

Updates to the nFORM Query Tool

December 10, 2024
nFORM 2.0 Team
Mathematica

OFFICE OF FAMILY ASSISTANCE

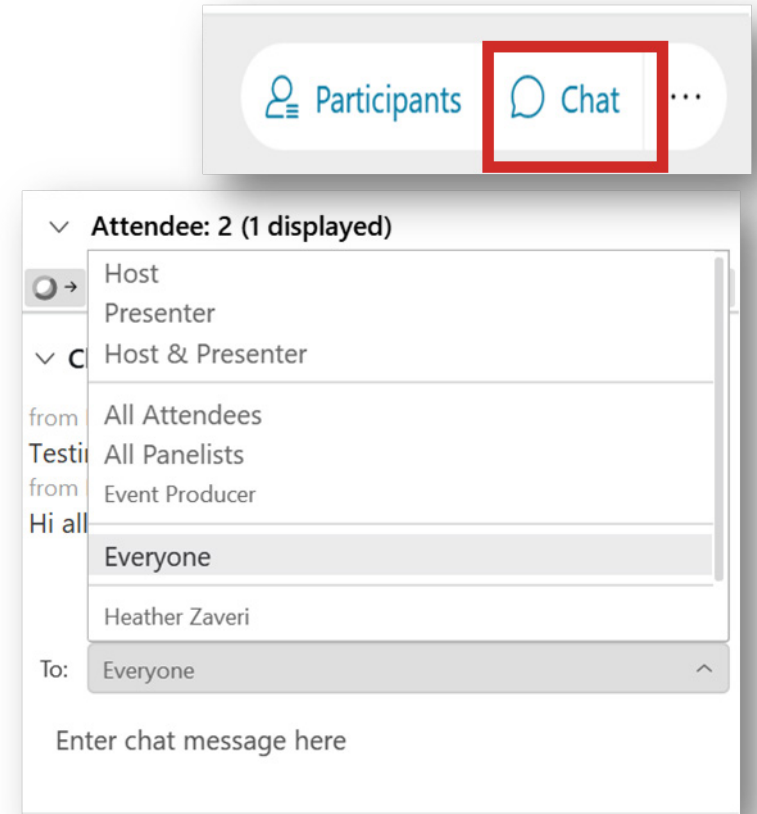
An Office of the Administration for Children & Families





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

- / Overview of upcoming query tool enhancements**
- / New features and functions across tabs**
- / Tab-specific enhancements**
 - All Workshops
 - Applicant Characteristics by Service Assignment
- / Announcements**



Overview of upcoming query tool enhancements

New visual interface and other updates coming soon!

New date filters that allow users to select individual dates

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

Updates to specific tabs

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

**Email will be sent
to all nFORM users
when updates are
available**



What will stay the same?

- / Data displays and calculations, except on Applicant Characteristics by Service Assignment tab**
- / Select population, date, and workshop/series filters to drill down on a specific group of clients**
 - Selected filters do not carry over across tabs
- / Reflects information entered into nFORM through the previous day**
- / Up to three staff at each grant recipient can access the query tool at the same time**



nFORM system updates

- / nFORM will be unavailable on Monday, December 16 between 8pm – Tuesday, December 17 at 8am ET**
 - Users should not log in during this time
- / Grant recipients should plan data entry and survey administration accordingly**
- / Contact the nFORM help desk with any questions or concerns**



New features and functions across tabs



New visual interface

Cloud Grantee 1 R (LL)

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

2025 Grant Year

This dashboard highlights key indicators for the current grant year for all client populations served by the grant. Grant years run from September 30 of one calendar year through September 29 of the following calendar year. Grant recipients that serve multiple populations can view data for each population by selecting the applicable 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 couple
Community individual
Reentering individual

Enrollment

Percent of Target Enrolled for the Current Grant Year

Current Enrollment (35)
Remaining (400)

