

# Using nFORM 2.0 Data Quality Indicators to Support Program Monitoring

September 10, 2024  
nFORM 2.0 Team  
Mathematica

**OFFICE OF FAMILY ASSISTANCE**

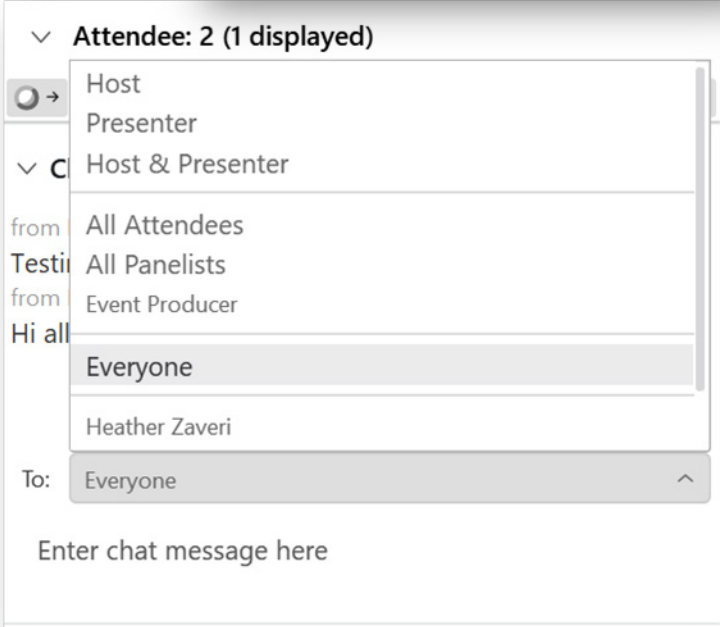
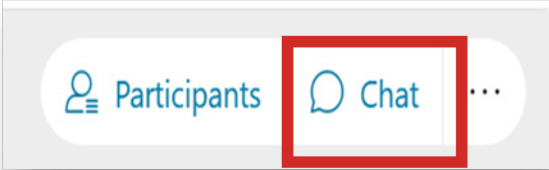
An Office of the Administration for Children & Families





# 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 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



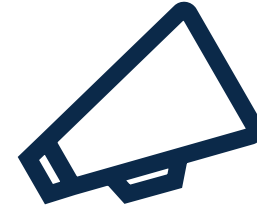
**Overview of  
high quality  
data**



**Monitoring  
client  
information**



**Monitoring  
client survey  
completion  
rates**



**Announcements**



# Overview of high quality data



# High quality data is essential to...



Support program services, operations, and performance monitoring



Inform continuous quality improvement (CQI) and evaluation



Cross-site analysis and broader understanding of clients and their experiences



# Components of high quality data



**Timely**



**Accurate**



**Complete**



**Secure**



# Support high quality data collection by updating your data collection plan

- / **Refer to plan template on HMRF Grant Resources site**
- / **Detail each data collection step; regularly review and update**
- / **Identify optimal timing for each step, responsible staff person, and backup staff**
- / **Train and update staff on data collection procedures**
- / **Be sure to document how you will monitor data collection and reporting, following Section F of the plan template**

<https://hmrfggrantresources.info/resource/data-collection-plan-template>





# Tools for monitoring data quality for client information and survey administration

## Query tool

- Grant Year Overview tab: data quality panel
- Applicant Characteristics tab: service assignment view
- Client Outcomes tab: item-level response rates

## Operational reports

- Client Status Summary report
- Caseload Summary and Detail report
- Local Evaluation Enrollment report
- Survey Report: Refused Survey



# Monitoring client information

# What types of data quality questions can I consider when reviewing client information?

Is client contact information up to date?

Have all service contacts, referrals, incentives, and program supports been recorded?

What surveys are clients due to complete?

Has attendance been recorded for workshops and make-up sessions?

# What other data quality questions can I consider when reviewing client information?

Are client statuses accurately reflecting where clients are in programming?

Are updates needed to case manager assignments?

Have clients been assigned to the location where they are receiving services?

For local evaluation grantees, are all service assignments recorded correctly?



