Customizing nFORM 2.0 data exports

August 13, 2024
nFORM 2.0 Team
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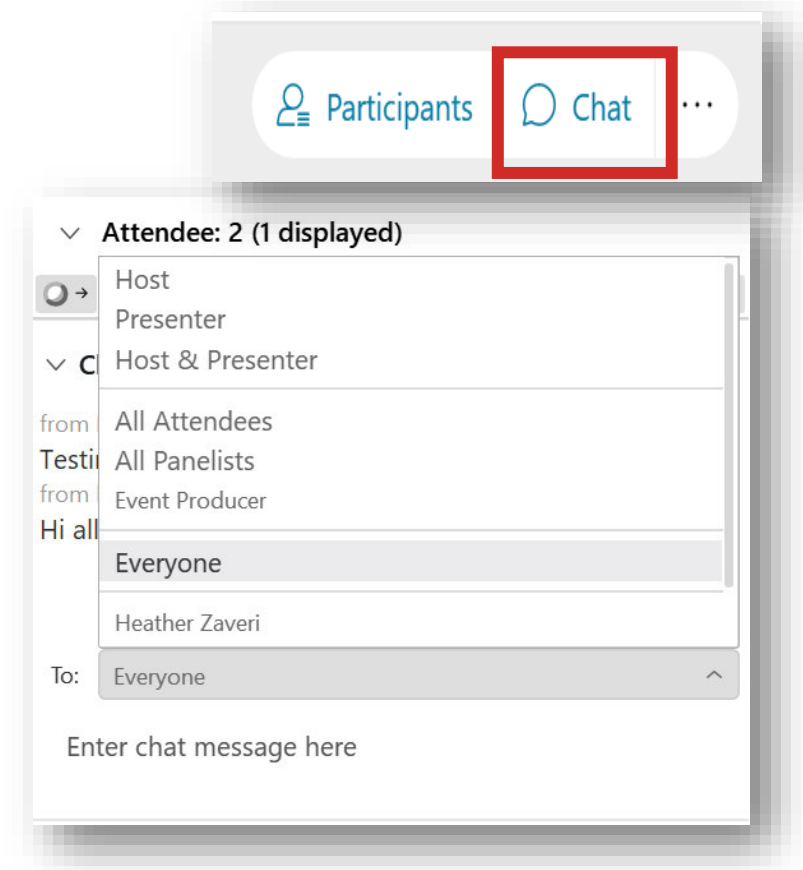OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

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**

/ **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

Overview of the data export and data dictionary

Review of custom data export enhancements

Selected updates to variable names and data formats

Resources for using the data export and data dictionary

Announcements

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Overview of the data export and data dictionary

Data export

/ **A cumulative Excel file of data recorded in nFORM**

/ **Does not include any PII, such as client names, contact information, service contact or referral notes**

/ **Each tab of data export contains a different type of data recorded in nFORM**

/ **Starting August 6th, users can specify what data to include in their export**

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The data export tabs include…

Client Info

Service Contacts

Referrals

Incentives – Program Supports

Workshop Characteristics

Series

Series Facilitators

Session Attendance

Service Providers

Survey Response Data

Program Operations Survey

Data dictionary

/ **Provides layout of all variables in the data export to help plan analyses**

Field Name	Field Type	Field Length	Value	Fatherhood FIRE	FRAMEWorks	READY4Life	Survey Response Data	Notes
ACS-Gender	Int	4	1=Female; 2=Male; 4=Other	X	X	X	X	
ACS-Gender_spec	VarChar	255		X	X	X	X	
ACS-Age	Int	4	Minimum = 13 and Maximum = 99	X	X	X	X	
ACS-Ethnicity	Int	4	1=Hispanic or Latino; 2=Not Hispanic or Latino	X	X	X	X	
ACS-Race 1	Int	4	0=No; 1=Yes	X	X	X	X	Race: American Indian or Alaska Native
ACS-Race 2	Int	4	0=No; 1=Yes	X	X	X	X	Race: Asian
ACS-Race 3	Int	4	0=No; 1=Yes	X	X	X	X	Race: Black or African American
ACS-Race 4	Int	4	0=No; 1=Yes	X	X	X	X	Race: Native Hawaiian or other Pacific Islander
ACS-Race 5	Int	4	0=No; 1=Yes	X	X	X	X	Race: White
ACS-Race 6	Int	4	0=No; 1=Yes	X	X	X	X	Race: Other
ACS-Race 6 spec	VarChar	255		X	X	X	X	