8.0%
92.0%

Number of Clients Enrolled by Month

Month	Number of Clients Enrolled
Oct	30
Dec	2

Updated date filters

- / Select specific date ranges to drill down on a group of clients or window of service delivery**
 - Select enrollment, service, or survey dates depending on the tab
- / Manually enter a start and end date, or select a date from the calendar menu**
- / If no dates are selected, the default start date is April 1, 2021 and the end date is the current date minus one day**

Example Enrollment tab enrollment date filter

Filter names and Current Selections menu specify date filter type (enrollment, service, or survey completion)

The screenshot displays the 'Enrollment' tab interface. At the top, there are navigation buttons: 'Grant Year Overview', 'Enrollment' (highlighted in purple), 'Applicant Characteristics', 'Individual Services', and 'Workshop Participation - All W'. Below this, the page title is 'Cloud Grantee 1 RF (LE)'. A dark blue bar contains the text 'Enable Accessibility Mode'. To the right of this bar, there are two date filter inputs: 'Enrollment Start Date' with the value '09/01/2024' and 'Enrollment End Date' with the value '09/15/2024'. Both inputs are circled in red. Below the filters is a 'Current Selections' section with a table:

Grantee Name	Cloud Grantee 1 RF (LE)
Enrollment Start Date	09/01/2024
Enrollment End Date	09/15/2024
Population Name	

At the bottom of the 'Current Selections' section, there are three buttons: a back arrow, 'Clear Selection', and a forward arrow. To the right of the 'Current Selections' section, there is a text area with the following content: 'Analyze enrollment trends by range from April 1, 2021 through grant has participation target'. Below this, there is a calendar widget for 'Sep 2024' with the date '15' highlighted in blue. The calendar is also circled in red.

Date selections will display in the Current Selections menu



Edit checks on date filters

Grant Year Overview | Enrollment | Applicant Characteristics | **Individual Services** | Workshop Participatio

Cloud Grantee 1 RF (LE)

Enable Accessibility Mode

Service Start Date: 6/30/2023

Service End Date: 06/30/2024

Please provide service start date in mm/dd/yyyy format.

Current Selections

Grantee Name	Cloud Grantee 1 RF (LE)
Service Start Date	6/30/2023
Service End Date	06/30/2024

CLIENT ISSUES, NEEDS, SERVICES, REFERRALS AND INCENTIVES

Analyze the referrals pro common inc 2021 throug service durin grant has pa should view

Date selections must be entered in mm/dd/yyyy format. If not, an error message will appear and the incorrectly entered date will not appear in the Current Selections menu

Checks on start and end dates remind users to select dates in correct range

Service Start Date

6/1/2020

Service start date may not be earlier than April 1, 2021.

Service End Date

06/30/2024

Service Start Date

06/01/2023

Service end date may not be later than 11/25/2024.

Service End Date

06/30/2025

Filters organized at top of each tab

/ For example, workshop and series filters will display under Primary Workshops tab Current Selections menu

The screenshot displays a dashboard with several navigation tabs at the top: Grant Year Overview, Enrollment, Applicant Characteristics, Individual Services, Workshop Participation - All Workshops, and Workshop Participation - Primary Workshops (highlighted in purple). Below the tabs, there is a header for 'Cloud Grantee 1 RF (LE)'. A dark blue button labeled 'Enable Accessibility Mode' is on the left. To its right are two date input fields: 'Enrollment Start Date' with the value '04/01/2021' and 'Enrollment End Date' with the value '12/02/2024'. Further right are three radio button options: 'Community couple', 'Community individual', and 'Reentering individual'. Below these is a 'Current Selections' panel with a list of filter categories: Grantee Name (Cloud Grantee 1 RF (LE)), Enrollment Start Date, Enrollment End Date, Population Name, Workshop, and Series. Each category has a trash icon to its right. Below the list are three input fields, with the middle one labeled 'Clear selection'. A red oval highlights the 'Workshop' and 'Series' filter options. To the right of the 'Current Selections' panel is a text block explaining the data analysis and a note about enrollment targets. Below this is a progress bar chart titled 'PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMARY WORKSHOPS' showing a current value of 34.9 against a target of 64.0. To the right of the progress bar is a circular gauge chart titled 'Average percentage of target hours reached by workshop p...' showing a value of 54.6 against a target of 50.0.

