

# Leveraging nFORM Data On Economic Stability

July 11, 2023  
nFORM 2.0 Team  
Mathematica

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

**OPRE**

**HMRF**  
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

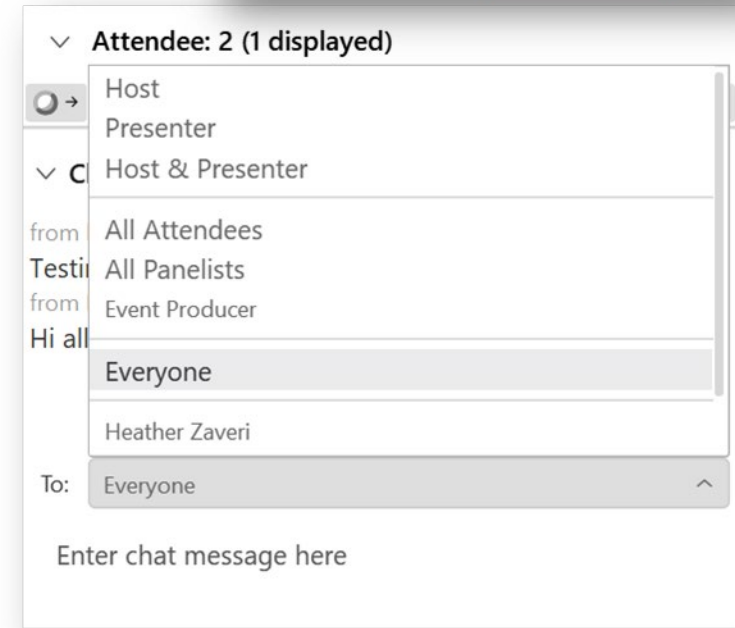
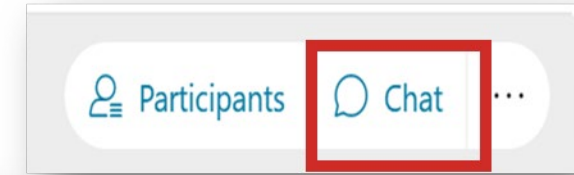
 **Mathematica**  
Progress Together

**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

- / nFORM 2.0 enhancement: User account locking**
- / nFORM data on economic stability services, client characteristics and outcomes**
- / nFORM data tools for monitoring economic stability**
- / City of Long Beach: Approach to monitoring economic stability services, client characteristics and outcomes**
- / Announcements**



# nFORM 2.0 user account locking



# nFORM 2.0 user account enhancement

- / nFORM accounts are deactivated when a user does not log in for more than 60 days**
- / As an additional security measure, deactivated accounts that have not been activated within 30 days of becoming deactivated will be automatically locked**
  - New accounts will be automatically locked if they are not confirmed within four days
  - Users with a locked account will not be able to log in
  - Site administrators can also lock an active or deactivated account at any time
- / Email will be sent to all nFORM users when enhancement is implemented**



# Locking and unlocking nFORM user accounts

- / **Site administrators can deactivate, reactivate, and lock user accounts on the User Profile screen (U3)**
- / **To unlock a user account, a site administrator must submit a ticket to the nFORM 2.0 help desk**
  - Site administrators are not able to unlock user accounts

**User Profile**

For assistance with unlocking this account, please submit a web help desk ticket.

**Wayne, Bruce**

<b>User Status</b>	Locked
<b>User Name</b>	brucewayne500500@gmail.com
<b>Phone</b>	(609) 945-6572
<b>Authentication Method</b>	Automated phone call
<b>User Type</b>	Site Administrator
<b>Grantee</b>	Grantee 1 HM (LE)
<b>Location</b>	Location G2S1
<b>Permissions</b>	Enrollment, Service Provider Management, Sessions Series Management





# Monitoring nFORM user accounts

- / Review the User Account Activity detailed report to monitor user account status and login activity**
- / Follow up as needed with staff to reactivate accounts before they become locked**
- / Site administrators should lock nFORM user accounts for staff who no longer work for the program or no longer need access to nFORM**





# Example user account activity report

Grantee Name	Location	User Last Name	User First Name	User Type	User Name (email)
Family Connections	Northside	Bradshaw	Carrie	Site Administrator	CBrad@email.com
Family Connections	Central	Hobbes	Miranda	General	MirandaH@ymail.com
Family Connections	Central	Jones	Samantha	Case Manager	Samantha.Jones@ymail.com

Monitor the last login date and days since last login to update user accounts and follow up with staff

