Upcoming Enhancements to the nFORM 2.0 Query Tool

May 9, 2023
nFORM 2.0 Team
Mathematica

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

OPRE

HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

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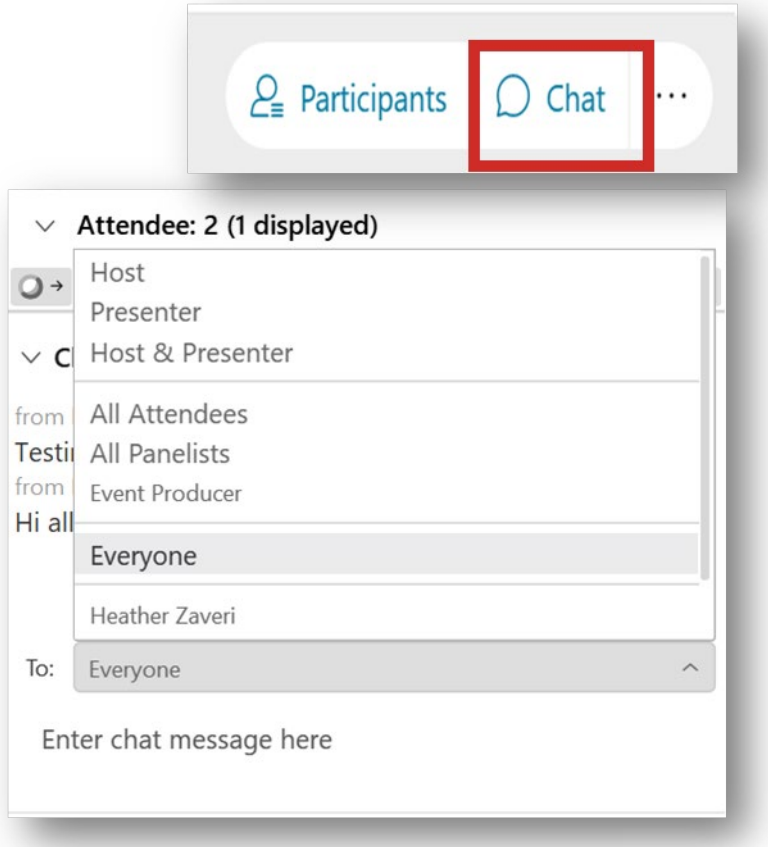
Progress Together

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

Housekeeping

- Use the chat to ask questions
- 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 resource site
  2. Review the Performance Measures and Data Collection Logistics Manual on the resource site for more information on keeping data secure

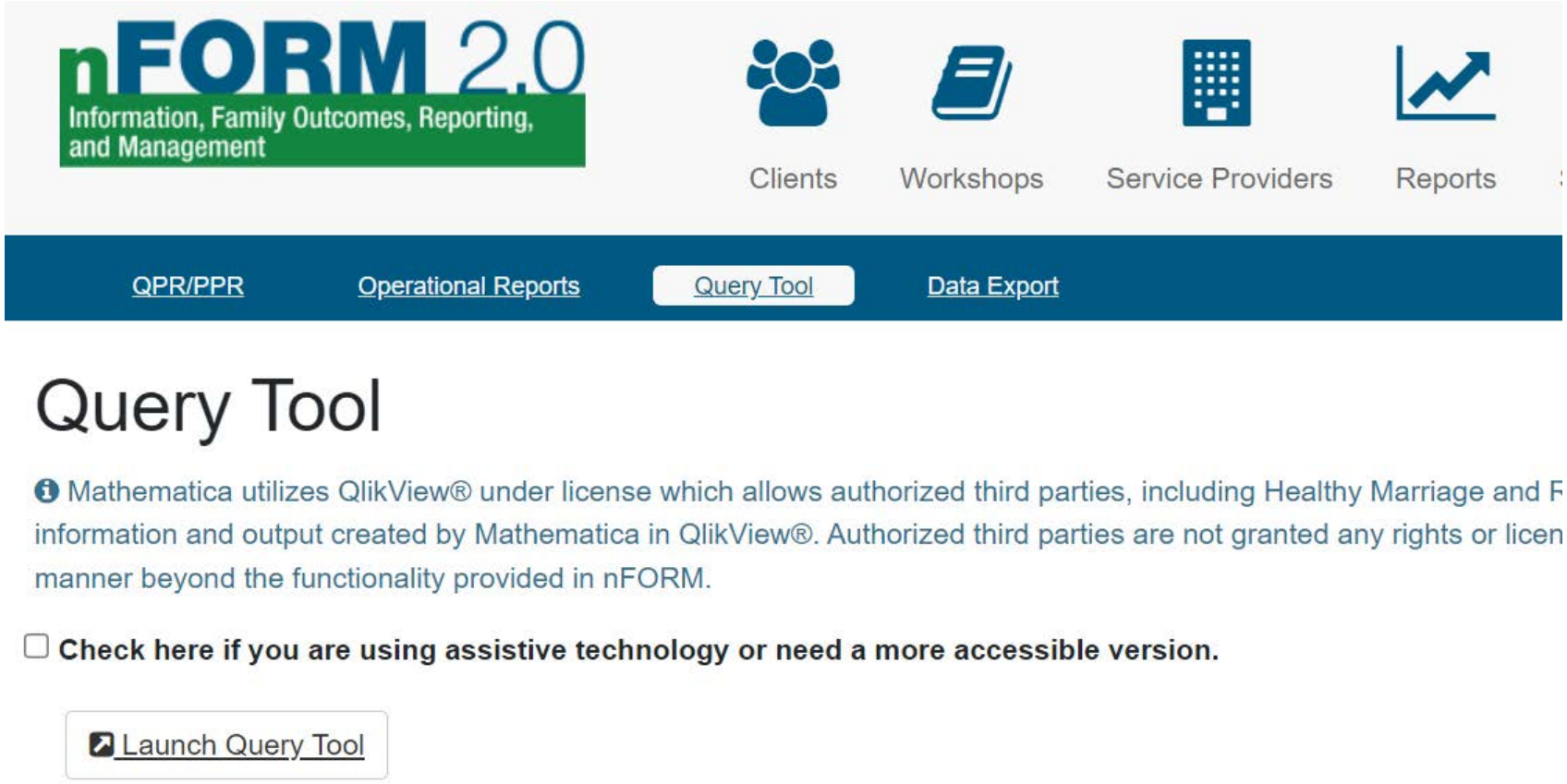
Today's topics

- **Overview of nFORM 2.0 query tool**
- **Upcoming enhancements to the nFORM query tool**
  - Workshop Participation: Primary Workshops tab
  - Grant Year Overview tab
- **Tips for using the query tool**
- **Announcements**

