

# Upcoming Enhancements to the nFORM 2.0 Query Tool

May 9, 2023  
nFORM 2.0 Team  
Mathematica

**OFFICE OF FAMILY ASSISTANCE**

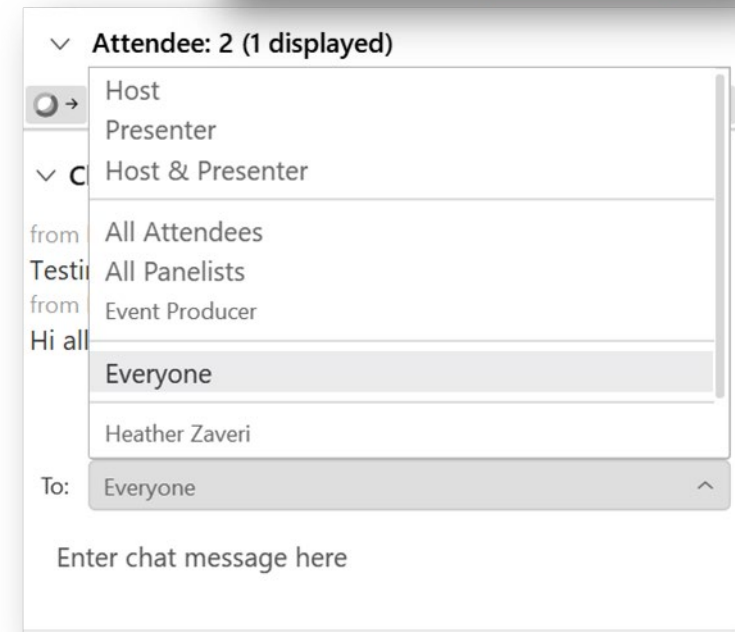
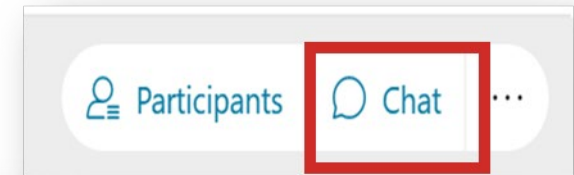
An Office of the Administration for Children & Families