Select multiple options on population and applicant characteristic filters

- / **Currently, nFORM users must hold down the Ctrl key to select more than one filter option**
- / **Updated query tool will allow users to select multiple populations, workshops, series and characteristics by left-clicking selections**
- / **Multiple ways to manage filter selections**



Drill down further on select data points



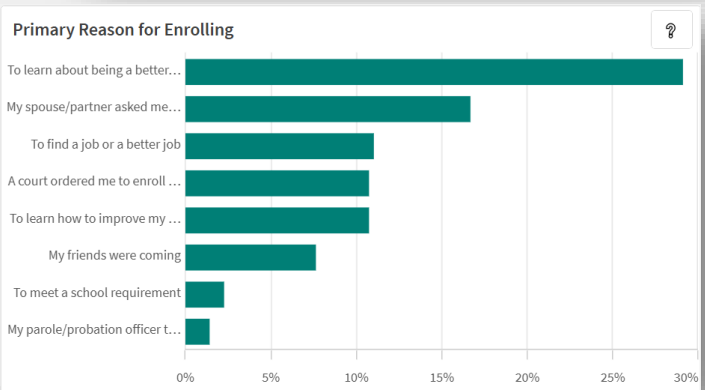
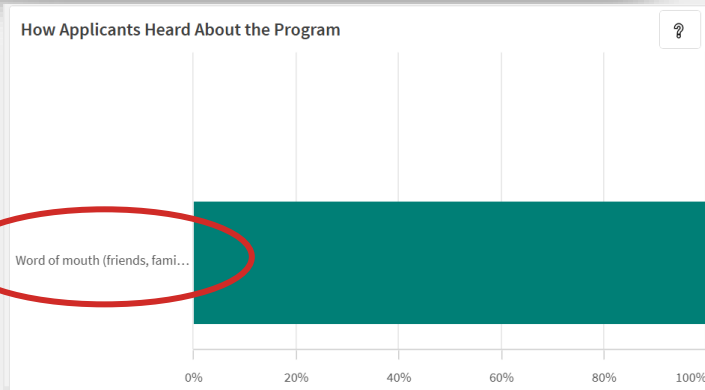
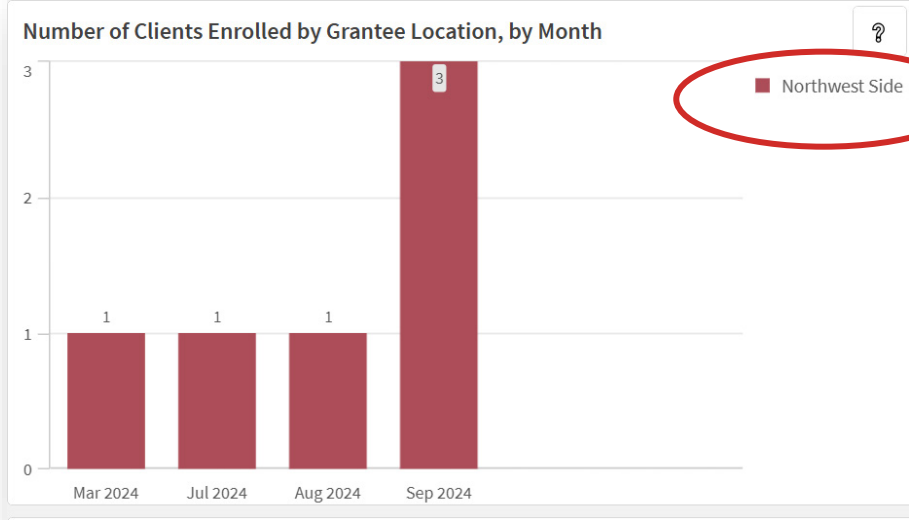
- / Clicking on a response option on the Enrollment or Individual Services tabs will adjust all other data points on that tab by clients who provided that response**
- / Review selections in the Current Selections menu**

