Using nFORM 2.0 to Monitor Individual Service Contacts

November 14, 2023
nFORM 2.0 Team
Mathematica

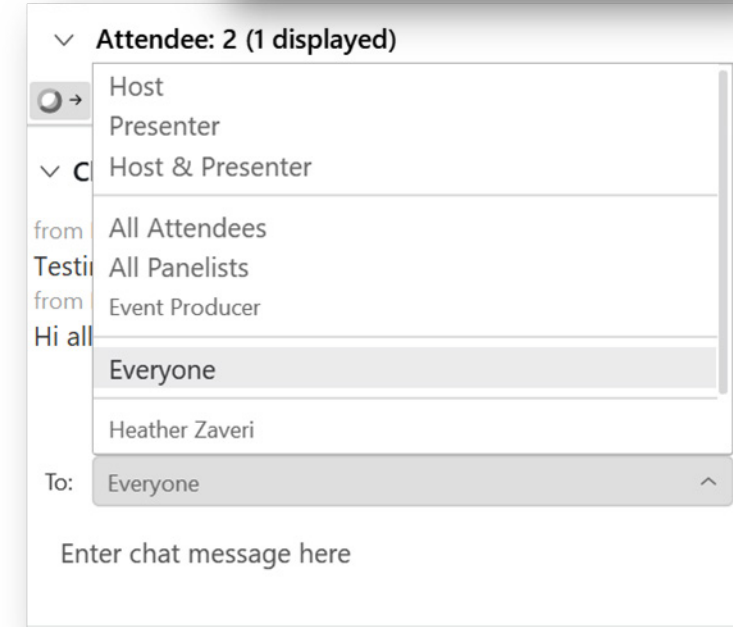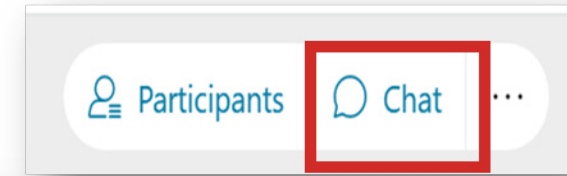OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

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 resources site

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

Today's topics

/ **The Osborne Association: Approach to survey administration**

/ **Refresher on individual service contacts (ISCs)**

/ **nFORM data tools for monitoring ISCs**

/ **Deep dive: Using nFORM 2.0 reports to monitor ISCs**

/ **Announcements**

Data export requests

/ **Site administrators should submit data export requests at the end of the business day so that the file can process overnight**

/ **Updated files may take up to 48 hours to be delivered**

- Wait at least two days before submitting another request

/ **Submit a ticket to the help desk with any questions about or issues receiving data export files**

The Osborne Association: Approach to survey administration

The Osborne Association

Overview of The Osborne Association's Fatherhood FIRE program

Description of The Osborne Association's approach to survey administration

The Osborne Association's process for monitoring survey completion

What are your questions for The Osborne Association?

/ **Enter your questions into the chat or ask Steuben and Sharon aloud!**

Refresher on individual service contacts

Types of individual service contacts (ISCs)

Substantive

- Lasts 15 minutes or longer
- Involves direct client contact
- Covers issues/needs beyond reminder contacts

Reminder-only

- Serve only as a reminder to a client about an outstanding or upcoming service
- Only issue/need recorded is "Reminder contact"

Other

- Includes all ISCs that do not meet the substantive or reminder-only ISC criteria

ACF requires Fatherhood FIRE grantees to provide each client with at least 8 substantive ISCs

Recording ISCs

／ **Record individual service contacts on the service history tab of a client's profile**

／ **Service contact information is used to distinguish between substantive and non-substantive service contacts**

／ **Staff record all issues and needs discussed during the ISC**

C7. Add/Edit Service Contact
* Indicates required field(s)

⊖ Service Contact Information

| * Service Date | 9/26/2023 | | * Case Manager | Site Administrator, Test |
| * Contact Method | --Select contact method | | * Length of Contact | --Select length of contact |