# 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**

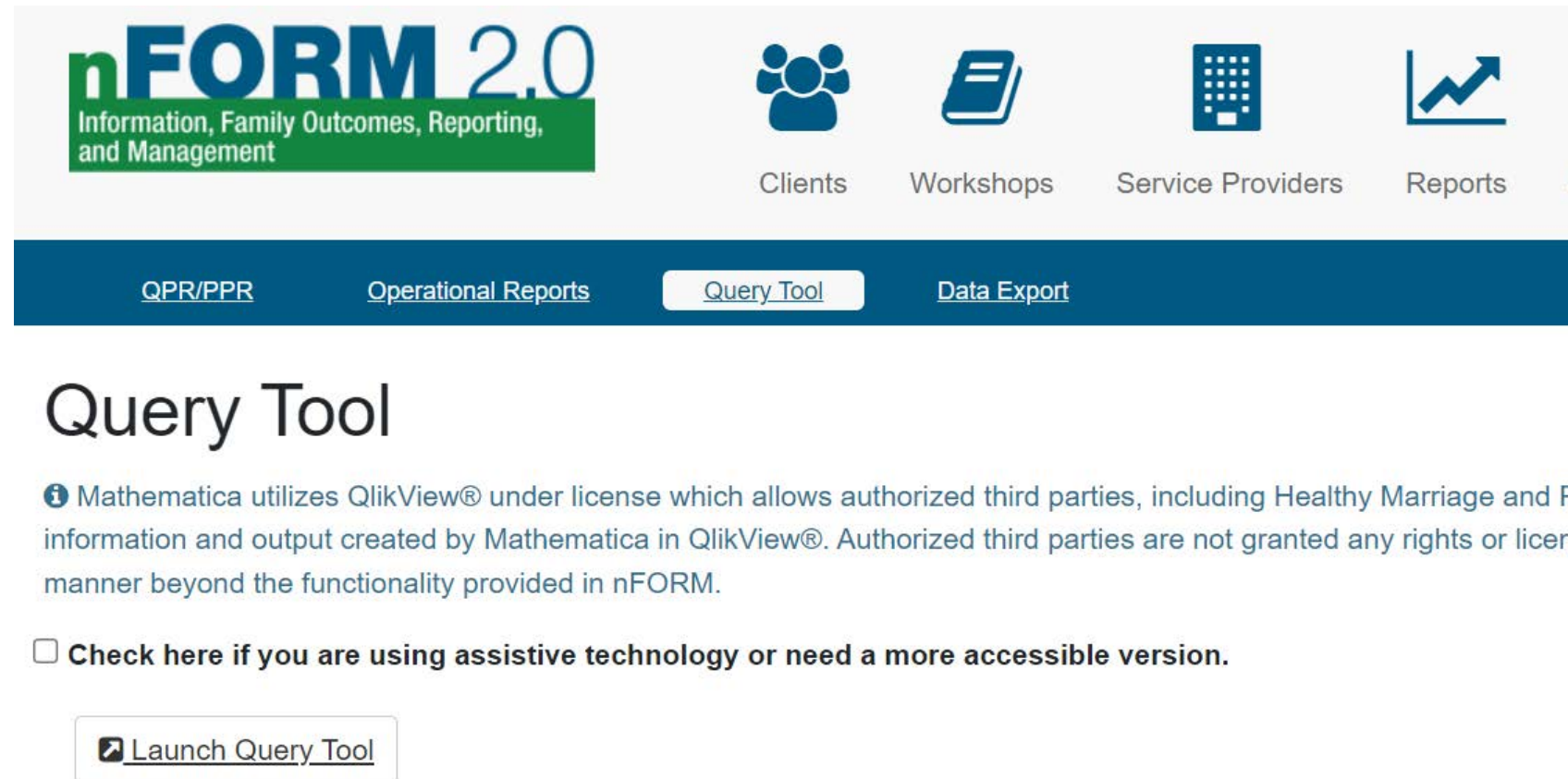
**/ Announcements**



# 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



The screenshot displays the nFORM 2.0 web application interface. At the top left is the logo for nFORM 2.0, which includes the text "Information, Family Outcomes, Reporting, and Management". To the right of the logo are four navigation icons: "Clients" (a group of people), "Workshops" (a document with a pencil), "Service Providers" (a grid of squares), and "Reports" (a line graph with an upward arrow). Below these icons is a dark blue navigation bar with four buttons: "QPR/PPR", "Operational Reports", "Query Tool" (which is highlighted with a white border), and "Data Export".

## Query Tool

**i** Mathematica utilizes QlikView® under license which allows authorized third parties, including Healthy Marriage and F information and output created by Mathematica in QlikView®. Authorized third parties are not granted any rights or licen manner beyond the functionality provided in nFORM.

Check here if you are using assistive technology or need a more accessible version.

[Launch Query Tool](#)

# 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**

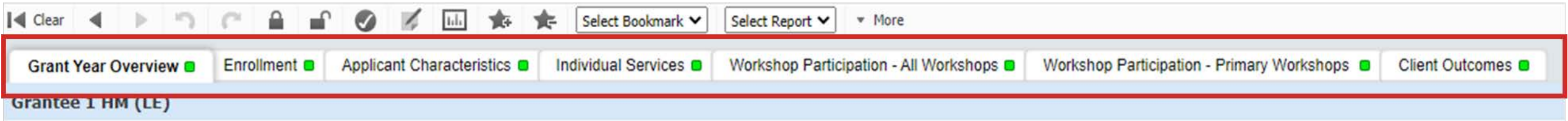
- Use other nFORM 2.0 data tools to monitor all clients
- Query tool counts do not include applicants pending enrollment, duplicates, or local evaluation clients assigned to Control (NO Services) or Waitlist Control (NO Services) groups



# 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

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

Grantee 1 HM (LE)

Calendar Year: 2020 | 2021 | Jan Jul | Feb Aug | Mar Sep | Apr Oct | May Nov | Jun Dec

Population Filter: **Adult couple** | Adult individual

Filter by population to set correct targets

Filter by enrollment date

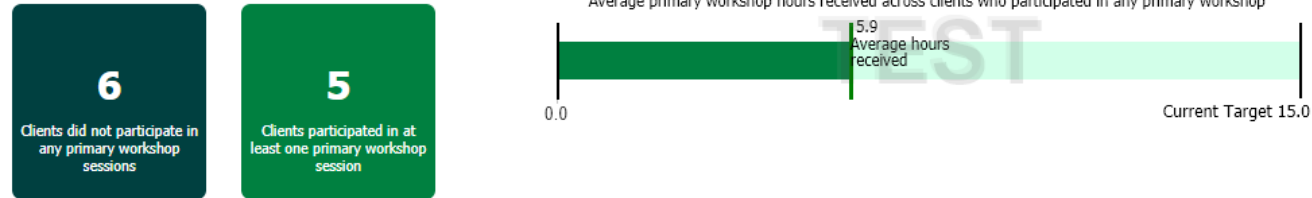
**Current Selections**

Grantee Name: Grantee 1 HM (LE)

