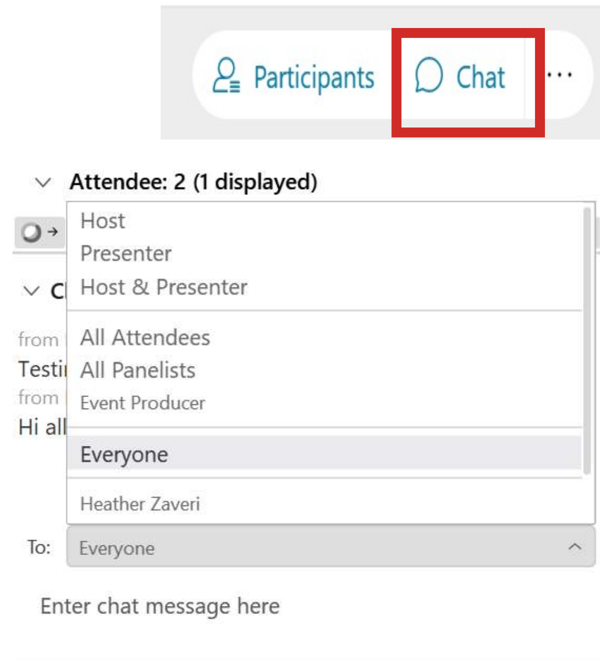
Using nFORM 2.0 Data Quality Indicators to Support Program Monitoring (Part 3)

November 12, 2024
nFORM 2.0 Team
Mathematica

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

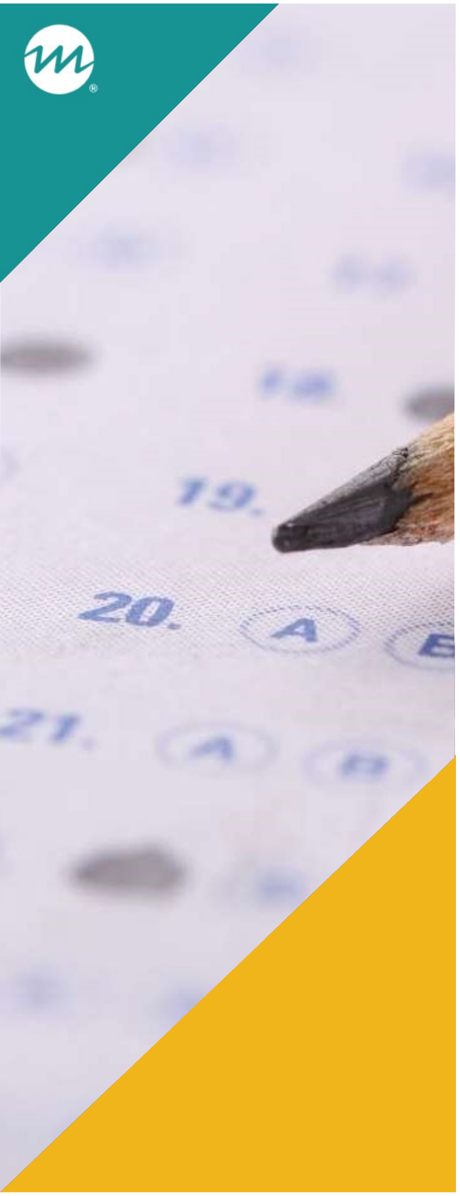
High quality data: Test your knowledge

Monitoring individual services

Upcoming query tool enhancements

Announcements

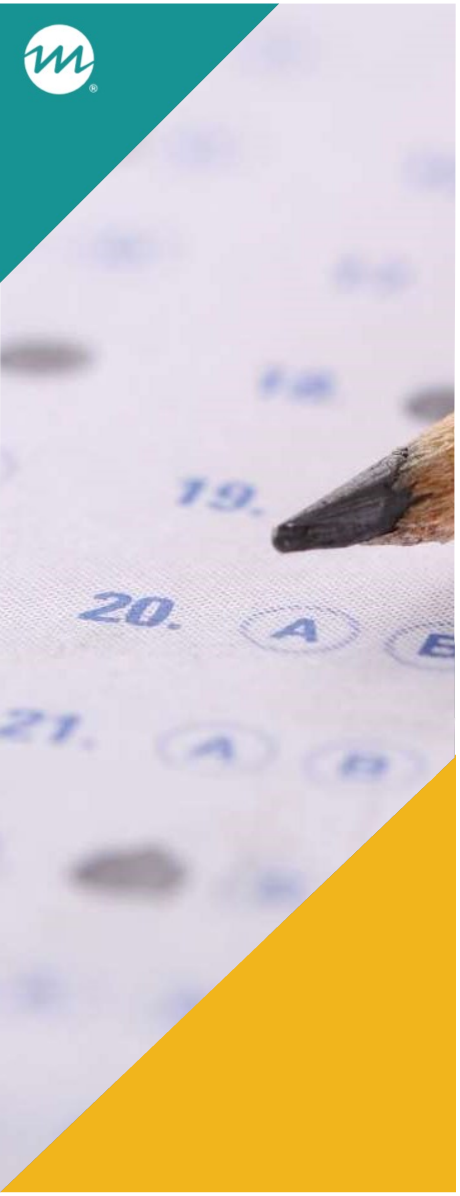
High quality data: Test your knowledge



Test your understanding of high quality data

What is high quality data?