Overview of the nFORM 2.0 query tool

The nFORM 2.0 query tool

- **Designed to help grantees track, monitor, and analyze the data that are collected using nFORM**
- **Accessing the query tool:**
  - All user account types can have access
  - Limit of 3 users per grantee can have access at one time



Overview of nFORM 2.0 query tool

- **Grantee data organized into seven topic-specific tabs**
- **Each tab provides a range of data visualizations**
  - Users can switch visuals to data tables, or view a 508 compliant query tool
  - Visualizations or tables can be exported for use in presentations/reports
  - Tool tips throughout explain which clients are included/excluded in calculations
- **Data lag by one day so visuals can be generated quickly**

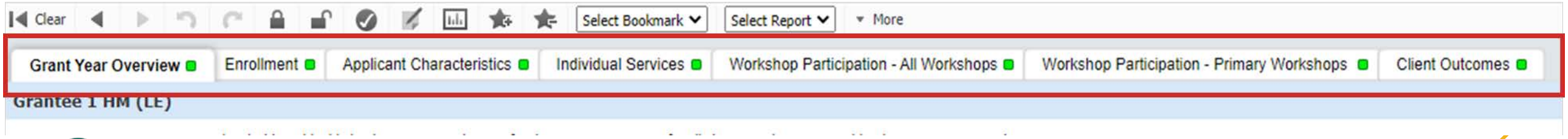
Overview of nFORM 2.0 query tool (cont.)

- **Filters on each tab help users drill down on the data to monitor their performance and progress on goals**
  - Use the query tool to identify priority challenges, help explore root causes, and develop and monitor CQI SMART goals
- **Query tool only counts clients who are enrolled in populations for which your grantee has enrollment/participation targets**
  - Use other nFORM 2.0 data tools to monitor all clients
  - Query tool counts do not include applicants pending enrollment, duplicates, or local evaluation clients assigned to Control (NO Services) or Waitlist Control (NO Services) groups

Separate tabs summarize progress on client enrollment, characteristics, participation, and outcomes

1. **Grant Year Overview**
2. **Enrollment**
3. **Applicant Characteristics**
4. **Individual Services**
5. **Workshop Participation – All Workshops**
6. **Workshop Participation – Primary Workshops**
7. **Client Outcomes**

Enhancements to the Primary Workshops tab to be released soon; Grant Year Overview tab enhancements will be available this summer

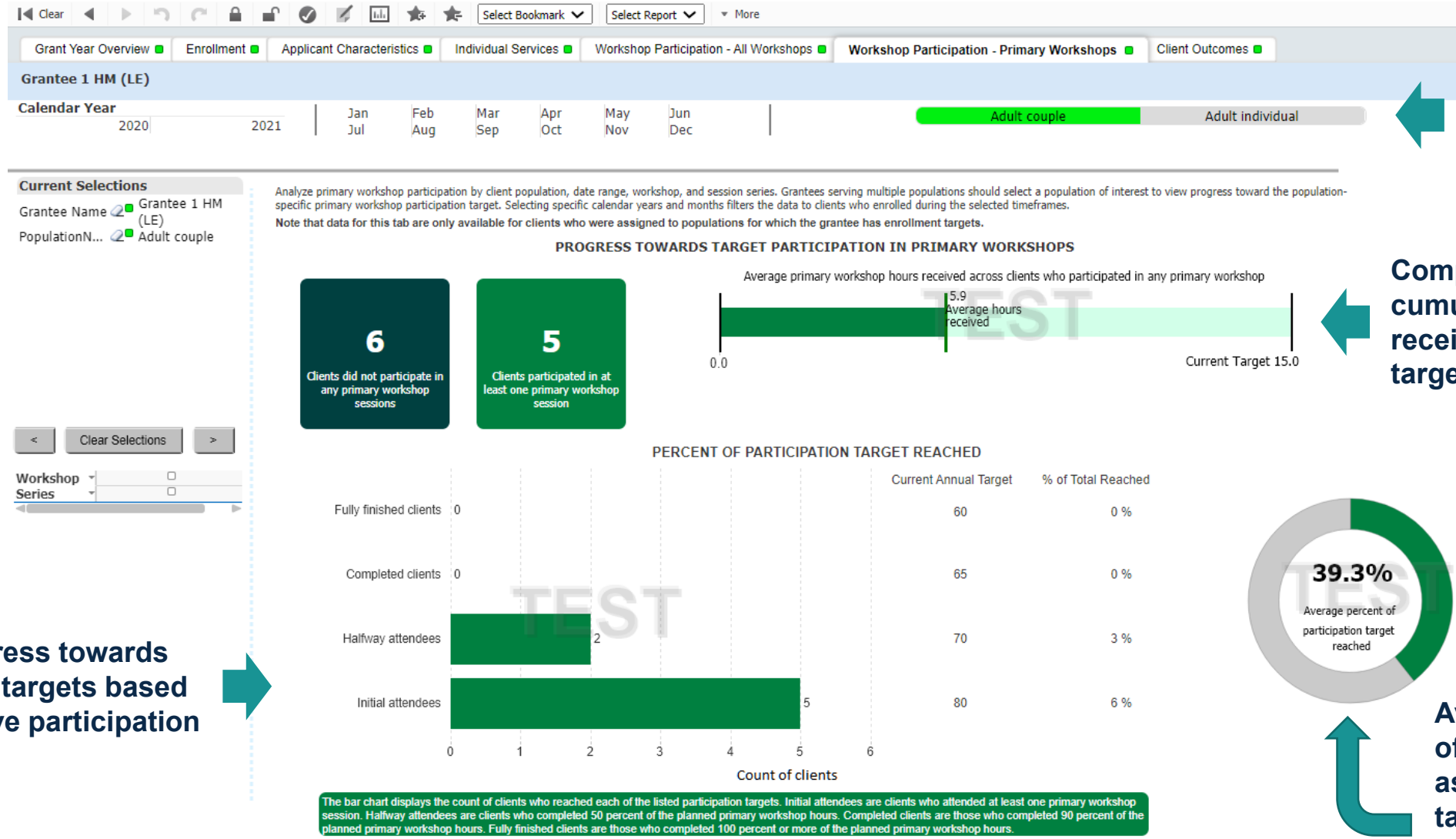


nFORM 2.0 query tool filters

Tab	Client population	Applicant characteristics	Date	Services
Grant Year Overview	√	n/a	n/a	n/a
Enrollment	√	n/a	Enrollment	n/a
Applicant Characteristics	√	√	Enrollment	n/a
Individual Services	√	n/a	Service	√
Workshop Participation – All Workshops	√	n/a	n/a	√
Workshop Participation – Primary Workshops	√	n/a	Enrollment	√
Client Outcomes	√	√	Completion	n/a