PopulationN...: Adult couple

Analyze primary workshop participation by client population, date range, workshop, and session series. Grantees serving multiple populations should select a population of interest to view progress toward the population-specific primary workshop participation target. Selecting specific calendar years and months filters the data to clients who enrolled during the selected timeframes. Note that data for this tab are only available for clients who were assigned to populations for which the grantee has enrollment targets.

## PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMARY WORKSHOPS



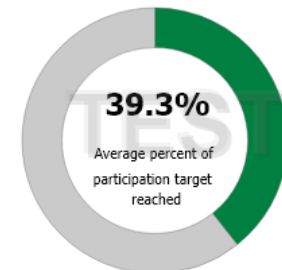
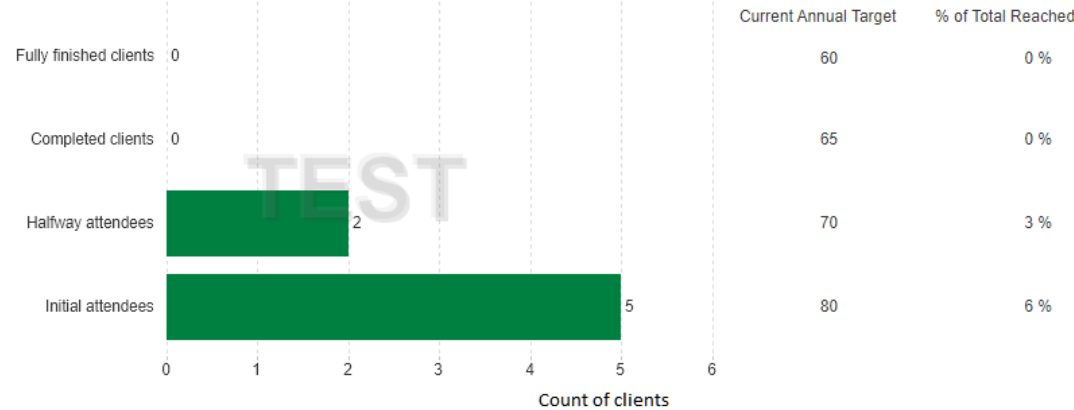
Compares average cumulative hours received to current target

Filter by workshops and series; overrides other filters

Clear Selections

Workshop Series: [Dropdown]

## PERCENT OF PARTICIPATION TARGET REACHED



Average hours of participation as a percent of target hours

Shows progress towards current year targets based on cumulative participation

The bar chart displays the count of clients who reached each of the listed participation targets. Initial attendees are clients who attended at least one primary workshop session. Halfway attendees are clients who completed 50 percent of the planned primary workshop hours. Completed clients are those who completed 90 percent of the planned primary workshop hours. Fully finished clients are those who completed 100 percent or more of the planned primary workshop hours.



# Primary Workshops tab data visualizations

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

Cloud Grantee 3 RF (LE)

Enrollment Start Date: 04/07/2021  Enrollment End Date: 04/22/2023  **Filter by specific dates**  Community couple  Community individual  Reentering individual