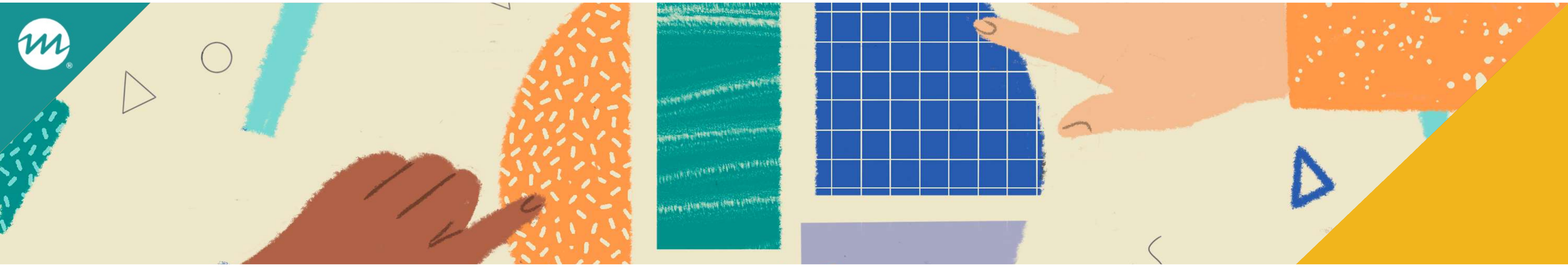
Select your response in Webex poll



Test your knowledge again!

Why is high quality data essential?

Select your response in Webex poll



As a reminder…

- **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 and October 2024 office hours on workshop data quality**
- **Today we'll cover data quality for individual services**

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

Tools for monitoring data quality for individual services

Query tool	• Grant Year Overview tab • Individual Services tab
Operational reports	• Individual Service Contacts report • Caseload Detail report • Incentives report
Data export	• Service Contacts • Referrals • Incentives

Monitoring individual services

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

Have all individual service contacts (ISCs) been recorded?

Do any referrals require follow up?

Does the substantive ISC count align with grant and ACF expectations?

Do all recorded incentives align with our ACF-approved incentive plan?