* Did service contact result in direct client contact? ❓   ○ Yes   ○ No

Additional Participant(s)
(Check all that apply)
☐ Child(ren)
☐ Client's partner
☐ Other parent(s) of child (not partner)
☐ Other service provider
☐ Parent/guardian of youth client
☐ Other

⊖ Client Issues and Needs Discussed

ISC issues/needs

/ **Record if ISC included a reminder or was "reminder-only" contact**

/ **If contact covered issues/needs beyond reminders, check all that were discussed**

/ **Enter more details in service notes—these can only be viewed in client's profile**

/ **Review the service contact for accuracy before saving**

⊖ Client Issues and Needs Discussed

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

ℹ *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)**

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Use the bulk entry function to record a service contact provided to a group of clients

Record service contacts in bulk for select issues/needs; all others must be recorded in client profiles

C18. Bulk Entry - Service Contacts
* Indicates required field(s)

Enter Service Contact Information *Information entered will be saved to the profile for each client selected below*

⊖ Service Contact Information

* Service Date: 10/27/2023

* Case Manager: Case Manager, Marybeth (Inactiv

* Contact Method: --Select contact method

* Length of Contact: --Select length of contact

* Did service contact result in direct client contact? ❓   ○ Yes   ○ No

⊖ Client Issues and Needs Discussed

* Client Issues and Needs Discussed (Check all that apply)
- ☐ Comprehensive Assessment
- ☐ Employment/Job Readiness
- ☐ Other Targeted Assessment
- ☐ Reminder contact (call, email, text)

Note

Use the available filters to identify the group of clients that received the bulk service contact

Review the list of eligible clients based on filters applied and select only the clients who received the service contact
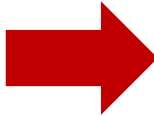
Reviewing ISCs in the client profile

Easily glance at the most recent case notes in each ISC

Bitsy Itsy Adams47 (Client ID 10055689)

Profile | **Service History** | Workshops / Sessions

Service Contacts

⊕ Add Service Contact

Service Date ⬍	Data Entered By ⬍	# Referrals ⬍	# Incentives and Program Supports ⬍	Contact Method ⬍	Most Recent Notes ⬍	Add Referral(s)
Q 5/12/2022	Test Site Administrator_616	2	0	In community		✚ Add Referral
Q 5/12/2022	Test Site Administrator_616	1	0	In community		✚ Add Referral

2 Record(s)

Review and update (if needed) each ISC provided to a client

nFORM data tools for monitoring ISCs

nFORM data tools for monitoring ISCs (table)

Type	PPR	Query Tool	Operational Reports	Data Export
All ISCs	n/a	✓	n/a	✓
Substantive ISCs	✓	n/a	✓	✓
Reminder-only ISCs	n/a	n/a	✓	✓
Other ISCs	n/a	n/a	n/a	✓
Referrals	✓	✓	✓ (follow-ups only)	✓

Using the PPR to monitor ISCs

- **PPR Section C-04.3 reports on the cumulative number of substantive ISCs provided to clients**
- **QPR does not report counts of service contacts or referrals**

3. Substantive Individual Service Contacts

3a. Client receipt of substantive individual service contacts (ISCs)	Community individuals		Reentering individuals	
Cumulative number of substantive ISCs received	#	%	#	%
None	12	18.8%	6	85.7%
One to four	30	46.9%	0	0%
Five to seven	12	18.8%	0	0%
Eight or more	10	15.6%	1	14.3%

3b. Average cumulative number of substantive ISCs received per client/couple through end of reporting period	Community individuals	Reentering individuals
Average cumulative number received per client/couple through end of reporting period	Average #	Average #
Enrolled across all grant years	3.5	1.4
Enrolled in grant year 3	1.1	0.0
Enrolled in grant year 2	3.4	0.0
Enrolled in grant year 1	6.2	0.0

Review all ISCs provided using the service contacts tab of the query tool

Select a year, month(s), and population type (if applicable) to drill down on services provided during a specific timeframe

ISC operational report

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

Compare ISCs by location and population when applicable

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

Review if clients are receiving the expected number of substantive and reminder-only ISCs