Example: Drill down by client referral source on Enrollment tab

Current Selections

Grantee Name	Cloud Grantee 1 RF (LE)
Enrollment Start Date	09/30/2023
Enrollment End Date	10/30/2024
Population Name	Community individual
Location	Northwest Side
Hear About Category	Word of mouth (friends, family, acquaintances)
Enroll Category	

← Clear Selection →



Managing filter selections

/ Review selected filters in the Current Selections menu

/ Remove a filter in Current Selections menu

- Click the trashcan icon to remove a specific filter and retain others
- Click “Clear Selection” button to remove all filters
- Use the arrows on either side of the Clear Selection button to reverse or add back most recent selection

/ Other ways to remove a filter

- Click on that option from the list of available filters
- Click the “X” in the pop-up menu

Managing filter selections (cont.)

Current Selections

Grantee Name	Cloud Grantee 1 RF (LE)	
Population Name	Community couple	→
Workshop	Here to Help	🗑️
Series	The Best Place 2024	🗑️
Characteristic		🗑️
SubCharacteristic		🗑️

← Clear Selection →

Characteristic ... [X] ✓

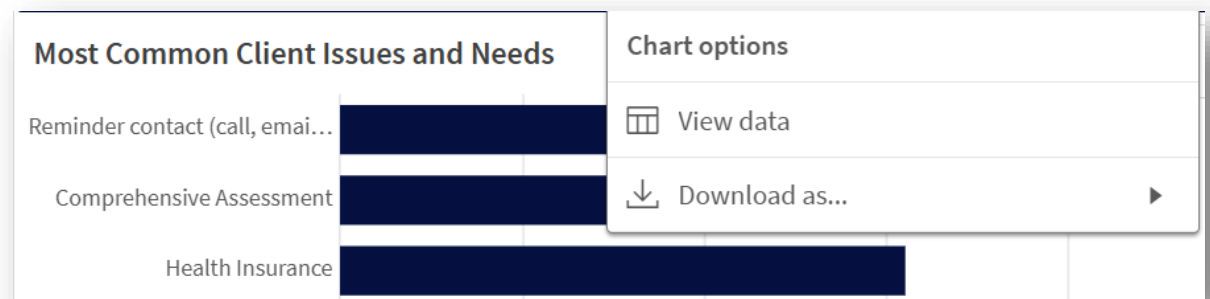
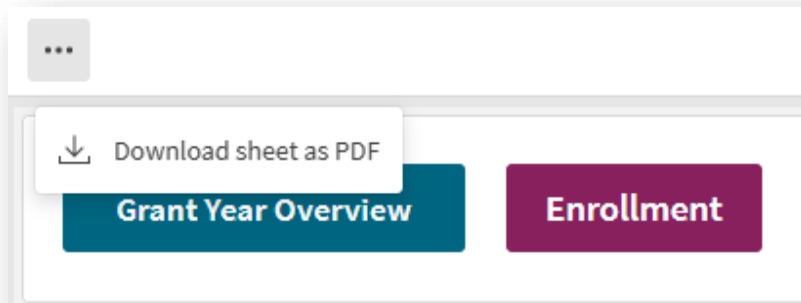
Age	✓
Employment Status	✓
Ethnicity	

APPLICANT

Download PDF images of query tool tabs and visualizations



- / Export a PDF image of each tab in the query tool by clicking the ellipsis icon in the top left corner of a tab and select “Download sheet as PDF”
- / Each data visualization can also be downloaded as either an image (JPEG or PNG), PDF, or Excel table by right-clicking on the chart and selecting “Download as...”.