Individual service contacts and referrals

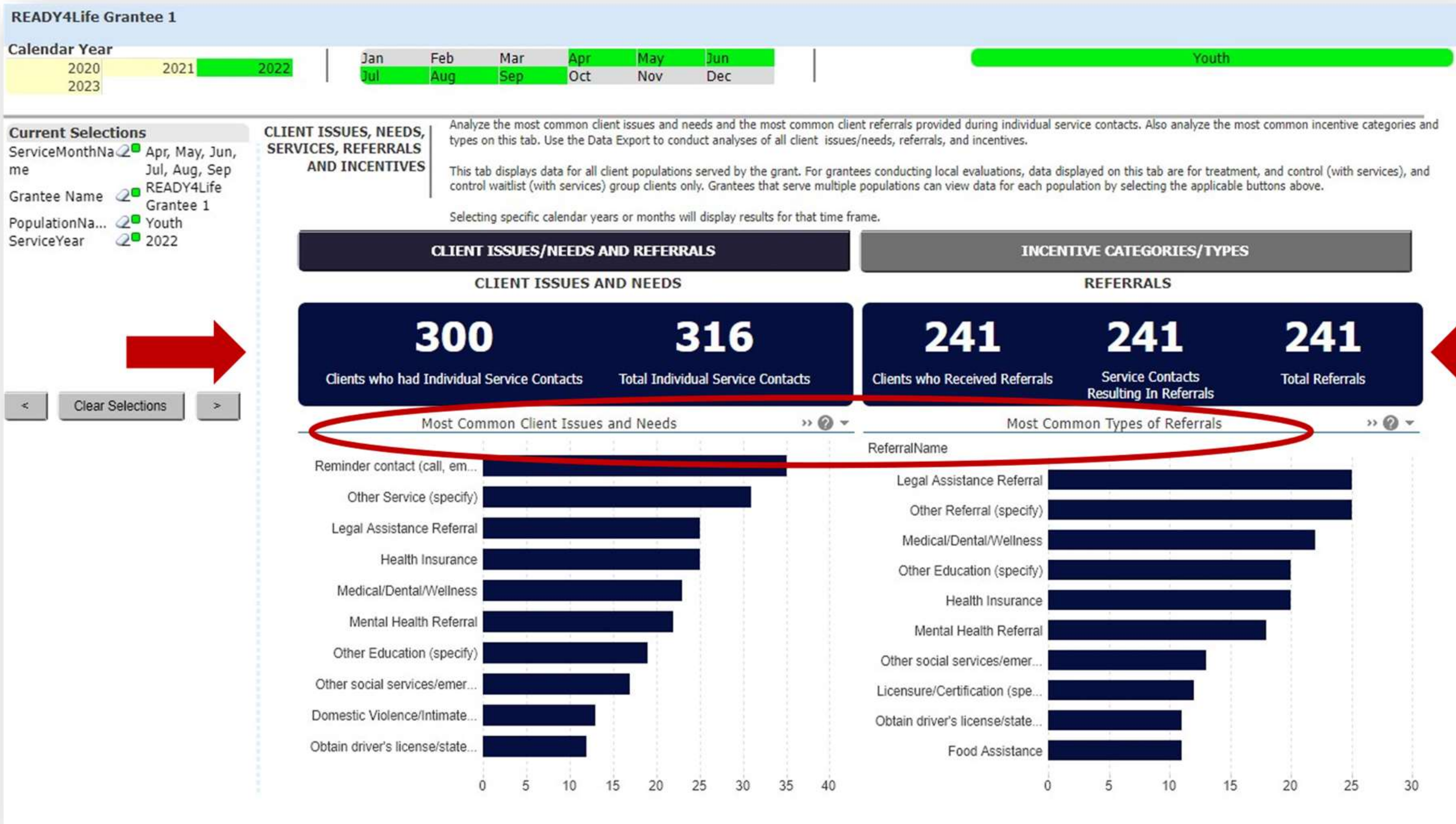
- **Use query tool Service Contacts tab to monitor number of ISCs and referrals provided and most common types**
  - Do the number of clients receiving and the number of service contacts/referrals provided align with your individual service delivery plan?
  - Do the most common types of issues/needs and referrals align with your plan and with client needs?
  - Is the "Other" category for type of service contact or referral recorded more than expected?
  - Are there potential issues with the way service contacts are being recorded?
- **Service Contact tab displays all service contacts provided, including substantive, reminder-only, and other**

Record a single client's service contact or referral in their profile under **Service History**

To record select service contacts for multiple clients use the **bulk update** feature

