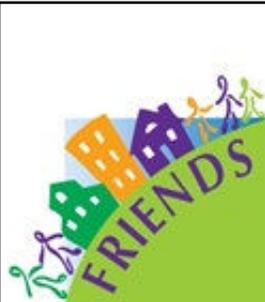




**Protective Factors Survey Online Data System
(PFSODS)
Instruction Manual**



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Protective Factors Survey Online Data System Instruction Manual

Overview

The Protective Factors Survey Online Data System (PFSODS) is a web-based tool that allows users access to an online data system. This system enables users to manage all aspects of the original Protective Factors Survey (PFS) and the Protective Factors Survey, 2nd Edition (PFS-2) and its various iterations, which include:

- PFS Traditional Pre-Post
- PFS Retrospective Pre-Post
- S-PFS (Spanish Adaptation) Traditional Pre-Post
- PFS-2 Traditional Pre-Post
- PFS-2 Retrospective Pre-Post
- PFS-2 Concrete Supports Traditional Pre-Post
- SPFS-2 Traditional Pre-Post (if participating in data field test)
- SPFS-2 Retrospective Pre-Post (if participating in data field test)

This system allows users to locally own their data while accessing a state-of-the-art online data collection system. This system is designed to allow for digital survey administration via direct interaction with clients or a text, email link, or QR code for completion at a separate time. The system is responsive and can be administered on a phone, tablet, laptop, or desktop. These options allow for direct entry by clients into the system, eliminating potentially time-consuming data entry.

To learn more about the surveys and the system, please visit <https://friendsnrc.org/evaluation/protective-factors-survey/>.

If you don't have digital access for client administration- don't worry! You can still use this system. You can administer traditional paper/pencil surveys and use the system for data entry via the paper entry format.

So how do I get started?

To use the system, you need a database or "group" that holds the data you are entering. If you are not joining an established group via your CBCAP Lead or other organization, you must set up a database. The costs are low for the server space to hold the database; it will cost approximately \$5 per month for the database storage. FRIENDS covers the costs and upkeep of the data system itself, so there are no other costs.

Non-CBCAP Leads: You have some options.

1. You can visit <https://brandnewbox.com/pfs/> for more information on options and set up your account. In addition, you can contract with them to help set up your account and get you started.
2. You can go to the **Setting Up Your Database** section of this manual and go through the steps to establish your database and connect it to the system. This self-service option is straightforward and has no additional charges over the database server costs.

CBCAP Leads: CBCAP Leads can work with FRIENDS and Brand New Box to set up state-level data systems. These systems provide many benefits for both the Lead Agency and funded agencies. These include:

- Real-time access to data for State Lead Agencies and program managers of funded programs without the need for data transfers.
- Access to an easy-to-use and powerful data management system that funded agencies could likely not otherwise afford.
- Reduction of the time needed to manage data by allowing for direct entry of survey results via participants into the system.

To set up a state-level account for CBCAP, contact ewinkle@friendsnrc.org.

Getting Set-up

I want to use the system; now what?

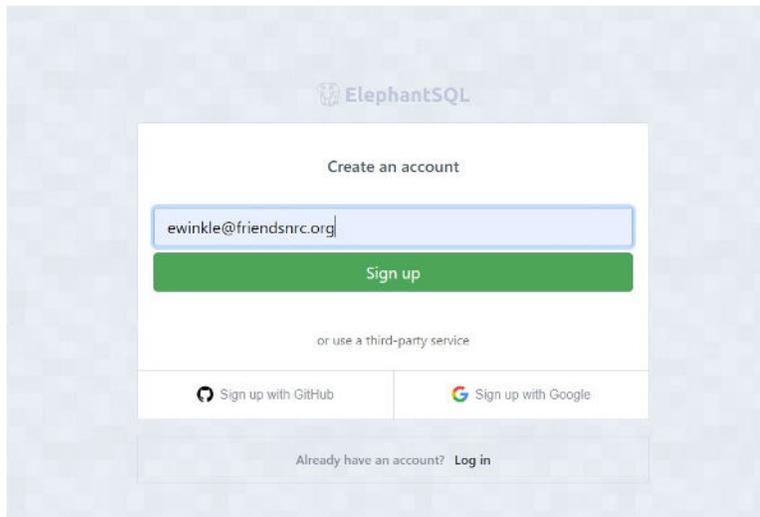
There are three levels of set-up for the system. Select your Set-up based on your role in the system.

- **Database Level (Group Owner)**- Choose this Set-up to initiate a database system. It is for independent users who have not been invited to a database/group by a group owner. If you need to create a database, visit this section. If you are CBCAP State Lead Agency and are interested in establishing a database, contact Edi Winkle at ewinkle@friendsnrc.org to get started.
- **Agency Level**- Choose this Set-up for agencies participating in an established database group. This section provides instructions on various aspects of completing an initial agency Set-up which includes:
 - Creating discrete programs so data can be sorted according to needs.
 - How to customize agency demographic questions.
 - Solutions for creating custom agency questions for survey administration in addition to the standardized survey items.
 - Managing staff that needs access to the system to administer surveys or work with survey data.
 - Instructions on survey administration utilizing the system.
 - Instructions on data entry.
- **Agency Staff**- Choose this Set-up for staff responding to an invite from your agency to get your account set up and access your agency to administer surveys or enter data.

Setting Up Your Database (Group Owner)

1. To own your data in the PFSODS, you need to have an account with a database provider. For this, you'll be using ElephantSQL, and you'll need to sign up for an account. Visit <https://customer.elephantsql.com/signup> to get started.