ISC information in the data export

/ **The Service Contacts tab in the data export includes all recorded ISCs**

- Also includes enrolled clients who have not yet received an ISC

/ **Does not include case notes recorded as part of ISCs**

/ **Grantees can use the Service Contacts tab to identify trends in ISCs provided**

- Check out the [February 2023 Office Hours](#) for an in-depth tutorial on creating pivot tables using information from the Service Contacts tab to analyze trends in issues/needs covered

Tips for monitoring and analysis

/ **Remember that the data in nFORM data tools reflect the time you run them and the filters selected, such as enrollment dates**

/ **Don't forget to keep data secure!**

- Delete client names from operational reports when not needed

/ **Use client ID, couple ID, and session ID to link data across multiple data sources**

/ **For grantees serving couples, consider how ISCs provided to a couple display differently in summary- and detailed-level reports**

Monitoring ISCs provided to couples

Scenario	PPR (Section C-04.3)	ISC count in summary ISC operational report	ISC count in detailed ISC operational report	Data export (Service Contacts tab)
Minnie participates in an ISC. Mickey does not participate in an ISC.	If substantive, 1 ISC is added in the total and average substantive ISC count	If substantive or reminder-only,1 ISC is added in the total and applicable category counts for Minnie	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie	For any type of ISC, 1 ISC row is added for Minnie
Minnie and Mickey each participate in an ISC (i.e. they each participate in an individual session)	If substantive, 2 ISCs are added in the total and average substantive ISC count	If substantive or reminder-only, 2 ISCs are added to the total and applicable category counts, 1 each for Minnie and Mickey	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie and for Mickey	For any type of ISC, 1 ISC row is added for Minnie, and 1 ISC row is added for Mickey
Minnie and Mickey participate in an ISC as a couple	If substantive, 1 ISC is added in the total and average substantive ISC count	If substantive or reminder-only, 1 ISC is added to the total and applicable category counts for Minnie and Mickey	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie and for Mickey	For any type of ISC, 1 ISC row is added for Minnie, and 1 ISC row is added for Mickey

Deep dive: Using nFORM 2.0 reports to monitor ISCs

Use the ISC report and data export to monitor the number of ISCs provided by type at the client level

Analysis goal: To identify the number of substantive, reminder only, and other ISCs provided to each client and determine whether additional services are needed

/ Analysis overview

- Merge data from the Client Info tab of the data export into the ISC operational report using a formula

- Use the expanded ISC report to review all individual services provided to a client and determine whether the client should receive additional services

Analysis steps #1-2

/ **Step 1: Generate an up-to-date version of your grantee's data export and save it to a secure local folder.**

/ **Step 2: Generate an up-to-date version of your grantee's individual service contact operational report and save it as an Excel file to a secure local folder.**

- Delete client names from the Detail report when no longer needed

Filter the report by all clients ever enrolled, or select a specific group or cohort of clients

Analysis steps #3-4

/ **Step 3: In ISC operational report, insert one new column in between "Most Recent Substantive Service Contact Date" and "Total Number of Substantive Service Contacts". Label the column "Total number of All Service Contacts".**

/ **Step 4: In ISC operational report, label the blank column to the right of "Total Number of Reminder Only Service Contacts" as "Total Number of Other Service Contacts"**

Most Recent Substantive Service Contact Date	Total Number of All Service Contacts	Total Number of Substantive Service Contacts	Total Number of Reminder Only Service Contacts	Total Number of Other Service Contacts

Analysis steps #5

/ **Step 5: Use a formula to merge the total number of ISCs provided from the "Number of Service Contacts" column on the data export's Client Info tab into the new "Total Number of All Service Contacts" column on the ISC operational report**

- Tailor the formula to replace [DataExport.xlsx] with the saved file location
- Ready4Life grantees must replace "$AJ:$AJ" in the formula with "$AI:$AI"

=INDEX ([DataExport.xlsx]ClientInfo**!$AJ:$AJ**, MATCH(C4,DataExport.xlsx]ClientInfo!$A:$A,0))*

*Bold text can be altered for data analytic purposes.