Query Tool Service Contacts tab

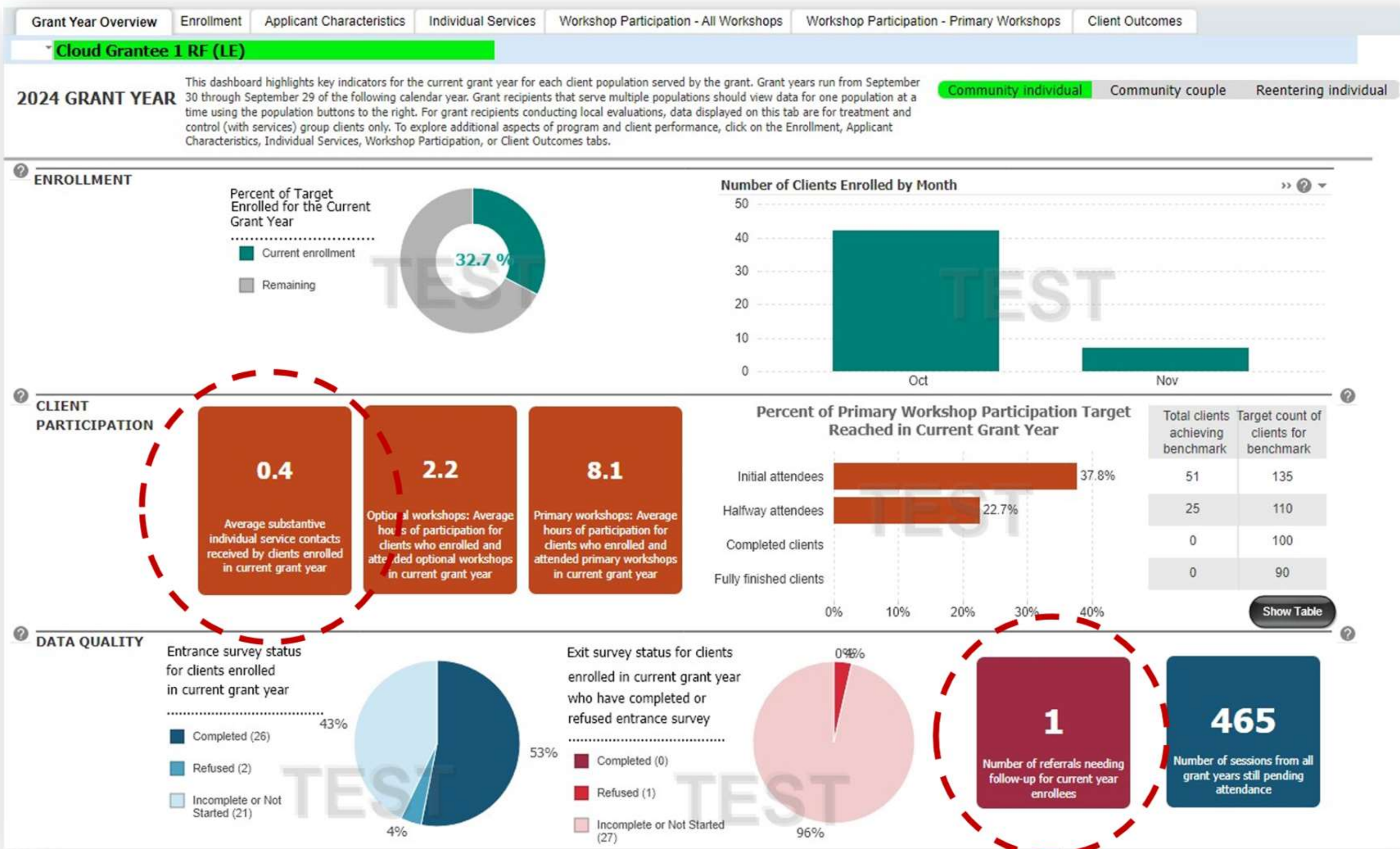
Select a year, month(s), and population type (if applicable) to drill down on services provided during a specific timeframe



Monitor substantive ISCs and referral follow-ups on Grant Year Overview tab of query tool

- **Monitor average substantive ISCs provided**
  - Compare the average number of substantive ISCs provided in comparison to the total number of ISCs on the Service Contacts tab of the query tool
  - Are substantive ISCs the expected proportion of all ISCs?
- **Monitor referrals needing follow-up**
- **If the numbers do not align with expectations, retrain staff on process for entering service contacts into nFORM**

Query Tool Grant Year Overview tab



Use Individual Service Contacts operational report to monitor substantive and reminder-only ISC provision

Cloud Grantee 3 READY4Life (LE) Individual Service Contacts - Detail Report*

Clients Enrolled 4/7/2021 - 9/22/2024

Client Grantee Location	Population	Client ID	Couple ID (if applicable)	Client Last Name	Client First Name	Current Client Status	Enrollment Date	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of Substantive Service Contacts@	Total Number of Reminder Only Service Contacts
Hogwarts	Community individual	10003025		Armweak	Colin	Active	8/16/2022	Storm, Rain			3
Hogwarts	Community couple	10027895	1212	Banana	Anna	Active	10/8/2022	Shine, Sun	10/10/2022	1	2
Hogwarts	Community couple	10027798	1212	Bobbington	Billy	Active	10/8/2022	Shine, Sun	10/10/2022	1	2

Use Caseload Summary Detail Report to identify clients with outstanding referral follow-ups

Record outstanding referral follow-up information in each client's profile under **Service History**

Caseload Detail as of: 9/10/2024

Staff Grantee Location	Staff with Case Management Capability	Assigned Client Study ID	Couple ID	Client Last Name	Client First Name	Client Status	Client Grantee Location	Enrollment Date	Most Recent Service Contact Date	Most Recent Workshop Session Attended Date	# of referrals requiring follow-up	# of incentives provided
Southside	McInerney, Hannah	40001025	10091	Halpert	Pam	Active	Northside	4/23/2023	6/16/2023	6/14/2023		1
Southside	McInerney, Hannah	40001024	10091	Halpert	Jim	Active	Northside	4/19/2023	6/6/2023	6/14/2023	2	1

