Reviewing Recruitment and Enrollment Data in nFORM 2.0

July 12, 2022
nFORM 2.0 Team
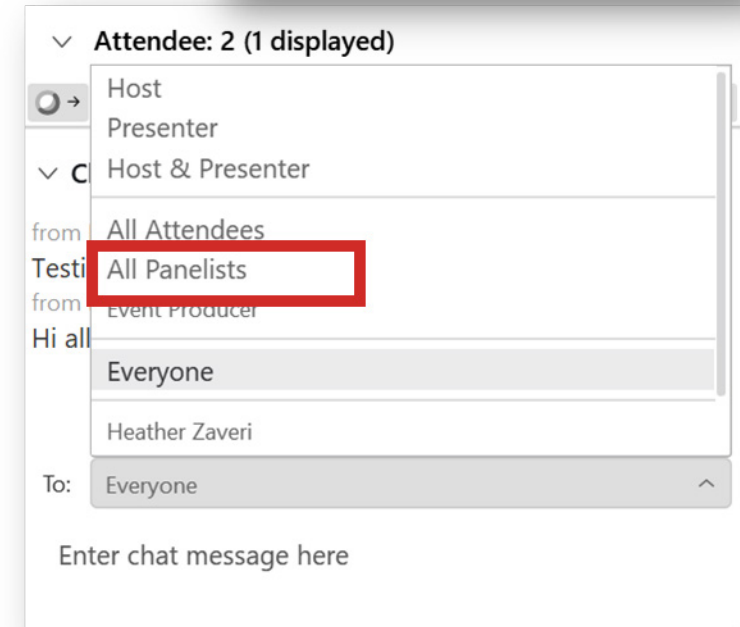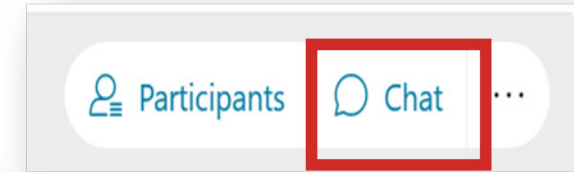**Mathematica**
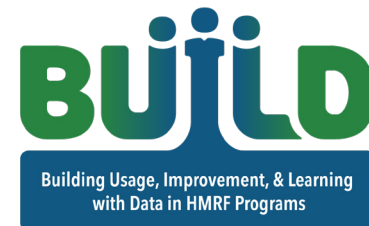
Housekeeping

/ **Use the chat to ask questions**

- Select "All Panelists" to submit 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 HMRF grantee resource site

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

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Today's topics

/ **Refresher on confirming client ID during survey administration**

/ **Introduce a new resource on how to monitor recruitment and enrollment using nFORM data tools**

/ **Discuss ways to review this information using the QPR/PPR, query tool, operational reports, and data export**

/ **Confirmation of grant year 3 enrollment and participation targets and number of nFORM user accounts**

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Survey Administration

Confirming client name and ID during survey administration

/ **As part of nFORM survey administration, grantee staff or the client will need to enter the client ID and passcode to open a client's survey**

- Staff should confirm that they are entering in or providing the correct client's ID

/ **The first question the client is asked in each survey is to confirm their name before continuing**

/ **As part of the survey script, staff should ask clients to notify them if the wrong name appears on the screen**

- Staff entering in responses from paper surveys will also be asked to confirm the client's name

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Confirming the client's name in nFORM surveys

If the client's name does not match what is on screen, select "No, Return to Login"

Confirming the client's name when entering paper survey responses

If the client's name does not match what is on screen, select "No, Return to Login"

nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Survey Client Confirmation

Please confirm the client.

Are you recording a paper copy for **Pat Blais**?

No, Return to Login   Yes, Continue

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Examine Recruitment and Enrollment with nFORM
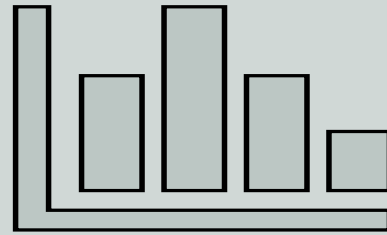
Introducing a new nFORM TA resource!

/ **nFORM resource on using nFORM to examine recruitment and enrollment coming soon**

/ **Useful for any program staff involved in monitoring progress and trends on recruitment and enrollment**

/ **Provides answers to questions on how to use various nFORM reports and data tools to review information for program monitoring and CQI**
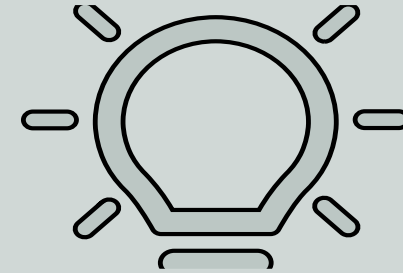
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How can I use this resource?

| To understand the types of questions to ask when reviewing information | To identify specific tools and variables to review data | To consider how this information supports program monitoring and CQI |

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How many clients are enrolling?