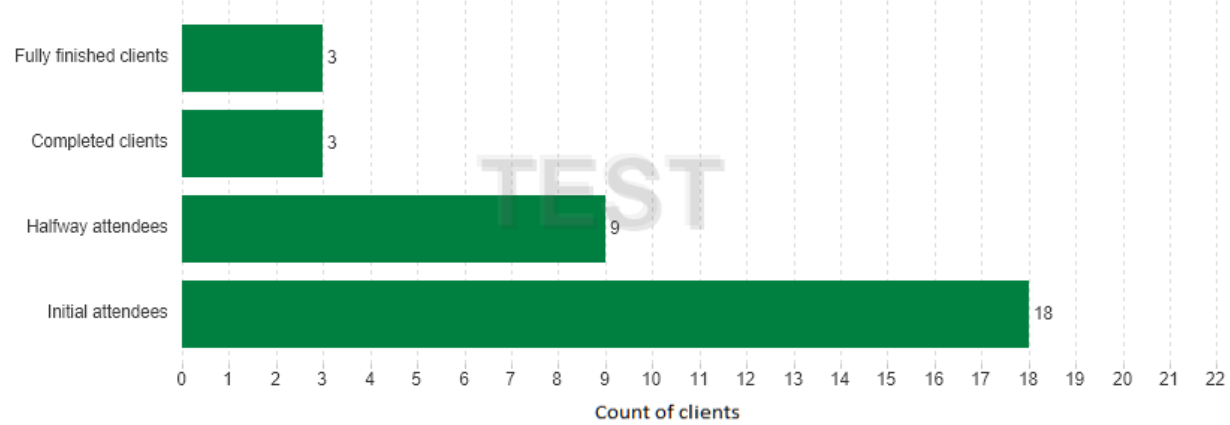
**Current Selections**  
Grantee Name: Cloud Grantee 3 RF (LE)  
Population Name: Community individual  
me2  
Clear Selections  
Workshop Series

Analyze primary workshop participation by client population, date range, workshop, and session series. Select any date range starting on or after April 7, 2021 and ending before today's date to filter the data to clients who enrolled during the selected timeframe. Grantees serving multiple populations should change the default population to view progress for other populations for which it has targets. For couples populations, enrollment is counted for the couple rather than individual partners. Note that data for this tab are only available for clients who were assigned to populations for which the grantee has enrollment targets.

### PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMARY WORKSHOPS



### COUNT OF CLIENTS REACHING BENCHMARK



The bar chart displays the count of clients who reached each of the listed participation targets. Initial attendees are clients who attended at least one primary workshop session. Halfway attendees are clients who completed 50 percent of the planned primary workshop hours. Completed clients are those who completed 90 percent of the planned primary workshop hours. Fully finished clients are those who completed 100 percent or more of the planned primary workshop hours.

Introduction explains a) how to use the updated date filter and b) how workshop participation is counted for couples

Relocated from top half of tab; initial attendees in bar chart plus non-attenders equals all enrollees in selected time frame

21  
Clients did not participate in any primary workshop sessions

PWP targets removed and will be added to GYO tab

Bar chart enhanced to show progress on targets to scale



# 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

Cloud Grantee 3 RF (LE)

Enrollment Start Date: 09/30/2022

Enrollment End Date: 12/31/2022

Current Selections

- Grantee Name: Cloud Grantee 3 RF (LE)
- Population Name: Community individual
- Enrollment Start Date: 9/30/2022
- Enrollment End Date: 12/31/2022

Cloud Grantee 3 RF (LE)

Enrollment Start Date: 09/30/2022

Enrollment End Date: 12/31/2022

Current Selections

- Grantee Name: Cloud Grantee 3 RF (LE)
- Population Name: Community individual
- Enrollment Start Date: 9/30/2022
- Enrollment End Date: 12/31/2022

Analyze primary workshop enrolled during the selected period. Note that data for this tab is only available for the selected period.

PROGRESS: 100%

Date selections will display in the Current Selections menu



# Edit checks on enrollment date filter

Cloud Grantee 3 RF (LE)

Enrollment Start Date  
930/2022

Enrollment End Date  
12/31/2022

Please provide the date in mm/dd/yyyy format.

---

**Current Selections**

Grantee Name Cloud Grantee 3 RF (LE)

PopulationNa Community individual

EnrollmentE... 12/31/2022

Analyze primary workshop participation by client population, date range, workshop, and session enrolled during the selected timeframe. Grantees serving multiple populations should change the counted for the couple rather than individual partners.  
Note that data for this tab are only available for clients who were assigned to populations

**PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMA**

Average primary workshop hours received across clients who participated in ar

Current Target 12.0

**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**

Enrollment Start Date  
09/30/2020

Enrollment End Date  
12/31/2022

Start date may not be earlier than April 7, 2021.

---

Enrollment Start Date  
09/30/2022

Enrollment End Date  
12/31/2024

End date may not be later than 4/22/2023.