Use data export to drill down on ISCs and referrals

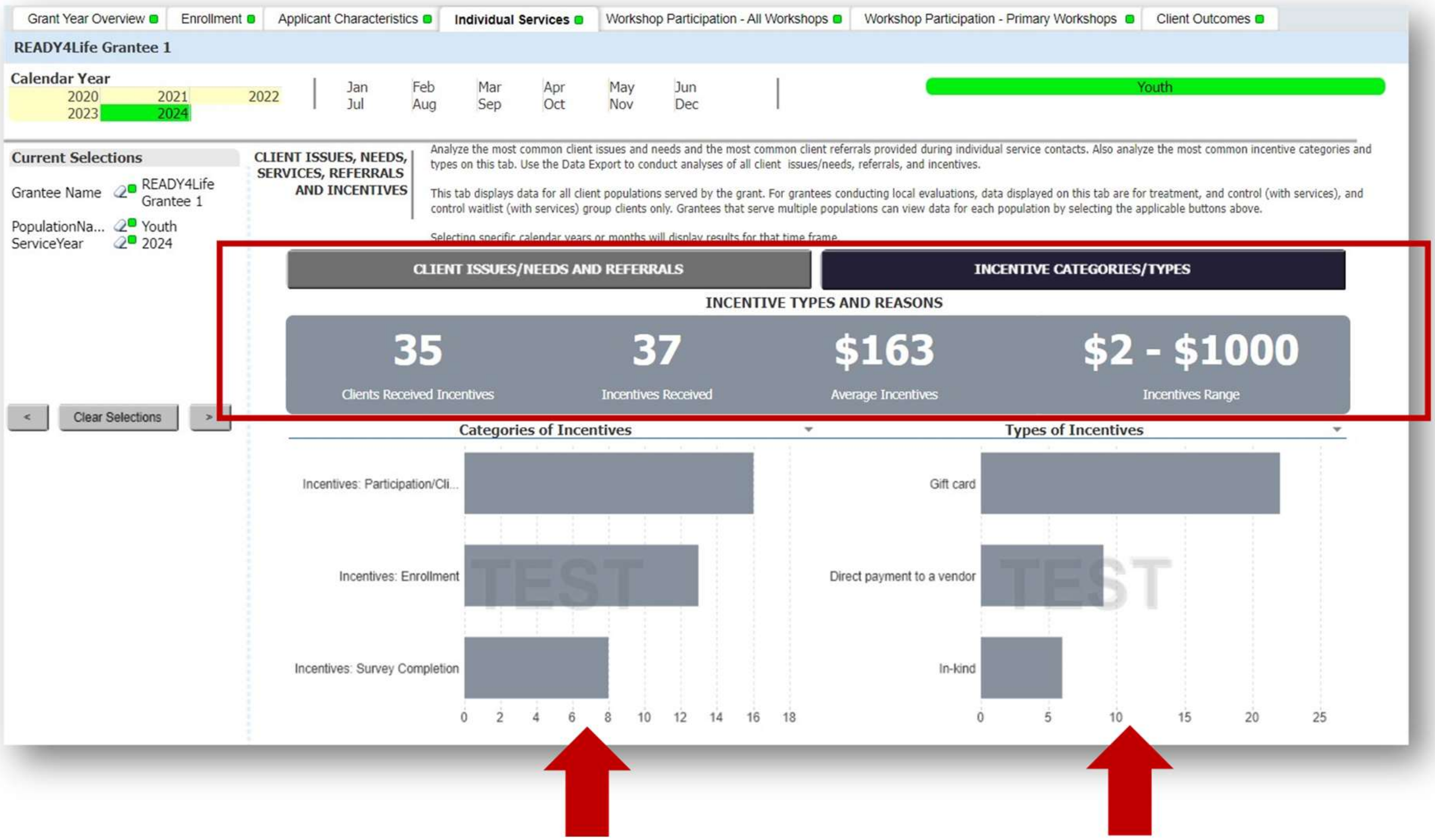
- **Service Contacts tab includes details about all ISCs provided at the client level**
  - Have all issues/needs covered during ISC been recorded?
- **Review the Referrals tab to monitor the number and types of referrals provided to clients**
  - Have all referrals provided to clients been recorded?
  - Do any referrals require follow-up?

Incentives

- Use Incentives/Program Supports view on query tool Service Contact tab to monitor level of incentives and program support provided
  - Do the number, types, and amounts of incentives provided align with your program's ACF-approved incentive plan?
  - Review average incentives and range to assess whether any incentives might exceed ACF maximum of $350 per person
- Use Incentives Detail operational report to determine whether any updates are needed to add or correct recorded incentives

Add or edit incentives for a client in their profile under **Service History**

Query Tool Incentives/Program Supports view



Incentives Detail operational report

Use enrollment date and client status to identify which incentives you would expect a client to have received based on program flow