Upcoming enhancements to the Workshop Participation – Primary Workshops tab of the query tool

Current Workshop Participation – Primary Workshops tab



Filter by enrollment date

Filter by population to set correct targets

Compares average cumulative hours received to current target

Filter by workshops and series; overrides other filters

Shows progress towards current year targets based on cumulative participation

Average hours of participation as a percent of target hours

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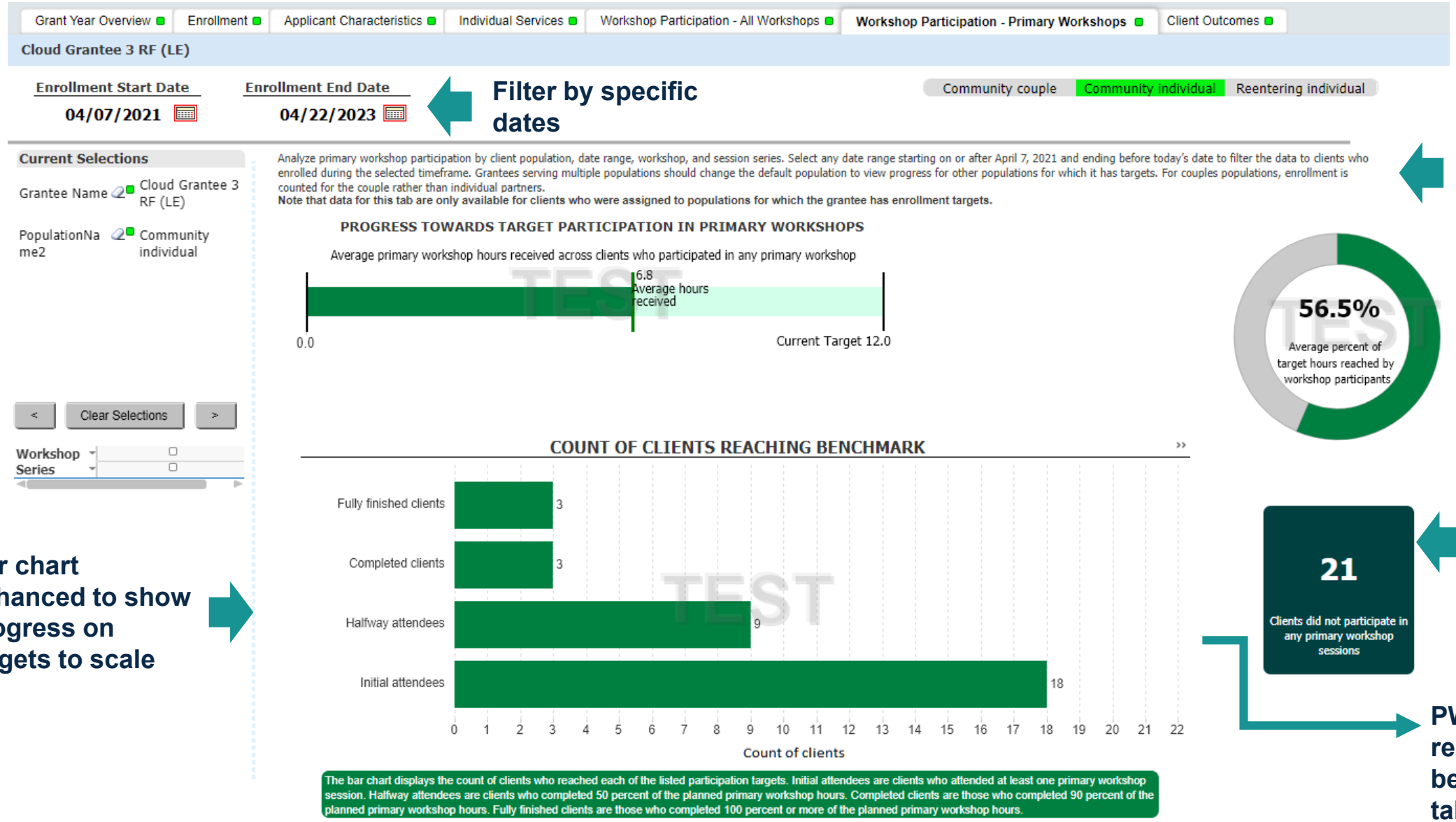
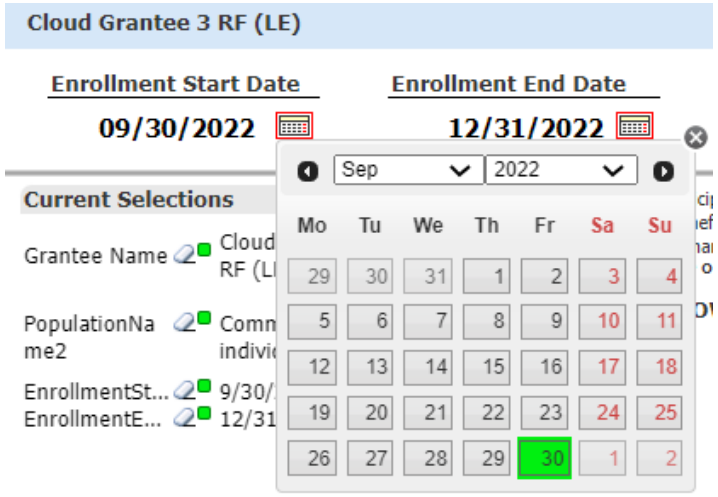
Primary Workshops tab data visualizations