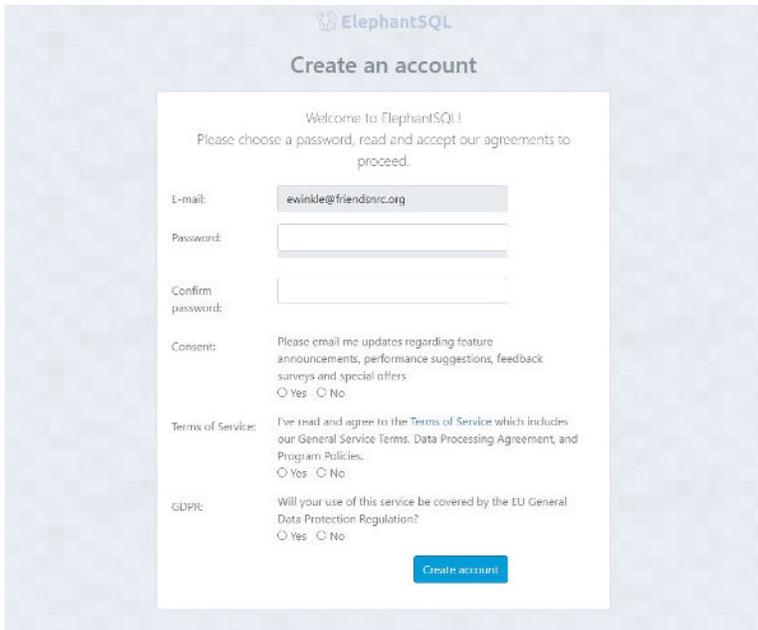
Here's what the signup page looks like. First, enter the person's email in your organization responsible for managing your data system. This might be your program manager, IT professional, or office manager. *You will need access to this email to complete the Set-up process.*



2. ElephantSQL will send you a confirmation email. Go to your email, find that email, and click the link they provide.

NOTE: Be sure to check your junk or spam folder if you are not finding the email after a couple of minutes.

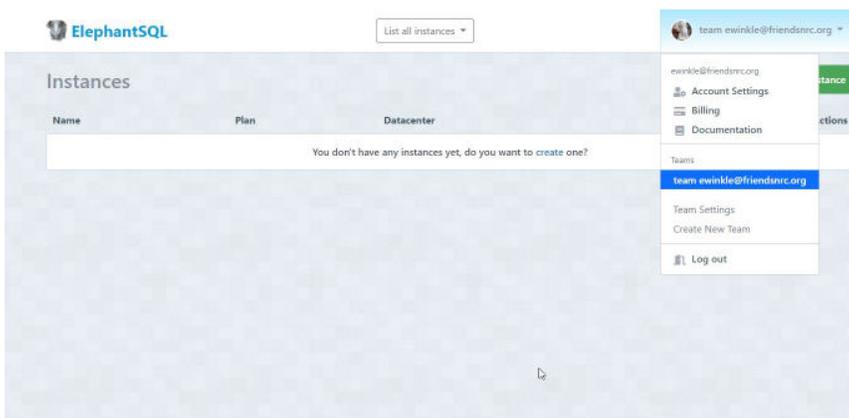
3. That link will take you to a *Create Your Account* page. Fill in your information. Be sure to make a note of the email and password you use. You must agree to the *Terms of Service* and indicate that EU Rules do not bind you.



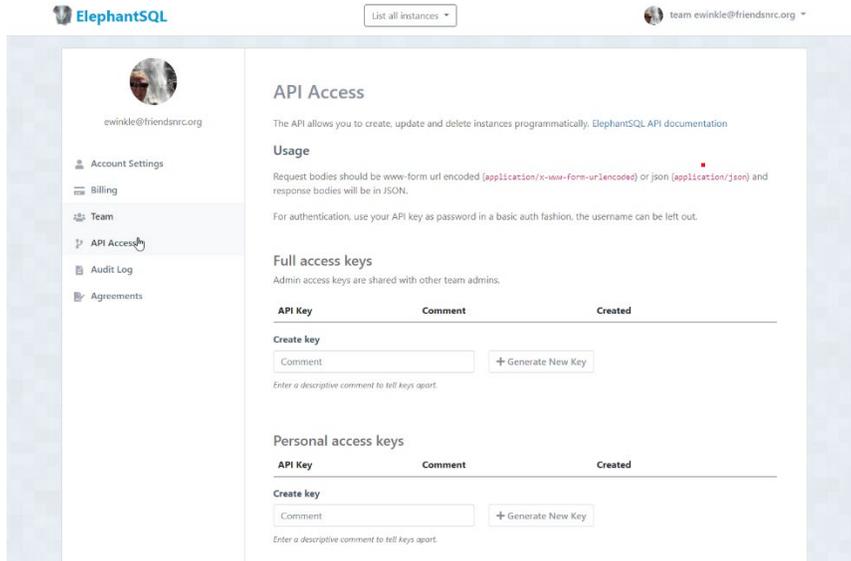
4. For Billing Set-up, you have some options:
 1. You can do monthly billing on a credit card. Just enter your card information under the billing section in account settings. You will be billed monthly for usage (likely \$5 per month for a Simple Spider plan)
 2. If you need annual billing, reach out to billing@elephantsql.com and let them know you want yearly billing for the simple spider plan via a credit card or PO. (The cost will be \$60, plus a \$9.00 service fee).