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



# Current Grant Year Overview tab

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

**Cloud Grantee 1 RF (LE)**

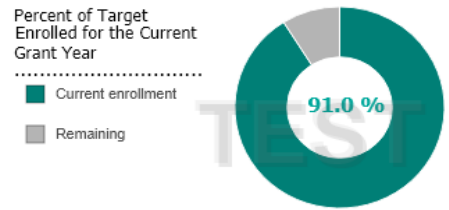
2022 GRANT YEAR

This dashboard highlights key grantee indicators for the current grant year for all client populations served by the grant. Grantees that serve multiple populations can view data for each population by selecting the applicable buttons to the right. For grantees conducting local evaluations, data displayed on this tab are for treatment and control (with services) group clients only. To explore additional aspects of grantee and client performance, click on the Enrollment Overview, Applicant Characteristics, Individual Services, Workshop Participation, or Client Outcomes tabs.

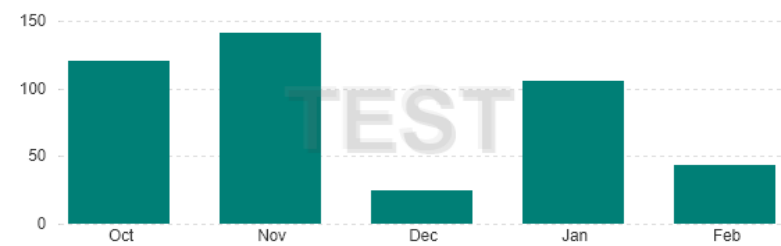
Community individual | Community couple | Reentering individual

← Filter by population type

## ENROLLMENT



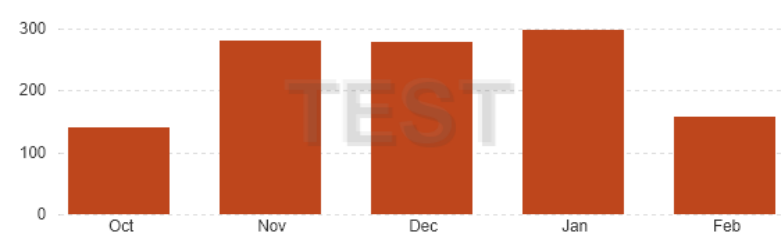
## Number of Clients Enrolled by Month



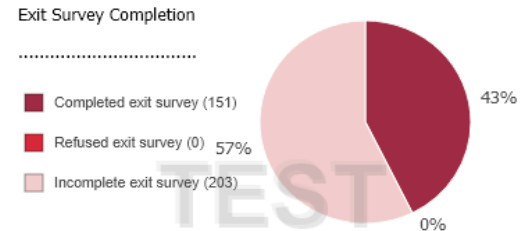
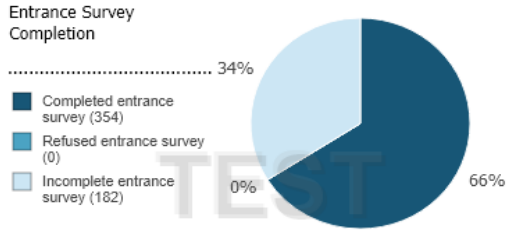
## CLIENT PARTICIPATION