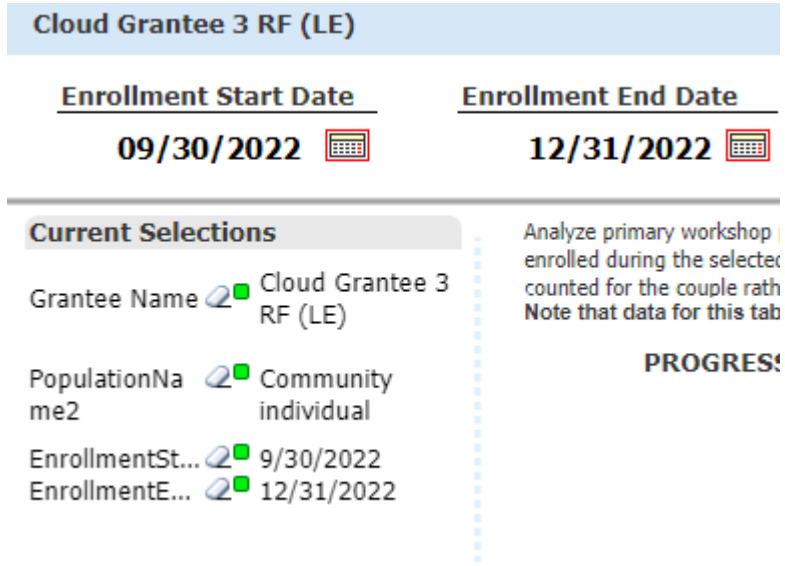


Primary Workshops tab date filter

- **nFORM users will be able to select individual enrollment dates to drill down on a specific group or cohort of clients**
- **If no dates are selected, the default start date is April 7, 2021 and the end date is the current date minus one day**

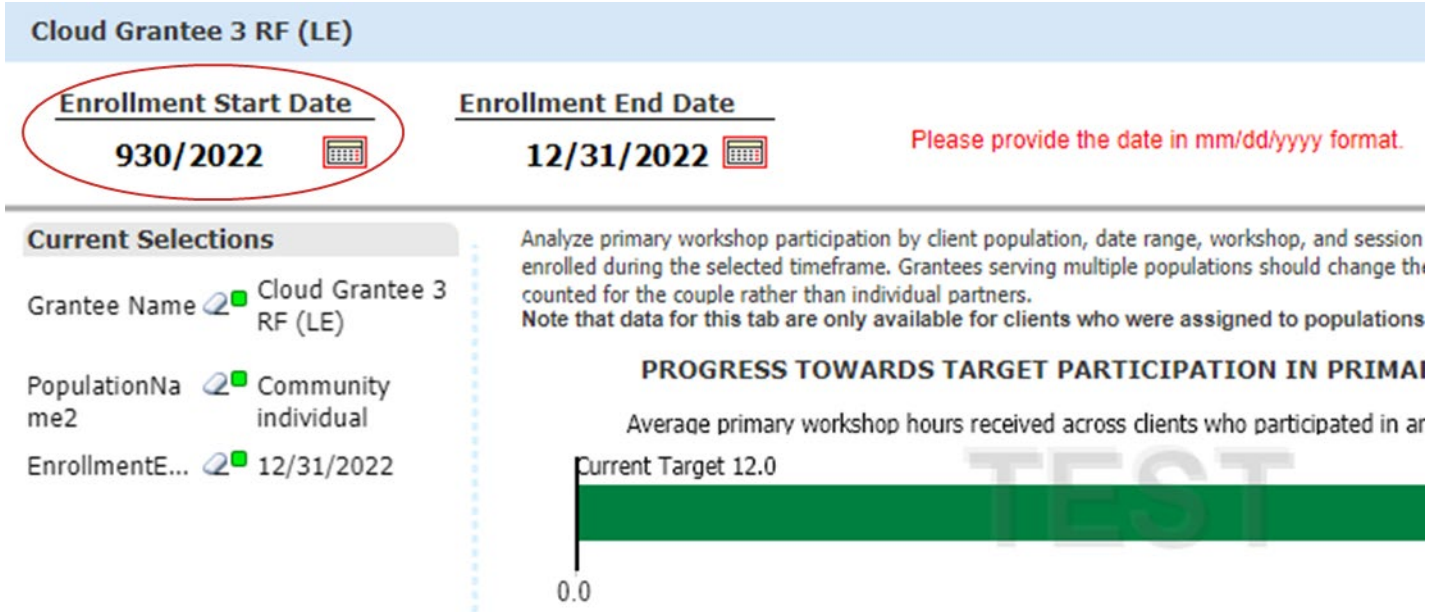
Users can either manually enter a start and end date, or select a date from the calendar menu