# Client status

## / Use Client Status Summary and Detail operational reports to monitor client statuses for all or select groups of clients

- For example, have any clients statused as “Active” graduated or no longer participate?
- Do the number of clients statused as “Completed/graduated” align with the number of clients who have completed at least 90% of primary workshop target hours?

Update a single client’s status in their profile under  
**Program Information**

For multiple clients use the **bulk update** feature



# Client Status Summary/Detail Report

## Client Status Report Summary as of 9/10/2024

| Grantee           | Total (excl Duplicates) | Applicant Pending Enrollment | Active | Completed/ Graduated | Consent Revoked | Deceased | Drop out | Incarcerated |
|-------------------|-------------------------|------------------------------|--------|----------------------|-----------------|----------|----------|--------------|
| Families Together | 180                     | 3                            | 150    | 3                    | 1               | 1        | 2        | 2            |

| Moved out of area | Non-responsive | Primary complete/optional active | Removed from program | State of emergency | Temporary Hold |  | Duplicate Pending | Duplicate Confirmed |
|-------------------|----------------|----------------------------------|----------------------|--------------------|----------------|--|-------------------|---------------------|
| 3                 | 4              | 1                                | 3                    | 2                  | 4              |  | 1                 | 1                   |

## Client Status Report Detail as of 9/10/2024

| Client Grantee Location | Client ID | Couple ID | Client Last Name | Client First Name | Enrollment Date | Client Status                | Client Status Change Date |
|-------------------------|-----------|-----------|------------------|-------------------|-----------------|------------------------------|---------------------------|
| Center office           | 10027798  |           | Armweak          | Colin             |                 | Applicant pending enrollment | 8/17/2024                 |
| Center office           | 10027895  |           | Banana           | Anna              | 10/8/2021       | Active                       | 10/8/2023                 |

Filter by location, enrollment date, client status, and client status change date to identify potential client profiles to update



# Location

- / Update locations on the Grantee Configuration page based on current service locations**
- / Use any detailed operational report to review clients' assigned locations**
- / Update client profiles as needed to add or change an assigned location to reflect where they currently receive services**





# Case manager assignment

- / **Use Caseload Summary/Detail operational reports to monitor case manager assignments**
- / **Consider whether updates are needed to case manager assignments**
  - For example, have all newly enrolled clients and returning clients been assigned to a case manager in nFORM?
  - Have clients been reassigned if a case manager leaves temporarily or permanently?

Assign or unassign a single client's case manager(s) in their profile under **Program Information**

For multiple clients use the **bulk update** feature

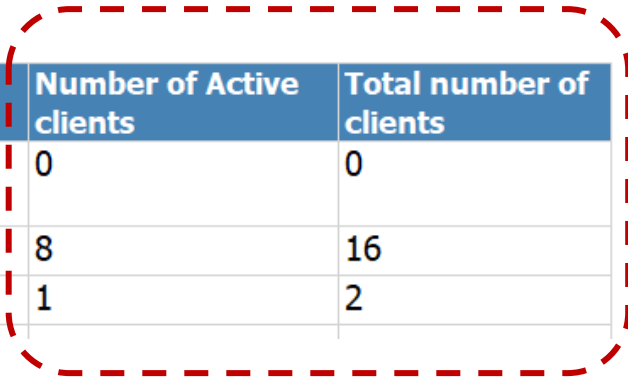




# Caseload Summary/Detail Report

## Caseload Summary as of: 9/10/2024

| Grantee           | Staff Grantee Location | Staff with Case Management Capability | Staff User Account Type | User Account Active? | Number of Active clients | Total number of clients |
|-------------------|------------------------|---------------------------------------|-------------------------|----------------------|--------------------------|-------------------------|
| Families Together | Center City            | Andrews, Ethan                        | Site Administrator      | N                    | 0                        | 0                       |
| Families Together | Southside              | McInerney, Hannah                     | Case Manager            | Y                    | 8                        | 16                      |
| Families Together | Southside              | Saint-Phard, Daniella                 | Case Manager            | Y                    | 1                        | 2                       |