/ **Values and Notes show how to interpret data in the export, for example…**

- Export shows 0 or 1 for ACS-Race fields

- Dictionary provides the value associated with each number and explanatory notes

Data dictionary tabs

Enrollment and participation

Client surveys

Program operations

Survey item grid

Glossary

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Data dictionary tabs (cont.)

/ **Data dictionary shows which exports and export tabs include each variable**

Field Name	Field Ty	Field Length	Value	Fatherhood FIRE	FRAMEWorks	READY4Life	ClientInfo	Service Contacts	Referrals	Incentives - Program Supports	Workshop Characteristics	Series	Series Facilitators	Session Attendance	Service Providers	Survey Response Data
Couple ID	int			X	X		X	X	X	X					X	X
Current Client Status	smallint		1=Applicant pending enrollment; 2=Active; 3=Duplicate	X	X	X	X	X	X	X					X	X
Curriculum Name n	nvarchar	255		X	X	X					X					
Curriculum Name (Other Specify) n	nvarchar	255		X	X	X					X					
Curriculum Hours n	decimal	4,1		X	X	X					X					

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Data dictionary tabs (cont.)

/ **Survey Item Grid identifies the full question text on each survey**

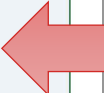| Field Name	Item Wording	Applicant Characteristics Survey	Healthy Marriage Adult Entrance Survey	Healthy Marriage Adult Exit Survey	Healthy Marriage Youth Entrance Survey
		Item Number	Item Number	Item Number	Item Number
TalkWrongChild2	Over the past month, did you... ...talk to [CHILD 2] about what he/she did wrong?		A5bc	A5bc	
CoparentChild2	How much do you agree or disagree with the following statement? [CHILD 2]'s other parent and I work well together as parents. SELECT ONE ONLY		A6	A6	
OverwhelmParent1	In the past month, how often have you felt overwhelmed by your parenting responsibilities? MARK ONE ONLY		A7	A7	E4
NewJobSkills	How much do you agree or disagree with each of the statements below? I would like to learn new job skills		B1a	B1a	
KnowJobOpen	How much do you agree or disagree with each of the statements below? I know where to find job openings.		B1b	B1b	

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Data dictionary updated to reflect August 2024 enhancements

/ **All versions of dictionary on HMRF Grant Resources site: https://hmrfgrantresources.info/resource/data-dictionary**

- For exports generated through November 30, 2022

- For exports generated between December 1, 2022 and August 5, 2024

- For exports generated on or after August 6, 2024

Custom data export enhancements

nFORM users can now customize data exports!

/ **Use filters to select the exact data needed to answer questions and conduct analyses**

Data Type(s)

Date Range

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Data export page

nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Clients　　Workshops　　Service Providers　　Reports　　Settings　　Help

Hello, daniellastphd@gmail.com!

Log off

QPR/PPR　　　Operational Reports　　　Query Tool　　　Data Export

Data Export

Request Data Export

Follow these steps to request a data export Excel file. Customize the data types and clients to include in your file (Steps 1 and 2), then carefully review your selections and submit your request (Step 3).

1. Select Data Type(s).

You may select more than one data type. If you would like all available data, select all four data types. Files with multiple data types selected will not include any duplicate tabs; for example, if you select Surveys and Workshops your file will only include one Client Info tab. For security purposes, the file will not contain personally identifiable information.