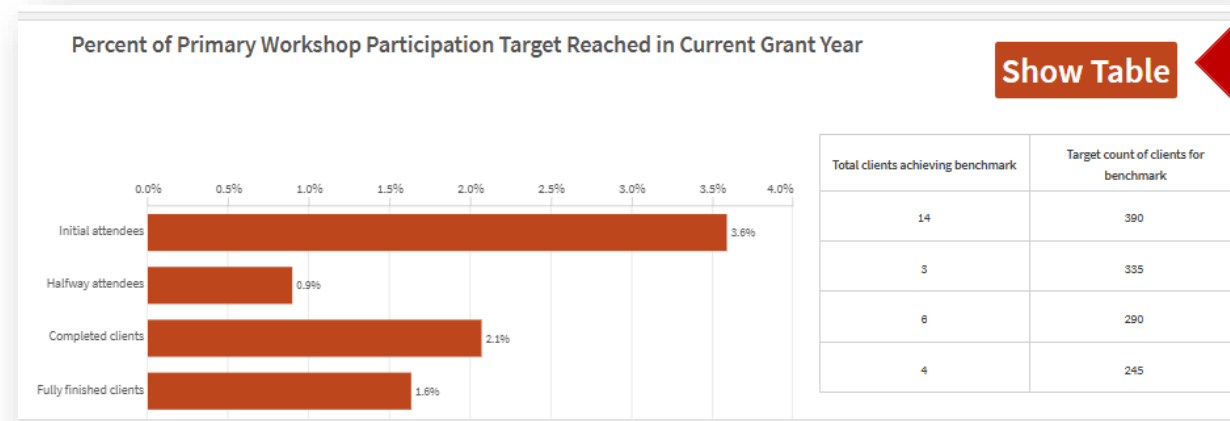


Access 508-compliant information on each tab rather than by launching a separate dashboard

The screenshot shows a navigation bar with five tabs: "Grant Year Overview", "Enrollment", "Applicant Characteristics", "Individual Services", and "Workshop Participation - A". Below the tabs, the text "Cloud Grantee 1 RF (LE)" is displayed. Underneath, there are two date filters: "Enrollment Start Date" with a value of "04/01/2021" and "Enrollment End Date" with a value of "11/17/2024". A red arrow points to a button labeled "Enable Accessibility Mode" on the left side of the filter section.

Click “Enable Accessibility Mode” for 508-compliant date filter

Click “Show Table” or right-click visualizations and select “View Data” to review information in a table layout





Questions





Tab-specific enhancements: Workshop Participation – All Workshops tab

Workshop Participation - All Workshops tab

- / **Gender, age, and race visualizations included for all grants**
- / **More prominent filter placement at top of tab**
- / **Users can filter information by**
 - Population
 - Workshop
 - Series
 - Applicant characteristic and subcharacteristic (i.e. gender characteristic → female subcharacteristic)

Example All Workshops tab

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

Cloud Grantee 3 READY4Life (LE)

Current Selections

Grantee Name: Cloud Grantee 3 READY4Life (LE)

Population Name: [Select]

Workshop: [Select]

Series: [Select]

Characteristic: [Select]

SubCharacteristic: [Select]

[Clear Selection]

Analyze client participation in workshops since the beginning of the grant by selecting specific workshops and session series from the menu. Individual make-up sessions of workshops are excluded from these analyses. Grant recipients that set participation targets for multiple populations should view data for one population at a time using the population buttons. For couple populations, attendance is counted only if both partners attend. Key characteristics—age, gender, and race—are counted for individual attendees. For grants conducting local evaluations, data displayed on this tab are for treatment, control (with services), and control waitlist (with services) group clients only.

Workshop: [Select] Series: [Select]