## Caseload Detail as of: 9/10/2024

| Staff Grantee Location | Staff with Case Management Capability | Assigned Client Study ID | Couple ID | Client Last Name | Client First Name | Client Status | Client Grantee Location | Enrollment Date | Most Recent Service Contact Date | Most Recent Workshop Session Attended Date | # of referrals requiring follow-up | # of incentives provided |
|------------------------|---------------------------------------|--------------------------|-----------|------------------|-------------------|---------------|-------------------------|-----------------|----------------------------------|--|------------------------------------|--------------------------|
| Southside              | McInerney, Hannah                     | 40001025                 | 10091     | Halpert          | Pam               | Active        | Northside               | 4/23/2023       | 6/16/2023                        | 6/14/2023                                  |                                    | 1                        |
| Southside              | McInerney, Hannah                     | 40001024                 | 10091     | Halpert          | Jim               | Active        | Northside               | 4/19/2023       | 6/6/2023                         | 6/14/2023                                  |                                    | 1                        |



# Service assignment for local evaluations

## **/ Use query tool Applicant Characteristics tab and Local Evaluation Enrollment operational report to monitor service assignments**

- Note that local evaluation data in nFORM cannot be used to determine baseline equivalence since it has not been tested for statistical significance

## **/ Consider whether clients appear to be assigned to groups as intended, and whether staff need refresher training on procedures**

## **/ If Control (NO services) and Control waitlist (NO services) clients are eligible to receive services after local evaluation period has ended, update client's service assignment to a Treatment category**

# Query Tool Applicant Characteristics by Service Assignment

Filter by enrollment date

Filter by applicant characteristic (as reported from ACS responses)

Filter by population type

Filter to view by service assignment

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

**Cloud Grantee 1 RF (LE)**

Calendar Year: 2020 | 2021 | 2022 | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec

Community individual | Community couple | Reentering individual

**Current Selections**  
 Grantee Name: Cloud Grantee 1 RF (LE)  
 PopulationName: Community individual  
 Characteristic: Age

**APPLICANT CHARACTERISTICS BY SERVICE ASSIGNMENT**

Count Of Applicants by Service Assignment by Month

Use information on this tab to assess whether characteristics of treatment and comparison group clients appear similar. Use the Data Export function to produce a data file for statistical testing. **The information on this tab cannot be used to determine baseline equivalence because it has not been tested for statistical significance.** The bar chart to the right displays applicant characteristics by service assignment within the selected time frame. The graphics also reflect any population selected by the grantee above.

The charts to the right display selected applicant characteristics by service assignment for the selected time frame. The graphics also reflect any population selected by the grantee above.

**Control (With Services)**

|                   |     |
|-------------------|-----|
| 25-34 years       | 25% |
| 55 years or older | 25% |
| 13-15 years       | 50% |

**Control Waitlist (With Services)**

|             |      |
|-------------|------|
| 13-15 years | 100% |
|-------------|------|

**Enhanced Services Plus Job Club**

|             |     |
|-------------|-----|
| 13-15 years | 57% |
| 18-20 years | 14% |
| 21-24 years | 14% |
| 35-44 years | 14% |

**Treatment Services**

|             |     |
|-------------|-----|
| 25-34 years | 38% |
| 35-44 years | 31% |
| 13-15 years | 8%  |
| 18-20 years | 8%  |
| 21-24 years | 15% |



# Local Evaluation Enrollment Summary/Detail report

## Local Evaluation Enrollment\* from 4/7/2021 - 9/22/2022

| Grantee Name    | Site Name | Total      | Control (NO Services Provided) | Control (With Services) | Control Waitlist (NO Services Provided) | Control Waitlist (with Services) | Treatment       |
|-----------------|-----------|------------|--------------------------------|-------------------------|---|----------------------------------|-----------------|
| Fathers Connect |           |            | Control - NO Services          | Control (With Services) | Wait for It                             | Control Waitlist (With Services) | Treatment Group |
| <b>Total</b>    |           | <b>100</b> | <b>20</b>                      | <b>15</b>               | <b>15</b>                               | <b>25</b>                        | <b>25</b>       |
| Camelot         |           | 60         | 10                             | 10                      | 8                                       | 14                               | 18              |
| Disneyland      |           | 40         | 10                             | 5                       | 7                                       | 11                               | 7               |