Once you have your account created (you can still be working on billing with ElephantSQL), you will need to complete the following steps:

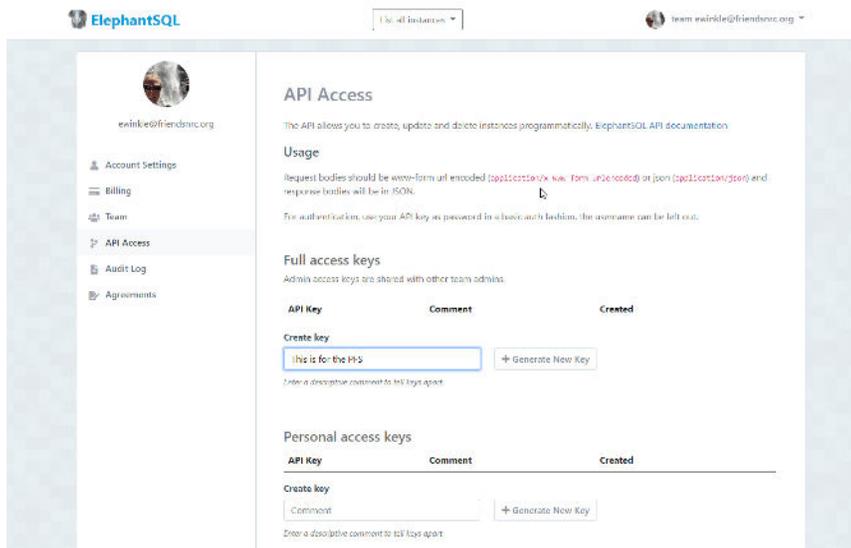
5. In your ElephantSQL account, click on the top right dropdown for an option called *Account Settings*.



- Once in account settings, select *API Access* from the left menu.



- We're going to generate a new API key. In the comment field, enter *This is for the PFS*, and then click *+ Generate New Key*.



- Now you have generated a new API Key for your database. That's the long string of random characters in this example below. It starts with '45937fd9'. Click the eye symbol to see the whole string.

API Access

The API allows you to create, update and delete resources programmatically. (ElephantSQL API documentation)

Usage

Request bodies should be in JSON form or hexadecimal (`app:street%20number%20zipcode`) or plain (`app:street/number`) and response bodies will be in JSON.

For authorization, use your API Key as password in a basic auth fashion, the username can be left out.

Full access keys

Admin access keys are shared with other team admins.

API Key	Comment	Created
API-u5fNw-v0ta-4b7z4b-UPw-3B4066-6146	This is for the API	2021-05-17 16:14:37 UTC

Create key

Comment:

Generate encryption account on this key (optional)

Personal access keys

API Key	Comment	Created
---------	---------	---------

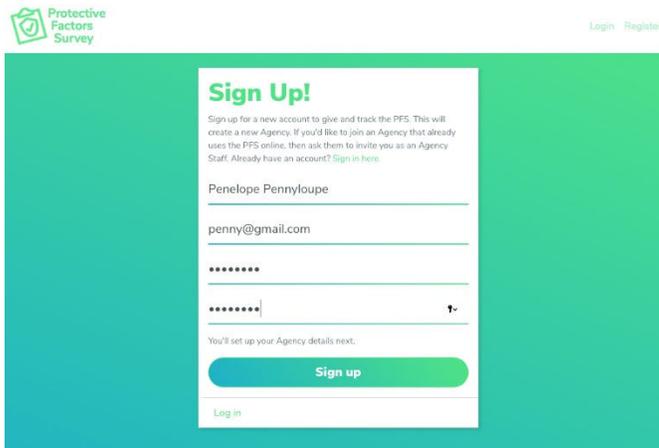
Create key

Comment:

Copy that API Key to your clipboard (clicking  will copy it) as you need it when you set up your agency account in PFSODS. (go to page 11 for information on that Set-up)

Setting Up Your Group

1. Once your database is set up with Elephant SQL or Brand New Box, you need to create your Group in the system. Visit https://pfsonline.friendsnrc.org/users/sign_up and enter your name, email, and create a password.



Protective Factors Survey

Login Register

Sign Up!

Sign up for a new account to give and track the PFS. This will create a new Agency. If you'd like to join an Agency that already uses the PFS online, then ask them to invite you as an Agency Staff. Already have an account? [Sign in here](#)

Penelope Pennyloupe

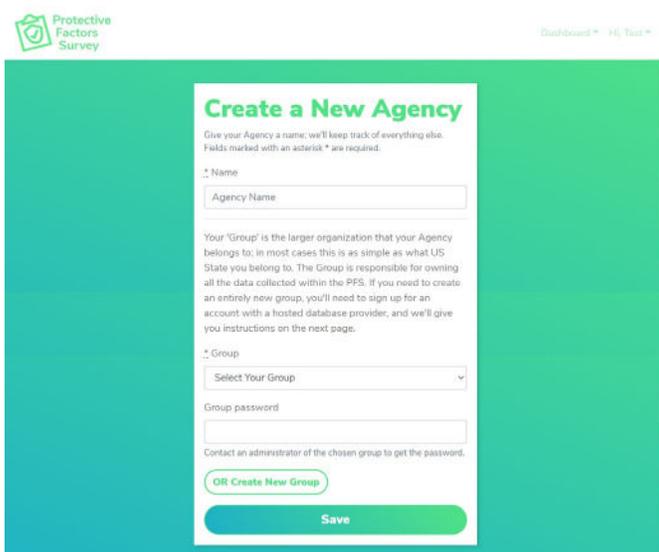
penny@gmail.com

You'll set up your Agency details next.

[Sign up](#)

[Log in](#)

2. At the *Create a New Agency* screen, go to the bottom of the page and click *OR Create a New Group*.



Protective Factors Survey

Dashboard * 16, Test *

Create a New Agency

Give your Agency a name; we'll keep track of everything else. Fields marked with an asterisk * are required.

* Name

Agency Name

Your "Group" is the larger organization that your Agency belongs to; in most cases this is as simple as what US State you belong to. The Group is responsible for owning all the data collected within the PFS. If you need to create an entirely new group, you'll need to sign up for an account with a hosted database provider, and we'll give you instructions on the next page.