Enrollment	Case Manager Assignment	Service Provider Management	Sessions Series Management	Query Tool	Account Creation	Last Login	# Days since Last Login Activity	User Account Status
x	x	x	x	x	6/22/2023	6/26/2023	4	Active
x					6/28/2022	3//24/2023	98	Locked
x	x				11/30/2022		219	Unconfirmed/Locked

Along with Active, Inactive and Locked user account statuses, accounts that have not yet been confirmed by staff will display as either Unconfirmed, Unconfirmed/Inactive, or Unconfirmed/Locked



# nFORM 2.0 economic stability data



# Background

- / **ACF requires Fatherhood FIRE grant recipients to provide economic stability services to improve economic outcomes for fathers and their families**
  - FRAMEWorks and READY4Life programs are encouraged but not required to provide these services
- / **Fatherhood FIRE FOA provides examples of standard economic stability services**
  - Career counseling/development (assessments of skills levels, aptitudes, abilities, competencies, and support services as needed)
  - Encouragement of education, including career-advancing education
  - Job search, job training, job enhancement, job retention, and job placement assistance
  - Basic technology training
  - Pre-employment or soft-skills development that may include basic academic skills
  - Workforce development



# Applicant Characteristics, Entrance and Exit surveys



- / **Client surveys are designed to measure client characteristics at enrollment, and outcomes at the beginning and end of HMRF programming**
- / **Survey measures focus on what might change during that timeframe, such as employment status and difficulty paying bills**
- / **Measures take into consideration that economic stability services are required for RF programs, but could also be offered by HM programs**



# Client survey data

## / Client characteristics and outcomes

### - Applicant characteristics survey

- Asks numerous questions about financial well being including household receipt of assistance, current living situation, educational status, employment status, recent earnings, health insurance coverage, and employment barriers
- Also asks whether client enrolled primarily to find a job or better job

### - Entrance/exit surveys

- FIRE and FRAMEWorks clients answer questions about job and career advancement including resume and job search skills, knowledge, and confidence; whether client has checking/savings accounts; or has trouble paying bills
- Exit survey also asks about job, education, and earnings status; barriers to employment; and perceptions of whether program was helpful to client's financial well-being
- FIRE surveys ask more questions on economic stability than FRAMEWorks surveys



# Individual services data

## / Service contacts and referrals

- Several relevant topics covered during individual service contacts and referrals including career planning, employment resources, employment/job readiness, financial counseling, job search assistance, licensure/certification, resume development, and other topics

## / Employment-related program supports (work supports and training)

## / Case notes can include additional context

\* Client Issues and Needs Discussed (Check all that apply)

Some of these services are not allowable with Healthy Marriage and Responsible Fatherhood funds and must be referred out.

### Assessment

- Comprehensive Assessment
- Employment/Job Readiness
- Other Targeted Assessment

### Child Support/Custody/Visitation

- Establish/modify child support order
- Establish/modify child visitation order
- Establish/modify child custody order
- Establish/modify parenting plan
- Child support arrearages assistance
- Establish paternity
- Couple mediation

### Child Welfare Services Involvement

### Domestic Violence/Intimate Partner Violence

### Financial Counseling

### Education

- English for Speakers of Other Languages (ESOL)
- General Educational Development (GED)
- Licensure/Certification (specify)
- Other Education (specify)

### Family Therapy/Counseling Referral

### Job/Career Advancement

- Career planning
- Employment resources
- Job search assistance
- Resume development

### Legal Assistance Referral

### Health/Mental Health Support

- Medical/Dental/Wellness
- Mental Health Referral
- Substance Abuse Referral
- Health Insurance

### Parenting

### Social services/Emergency needs

- Housing/Rent Assistance
- Childcare Assistance
- Clothing (not job related)
- Public assistance/welfare
- Food Assistance
- Obtain driver's license/state ID/birth certificate/other identifying documents
- Other social services/emergency needs (specify)

### Healthy Marriage and Relationship Education Services

### Other Service (specify)

### Meeting with Facilitator

### Reminder contact (call, email, text)

### Youth services (specify)



# Workshop data

## / Workshops

- Workshop activities and elements related to economic stability
- Curricula that cover economic stability
- Client attendance at workshops that include economic stability activities (FIRE) or financial management or job and career advancement elements (FRAMEWorks and READY4Life)

W2. Add/Edit Workshop ×

*\* Indicates required field(s)*

Program: Fatherhood FIRE

\* Population:

\* Workshop Name:

Description:


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Workshop Details

\* Registration Required:  Yes  No  
*This selection cannot be changed once it is saved.*


\* Enrollment:

\* Total Hours to be Offered:

\* Activities (Check all that apply):  
 Economic stability   
 Promote or sustain marriage  
 Responsible parenting

\* Type :  Primary  Optional  Not in Use  
*This selection cannot be changed once it is saved.*

\* Structure:  Single  Blended  Linked  Non-curricularized

\* Curriculum or other group service #1:  Hours:   
*(Enter all that apply)* Specify:  

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# Grantee-level data

## / **Program operations survey**

- Client referrals from and recruitment at employment assistance centers or one-stops
- Employment specialists on staff—education, experience, training, and supervision; gender, race, and ethnicity

## / **Service provider directories allow programs to document which organizations provide services allowable with HMRF grant funding**

- Directory uses same menu as for individual service contacts and referrals





# nFORM 2.0 tools for monitoring economic stability data



# QPR/PPR performance measures

**/ Quarterly reports include several aggregate measures related to economic stability**

## Client-level data

- Select applicant characteristics, entrance and exit survey outcomes
- Client participation in workshops that feature relevant activities and elements
- Example: Exit survey question on perceived helpfulness of program for clients' financial well-being

## Program-level data

- Information from program operations survey on recruitment activity, referrals, and staffing
- Example: Questions about recruitment from employment assistance centers or one-stops



# QPR/PPR progress narrative

- / Progress narrative (Section B-01 Performance Narrative) includes opportunities for programs to detail the types of employment services offered, their employment partners, and subsidized employment program elements if offered**
- / Programs can also address any issues with economic stability services or outcomes when responding to other questions**





# Query tool

- / **Most query tool tabs include some information on economic stability services, outcomes, and client characteristics**
  - **Enrollment:** Displays primary reasons for enrolling, including to find a job or better job
  - **Applicant Characteristics:** Can filter by employment status
  - **Individual Services:** Displays ten most common issues/needs discussed during ISCs, including those related to economic stability if commonly provided
  - **All Workshops and Primary Workshops:** On both tabs, filter by workshops that offer economic stability activities, elements or curricula
  - **Client Outcomes:** Shows Entrance and Exit survey outcomes related to economic stability that are reported on PPR. Can also filter by employment status



# Data export

- / Data export includes all client and program level data captured in nFORM, except personally identifiable information**
- / Programs can use this report to develop tailored analyses on economic stability services, outcomes, and client characteristics**





# Data export tabs and relevant data

**Client Info:**  
Referral source

**Service Contacts:**  
Relevant  
issues/needs  
addressed

**Referrals:**  
Relevant referrals  
provided to clients

**Incentives/  
Program  
Supports:**  
Work-related  
supports provided

**Workshop  
Characteristics:**  
Relevant activities  
and elements by  
workshop

**Service Providers:**  
Service providers  
that offer economic  
stability services

**Survey Response  
Data:**  
Applicant  
characteristics and  
relevant outcomes

**Program  
Operations  
Survey:**  
Program-level data  
on referrals,  
recruitment and  
staffing



# City of Long Beach: Approach to monitoring economic stability data



# Anthony Padilla (Data Manager): City of Long Beach



**Overview of City of Long Beach's Fatherhood FIRE program**



**Description of City of Long Beach's program monitoring needs**



**City of Long Beach's process for reviewing economic stability information**







# City of Long Beach's Career Coach Tracker

Career Coach Tracker							Mark which services were reviewed during "Initial Appointment." Meet for One-Hour							
Client ID	First Name	Last Name	Assigned LC	Review ACS	FFP Enrollment Date	Date of Initial Appointment	Employment Assessment 1= yes 0= no	Resume 1= yes 0= no	IEP 1= yes 0= no	Certification 1= yes 0= no	Education 1= yes 0= no	Referred to another program 1= yes 0= no	Gift card 1= yes 0= no	Comments

# What are your questions for Anthony?

**Enter your questions into the chat, or let us know if you would like to ask aloud!**



# Menti question

**How do you use nFORM to monitor economic stability services, outcomes, and client characteristics?**





# nFORM announcement




# New nFORM TA resource available

- / Using nFORM 2.0 Tools to Monitor HMRF Performance Measures: new tip sheet on how to map information from each category of HMRF performance data in the PPR**
- / Includes an appendix with more information on each of the data tools included and when to use them**