- ☐ Surveys (tabs: Client Info, Survey Response Data)
- ☐ Workshops (tabs: Client Info, Workshop Characteristics, Series, Series Facilitators, Session Attendance)
- ☐ Individual Services (tabs: Client Info, Service Contacts, Referrals, Incentives-Program Supports, Service Providers)
- ☐ Program Operations (tabs: Workshop Characteristics, Series, Series Facilitators, Service Providers, Program Operations Survey)

2. Enter Client Enrollment Date Range

Use the calendar feature to select and retain accurate dates between 4/1/2021 and today's date. If you are selecting only program operations data, you do not need to enter an enrollment date range.

Start Date [　　　　　📅]　　　End Date [　　　　　📅]

3. Carefully review selections, then click "Submit Request".

Your request will appear as a pending file below. If needed, select "Clear filter selections" and revise your selections before submitting your request. If you navigate away from this screen before submitting your request, selections will not be saved.

[Submit Request]　　　　　　　　　[Clear Filter Selections]

Please allow up to two days for your request to process. You cannot submit a new request while a file is pending. However, any site administrator at your grant can cancel a pending request by clicking the "Cancel" button below. Please also **review the data export resources on the** HMRF Grantee Resource Site these include the data dictionary, data export template, and Module VIII of the nFORM User Manual. Submit a ticket to the nFORM 2.0 help desk if you need assistance.

Available Files

ⓘ Most recent 3 files available.

File	Data Types	Enrollment Date Range	Requested By	Date Generated
📄 DataExport_2024_07_30_111539.xlsx	Workshops	4/1/2021 - 1/1/2023	DSaint-Phard	7/30/2024 11:15:39 AM
📄 DataExport_2024_07_29_134631.xlsx	Surveys;Individual Services	11/1/2023 - 7/29/2024	DSaint-Phard	7/29/2024 1:46:31 PM
📄 DataExport_2024_07_26_133010.xlsx	Program Operations		DSaint-Phard	7/26/2024 1:30:10 PM

Step 1: Select data type(s)

/ **Select each data type you want to include in the export**

☐ Surveys (tabs: Client Info, Survey Response Data)
☐ Workshops (tabs: Client Info, Workshop Characteristics, Series, Series Facilitators, Session Attendance)
☐ Individual Services (tabs: Client Info, Service Contacts, Referrals, Incentives-Program Supports, Service Providers)
☐ Program Operations (tabs: Workshop Characteristics, Series, Series Facilitators, Service Providers, Program Operations Survey)

/ **If you select multiple data types, export will include just one of each tab**

- For example, the export will only include one Client Info tab if both Surveys and Workshops are selected

/ **If you want a full data export, select all four data types**

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Step 2: Select client enrollment date range