* Group

Select Your Group

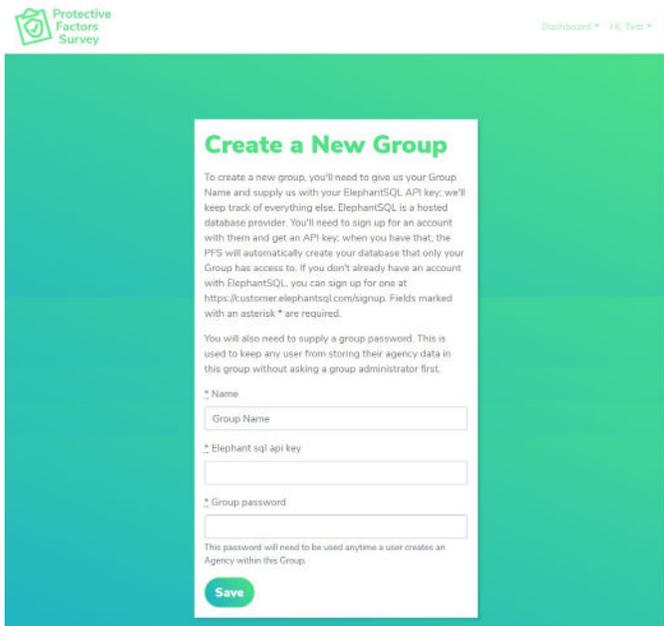
Group password

Contact an administrator of the chosen group to get the password.

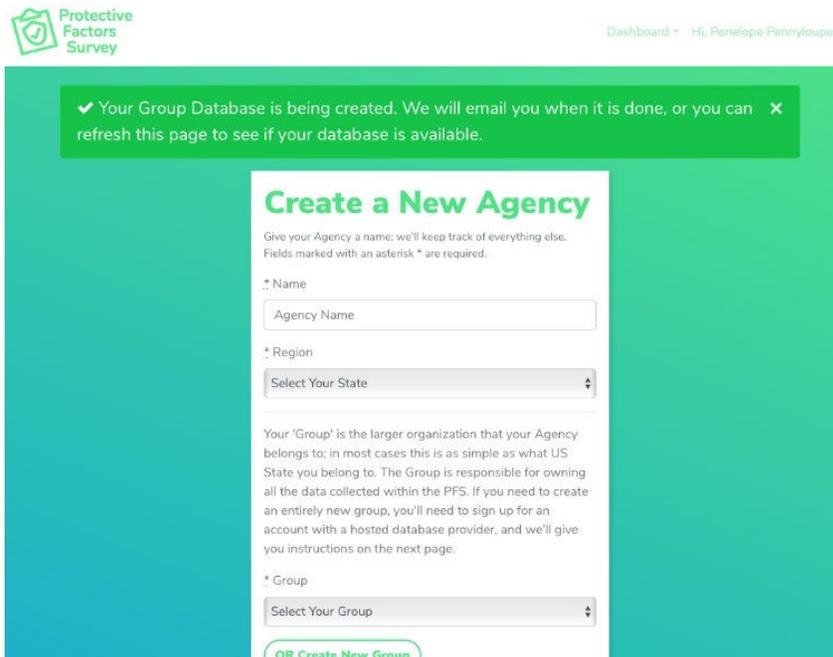
[OR Create New Group](#)

[Save](#)

3. This page asks for your Group Name and ElephantSQL key. You copied that on your clipboard earlier from your ElephantSQL account. Paste it here after you have named your *Group*. You will also need to designate a *Group Password*. The *Group Password* will allow other agencies to join your database moving forward. Once you have entered the group name, Elephant API, and group password, click save. You can change/edit the password from inside your *Group* once created.

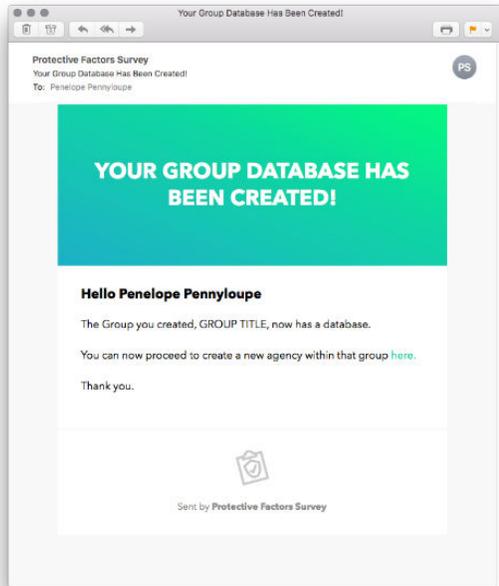


4. You'll see a message that tells you to wait while we automatically create the linkages to your database for you. Then, you'll get an email when it's ready; it usually only takes a few minutes.



NOTE: Be sure to check your junk or spam folder if you are not finding the email after a couple of minutes.

5. When your database is ready, you'll get an email letting you know. Click the link in that email, and you'll be directed back to the Set-up.



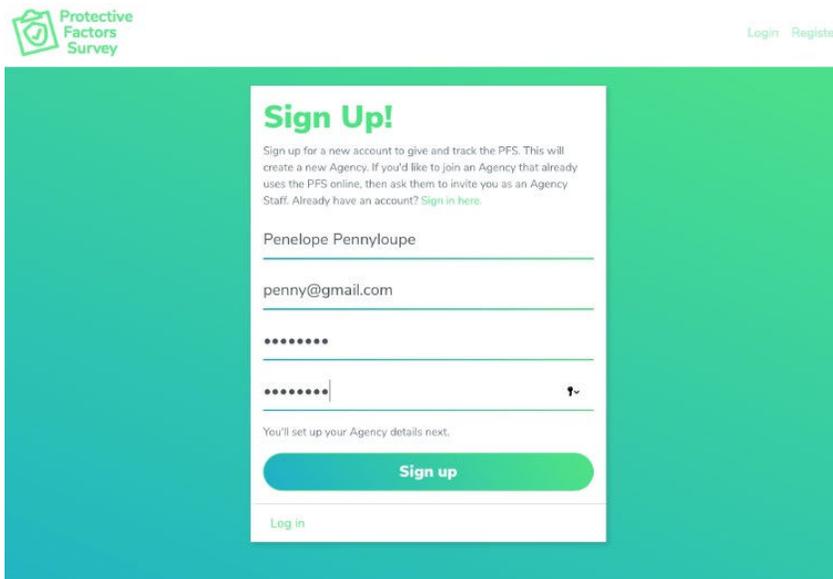
NOTE: Be sure to check your junk or spam folder if you are not finding the email after a couple of minutes.