/ **Review Section B-01 of the QPR and C-03.2 of the PPR to monitor your grantee's progress on enrolling clients**

- Compare total number of clients/couples enrolled to enrollment target for each population your grantee serves to track progress on enrollment
- School-based Ready4LIFE programs can review total number of students enrolled in the current school year in Section C-03.2 of the School Year Performance Report

2. Enrollment targets and actual enrollment

	Number of adult couples[a]	Number of adult individuals
Enrollment target for the grant year	260	210
Enrolled since the beginning of grant year through the end of reporting period	78	841
% of grant-year target met to date	30%	400.5%

[a] The number of adult couples is the number of couple units.

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How many clients are enrolling? (continued)

Drill down further using the query tool and operational reports

The query tool's **Grant Year Overview** tab displays percentage of enrollment target reached for current grant year

Identify the number of "Applicant pending enrollment clients" and other client-level information using the **Client Status Report Summary** operational report

Analyze progress on meeting enrollment targets and whether new recruitment strategies are needed

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Are there enrollment patterns?

／ **Review the query tool and operational reports for enrollment trends by month, location, how applicants heard about the program, their primary reasons for enrolling, and service assignment (for local evaluation grantees)**
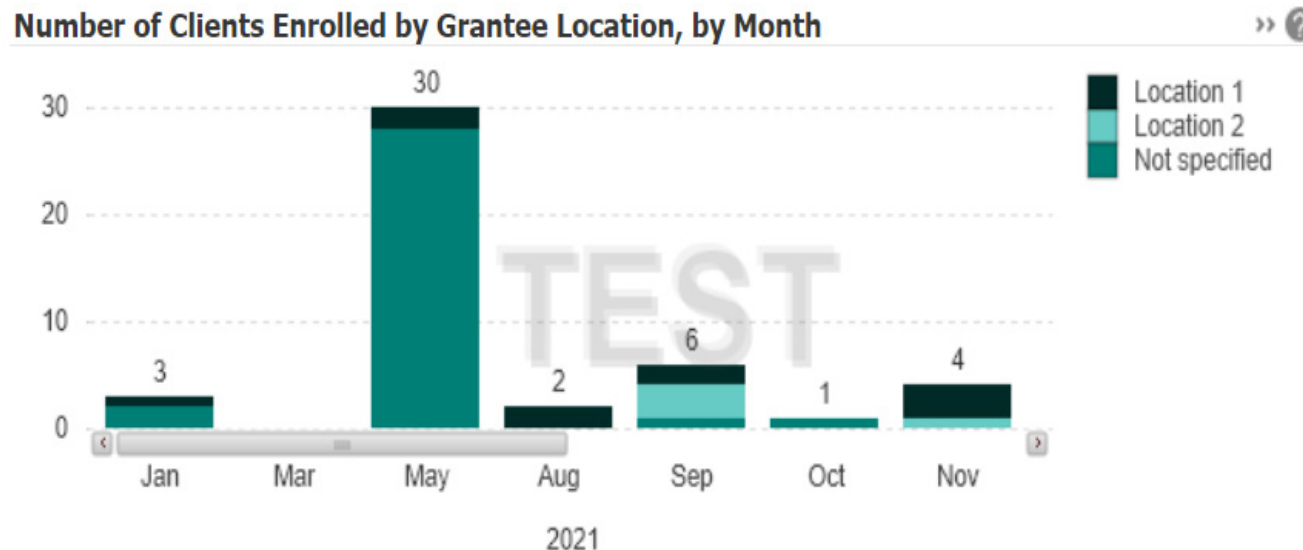
／ **Plan staffing and service delivery, and refine recruitment strategies**

Number of Clients Enrolled by Grantee Location, by Month

»› ⑦

Location 1
Location 2
Not specified

30

20

10

0

3   30   2   6   1   4

Jan   Mar   May   Aug   Sep   Oct   Nov

2021

Query tool enrollment tab

Filter by location to review enrollment information by month, how applicants heard about the program, and why they enrolled

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Using operational reports to identify enrollment patterns: survey completion summary report

Survey Completion Summary report

Grantee	Population	Number of Clients					
		Applicant Characteristics		Entrance Survey		Exit Survey	
		Completed	Refused	Completed	Refused	Completed	Refused
Cloud Grantee 1 RF (LE)	All	827	1	525	0	207	0
	Community couple	317	1	232	0	82	0
	Community individual	384	0	233	0	102	0
	Reentering individual	126	0	60	0	23	0

*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.