## Fathers Connect Service Assignment Group\* from 4/7/2021 - 9/22/2022

| Client Grantee Location | Client ID | Couple ID | Client Last Name | Client First Name | Service Name          | Service Category               | Enrollment Date |
|-------------------------|-----------|-----------|------------------|-------------------|-----------------------|--------------------------------|-----------------|
| Camelot                 | 10091465  |           | Collins          | Barnabas          | Control - NO Services | Control (NO Services Provided) | 9/2/2022        |
| Camelot                 | 10094035  |           | Duck             | Donald            | Control - NO Services | Control (NO Services Provided) | 9/21/2022       |



**Use enrollment date to monitor random assignment within a specific time period**



Where can I find more information on entering and updating client information?

## nFORM user manual

- Module III: Grantee Administrative Functions
- Module V: Enrolling Clients
- Module VII: Managing Enrolled Clients

## Training videos

- Adding service assignments for local evaluations
- Adding grantee locations and service providers
- Making bulk updates
- Enrolling clients and client profiles

## nFORM office hours

- June 2024 – Welcome to nFORM! Overview for new (and returning) nFORM users
- May 2022 – Tailoring nFORM for your grantee



**Questions**





We want to hear your experiences and ideas!

**How do you use nFORM to monitor client data quality?**

**What types of data quality challenges have you observed? How have you addressed those issues?**

Use the Webex chat to enter your responses or feel free to answer aloud



# Monitoring client survey completion rates



# What types of data quality questions can I consider when reviewing survey information?

Are the expected number of clients completing the ACS, entrance and exit surveys?

Are there trends in survey item non-response rates?

Are there trends in survey refusal rates?

Are there unexpected trends in responses?

# Identify clients who have not completed enrollment

/ Use Client Status Summary and Detail operational report to identify clients who have not submitted their ACS or, for local evaluations, received a service assignment

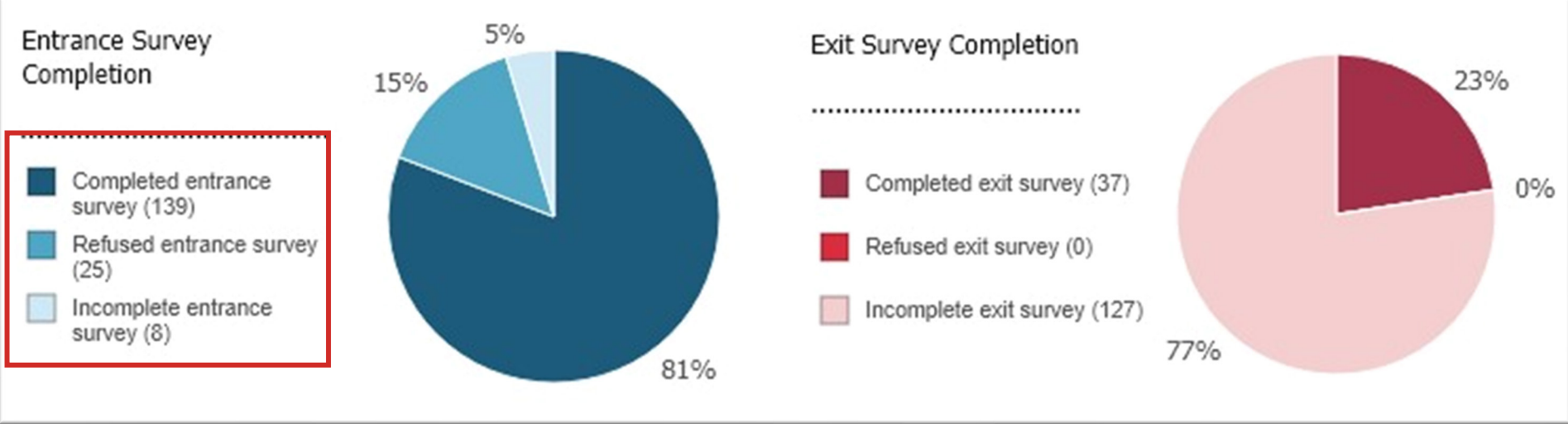
**Client Status Report Summary as of 9/10/2024**