6. **NOW** you can proceed. If you are a state CBCAP Lead, you can invite your funded agencies to participate in your Group by sending them the link <https://pfsonline.friendsnrc.org/> and inviting them to participate in the Agency Set-up process. (see **Agency Set-Up** on page 14 for more information.)

If you are setting up a database for your agency, you are now ready to proceed. Visit **Agency Set-up** in the next section to walk through that process; you must set up an agency under your Group to collect data, even if it will only be your one agency using the system.

Agency Set-Up

1. Visit https://pfsonline.friendsnrc.org/users/sign_up and enter your name and email. Then, create a password. If you already have an account, click the log in under the *Sign Up* button.



The screenshot shows the 'Sign Up!' form on the Protective Factors Survey website. The form is set against a teal background. At the top left is the 'Protective Factors Survey' logo, and at the top right are links for 'Login' and 'Register'. The form itself is white with a green border. It contains the following elements:

- Sign Up!** (Section Header)
- Introductory text: "Sign up for a new account to give and track the PFS. This will create a new Agency. If you'd like to join an Agency that already uses the PFS online, then ask them to invite you as an Agency Staff. Already have an account? [Sign in here.](#)"
- Name field: "Penelope Pennyloupe"
- Email field: "penny@gmail.com"
- Password field: "*****"
- Confirm Password field: "*****" with a toggle icon on the right.
- Text: "You'll set up your Agency details next."
- Sign up** (Primary Button)
- [Log in](#) (Secondary Link)

2. It's time to give your Agency a name. Fill out a name and ensure that the proper GROUP is selected in the *Group* field below. Also, you will need the *Group Password* that you designated in the Group Set-Up phase. (If you are setting up an agency using a Group created by another entity, you will need the *Group Password* from that entity. You will need to reach out to them to procure that.) Once you have entered all information, click *Save*. The *Group* is the database you will be using.

NOTE: If you have not been invited to participate in an existing database, you must establish your own. Refer to page 6 to learn how to get started.

Create a New Agency

Give your Agency a name; we'll keep track of everything else. Fields marked with an asterisk * are required.

Name

Your "Group" is the larger organization that your Agency belongs to; in most cases this is as simple as what US State you belong to. The Group is responsible for owning all the data collected within the PFS. If you need to create an entirely new group, you'll need to sign up for an account with a hosted database provider, and we'll give you instructions on the next page.

Group

Group password

Contact an administrator of the chosen group to get the password.

[OR Create New Group](#)

[Save](#)

3. 🎉 Tada! 🎉 You're in! You're now looking at the *PFS Dashboard*.

✓ Welcome!
✕

Your PFS Records

[+ New](#)

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
Download Your PFS Records and Reports					

Agency

[Edit](#)

Agency Title
California

Name	Email
Penelope Pennyloupe	matt...

[Manage Staff](#)

Stats

Customize

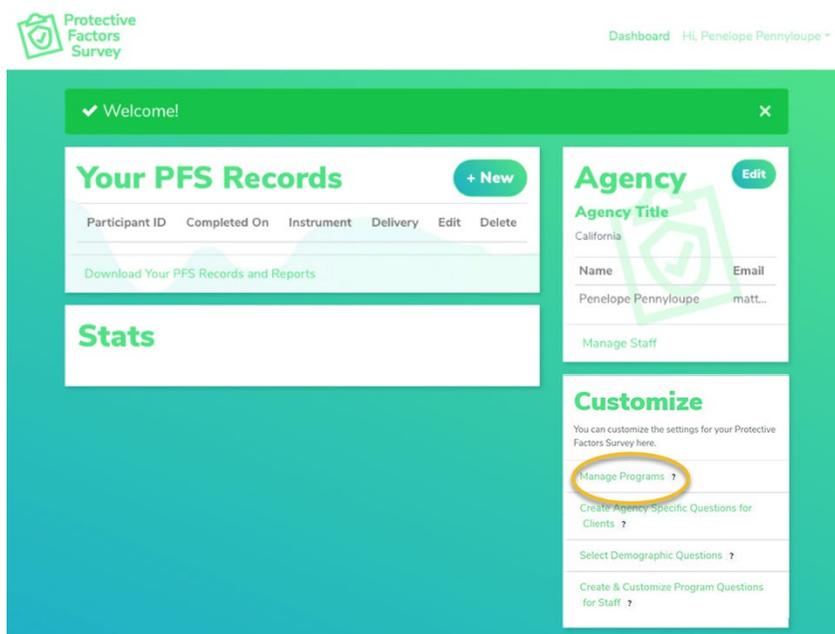
You can customize the settings for your Protective Factors Survey here.

- [Manage Programs](#)
- [Create Agency Specific Questions for Clients](#)
- [Select Demographic Questions](#)
- [Create & Customize Program Questions for Staff](#)

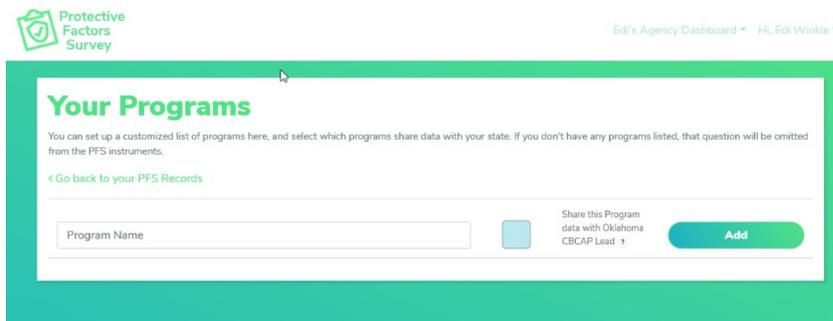
Program Set-up

It's time to customize your agency by setting up Programs. Select *Manage Programs* under customize.