/ **Use the calendar feature to select enrollment start and end dates**

/ **Select dates between 04/01/2021 and the current date**
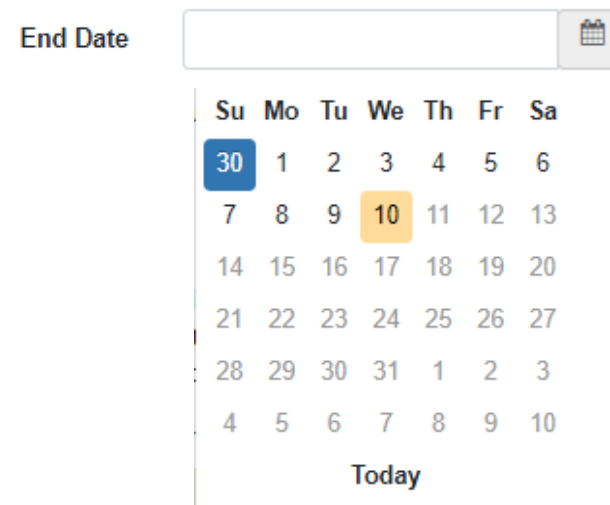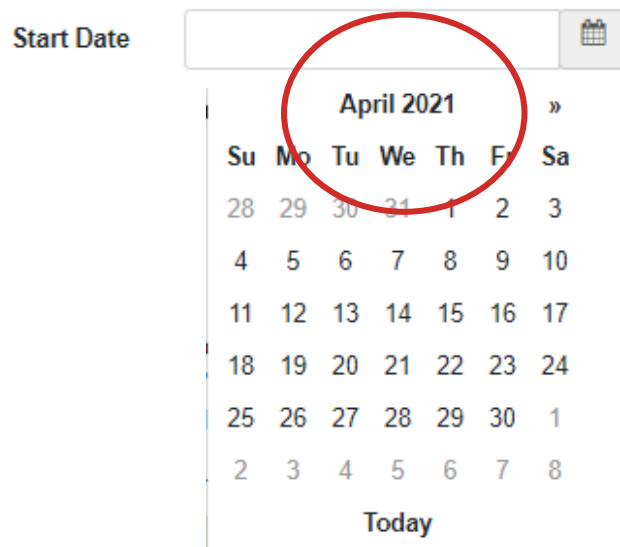
To avoid errors, use the calendar feature instead of typing in dates

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Step 2: Select client enrollment date range (cont.)

／ **Review dates for accuracy before submitting your request**

／ **Dates must be in XX/DD/YYYY format, with lead zeros where applicable**

／ **Examples of invalid dates include**

1) Start date before 04/01/2021 (such as 04/01/2019)
2) End date in the future (such as 04/01/2025)
3) Invalid date format (such as 4/5/2021)

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Step 3: Review and submit

/ **Carefully review all selections**

> Are all the data types (or tabs) you need selected?
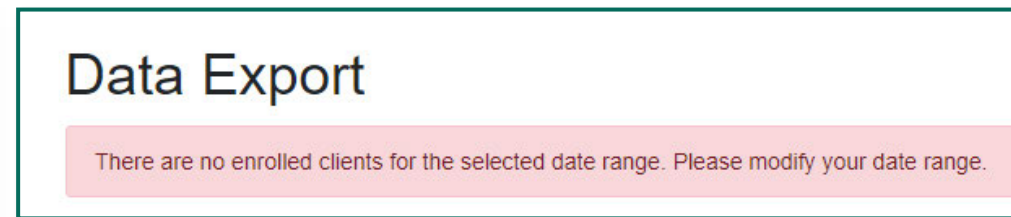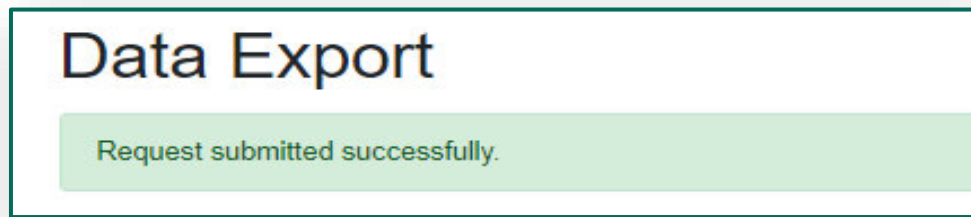
> Is the client enrollment date range correct?

/ **If needed, go back and update selections or click "Clear Filter Selections" on bottom right of screen**

/ **Once ready, click "Submit Request" on bottom left**

/ **If you navigate away from the data export screen before hitting "Submit Request", selections will not be saved**

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Step 3: Review and submit (cont.)

/ **A message at the top of the screen will indicate if the submission was successful or included errors you'll need to correct**

Data Export

Request submitted successfully.

Data Export

There are no enrolled clients for the selected date range. Please modify your date range.