Client Grantee Location	Population	Client ID	Client Last Name	Client First Name	Current Client Status	Application Date	Enrollment Date	Survey Completion Date		
								Applicant Characteristics Survey	Entrance Survey	Exit Survey
Eastside	Community individual	10022858	Byers	Joyce	Active	12/1/2021	12/1/2021	12/1/2021	12/4/2021	2/4/2022
Eastside	Community individual	10066827	Lou	Mary	Temporary hold	1/24/2022	1/22/2022	Refused		
Southside	Reentering individual	10025266	Carter	Joe	Active	3/17/2022	3/19/2022	3/19/2022		

Identify the number of clients who completed the ACS (and enrolled) along with detailed information on enrollment and survey completion by client

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Using operational reports to identify enrollment patterns: local evaluation enrollment report

Local Evaluation Enrollment report

| Grantee Name					
RF Grantee	**Site Name**	**Total**	**Control Waitlist (With Services)**	**Treatment**	
			CW group	**Treatment 1 group**	**Treatment 2 group**
	Total	**15**	**7**	**4**	**4**
	Eastside	5	1	2	2
	Northside	3	2	0	1
	Southside	4	2	1	1
	Westside	3	2	1	0

Local evaluation grantees can review enrollment by service assignment

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Who is enrolling?

/ **Review client demographics in Sections C-02.1 – C-02.3 of the PPR and School Year Performance Report**

/ **Regularly monitor demographic information using the Applicant Characteristics tab of the query tool**

- Age
- Employment status
- Race
- Ethnicity
- Gender
- Partner status
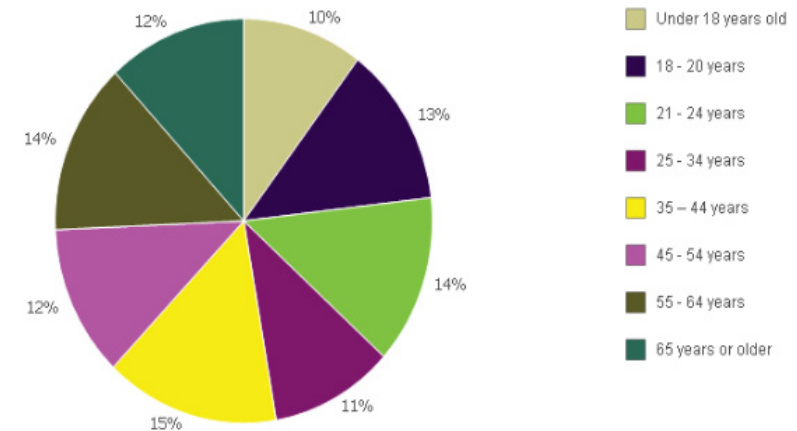
/ **Use the Survey Response Data tab of the data export for a complete set of client characteristics**

12% 10%
13%
14%
14%
12%
15% 11%

Under 18 years old
18 - 20 years
21 - 24 years
25 - 34 years
35 – 44 years
45 - 54 years
55 - 64 years
65 years or older

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Who is enrolling? (continued)

/ **Review the total number of clients living within each zip code using the Zip Code Summary operational report**

Client Grantee Location	Population	Zip Code	# Clients
Northside	Community individual	7777	1
Eastside	Community couple	10001	5
Eastside	Community couple	10002	2

Use this report to:
- ✓ Determine whether clients are being served in expected locations
- ✓ Assess staffing and service delivery needs
- ✓ Target recruitment activities by location

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How do clients hear about services and why do they enroll?

- **Section C-01 of the PPR includes information on recruitment methods used, the types of agencies that provided referrals, recruitment staffing, and a breakdown of how clients heard about the program and their primary reasons for enrolling**

- **The query tool's Enrollment tab also includes information on how applicants heard about the program and their primary reasons for enrolling**
  - Filter by calendar years and months and/or location to monitor how responses change by location or over time

- **Plan recruitment activities based on this information**

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How do clients hear about services and why do they enroll? Using the data export

/ **Detailed program information on recruitment activities and client information about referral sources can be found on:**

- **Program Operations tab:** Includes detailed grantee-level data on recruitment activities based on responses to program operations quarterly survey
- **Client Info tab:** Includes each client's referring organization name and type as entered by staff into nFORM
- **Survey Response Data tab:** Reports the method by which the client reported hearing about the program on the ACS

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Confirmation of Grant Year 3 Targets

Confirming grant year 3 targets and user accounts

/ **The nFORM team will email each grantee's authorizing representative and project director to confirm grant year 3 enrollment and participation targets and number of requested nFORM accounts**

/ **Confirmation of the targets included in recent non-competing continuation applications**

/ **Grantees should respond to confirm if no changes are needed**

/ **Discuss any requested updates first with your grantee's FPS**

- If FPS approves changes, email updated information to the nFORM help desk

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