NOTE: Program Set-up is a crucial step that allows you to sort and manage your data. It is also vital to share your data with your CBCAP State Lead or Group Owner, if applicable. If you need to share data with the group owner (i.e., a funder providing your access to the system), you must create at least one program and check the box to allow for data sharing for that data to be seen with the group owner.



Go to the *Your Programs* screen. There are a few items to consider as you set up programs.



1. **Programs need to be set up before any data entry.** Programs are a critical data organizing step and **MUST** be done before data entry. If you need to share data with your CBCAP Lead (or other

group owner providing access to the system), at least one program must be set up, and the box must be checked. This program will trigger the sharing mechanism.

NOTE: Failure to complete this step will result in a loss of data to your Lead and will cost support dollars to resolve.

2. Programs dictate parameters for data analysis. You can run reports on discrete programs or aggregate data as a whole. If you need to isolate a data set, you should create it as a discrete program. You may enter as many programs as needed.
 - a. For example, if you want to sort your data on funding stream and/or service type, you should create a program for the funding stream(s) and the service type(s). Then you can choose to sort data later in reports based on service type or funders, or both.
 - b. If you set up programs for funding source a, funding source b, and funding source c – you can run reports isolating each of those or just for b and c, or a and c. If you set up programs for home visiting, clothes closet, and parent support, you can run reports isolating those programs individually or consolidating any variation.
 - c. **If you are a CBCAP-funded agency participating in a statewide database, you need to be sure to check the box to share your data where required with your CBCAP State Lead Agency.** The checkbox can't be edited after program creation. Don't check the box for programs on which you want to collect data but are not currently CBCAP-funded.
 - d. **If you are a group owner and are setting up programs for your agency, you should check the box on every program created so you can run reports in the agency or group report features equally.** Setting up programs will allow you the same capabilities for data sort as CBCAP agencies, so you must complete this step as well.

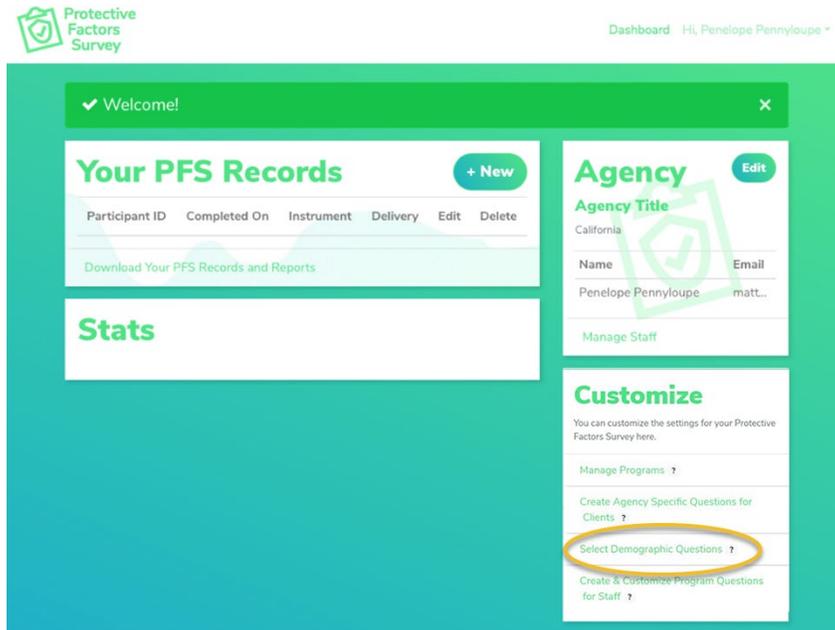
The screenshot shows the 'Your Programs' section of the Protective Factors Survey dashboard. At the top left is the logo for 'Protective Factors Survey'. At the top right, it says 'Edi's Agency Dashboard' and 'Hi, Edi Winkle'. Below the title, there is a brief instruction: 'You can set up a customized list of programs here, and select which programs share data with your state. If you don't have any programs listed, that question will be omitted from the PFS instruments.' A link '< Go back to your PFS Records' is on the left. The main form has a 'Program Name' input field, a checkbox (highlighted with a red circle) labeled 'Share this Program Data with Oklahoma CBCAP Lead ?', and a green 'Add' button.

To add a program you are sharing data on, add a program name, click the box, and click **Add**.

NOTE: You cannot edit this feature after program creation. Therefore, this step is crucial in the program set up to ensure you share data with your funder appropriately.

Demographics Set-Up

This feature allows you to edit demographics for your agency. Click on *Select Demographic Questions* in the Customize box from the dashboard screen.



You can customize the options provided in the demographic sections of the Protective Factors Survey during electronic administrations. For example, you can choose from including/excluding whole questions or customize options available under questions.

1. To toggle on/off questions, choose the check box next to the question title. If you uncheck that box, the question will not appear in the survey administration, so it does not matter what options are selected. If you wish for a question to appear, check the box next to the question title.
2. If you include a question and want to customize the options under the question - check the options you'd like to include.
3. You can also reset the default options that match the survey tool's official paper copy.

NOTE: If you are using paper administrations, you want to make sure you edit any paper copies to reflect your choices, so your data entry has the right questions/responses to match your system. These customizations will apply to all programs in your agency and will appear on every survey administration.

Demographic Questions

You can customize the set of options provided in the demographic sections of the Protective Factors Survey during electronic administrations. You can choose from including/excluding whole questions or customize options available under questions.