Date selections will display in the Current Selections menu

Edit checks on enrollment date filter

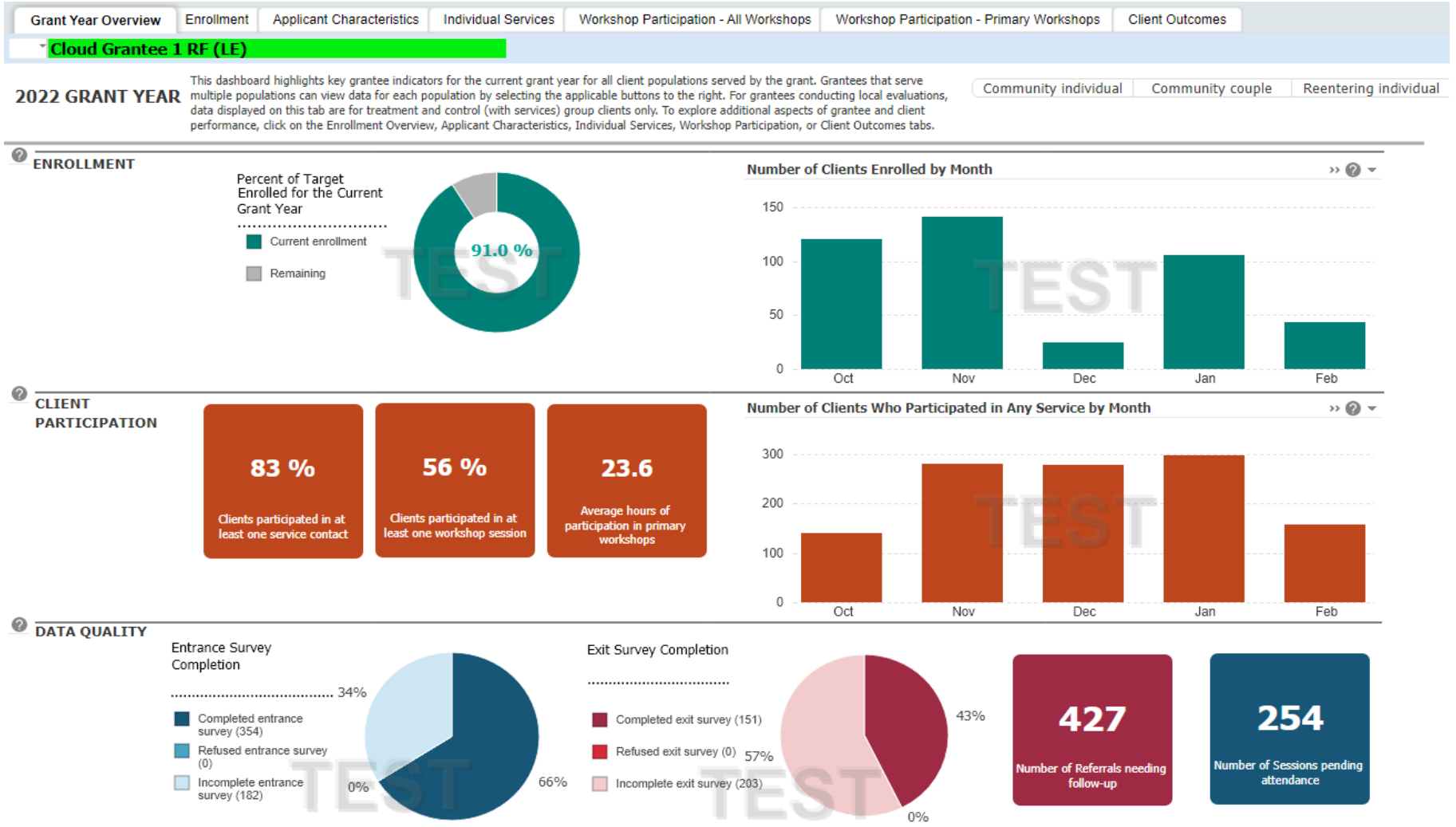


Date selections must be entered in mm/dd/yyyy format. If not, an error message will appear and the incorrectly entered date will not appear in the Current Selections menu

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

Upcoming enhancements to the Grant Year Overview tab of the query tool

Current Grant Year Overview tab



Filter by population type

Grant Year Overview tab enhancements

- **Enrollment panel will remain as is**
- **Client participation panel will include data on substantive service contacts, optional workshop participation, and progress towards current grant year primary workshop targets**
- **In data quality panel, labels and legends for entrance and exit survey status, referral follow ups, and sessions pending attendance will be updated**

Client participation panel

Before

0 %

Clients participated in at least one service contact

0 %

Clients participated in at least one workshop session

-

Average hours of participation in primary workshops

After

6.8

Average substantive individual service contacts received by clients enrolled in current grant year

4.3

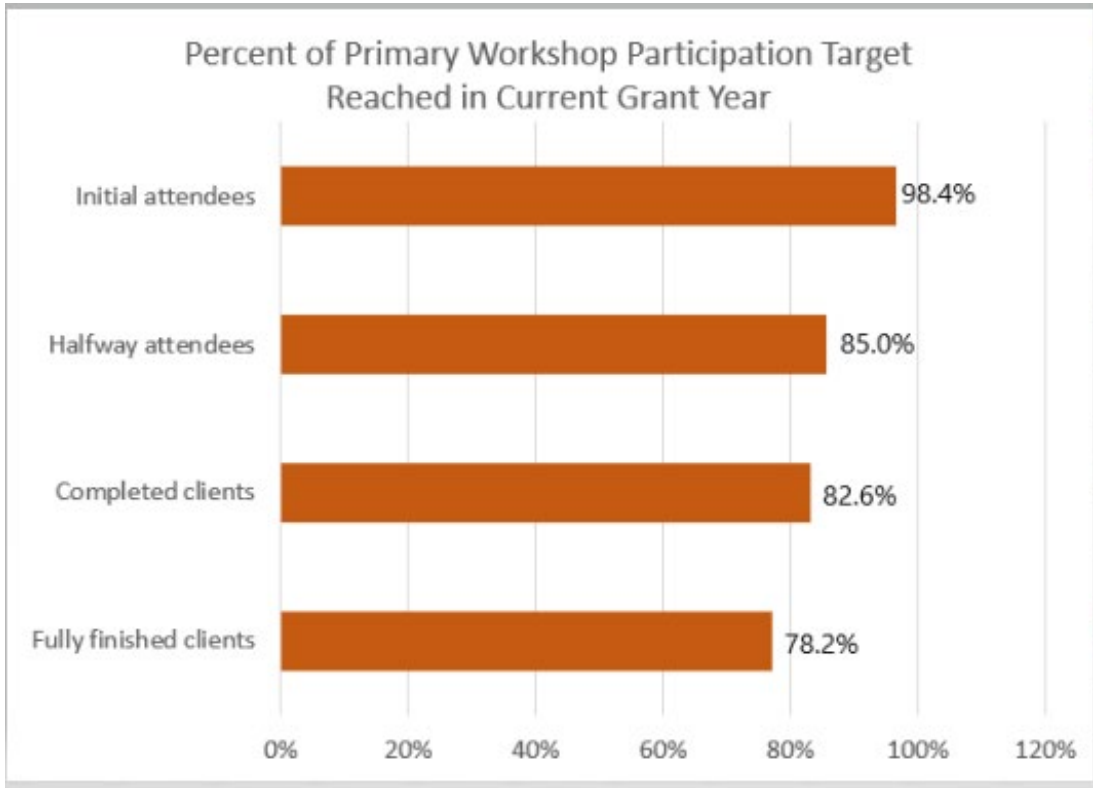
Optional workshops: Average hours of participation for clients who enrolled and attended optional workshops in current grant year