Youth

3075
Clients Attended at Least One Workshop Session

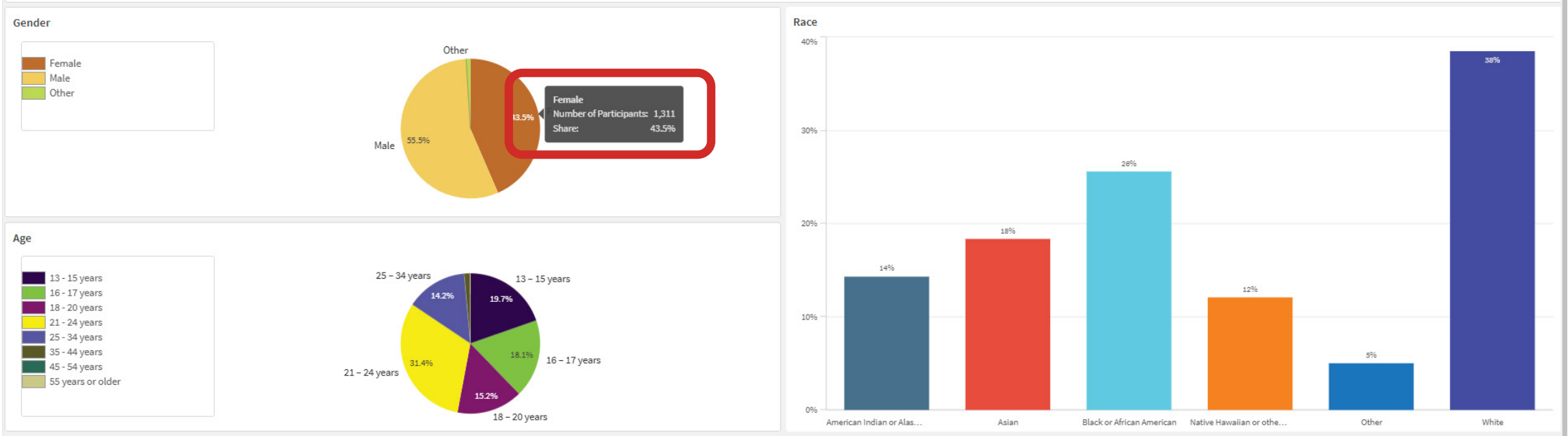
66
Average Number of Clients in Each Workshop Session

57.2 hours
Average Number of Hours Clients Attend Workshops (Of Clients Who Attended Workshops)

Example All Workshops tab (cont.)



KEY CHARACTERISTICS OF ATTENDEES (For Workshop Attendees Who Reported These Characteristics)



Hover over graphs to see the number of clients along with percentages

Using each visualization

Consider whether distribution of clients' gender aligns with target population(s)

- For example, if your program serves mothers and fathers, are there clients across genders?

Review whether the distribution of age ranges aligns with your program's design

- For example, are there potential issues with reported ages that are outside of the scope of your program (for example, minor youth)?

Identify opportunities to increase participation for a specific racial group

- For example, do trends differ by race from enrollment to workshop attendance?

