Deep Dive Into the nFORM 2.0 Operational Reports

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nFORM 2.0 Team
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OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

OPRE

HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

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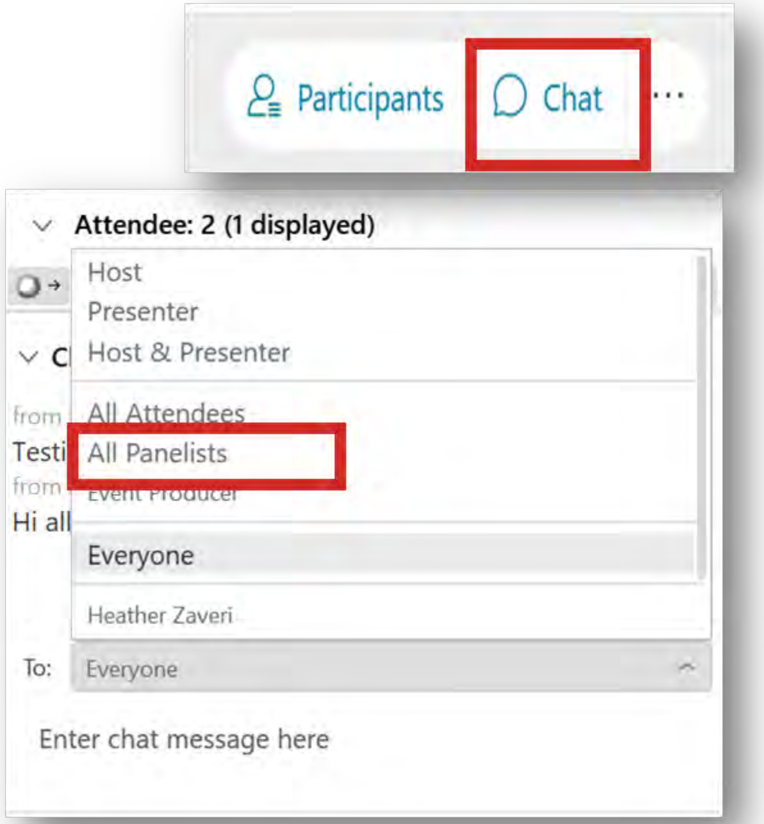
Progress Together

BUILD
Building Usage, Improvement, & Learning with Data in HMRF Programs

Housekeeping

- **Use the chat to ask questions**
  - Select “All Panelists” to submit questions
- **Click on the link in the chat to access closed-captioning**



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REMINDERS:

- **Never text or email personally identifiable information (PII) like client names – *including to the help desk***
  - Only refer to clients 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 the HMRF Grantee Resource site for more information on keeping data secure

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Today’s topics

- Overview of the nFORM operational reports
- Deep dive into the operational reports
  - Purpose and benefits
  - Data points available
- Tips for using the operational reports
- Feedback on the operational reports

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Overview of the operational reports

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Operational reports are designed to provide grantees with efficient access to nFORM data to…

1. **Help manage daily HMRF program operations**
2. **Monitor CQI strategies**
3. **Provide contextual information for the QPR/PPR progress narrative**

List of operational reports

QPR/PPR | Operational Reports | Query Tool | Data Export

Operational Reports

- Caseload Summary
- Client Status Report Summary
- Individual Service Contacts
- Local Evaluation Enrollment
- Maximum Incentives Report
- Phone Number Report
- Primary Workshop Participation Detail Report
- Primary Workshop Participation Summary
- School Year Performance Report
- Series Session Attendance
- Survey Completion Summary
- Survey Report - Paper Survey
- Survey Report - Refused Survey
- User Account Activity
- Zip Code Report

Available only to grantees conducting local evaluations

Available only to site administrators at READY4Life grantees

Available only to site administrators at all grantees

Deep dive into operational reports

Accessing the operational reports

- **nFORM's Operational Reports screen (R2), under Reports tab, displays all reports that an nFORM user has permission to access**
  - Table VIII.2 in the user manual describes each report and the nFORM users who have access to it
- **Reports can be opened on-demand in different formats such as PDF or Excel, if grantee staff want to sort and filter data**
- **Many reports require grantees to enter specific start and end date filters**
  - Filters based on enrollment date, workshop series start date, or other dates depending on report content
- **Some reports include other filter options, such as Workshop and Series for which clients are registered**
- **Some reports include both summary and individual client level data**

Caseload Summary/Detail Report

Overview: Provides both summary and detailed information on all staff with case management responsibilities

- Shows case managers' active client counts and assignments, and the average caseload across staff
- Detailed page includes information on client activity