- 1 To toggle on/off questions, choose the check box next to the question title. If you uncheck that box, the question will not appear in the survey administration so it does not matter what options are selected. If you wish for a question to appear, make sure the box is checked next to the question title.
- 2 If you include a question and want to customize the options under the question - just check the options you'd like to include.
- 3 You can also [reset to the default options](#) which matches the official paper copy of the survey tool.

Note: If you are using paper administrations, you want to make sure you edit any paper copies to reflect your choices here so your data entry has the proper questions/responses to match your system.

[< Click back to your PFS Records](#)

Sex/Gender

- | | | |
|--|--|---|
| <input checked="" type="checkbox"/> Male | <input checked="" type="checkbox"/> Female | <input checked="" type="checkbox"/> Nonconforming / Nonbinary |
| <input type="checkbox"/> Other | <input checked="" type="checkbox"/> Prefer not to Answer | |

Age (in years)

This question does not have any choices.

Primary Language Spoken at Home

- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> English | <input checked="" type="checkbox"/> Spanish | <input type="checkbox"/> Armenian |
| <input type="checkbox"/> Cambodian | <input type="checkbox"/> Farsi | <input type="checkbox"/> Korean |
| <input type="checkbox"/> Tagalog | <input type="checkbox"/> Vietnamese | <input checked="" type="checkbox"/> Creole |
| <input checked="" type="checkbox"/> Mandarin | <input checked="" type="checkbox"/> Arabic | <input checked="" type="checkbox"/> Russian |
| <input checked="" type="checkbox"/> Other | | |

Race/Ethnicity

- | | | |
|---|--|--|
| <input checked="" type="checkbox"/> Native American or Alaskan Native | <input type="checkbox"/> Other Asian | <input checked="" type="checkbox"/> Black or African American |
| <input type="checkbox"/> Mexican, Mexican American, Chicano | <input type="checkbox"/> Puerto Rican | <input type="checkbox"/> Cuban |
| <input checked="" type="checkbox"/> Hispanic or Latino | <input checked="" type="checkbox"/> Native Hawaiian/Pacific Islander | <input type="checkbox"/> Guamanian or Chamorro |
| <input type="checkbox"/> Asian Indian | <input type="checkbox"/> Chinese | <input type="checkbox"/> Filipino |
| <input type="checkbox"/> Japanese | <input type="checkbox"/> Korean | <input type="checkbox"/> Vietnamese |
| <input type="checkbox"/> Samoan | <input type="checkbox"/> Other Pacific Islander | <input checked="" type="checkbox"/> Asian |
| <input checked="" type="checkbox"/> African National/Caribbean Islander | <input checked="" type="checkbox"/> Middle Eastern | <input checked="" type="checkbox"/> White (Non-Hispanic/European American) |
| <input checked="" type="checkbox"/> Multi-racial | <input checked="" type="checkbox"/> Other race | |

Relationship Status

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> Married | <input checked="" type="checkbox"/> Partnered | <input checked="" type="checkbox"/> Single - Never Married |
| <input checked="" type="checkbox"/> Divorced | <input checked="" type="checkbox"/> Widowed | <input checked="" type="checkbox"/> Separated |

Family Housing

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> Own | <input checked="" type="checkbox"/> Rent | <input checked="" type="checkbox"/> Shared Housing with relatives / friends |
| <input checked="" type="checkbox"/> Temporary | <input checked="" type="checkbox"/> Homeless | |