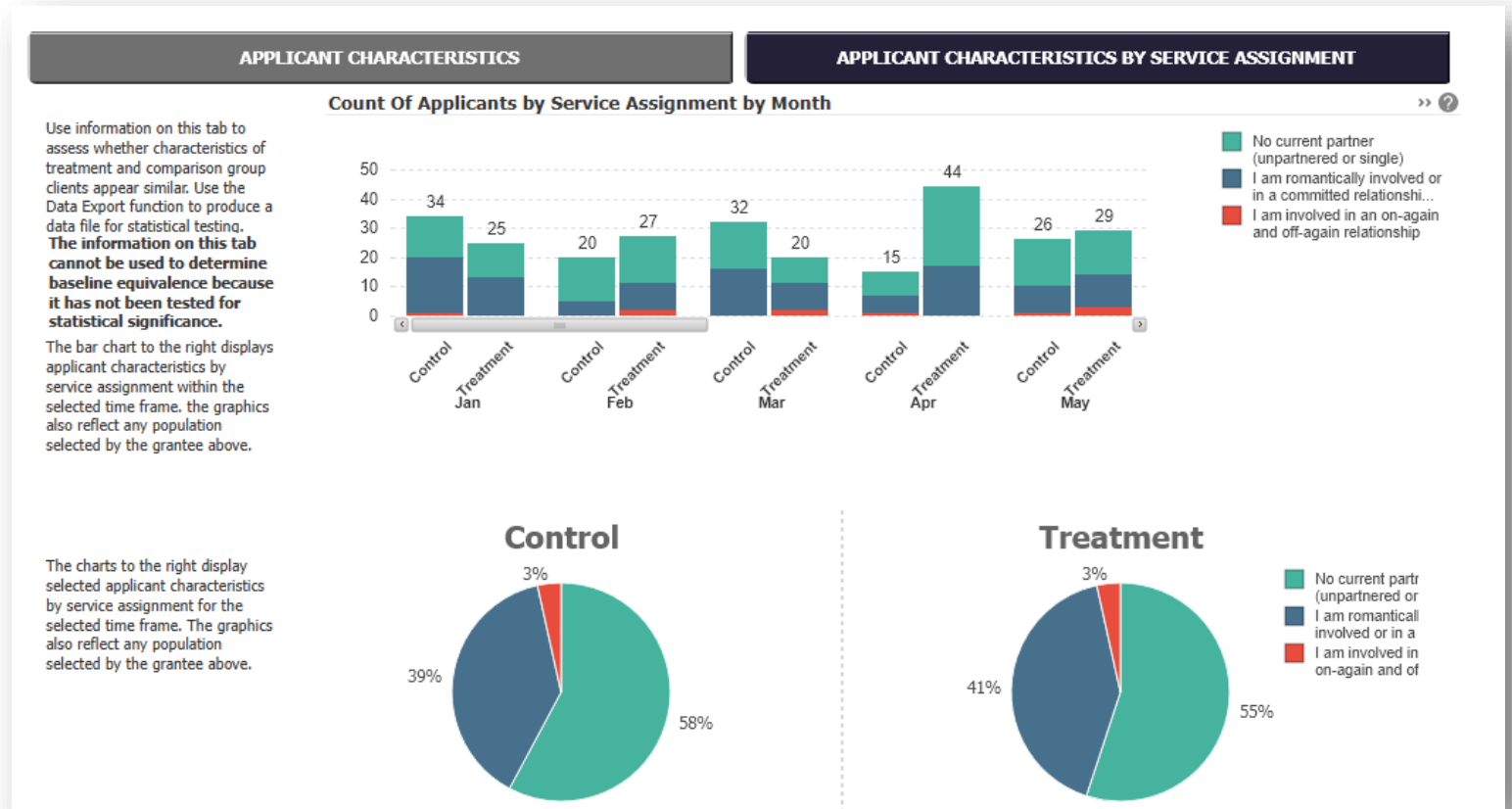


Tab-specific enhancements: Applicant Characteristics by Service Assignment tab

Current Applicant Characteristics by Service Assignment tab

/ Bar graph shows count of applicants enrolled each month by service assignment and selected characteristic

/ Pie charts display percentage of clients enrolled in each service assignment by selected characteristic



Updated Applicant Characteristics by Service Assignment tab

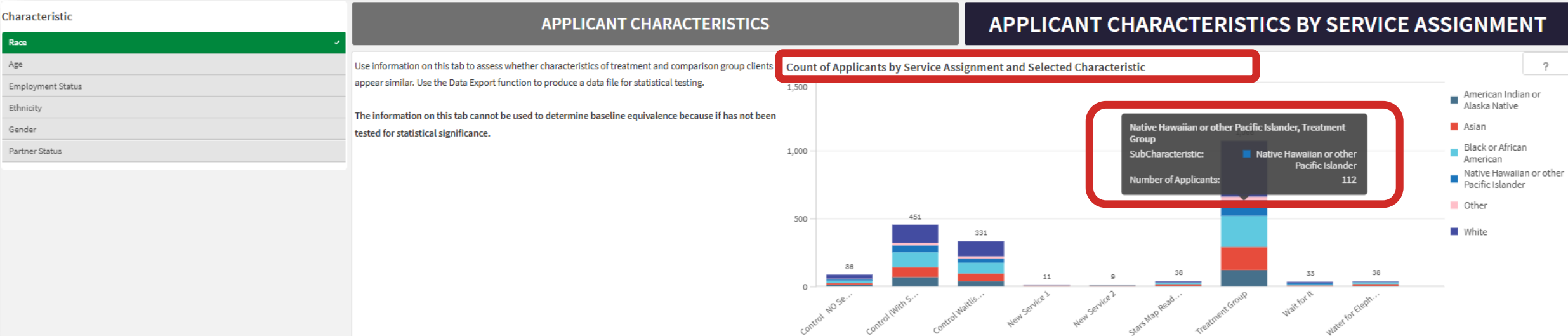
/ Updated tab will include two new bar charts