16.5

Primary workshops: Average hours of participation for clients who enrolled and attended primary workshops in current grant year

Client participation panel (cont)

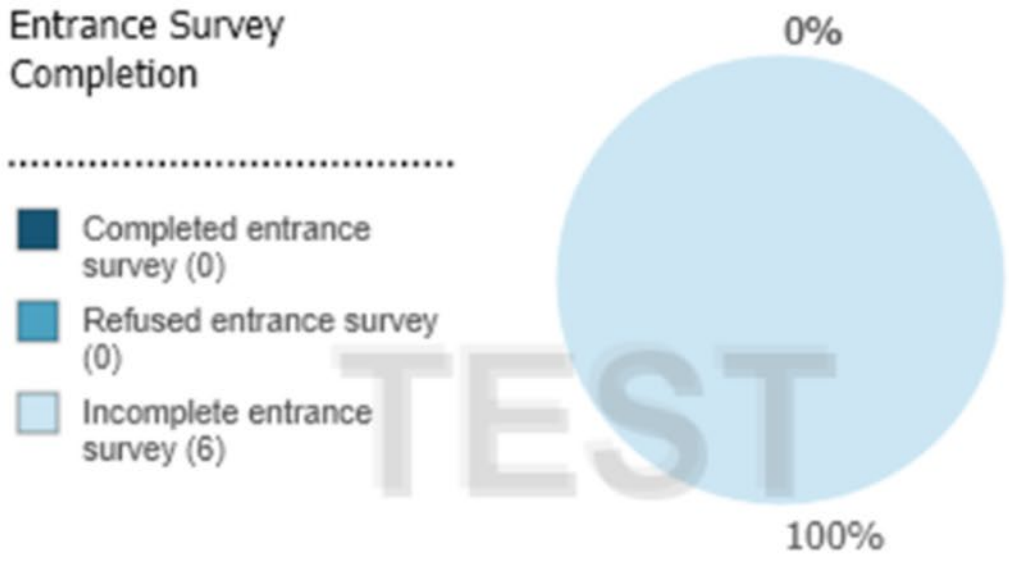
- **Bar chart and table align with PPR Section C-04.2b Table 2**
- **Displays current grant year targets**
- **Targets set by population; grantees serving multiple populations must select and view one at a time**



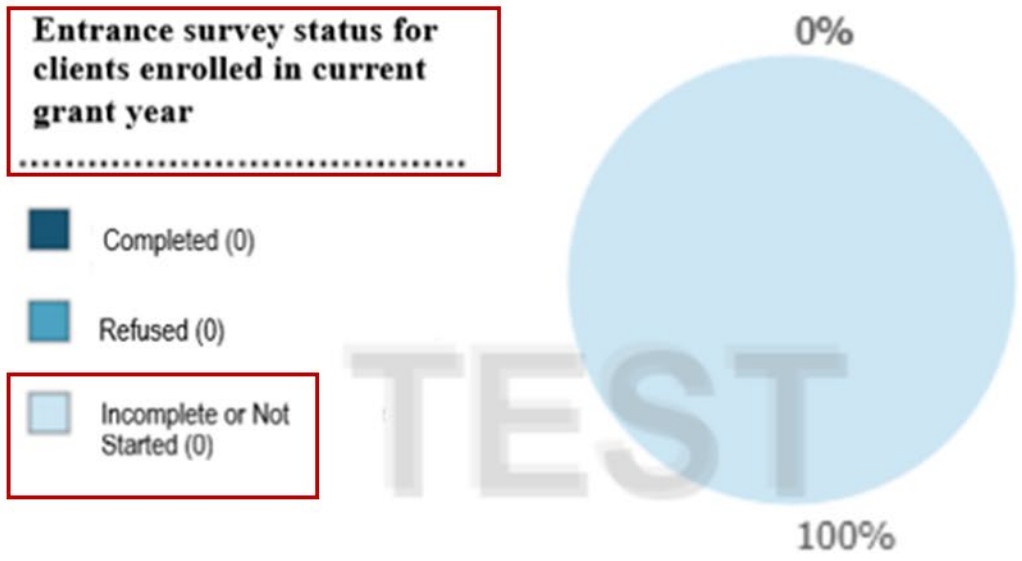
Total clients achieving benchmark	Target count of clients for benchmark
nnn	ddd
nnn	ddd
nnn	ddd
nnn	ddd

Data quality panel (survey status)