Incentives Detail Report

Clients Enrolled 9/1/2021 - 9/22/2024

Client Grantee Location	Population	Client ID	Couple ID	Client Last Name	Client First Name	Current Client Status	Service Assignment Name	Enrollment Date	Total Incentives	Enrollment	Participation/Client Milestone	Survey Completion
	Community couple	10028535	10668	Americano	California	Active		11/8/2021	$55.00	$55.00	$0.00	$0.00
	Community couple	10028865	10678	Austen	Jane	Active		11/8/2021	$0.00	$0.00	$0.00	$0.00
	Community couple	10025059	10647	Bowie12	David12	Active		11/8/2021	$12.50	$12.50	$0.00	$0.00
	Community couple	10024911	10714	Bowie5	David5	Active		6/14/2022	$100.00	$100.00	$0.00	$0.00
	Community couple	10025305	10692	Bowie7	David7	Moved out of area		4/4/2022	$50.00	$0.00	$0.00	$50.00
	Community couple	10028603	10671	Cake	October	Active		4/4/2022	$0.00	$0.00	$0.00	$0.00

Where can I find more information on monitoring individual services?

nFORM manual

- Module VII.B Service history
- Module VII.B2 Monitoring ISCs provided to couples
- Module VII.B3 Monitoring referrals provided to couples

Tip sheets and videos

- Using nFORM 2.0 to monitor client receipt of individual service contacts (tip sheet)
- Deep dive on client participation (video)

nFORM office hours

- February 2023 – Using nFORM 2.0 data to monitor ISCs and referrals
- November 2023 – Using nFORM 2.0 to monitor ISCs

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


Questions

Upcoming query tool enhancements

Query tool updates coming soon!

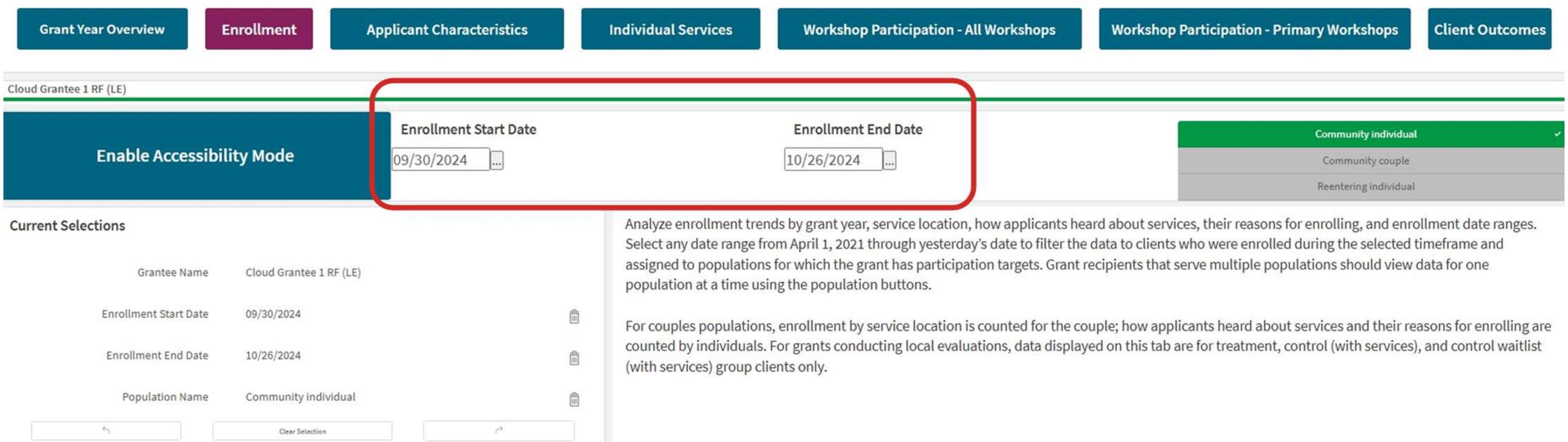
- **Cleaner visual interface**
- **Updated filters and functionality**
  - Select individual dates on all tabs that include a date filter
  - More prominent placement of filters at the top of each tab
  - New PDF export feature will allow users to generate a screenshot of each tab
- **Ability to access 508 compliant information on each tab rather than through a separate dashboard**