- Count of applicants by service assignment and selected characteristic
- Percent of applicants by service assignment and selected characteristic

/ Review both bar charts to identify whether distribution of applicant characteristics across service assignments during the selected timeframe aligns with your local evaluation plan

/ Information on this tab cannot be used to determine baseline equivalence since it has not been tested for statistical significance

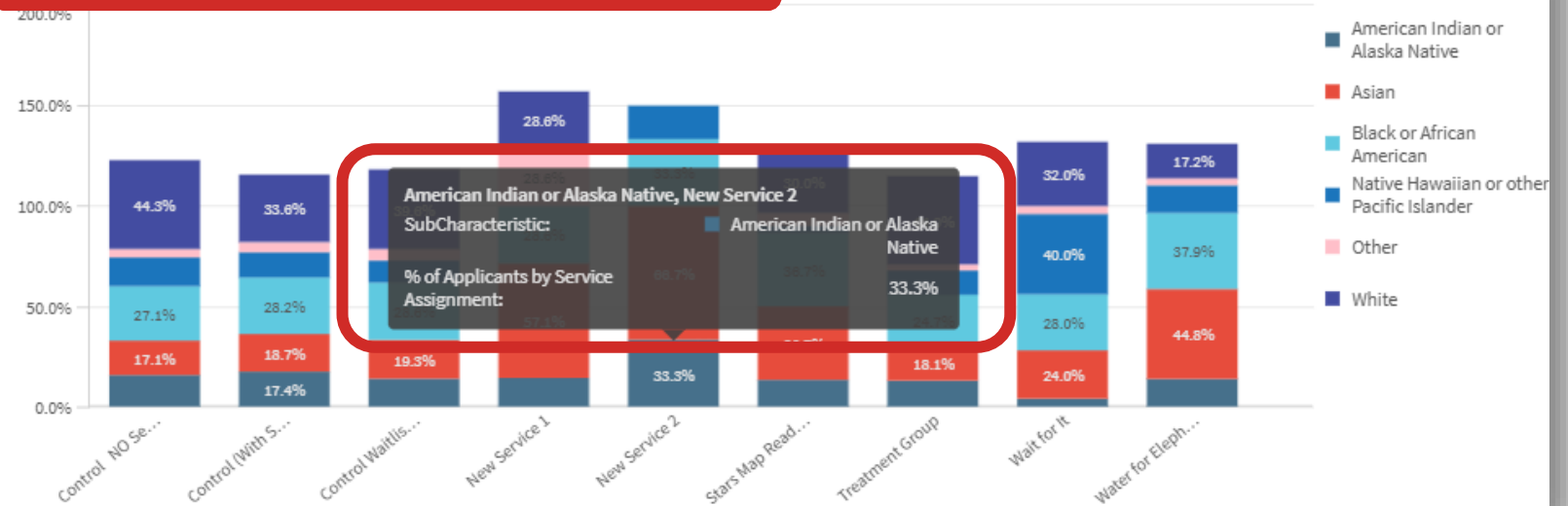
Example Applicant Characteristics by Service Assignment tab—counts



Example Applicant Characteristics by Service Assignment tab—percentages

The bar charts to the right display selected applicant characteristics and client population by service assignment for the selected time frame. The top chart presents the selected data as counts and the bottom chart displays the same data as percentages. For Employment Status and Race, applicants may select more than one response option, so percentages may exceed 100.

Percent of Applicants by Service Assignment and Selected Characteristic



Total percentages by service assignment may exceed 100% if selected characteristic is based on a “Select all that apply” survey question



Questions





Announcements



Save the date for upcoming office hours

- / nFORM office hours on Tuesday, January 14 from 2-3pm ET**
- / CQI office hours on Tuesday, January 28 from 2-3pm ET**