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Step 4: Check file status

Pending File					
File	**Data Types**	**Enrollment Date Range**	**Requested By**	**Requested On**	**Cancel**
Pending processing	Surveys	2/1/2024 - 7/10/2024	TSite Administrator_504	7/11/2024 11:59:02 AM	Cancel

/ **Reports may take up to 48 hours to process**

/ **Each grant can only submit one data export request at a time**

- nFORM users cannot submit a new request while a file is pending
- Site administrators can cancel a pending request and submit a new one if needed

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Step 5: Download and save the file

/ **Available Files menu includes the 3 most recent files**

/ **When ready, the latest export will appear at top of menu**

File	Data Types	Enrollment Date Range	Requested By	Date Generated
DataExport_2024_07_30_111539.xlsx	Workshops	4/1/2021 - 1/1/2023	DSaint-Phard	7/30/2024 11:15:39 AM
DataExport_2024_07_29_134631.xlsx	Surveys;Individual Services	11/1/2023 - 7/29/2024	DSaint-Phard	7/29/2024 1:46:31 PM
DataExport_2024_07_26_133010.xlsx	Program Operations		DSaint-Phard	7/26/2024 1:30:10 PM

Available Files — Most recent 3 files available.

Download a file by clicking on the file name; the "Save as" window will open
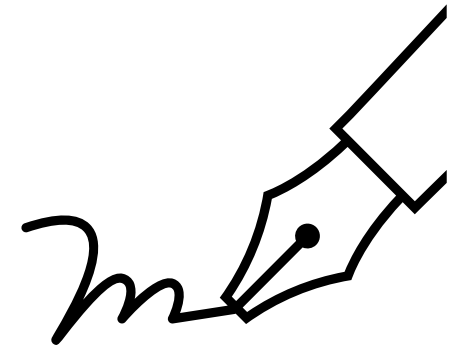
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Questions?

Selected updates to variable names and data formats

Selected updates to the data export file

/ **Updated six field names across grant types**

/ **Removed duplicate entries from Incentives tab**

/ **Revised order of output on Program Operations Survey tab**

/ **Updated variables and field names in READY4Life export**

Updates to six field names across grant types

/ **On the Service Contacts tab**

- "Addl Participants – Other parent's of child not partner" updated to **"Addl Participants – Other parent(s) of child (not partner)"**

- "Addl Participants – Parent guardian of youth client" is now **"Addl Participants – Parent/guardian of youth client"**

/ **"Service ID" is now labeled "Service Contact ID" on the…**

- Service Contacts tab

- Referrals tab

- Incentives – Program Supports tab

Updates to six field names (cont.)

/ **On the Workshop Characteristics tab**

- "Enrollment" is now **"Workshop Enrollment"**

- "Structure" is now **"Workshop Structure"**

/ **On the Session Attendance tab**

- "Most Recent De Registration Date" has been updated to **"Most Recent De-Registration Date"**

Updates to Incentives tab data

Removed duplicate records for two specific scenarios for HM and RF couples—these scenarios are very rare

Scenario	Prior data export	Updated data export
Incentive for **one partner** when service contact is for the **other partner**	An incentive record for each partner, with "Incentive-Program Support for Couple?" marked as 0 (No)	An incentive record only for partner who received the incentive, with "Incentive-Program Support for Couple?" marked as 0 (No)
Incentive for **both partners** when service contact is for **one partner only**	An incentive record for each partner, with "Incentive - Program Support for Couple?" marked as 1 (Yes) An incentive record for partner who received the service contact with "Incentive - Program Support for Couple?" marked as 0 (No)	An incentive record for each partner, with "Incentive - Program Support for Couple?" marked as 1 (Yes)

When using the data export to analyze incentives, use the "Incentive-Program Support ID" number to identify each unique incentive—this indicator was correct in the duplicate records so did not overstate incentives received