Analysis steps #6

/ **Step 6: In the ISC operational report, identify the total number of "other" service contacts by using a formula in the "Total Number of Other Service Contacts" column**

=K4-(L4+M4)

Most Recent Substantive Service Contact Date	Total Number of All Service Contacts	Total Number of Substantive Service Contacts	Total Number of Reminder Only Service Contacts	Total Number of Other Service Contacts

Example expanded ISC report

Client Grantee Location	Population	Client ID	Couple ID (if applicable)	Client Last Name	Client First Name	Current Client Status
Central Office	Adult individual	10024254		Halpert	Jim	Active
Northside	Adult couple	10021613	2222	Schrute	Dwight	Drop Out

Review how many service contacts in total and by type are provided to clients, and consider whether additional services are needed

Enrollment Date	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of All Service Contacts	Total Number of Substantive Service Contacts	Total Number of Reminder Only Service Contacts	Total Number of Other Service Contacts
9/17/2023	Andy Bernard	10/1/2023	4	1	1	2
10/19/2023	Michael Scott		2		1	1

If the number of each type of service contact provided does not align with your expectations, review each contact for potential data entry errors

Take your analysis a step further by including other variables

/ **Step 7: Add more columns to the expanded ISC report to review additional client-level information**

- For example, use an Index formula to merge in data on the number of referrals, incentives, and program supports provided from the Client Info tab of the data export

- Merge in data from other tabs in the data export to the ISC report, such as applicant characteristics data from the Survey Response data tab

Example of additional case management information on expanded ISC report ↓

Current Client Status	Enrollment Date	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of All Service Contacts	Total Number of Substantive Service Contacts	Total Number of Reminder Only Service Contacts	Total Number of Other Service Contacts	Total Number of Referrals Provided	Total Number of Incentives/Program Supports Provided
Active	9/17/2023	Andy Bernard	10/1/2023	4	1	1	2	3	1
Drop Out	10/19/2023	Michael Scott		2		1	1	0	1

/ **Step 8: Use a formula to merge the "Number of Referrals Provided" from the data export's Client Info tab into the ISC operational report's new "Total Number of Referrals Provided" column**

=INDEX ([DataExport.xlsx]ClientInfo**!$AK:$AK**,
MATCH(C4,DataExport.xlsx]ClientInfo!$A:$A,0))*

R4L grantees replace "$AK:$AK" with "$AJ:$AJ"

*Bold text can be altered for data analytic purposes.

Example of additional case management information on expanded ISC report (cont.)

Current Client Status	Enrollment Date	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of All Service Contacts	Total Number of Substantive Service Contacts	Total Number of Reminder Only Service Contacts	Total Number of Other Service Contacts	Total Number of Referrals Provided	Total Number of Incentives/Program Supports Provided
Active	9/17/2023	Andy Bernard	10/1/2023	4	1	1	2	3	1
Drop Out	10/19/2023	Michael Scott		2		1	1	0	1

Step 9: Use a formula to merge the "Number of Incentives/Program Supports Provided" from the data export's Client Info tab into the ISC operational report's new "Total Number of Incentives/Program Supports Provided" column

=INDEX ([DataExport.xlsx]ClientInfo!**$AL:$AL**, MATCH(C4,DataExport.xlsx]ClientInfo!$A:$A,0))*

R4L grantees replace "$AL:$AL" with "$AK:$AK"

*Bold text can be altered for data analytic purposes.

What are your tips?

What recommendations, tips, or considerations do you have for monitoring ISCs with nFORM?

Add your thoughts or suggestions
to the chat, or let us know if you would like
to share aloud!

Announcements

Upcoming events

/ **Come find us at the economic stability summit on November 29-30!**

- Members of the nFORM TTA team will be available to answer question

/ **Look for the invitation to the CQI office hours on Tuesday, December 5 from 2-3pm ET**

/ **Save the date for the next nFORM office hours on Tuesday, December 12 from 2-3pm ET**

Questions?