Where needed, record attendance for sessions and make-up sessions for individual clients**

For clients registered ahead of time, record a makeup session in their profile under **Workshops/Sessions**



Series Session Attendance Report

Grantee: Grantee 1 HM (LE)
Workshop: 24/7 Dad
Series: Macy - New series
Registration Required: Yes
Start Date: 10/10/2023 End Date: 12/12/2023
Meeting Day(s): Tue
Total Workshop Hours: 20
Scheduled Location: Mathematica
Facilitators: Macy

Client ID	Couple ID (if applicable)	Client	Client Grantee Location	Registration Date	Disenrollment Date	Number of Sessions *			Attendance						
						Attended	Missed	Made up	10/10/2023	10/17/2023	10/24/2023	10/31/2023	11/07/2023	11/14/2023	
									Not Recorded						Not Recorded
10000087		Rhee, Glenn				1	0	0			Yes				
10001552	31483	Bailey, Mary	Location G2S2			5	0	0		Yes		Yes	Yes		
10009460		Allen, Barry	Location - New5			3	0	0					Yes		
10024500	32536	Anderson, Jaime	Location 5			1	0	0							
10024513	32536	Anderson, Javier	test17			3	0	0		Yes			Yes		
10025347		Ream, Colman	Location G2S1			1	0	0			Yes				
10025486		Barham, Leonerd	Location G2S1			1	0	0							

* Missed and Made up sessions appear only when the client was registered in advance for the session

Review the number of sessions clients have attended and missed to determine whether additional follow up or updates are needed



Drill down on primary workshop participation data

- / When reviewing progress towards PWP targets on query tool Grant Year Overview tab, consider point of time in the grant year and program flow to identify potential issues**
- / Use query tool Workshop Participation–Primary Workshops tab to review specific groups of clients**
 - Available filters include population, enrollment start and end dates, workshop, and series
- / Use Primary Workshop Participation Detail Report to review client-level information on progress towards targets**



Query Tool Workshop Participation—Primary Workshops tab

Grant Year Overview | Enrollment | Applicant Characteristics | Individual Services | Workshop Participation - All Workshops | **Workshop Participation - Primary Workshops** | Client Outcomes

Fatherhood FIRE Grantee 6

Enrollment Start Date: 04/01/2021 | Enrollment End Date: 09/21/2024

Community couple | Community individual | Reentering individual

Current Selections
Grantee Name: Fatherhood FIRE Grantee 6

Analyze primary workshop participation by client population, enrollment date range, workshop, and session series. Select any date range from April 1, 2021 through yesterday's date to filter the data to clients who were enrolled during the selected timeframe and assigned to populations for which the grant has participation targets. Grant recipients that serve multiple populations should view data for one population at a time using the population buttons to the right. For couples populations, enrollment and participation are counted for the couple rather than individual partners. Note that data for this tab are only available for clients who were assigned to populations for which the grantee has enrollment targets.

PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMARY WORKSHOPS
Average primary workshop hours received across clients who participated in any primary workshop

41.2 Average hours received | Current Target 48.0

COUNT OF CLIENTS REACHING BENCHMARK

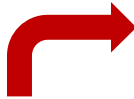
Client Category	Count of Clients
Initial attendees	709
Halfway attendees	560
Completed clients	185
Fully finished clients	166

Count of clients

85.7%
Average percent of target hours reached by workshop participants

120
Clients did not participate in any primary workshop sessions

The bar chart displays the count of clients who reached each of the listed participation targets. Initial attendees are clients who attended at least one primary workshop session. Halfway attendees are clients who completed 50 percent of the planned primary workshop hours. Completed clients are those who completed 90 percent of the planned primary workshop hours. Fully finished clients are those who completed 100 percent or more of the planned primary workshop hours.



Filter by enrollment date



Filter by population to set correct targets

Filter by workshops and series

Clear Selections

Workshop Series

Shows cumulative progress towards participation benchmarks



Primary Workshop Participation Detail Report

Families Together

Participation in Primary Workshop(s)* - Detail Report

Location	Client Population	Client ID	Couple ID (if applicable)	Client First Name	Client Last Name	Current Client Status	Enrollment Date	Entrance Survey Completion Date
Family Center	Adult couple	10001374	10101	Mickey	Mouse	Completed/Graduated	12/16/2021	12/17/2021
Family Center	Adult couple	10001400	10101	Minnie	Mouse	Completed/Graduated	12/16/2021	12/17/2021

Most Recent Primary Workshop Session Attended Date	Exit Survey Completion Date	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)
2/8/2022		9	12	75.0%
2/8/2022		9	12	75.0%

Review PWP hours and % of participation, client status, enrollment date, most recent primary workshop session attended date, and entrance and exit survey completion dates to identify potential data issues



Where can I find more information on monitoring workshops?

nFORM user manual

- Module VI: Managing workshops and sessions
- Module VII: Managing enrolled clients

Tip sheets

- Recording make-up attendance for workshop sessions in nFORM
- Review workshop participation in the QPR/PPR
- Setting up workshops properly in nFORM 2.0

nFORM office hours

- March 2023 – Using nFORM 2.0 data to monitor primary workshop completion
- April 2023 – Using nFORM 2.0 data to monitor workshop participation

<https://www.hmrfgrantresources.info/nform2-resources>



We want to hear from you!

What helps your program monitor HMRF data quality?

Use the Webex chat to enter your responses or feel free to answer aloud



Lets hear from you again!

**What makes it challenging
for your program to monitor
HMRF data quality?**

Use the Webex chat to enter your responses or
feel free to answer aloud



Questions





Announcements



Save the date for upcoming office hours

- / **CQI office hours on Tuesday, October 22, 2–3 p.m. ET**
- / **nFORM office hours on Tuesday, November 12, 2–3 p.m. ET**