Query tool updates coming soon! *(continued)*

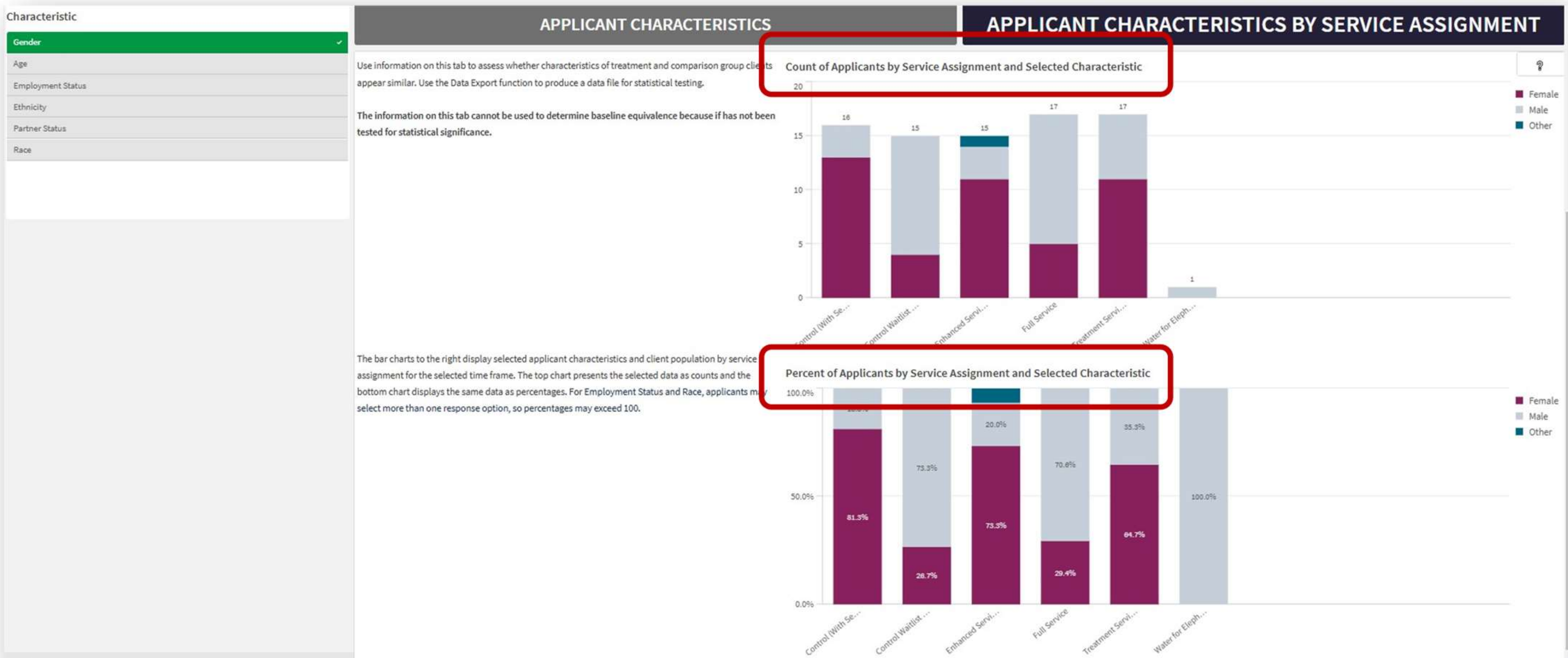
- **Applicant Characteristics by Service Assignment view to include updated visualizations**
- **Workshop Participation – All Workshops tab will display clients' gender, age, and race for all grant types**
- **December 10, 2024 nFORM office hours will include an in-depth discussion of query tool enhancements**
  - Email will be sent to all nFORM users when updates are available

Sneak peek: Enrollment tab

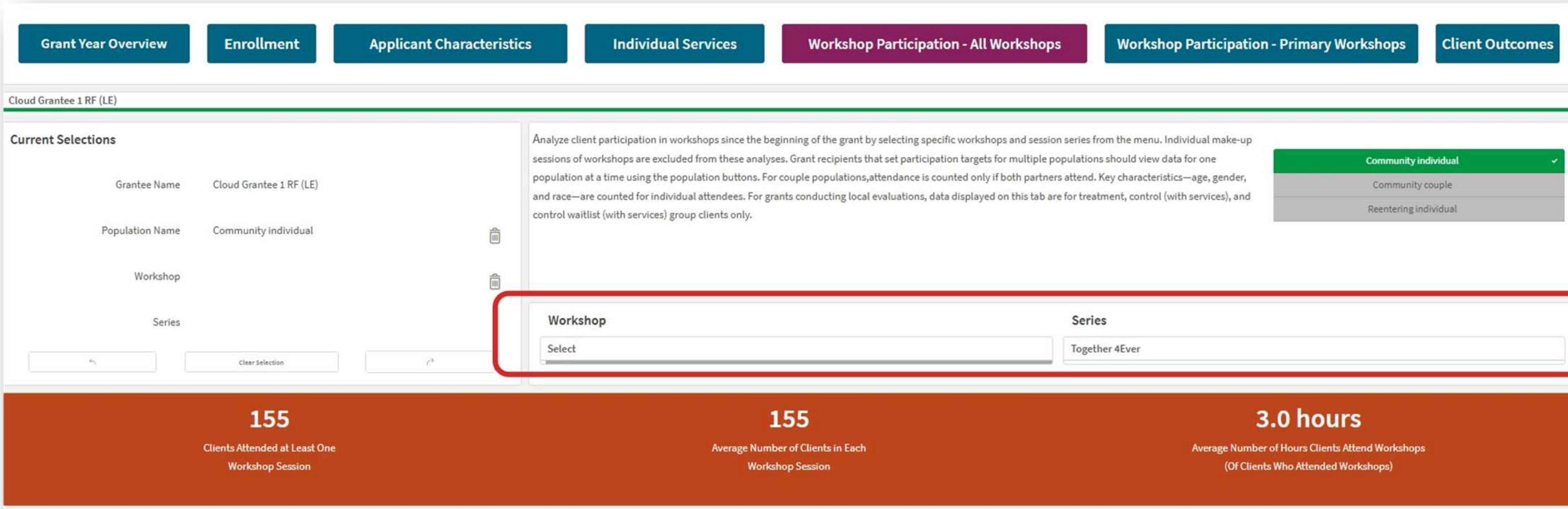
Users will be able to manually enter a start and end date, or select a date from the calendar menu on all applicable tabs