Before



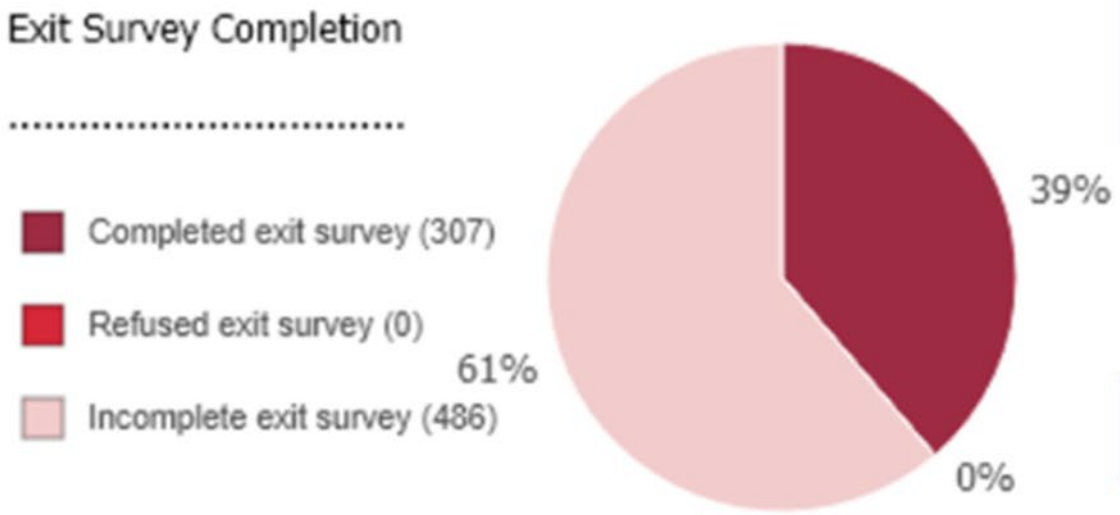
After



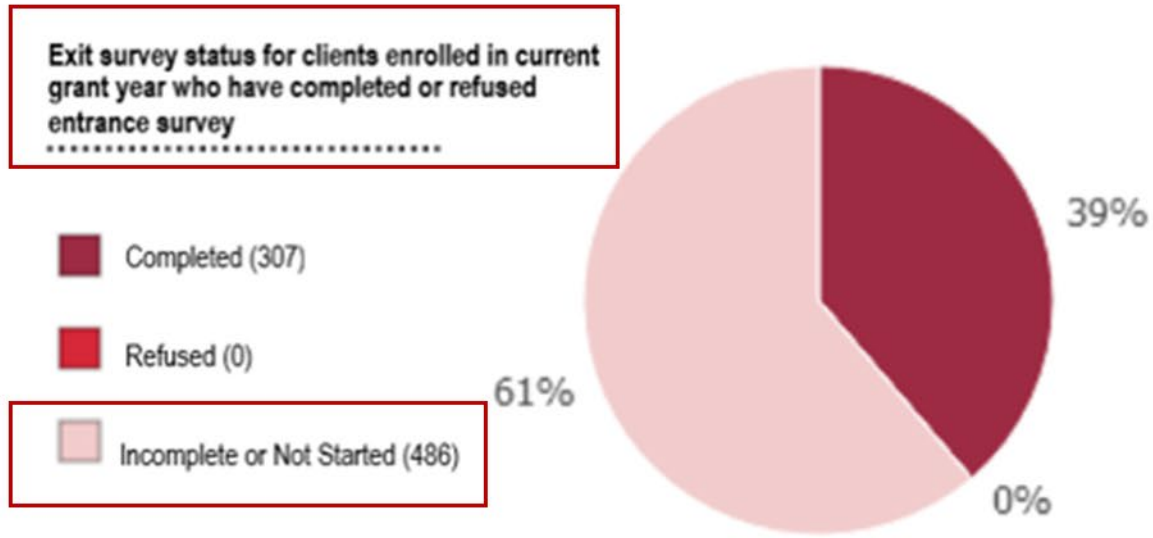
Updated labels, data legends, and tool tip clarify that survey status is for clients enrolled in current grant year, and incompletes include clients who may or may not have started the survey

Data quality panel (Exit survey status)

Before

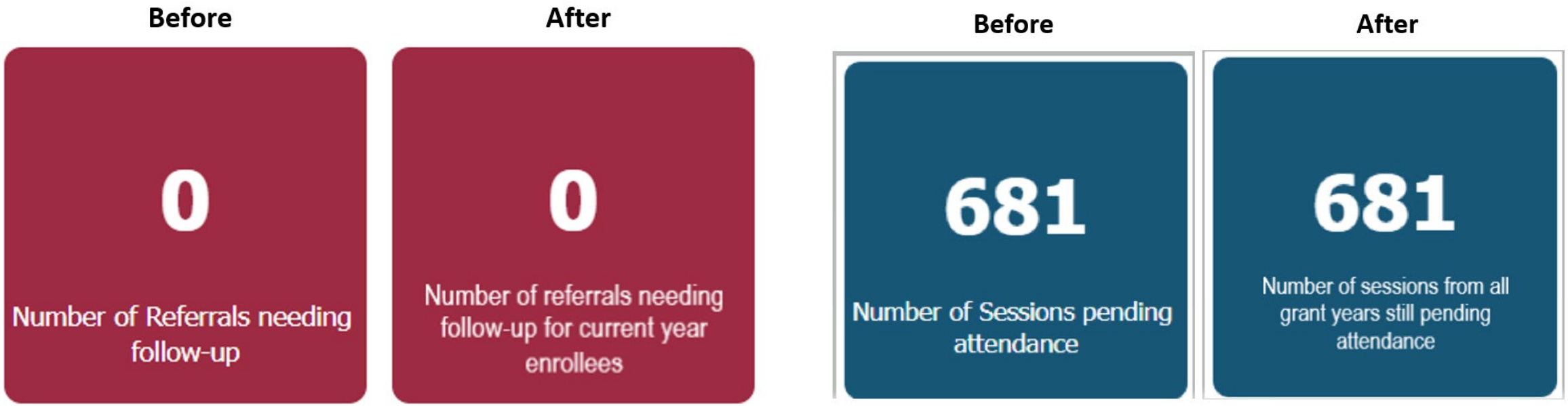


After



Exit survey status includes clients who may or may not have had the opportunity to complete an exit survey

Data quality panel - referral follow ups and sessions pending attendance



Tips for using the query tool

Tips for using the query tool

/ When using filters

- You can view data across multiple months in a year by holding the ctrl key
- Remember that date filters are based either on client enrollment date or service date
- Be sure to select a population type before reviewing data
- Clear filters after reviewing data

/ When mapping query tool data to other reports

- Consider the timeframe and filters included
- Remember that participation data in the query tool and QPR/PPR includes information only for those sessions where every client who was registered to attend has been recorded as being present or absent

Share with us!

What tabs of the query tool do you review the most?

Share with us more!

How do you use the available filters to drill down on a specific group of clients or workshops?

