nFORM
Information, Family Outcomes, Reporting, and Management

Options for Virtual Survey Administration

HMRF grant recipients administer two surveys to program clients—the Entrance Survey at enrollment and the Exit Survey at the last workshop. Many grants will administer web-based versions of these surveys on program equipment at their service locations. However, grant recipients will need to administer these surveys virtually when they offer virtual workshops or clients are otherwise unable to complete surveys in person. In this tip sheet, we give two ACF-approved ways to administer surveys to clients remotely, along with the practices to follow for each method. To find more information on survey administration, including administering paper surveys or in languages other than English and Spanish, review the nFORM User Manual on the HMRF Grant Resource site.

Administer the survey by phone or video call

- **Create a plan for data collection by phone or video call.** Schedule calls to coincide with points when clients need to take their surveys (at enrollment and the last workshop). Review your organization's videoconferencing platform and be sure to use secure, approved options. Use nFORM's outreach detail and survey completion detail operational reports to identify 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 and that they have enough privacy so others will not hear them. Ask clients if they have any questions before starting.
- **Create a contact strategy.** Tell clients you will call back or reconnect if you get disconnected. If clients need to stop or cannot do the survey when you call, then arrange a time to call back. Contact clients multiple times if they are unavailable.
- **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 entering web survey responses while they are on the video call.
- **Follow phone and video etiquette.** Make sure your background is appropriate, well lit, and free of distractions—consider using a blurred background or **background** image. Make sure your audio is clear and free of static and background noises.
- **Enter answers in the web survey as clients respond.** Read everything in the survey exactly as it is written—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 correctly is critical for data quality.

Email links to clients so they can take the survey themselves

- **If emailing a link 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.**
- **Confirm on the client's nFORM profile that the survey has been submitted.** If the survey does not show as having been completed, log into the survey and select the "Yes, submit my survey" option on the last screen.
- **Plan to generate and send new passcodes if the first ones expire after 96 hours or 10 uses.**

Contact the data capacity and CQI help desk at nFORMCQITA@mathematica-mpr.com with any questions. We are happy to help!