| Grantee           | Total (excl Duplicates) | Applicant Pending Enrollment | Active | Completed/ Graduated | Consent Revoked | Deceased | Drop out | Incarcerated |
|-------------------|-------------------------|------------------------------|--------|----------------------|-----------------|----------|----------|--------------|
| Families Together | 180                     | 3                            | 150    | 3                    | 1               | 1        | 2        | 2            |

Use the detail report to filter on clients who have a status of “Applicant Pending Enrollment” to follow up



# Use query tool Grant Year Overview tab to monitor survey administration progress



- **Determine whether anticipated number of clients enrolled in current grant year have completed entrance and exit surveys**
- **Remember that clients who are enrolled but not yet eligible to complete a survey are included in the incomplete survey counts**


# Review survey completion and refusals using operational reports

- / Use Survey Completion Summary operational report to identify the total number of clients who have completed or refused the ACS, Entrance and Exit survey**
  - Consider the number of clients expected to have completed each survey based on program flow
  - For example, how many clients have attended at least one workshop session and should have completed an entrance survey?
- / Use Survey Completion Detail report to filter on clients who have not yet completed an entrance or exit survey to identify potential follow up**



# Monitor refusal trends using the Survey Report – Refused Survey

Monitor number of refusals by survey



| Grantee          | Client Grantee Location | Population       | Applicant Characteristics Survey |   |   |   |   | Entrance Survey |       |   |   |   | Exit Survey |   |       |    |   |   |    |    |   |
|------------------|-------------------------|------------------|----------------------------------|---|---|---|---|-----------------|-------|---|---|---|-------------|---|-------|----|---|---|----|----|---|
|                  |                         |                  | Total                            | 0 | 1 | 2 | 3 | 4               | Total | 0 | 1 | 2 | 3           | 4 | Total | 0  | 1 | 2 | 3  | 4  |   |
| Families Connect | All                     | All              | 1                                | 0 | 0 | 0 | 0 | 1               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 20 | 0 | 0 | 10 | 10 | 0 |
|                  |                         | Adult couple     | 1                                | 0 | 0 | 0 | 0 | 1               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 15 | 0 | 0 | 8  | 7  | 0 |
|                  |                         | Adult individual | 0                                | 0 | 0 | 0 | 0 | 0               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 5  | 0 | 0 | 2  | 3  | 0 |
|                  | Dragonstone             | All              | 1                                | 0 | 0 | 0 | 0 | 1               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 19 | 0 | 0 | 9  | 10 | 0 |
|                  |                         | Adult couple     | 1                                | 0 | 0 | 0 | 0 | 1               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 15 | 0 | 0 | 5  | 10 | 0 |
|                  |                         | Adult individual | 0                                | 0 | 0 | 0 | 0 | 0               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 4  | 0 | 0 | 0  | 0  | 0 |
|                  | Kings Landing           | All              | 0                                | 0 | 0 | 0 | 0 | 0               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 1  | 0 | 0 | 1  | 0  | 0 |
|                  |                         | Adult couple     | 0                                | 0 | 0 | 0 | 0 | 0               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 0  | 0 | 0 | 0  | 0  | 0 |
|                  |                         | Adult individual | 0                                | 0 | 0 | 0 | 0 | 0               | 0     | 0 | 0 | 0 | 0           | 0 | 0     | 1  | 0 | 0 | 1  | 0  | 0 |

| Client Grantee Location | Population   | Client ID | Client Last Name | Client First Name | Current Client Status | Application Date | Enrollment Date | Survey | Date Client Refused Survey | System Entry Date | #Days difference | Reason           |
|-------------------------|--------------|-----------|------------------|-------------------|-----------------------|------------------|-----------------|--------|----------------------------|-------------------|------------------|------------------|
| Dragonstone             | Adult couple | 10024571  | Dragon           | Vermax            | Active                | 3/17/2022        | 4/29/2022       | ACS    | 4/29/2022                  | 5/2/2022          | 3                | Privacy concerns |
| Dragonstone             | Adult couple | 10025677  | Snake            | Sea               | Active                | 5/17/2022        | 5/23/2022       | Exit   | 8/8/2022                   | 8/10/2022         | 2                | Not interested   |