Benefits: Grantees can monitor caseloads and client assignments

- Identify clients that require follow up for case management and/or workshops
- Monitor information for potential changes to staffing or service delivery resources

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Caseload Summary/Detail Report Data

Caseload Summary as of: 9/22/2022

Grantee	Staff Grantee Location	Staff with Case Management Capability	Staff User Account Type	User Account Active?	Number of Active clients	Total number of clients
Youth Connections		Man, Bat	Case Manager	N	11	12
Youth Connections		Woman, Wonder	Case Manager	Y	20	20

Caseload Detail as of: 9/22/2022

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	Application Form Completed by	Enrollment Date	Most Recent Service Contact Date	Most Recent Workshop Session Attended Date	# of referrals requiring follow-up	# of incentives provided
Southside	Man, Bat	10056196		Beasley	Pam	Active	Southside	Man, Ant	12/22/2021		5/12/2022	0	5
Southside	Man, Bat	10031470		Schrute	Dwight	Consent revoked	Southside	Man, Ant	10/12/2021	8/16/2022	7/14/2022	1	9

Identify potential data quality issues or follow up with clients as needed

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Client Status Report Summary/Detail

Overview: For each status type, provides the total number of clients with that status as of the report date

- Also includes client-level information on client status, enrollment date, and assigned location

Benefits: Monitor client flow through your program

- Identify clients who may require follow up, such as…
- Clients statused as “applicant pending enrollment” who need to finish the enrollment process
- Clients statused as “nonresponsive” who may require additional outreach

Client Status Report Summary/Detail Data

Client Status Report Summary as of 9/22/2022

Grantee	Total (excl Duplicates)	Applicant Pending Enrollment	Active	Completed/ Graduated	Consent Revoked	Deceased	Drop out	Incarcerated
All Grantees	180	3	150	3	1	1	2	2
Families Together	180	3	150	3	1	1	2	2

Moved out of area	Non-responsive	Primary complete/optional active	Removed from program	State of emergency	Temporary Hold		Duplicate Pending	Duplicate Confirmed
3	4	1	3	2	4		1	1
3	4	1	3	2	4		1	1

Client Status Report Detail as of 9/22/2022

Client Grantee Location	Client ID	Couple ID	Client Last Name	Client First Name	Enrollment Date	Client Status	Client Status Change Date
Center office	10027798		Armweak	Colin		Applicant pending enrollment	8/17/2022
Center office	10027895		Banana	Anna	10/8/2021	Active	10/8/2021

Can be used to identify all clients with a specific status, or monitor the most recent date a client status was updated

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Individual Service Contacts Report

Overview: Currently displays the average number of substantive individual service contacts (ISCs) and reminder-only contacts a grantee provides by client population and location

- Also provides detailed information on each enrolled client’s most recent substantive ISC, the total number of substantive ISCs and reminder-only contacts received
- Includes client enrollment date filter

Benefits: Grantees that provide case management services can monitor whether the level of ISCs being provided aligns with the program’s design

- Identify potential follow up for clients who have not received the expected number of ISCs

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Individual Service Contacts Data

Grantee	Client Grantee Location	Population	Number of Clients/Couples	Average Number of Substantive Service Contacts@	Average Number of Reminder Only Service Contacts
Fathers Connect	All	All	200	4.5	8
		Community individuals	140	5	9
		Community couples	60	4	7
	Hogwarts	All	80	4.5	8
		Community individuals	50	5	9
		Community couples	30	4	7
	Under the Sea	All	120	4.5	8
		Community individuals	90	5	9
		Community couples	30	4	7

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

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Monitor whether clients have received the expected number of substantive ISCs

Primary Workshop Participation Summary Report

Overview: For each population served by a grantee, presents the total number of clients and their average hours of participation in primary workshops by and across locations

- Average hours across all locations are compared to a grantee's targets for each population
- Provides participation data for primary workshop sessions where attendance is either fully or partially recorded
- Includes client enrollment date filter

Benefits: Allows grantees to monitor average primary workshop participation and any differences between locations or populations served

- To drill down further, grantees can use the primary workshop participation detailed report which provides client-level information

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Primary Workshop Participation Summary Report Data

Youth Together

Participation in Primary Workshop(s)* - Summary Report

Clients Enrolled 4/7/2021 - 9/22/2022

Grantee	Client Population	Location	Number of Clients	Average Participation in Primary Workshop(s) (Hours)	Target for Participation in Primary Workshop(s) Hours	Average % of Target Participation (in Primary Workshop(s)) Achieved
Youth Together	Youth		300	23.5	24	97.9%
		Kings Landing	200	23	24	95.8%
		Winterfell	100	24	24	100.0%