Updates to Program Operations Survey tab

Output now reflects the chronological order of QPR/PPR due dates

Output used to be in reverse chronological order

	A	B	C	D	E
1	Due Date	Ad Types 1	Ad Types 2	Ad Types 3	Ad Types 4
2	7/30/2016	0	0	0	0
3	10/30/2016	0	0	0	0
4	1/30/2017	1	0	0	0
5	4/30/2017	0	1	0	0
6	7/30/2017	1	0	0	0
7	10/30/2017	0	0	0	0

READY4Life data export updates

/ **READY4Life files no longer include variable for whether an individual service was provided to a couple**

/ **Variable removed from the following tabs**

- Service Contacts

- Referrals

- Incentives – Program Supports

/ **On the Survey Response Data tab**

- "EXIT-Sinc Prog Rel Healthy" is now "EXIT-Since Prog Rel Healthy"

Resources for using the data export and data dictionary

When using the data export, remember...

/ **Export based on selected data type and enrollment date filters**

- If comparing to or merging with data from other sources, make sure data and timeframes align

/ **Export does not include PII (such as client names, contact information, or case notes)**

/ **Identify any considerations for analyses, such as**

- Exclude records for duplicate pending or confirmed clients

- Review February 2023 and March 2023 nFORM office hours for tips on analyzing data for couples

/ **Analyze data in Excel or other statistical software**

/ For example, SPSS, Stata, R

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Data export template

/ **Excel file that replicates file layout of the data export**

/ **Introduction tab describes how to use template**

/ **Each tab of data export template includes**

- Summary of the types of data included
- Example data
- Tips on how to use the data, including potential linking variables
- Where to find more information in the data dictionary

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August 6th email tip on data export

nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Dear HMRF grantees,

We are pleased to announce that enhancements to the nFORM 2.0 data export are now available. Site administrators can now customize a data export to include specific data types--surveys, workshops, individual services, and/or program operations. Site administrators can also select an enrollment date range to specify which group of clients to include. These selection features have been added to the Data Export screen under the Reports tab in nFORM.

Data Export

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☐ Surveys (tabs: Client Info, Survey Response Data)

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HMRF Grant Resources site

/ **Sections VIII.D and VIII.D.1 of nFORM User Manual include detailed information on data export and data dictionary**

/ **Search "data export" and "data dictionary" for additional resources and relevant office hours**

/ **For example…**

- [December 2022 office hours](#) (Review of the nFORM 2.0 Data Export) provides a detailed review of the data export
- Many 2023/2024 office hours explore specific approaches to using nFORM 2.0 data for program monitoring using the data export and other data tools

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Questions?

Announcements

New tip sheet on HMRF Grant Resources site

/ **Summarizes topics covered in January – May 2024 nFORM office hours**

/ **Includes sections on monitoring enrollment, workshop delivery, individual services, and survey responses by client characteristics**

nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Using nFORM 2.0 to monitor equity in service delivery

The Administration for Children and Families (ACF) defines equity as "the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment." ACF asks Healthy Marriage and Responsible Fatherhood (HMRF) grant recipients to describe program activities that address or advance equity on HM and RF quarterly narrative progress reports. This tip sheet highlights how grant recipients can use nFORM data to monitor and report on their program's progress towards ACF's goal of equitable program delivery, including enrollment, workshop and individual services, and survey responses by target demographic groups. More information can be found in ACF's FEDTalk on advancing equity and the January 2024, February 2024, and March 2024 nFORM office hours recordings and slides on the HMRF Grant Resources site. After reviewing this tip sheet, contact the nFORM 2.0 help desk with any questions by either submitting a ticket through the help tab of nFORM or emailing us at nform2helpdesk@mathematica-mpr.com. We are happy to help!

https://hmrfgrantresources.info/resource/using-nform-20-monitor-equity-service-delivery

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Save the date for upcoming office hours

/ **CQI office hours on Tuesday, August 27 from 2-3pm ET – Using research to inform CQI**

/ **nFORM office hours on Tuesday, September 10 from 2-3pm ET – Data quality indicators**