View Reason column to understand and create strategies to reduce refusals



# Monitor survey item response rates

- / Use query tool Client Outcomes tab to identify whether number of responses is lower than expected
- / Use survey PDFs and data export to identify how many clients should have responded to each survey and question before analyzing response data

| ENTRANCE OUTCOME   | RANGE                                       | NUMBER OF INDIVIDUAL CLIENTS | Average Score/Percent |
|--|---|------------------------------|-----------------------|
| How often accepts child the way he or she is                         | 1 (always) to 5 (never)                     | 98                           | 1.1                   |
| Feels they and their child understand each other                     | 1 (always) to 5 (never)                     | 99                           | 1.7                   |
| Hits, spans, grabs, or uses physical punishment                      | 1 (yes); 0 (no)                             | 98                           | 6.1                   |
| Yells, shouts, or screams at child when he/she is mad at him...      | 1 (yes); 0 (no)                             | 96                           | 9.4                   |
| Talks about what child did wrong                                     | 1 (yes); 0 (no)                             | 98                           | 61.2                  |
| In past month, saw child every day or almost every day (%)           | 0 - 100                                     | 10                           | 14.9                  |
| In past month, saw child one to three times a week (%)               | 0 - 100                                     | 23                           | 34.3                  |
| In past month, saw child one to three times a month (%)              | 0 - 100                                     | 31                           | 47.8                  |
| In past month, did not see child (%)                                 | 0 - 100                                     | 2                            | 3.0                   |
| I would like to learn new job skills                                 | 1 (strongly agree) to 4 (strongly disagree) | 206                          | 1.5                   |
| I feel confident in my ability to conduct an effective job sear...   | 1 (strongly agree) to 4 (strongly disagree) | 209                          | 1.9                   |
| Believes that it is better for children if their parents are marr... | 1 (strongly agree) to 4 (strongly disagree) | 218                          | 1.8                   |
| Believes that living together is just the same as being married      | 1 (strongly agree) to 4 (strongly disagree) | 217                          | 2.4                   |
| Satisfaction with current relationship                               | 1 (very satisfied) to 3 (not satisfied)     | 61                           | 1.7                   |

# Check for unexpected response trends

- / **Consider whether responses might not be an accurate reflection of clients' characteristics or experiences**
- / **Unexpected patterns may indicate an underlying issue in how clients interpret or perceive a question**
  - Clients may also be concerned about how they answer a question

Use the Survey Response Data tab of the data export to conduct more in-depth reviews of survey data



# Where can I find more information on monitoring survey completion?

## nFORM manuals

- nFORM user manual module V.D: Administer ACS
- nFORM user manual module VIIA: Client profile
- Performance Measures and Data Collection Logistics manual

## Tip sheets and training videos

- Examine survey administration with nFORM
- Options for administering surveys virtually
- Tips for survey scripts
- Training video: Administering surveys

## nFORM office hours

- October 2023 – Examining survey administration with nFORM data tools
- April 2022 – nFORM 2.0 survey administration: Grantee experiences and strategies





**Questions**





We want to hear your experiences and ideas!

**How do you use nFORM to monitor survey data quality?**

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# Announcements

A red pushpin is pinned to a calendar grid. The calendar shows dates 22 and 23. The background is white with a green triangle in the bottom left corner.

# Save the date for upcoming office hours

- / **CQI office hours on Tuesday, September 24 from 2-3pm ET – Applying research to CQI efforts**
- / **nFORM office hours on Tuesday, October 8 from 2-3pm ET – Data quality indicators on workshop participation and individual services**