## Number of Clients Who Participated in Any Service by Month



## DATA QUALITY





# 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

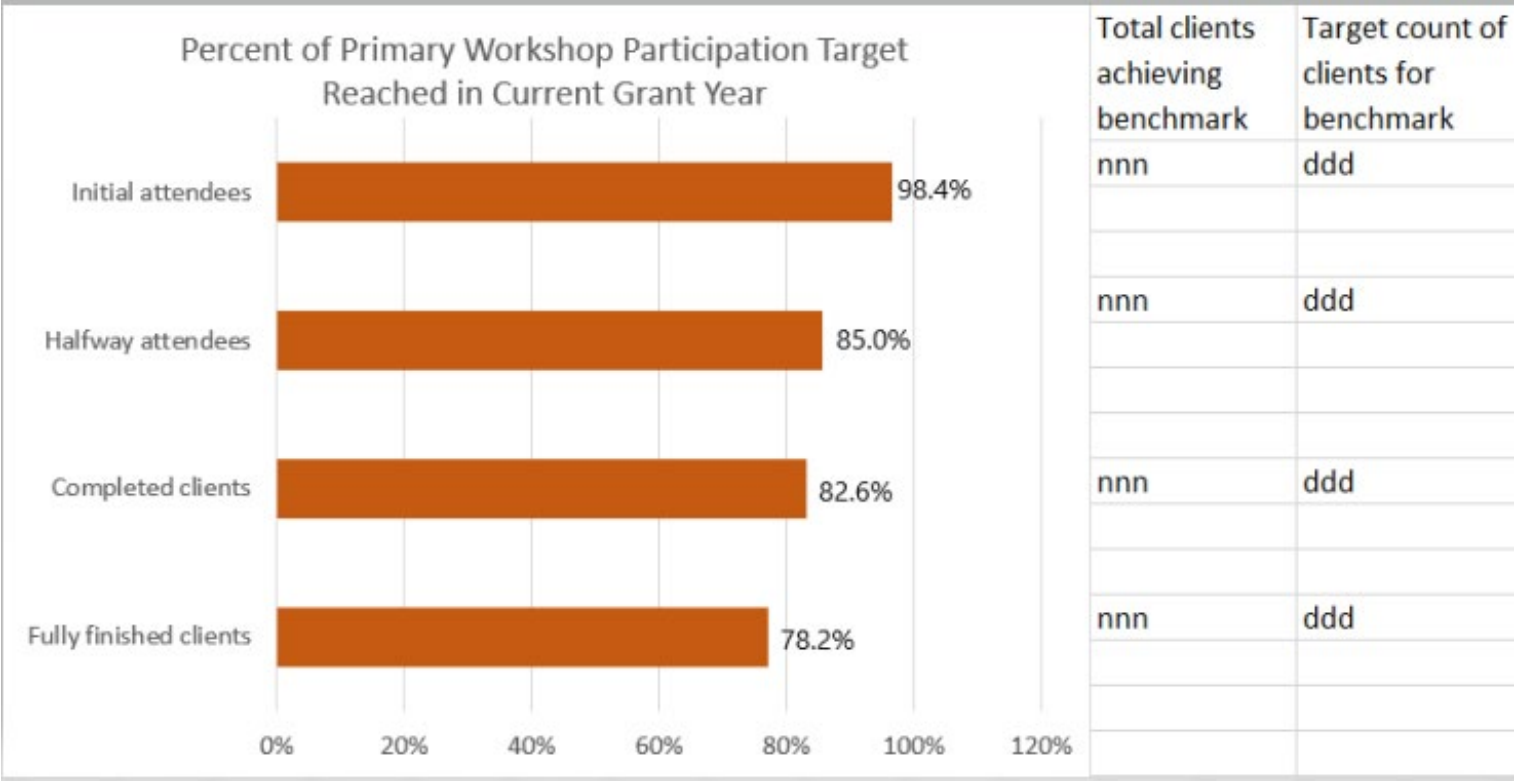
**16.5**

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**





# Data quality panel (survey status)

**Before**

**After**

Entrance Survey  
Completion

.....

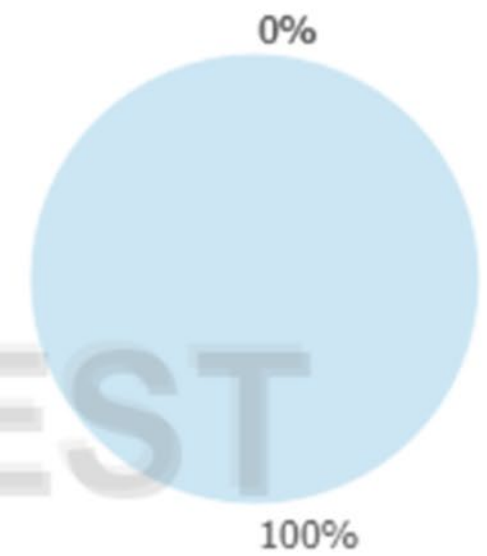
- Completed entrance survey (0)
- Refused entrance survey (0)
- Incomplete entrance survey (6)



**Entrance survey status for clients enrolled in current grant year**

.....