Sneak peek: Applicant Characteristics by Service Assignment tab



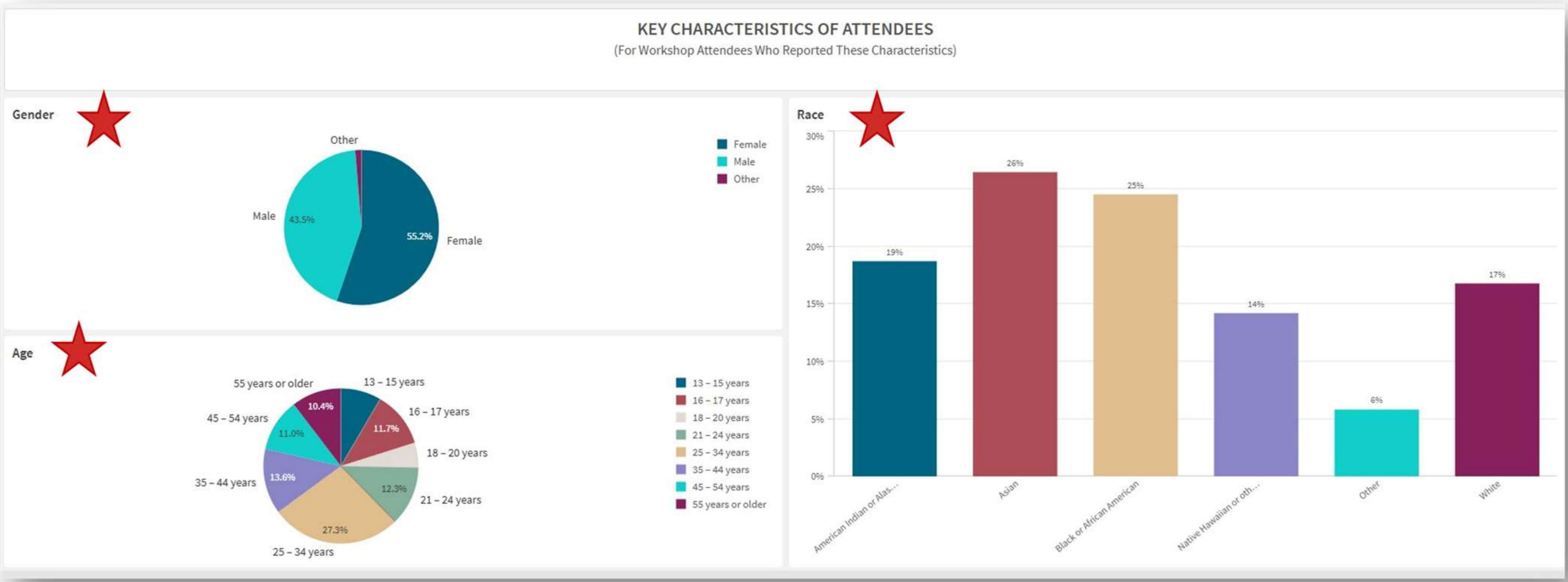
Sneak peek: All Workshops tab



More prominent workshop and series filters will better allow program staff to drill down on a specific group of clients

Sneak peek: All Workshops tab *(continued)*

Gender, age and race will display for all populations




Questions

Announcements

Save the date for upcoming office hours

- **CQI office hours on Tuesday, December 3, from 2:00–3:00 p.m. ET: Incorporating rapid cycle evaluation methods into CQI**
- **nFORM office hours on Tuesday, December 10, from 2:00–3:00 p.m. ET: Deep dive on query tool enhancements**