**<https://hmrfggrantresources.info/resource/using-nform-20-tools-monitor-hmrf-performance-measures>**



# Using nFORM 2.0 Tools to Monitor HMRF Performance Measures



**nFORM 2.0**  
Information, Family Outcomes, Reporting,  
and Management

## Using nFORM 2.0 Tools to Monitor HMRF Performance Measures

Grantees can use a range of data tools in nFORM 2.0 to monitor their program operations and services provided, as well as the characteristics and outcomes of their clients. To help grantees dig deeper into their performance, this tip sheet maps each type of HMRF performance data in the Performance Progress Report (PPR) to relevant nFORM 2.0 data tools. This tip sheet is organized to follow the structure of PPR Section C—Quantitative (Numeric) Performance Measures. The appendix of this tip sheet includes more information on each of these data tools and when to use them. The [HMRF Grantee Resource site](#) includes a range of additional resources to help grantees use nFORM 2.0 data tools for program monitoring, including the [nFORM 2.0 User Manual \(Module VIII\)](#) and the [data dictionary](#) of fields included in the data export.

Contact the nFORM 2.0 help desk with any questions about using nFORM 2.0 data tools, or anything else related to nFORM 2.0, by either submitting a ticket through the [help tab](#) of nFORM or emailing us at [nform2helpdesk@mathematica-mpr.com](mailto:nform2helpdesk@mathematica-mpr.com). We are happy to help!

nFORM 2.0 Data Tools				
Topic	PPR/QPR*	Query Tool	Operational Reports	Data Export
<b>Marketing and Recruitment</b>	<b>Section C-01 Recruitment</b> <b>C-07 Implementation challenges</b> <ul style="list-style-type: none"> <li>Obtaining referrals</li> <li>Recruiting participants</li> <li>Cooperation of recruitment and referral sources</li> </ul> <b>Section C-08 Marketing</b>	<b>Enrollment tab</b> <ul style="list-style-type: none"> <li>How clients heard about the program</li> <li>Primary reason clients enrolled</li> </ul>	N/A	<b>Client Info tab</b> <ul style="list-style-type: none"> <li>Referring organization</li> <li>Referring organization type</li> </ul> <b>Survey Response Data tab</b> <ul style="list-style-type: none"> <li>How clients heard about the program</li> <li>Reason(s) why clients enrolled in the program</li> <li>Primary reason why clients enrolled in the program</li> </ul> <b>Program Operations Survey tab</b> <ul style="list-style-type: none"> <li>Recruitment advertising</li> <li>Recruitment methods</li> <li>Referral organizations</li> <li>Organizations where on-site recruitment occurred</li> </ul>



# Using nFORM 2.0 Tools to Monitor HMRF Performance Measures (page 2)

nFORM 2.0 Data Tools				
Topic	PPR/QPR <sup>a</sup>	Query Tool	Operational Reports	Data Export
<b>Client characteristics and status</b>	<b>Section C-02 Applicant Characteristics</b>	<b>Applicant Characteristics tab</b> <b>Workshop Participation – All Workshops tab</b> <ul style="list-style-type: none"><li>• Characteristics of workshop attendees</li></ul> <b>Client Outcomes tab</b> <ul style="list-style-type: none"><li>• Client outcomes by characteristics</li></ul>	<b>Client Status Report Summary/Detail report</b> <b>Phone Number report</b> <b>Zip Code report</b>	<b>All client-level tabs include client status</b> <b>Survey Response Data tab displays applicant characteristics by client</b>
<b>Enrollment</b>	<b>Section C-03 Program Enrollment</b>	<b>Grant Year Overview tab</b> <ul style="list-style-type: none"><li>• Progress towards enrollment target(s)</li><li>• Number of clients enrolled by month</li></ul> <b>Enrollment tab</b>	<b>Survey Completion Summary/Detail report</b> <b>Local Evaluation Enrollment report</b>	<b>All client-level tabs include enrollment date</b>
<b>Survey completion status</b>	<b>Section C-03 Program Enrollment<sup>b</sup></b>	<b>Grant Year Overview tab</b> <ul style="list-style-type: none"><li>• Percent of completed, refused, and incomplete/not started Entrance and Exit surveys</li></ul> <b>Client Outcomes tab</b>	<b>Survey Completion Summary/Detail report</b> <b>Survey Report – Paper Survey</b> <b>Survey Report – Refused Survey</b>	<b>Client Info tab</b> <ul style="list-style-type: none"><li>• Survey completion date, mode, and language</li></ul> <b>Survey Response Data tab</b> <ul style="list-style-type: none"><li>• Survey completion date, mode, and language</li></ul>



# Questions?