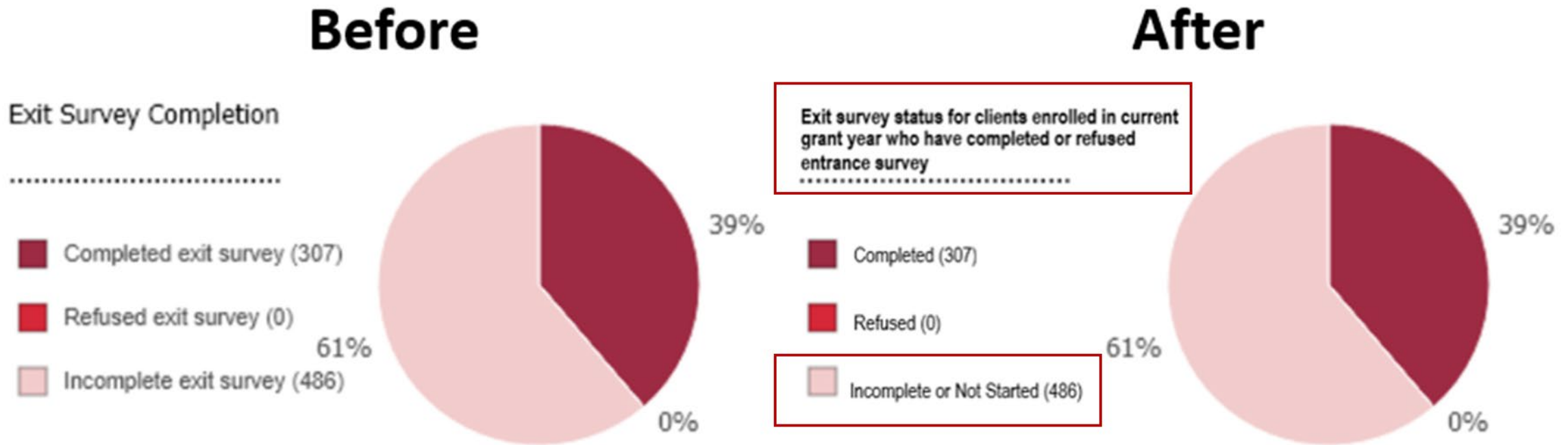
- Completed (0)
- Refused (0)
- Incomplete or Not Started (0)



**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)



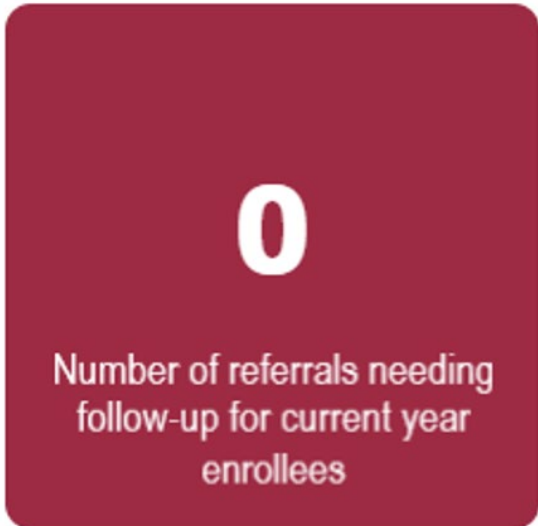
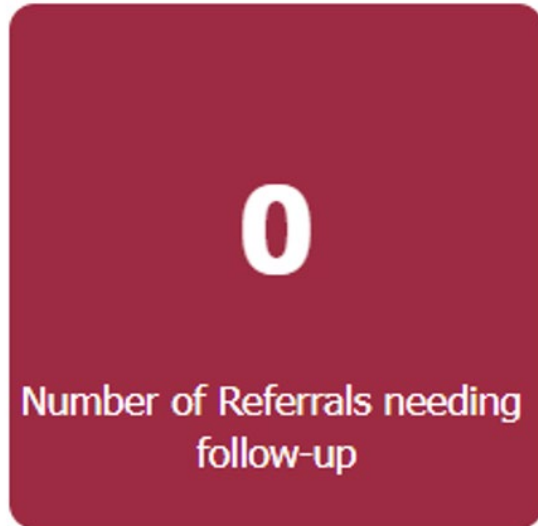
**Exit survey status includes clients who may or may not have had the opportunity to complete an exit survey**



# Data quality panel - referral follow ups and sessions pending attendance

Before

After



Before

After





# 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**

## Tips for Completing the Progress Narrative

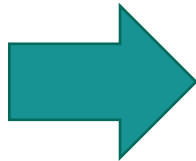
This tip sheet provides detailed steps for accessing and saving the template and tips on how to complete the progress narrative each quarter.

Apr 2023

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



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



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 HMRP 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 HMRP Grantee Resources site, select either the [Healthy Marriage](#) version or the [Responsible Fatherhood](#) version.
2. To download the template from nFORM or the HMRP 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 20<sup>th</sup> 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?