Review differences in average participation by location

Primary Workshop Participation Detail Report

Overview: Displays client-level information on primary workshop participation including progress towards completing the target number of primary workshop hours

- Includes participation data for primary workshop sessions where attendance is either fully or partially recorded
- Includes client enrollment date filter

Benefits: Grantees can identify individual clients who may require additional follow up to complete primary workshops

Primary Workshop Participation Detail Report Data

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%

Use multiple fields to help identify clients who should have completed primary workshops

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Series Session Attendance Report

Overview: Displays client attendance in all series for a selected workshop

- Grantees can filter by a specific workshop series
- Includes filter for series start date

Benefits: Allows grantees to monitor attendance both during and after a workshop series has ended

- Identify clients who did not attend a session and may need to attend a make-up
- Monitor attendance across multiple series of the same workshop

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Series Session Attendance Report Data

Grantee: Families Together
Workshop: Communication is Key
Series: Cohort 1 6.1-6.30.21
Registration Required: Yes
Start Date: 06/01/2021 **End Date:** 06/30/2021
Meeting Day(s): Tue
Total Workshop Hours: 12
Scheduled Location: E5 Building
Facilitators: Bob Mister

Review session details

									Attendance		
						Number of Sessions *					
Client ID	Couple ID (if applicable)	Client	Client Grantee Location	Registration Date	Disenrollment Date	Attended	Missed	Made up	06/08/2022	06/15/2022	06/29/2022
10051052		Stark, Sansa	Kings Landing	5/29/2021		3	0	0	Yes	Yes	Yes
10051078		Martell, Oberyn	Kings Landing	5/29/2021		3	0	0	Yes	Yes	Yes
10051094		Hound, The	Kings Landing	5/29/2021		1	1	1	Yes	Made up	No
10051117		Targaryen, Daenerys	Kings Landing	5/29/2021		1	0	0	Yes	No	No
10051120		Tyrell, Olenna	Kings Landing	5/29/2021		3	0	0	Yes	Yes	Yes
10051133		Stark, Ned	Kings Landing	5/29/2021		1	2	0	Yes	No	No

Identify any clients who missed a session and have not yet participated in a make up

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School Year Performance Report (READY4Life grantees only)

Overview: For READY4Life grantees only, this replicates the PPR but with calculations based on the school year calendar (July 1 to June 30) rather than the grant year calendar (September 30 to September 29).

- Similar to the QPR/PPR, this report is intended to be downloaded as a PDF
- Includes PPR reporting period filter

Benefits: READY4Life grantees serving youth in schools can use this report to monitor performance measures based on the academic calendar

- The information can also help inform the progress narrative portions of the QPR/PPR

Grant Year	School Year Reporting Period	
	Start date	End date
2021	9/30/2020	6/30/2021
2022	7/1/2021	6/30/2022
2023	7/1/2022	6/30/2023
2024	7/1/2023	6/30/2024
2025	7/1/2024	9/29/2025

Note that the 2021 and 2025 grant year reports do not cover four quarters

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Phone Number Report

Overview: Provides a list of all phone numbers for each client enrolled in nFORM

- Can be filtered on enrollment date and specific client statuses and workshops, to help in following up with groups of clients at a time.
- Does not include clients statused as “Applicant pending enrollment”

Benefits: Allows grantee staff to more easily access information needed to follow up with clients by phone or text (for clients who have agreed to be texted)

Clients Enrolled: 4/7/2021 - 9/22/2022

ClientStatus: All Client Statuses

Heading displays which client status (if any) was filtered on

Client Grantee Location	Population	Client Last Name	Client First Name	Home Phone	Cell Phone	Work Phone	OK to Text
Milkyway	Adult individual	Armweak	Colin		732-473-2984	328-976-2389	N
Milkyway	Adult individual	Banana	Anna	859-734-9573			Y

Review which clients agreed to be texted

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Tips for using the operational reports

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Tips for using operational reports (1)

- Remember that the data in the reports will reflect the time you run the reports and the filters that you select
- Review the headings and footnotes as a reminder of the types of data included and excluded from each report
- Use client and couple ID, workshop ID, series ID, and session ID to link data across multiple operational reports and the data export

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Tips for using operational reports (2)

- **For grantees serving couples, remember that both members of a couple**
  - Must have enrolled together to count towards a grantee’s enrollment target
  - Attended or made up the same workshop sessions for their attendance to count towards primary workshop participation targets
- **Follow best practices to keep data secure**
  - Most of the operational reports include client names, which are personally identifiable information
  - When opening a report in Excel, delete client names if they are not needed
  - Check out the training video titled “Keeping Data Secure” and Appendix A in the Performance Measures and Data Collection Logistics Manual on the Grantee Resource Site for more information on protecting personally identifiable information

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