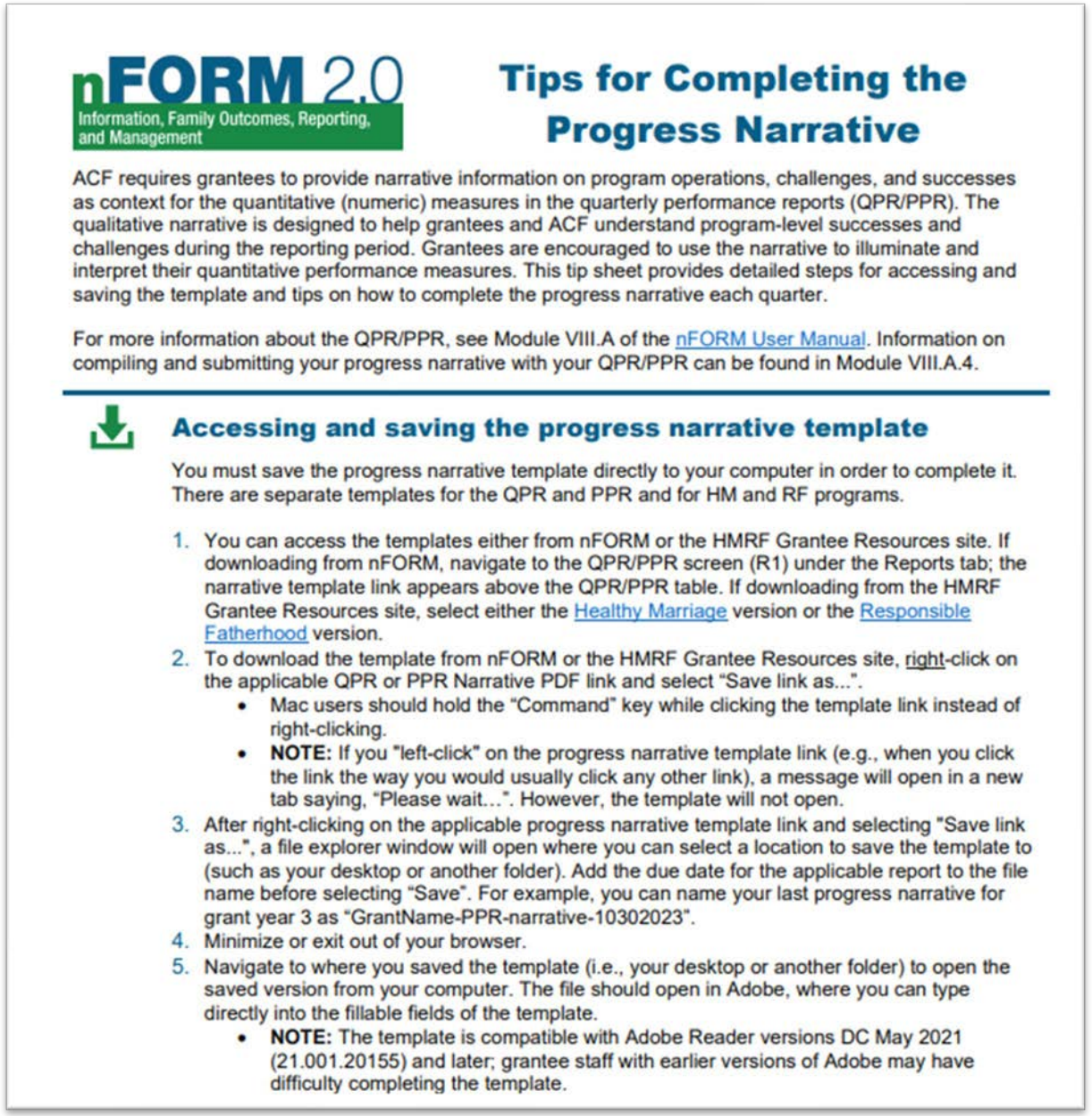
Announcements

New tip sheet on completing the progress narrative now available!

- **Includes step-by-step instructions for accessing and saving the progress narrative template, and tips on the types of information to include when completing the narrative**

https://www.hmrfgrantresources.info/resource/tips-completing-progress-narrative

Page 1 includes instructions on how to access and save the narrative template



nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Tips for Completing the Progress Narrative

ACF requires grantees to provide narrative information on program operations, challenges, and successes as context for the quantitative (numeric) measures in the quarterly performance reports (QPR/PPR). The qualitative narrative is designed to help grantees and ACF understand program-level successes and challenges during the reporting period. Grantees are encouraged to use the narrative to illuminate and interpret their quantitative performance measures. This tip sheet provides detailed steps for accessing and saving the template and tips on how to complete the progress narrative each quarter.

For more information about the QPR/PPR, see Module VIII.A of the nFORM User Manual. Information on compiling and submitting your progress narrative with your QPR/PPR can be found in Module VIII.A.4.

Accessing and saving the progress narrative template

You must save the progress narrative template directly to your computer in order to complete it. There are separate templates for the QPR and PPR and for HM and RF programs.

1. You can access the templates either from nFORM or the HMRF Grantee Resources site. If downloading from nFORM, navigate to the QPR/PPR screen (R1) under the Reports tab; the narrative template link appears above the QPR/PPR table. If downloading from the HMRF Grantee Resources site, select either the Healthy Marriage version or the Responsible Fatherhood version.
2. To download the template from nFORM or the HMRF Grantee Resources site, right-click on the applicable QPR or PPR Narrative PDF link and select "Save link as...".
   - Mac users should hold the "Command" key while clicking the template link instead of right-clicking.
   - **NOTE:** If you "left-click" on the progress narrative template link (e.g., when you click the link the way you would usually click any other link), a message will open in a new tab saying, "Please wait...". However, the template will not open.
3. After right-clicking on the applicable progress narrative template link and selecting "Save link as...", a file explorer window will open where you can select a location to save the template to (such as your desktop or another folder). Add the due date for the applicable report to the file name before selecting "Save". For example, you can name your last progress narrative for grant year 3 as "GrantName-PPR-narrative-10302023".
4. Minimize or exit out of your browser.
5. Navigate to where you saved the template (i.e., your desktop or another folder) to open the saved version from your computer. The file should open in Adobe, where you can type directly into the fillable fields of the template.
   - **NOTE:** The template is compatible with Adobe Reader versions DC May 2021 (21.001.20155) and later; grantee staff with earlier versions of Adobe may have difficulty completing the template.

Data export template also now available!

- **Excel file replicates file layout of the data export**
- **Introduction tab describes how to use data export for program operations, monitoring and improvement**
- **Each tab of data export template includes**
  - Example data
  - Summary of the types of data included
  - Tips on how to use the data
  - Text boxes that highlight the data identifiers that grantees can use to link records
  - Tips on where to find more information in the data dictionary

https://www.hmrfgrantresources.info/resource/nform-20-data-export-template

A special edition of the June office hours will feature both the nFORM and CQI teams

- **To accommodate the Regional Roundtables, the nFORM and CQI teams will host a combined office hours session on Tuesday, June 20th from 2-3pm ET**
- **The tutorial will include an expanded version of a Regional Roundtables session about using data to guide your work**
- **All grantee staff, including those who may not typically attend nFORM or CQI office hours, are encouraged to attend**
- **Keep an eye out for an email invitation to register!**

Questions?