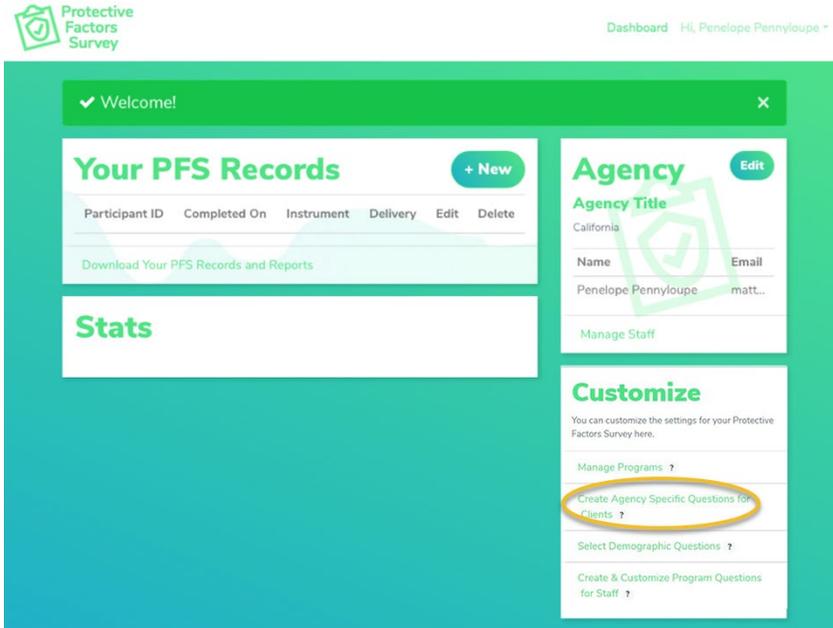
Family Income

Save

Don't forget to click save

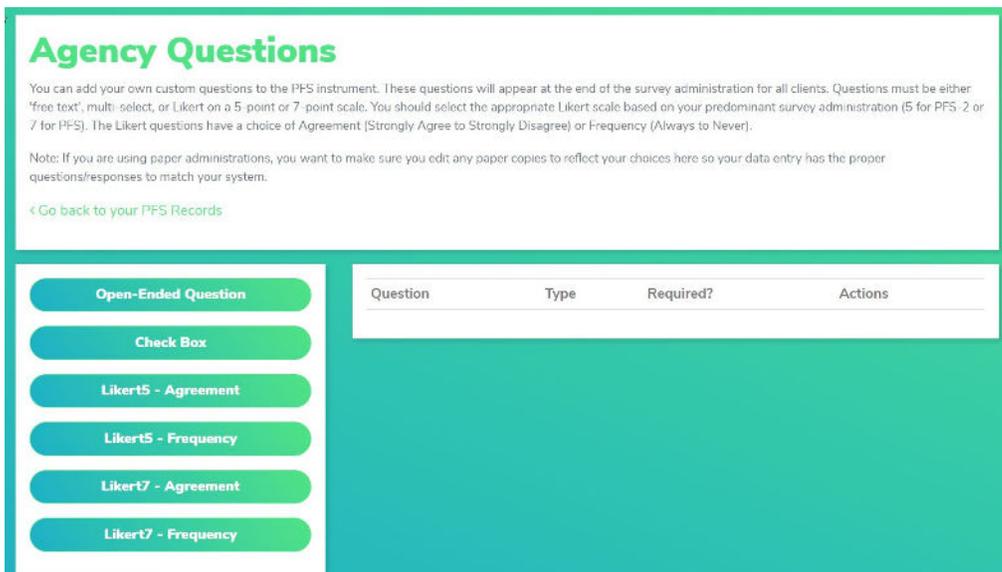
Create Custom Questions for Clients

You can create custom questions for clients that will be used within your agency survey administrations. Click on *Create Agency Specific Questions for Clients* in the Customize box on your agency dashboard.



Once you click *Create Agency-Specific Questions for Clients* you will be taken to this interface. You can define four types of questions.

- Open-Ended Question
- Check Box
- Likert- Agreement (on a 5-point or 7-point scale)
- Likert- Frequency (on a 5-point or 7-point scale)

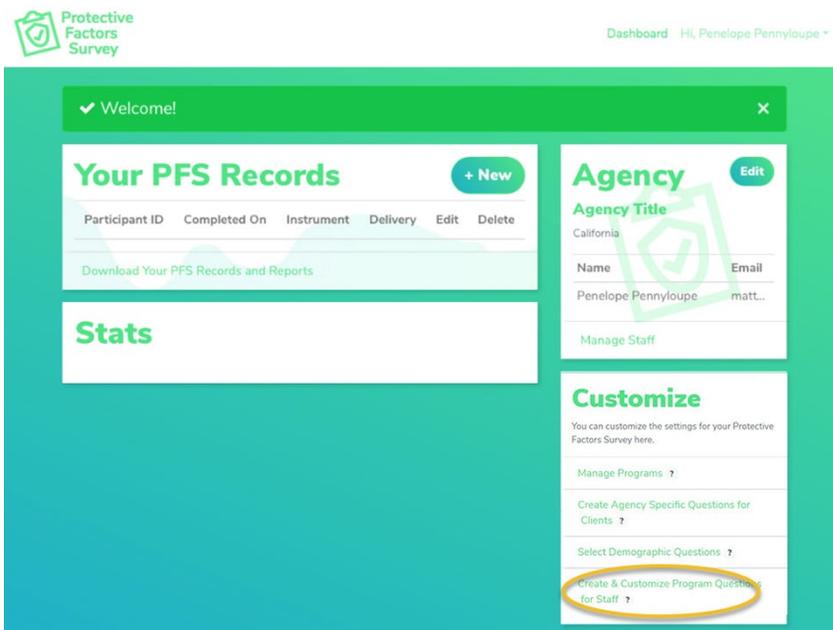


To define questions, click on the button for the type of question you wish to establish and follow the interface. If you want the question to be a required item, click the box and select save changes.

NOTE: These are applicable across all programs at the Agency Level. They cannot be program-specific.

Create and Customize Program Questions for Staff

You can customize the questions displayed in the program information section (staff-facing) of the electronic survey administrations. Click on *Create & Customize Program Questions for Staff* in the Customize box on your agency dashboard.



Once you click *Create & Customize Program Questions for Staff* you will be taken to this interface. Here you can do two different activities.

First, you can customize the set of program questions of the Protective Factors Survey for staff to answer when they set up the client survey. Check the box next to the question for which options you'd like to include. You can also reset the default options that match the survey tool's official paper copy.

Standard Program Questions

You can customize the set of program questions of the Protective Factors Survey for staff to answer when they set up the client survey. Check the box next to the question for which options you'd like to include. You can also [reset to the default options](#) which matches the official paper copy of the survey tool.

Save

[Go back to your PFS Records](#)

- How was the survey completed?**
- How was the client referred?**
- Has the participant been reported to Child Protective Services?**
- If yes, when?**
- If yes, was the report substantiated?**
- Identify the type of program that most accurately describes the services the participant is receiving. (Select all that apply)**
- If you are using a specific curriculum, please name it below**
- Answer at Pre-Test: Number of hours of service offered to the participant**
- Answer at Post-Test: Number of hours of service received by the participant**

Next, you can add your custom questions to the PFS instrument. These questions will appear during the staff facing questions in the “Set-up” phase of the survey.

NOTE: If you are using paper administrations, you want to make sure you edit any paper copies to reflect your choices here, so your data entry has the right questions/responses to match your system.

You can define four types of questions.

- a. Open-Ended Question
- b. Check Box
- c. Likert- Agreement (on a 5-point or 7-point scale)
- d. Likert- Frequency (on a 5-point or 7-point scale)

Custom Program Questions

You can add your own custom questions to the PFS instrument. These questions will appear during the staff facing questions in the "set-up" phase of the survey. Questions must be either "free text", multi-select, or Likert on a 5-point or 7-point scale. You should select the appropriate Likert scale based on your predominant survey administration (5 for PFS-2 or 7 for PFS). The Likert questions have a choice of Agreement (Strongly Agree to Strongly Disagree) or Frequency (Always to Never).

Note: If you are using paper administrations, you want to make sure you edit any paper copies to reflect your choices here so your data entry has the proper questions/responses to match your system.

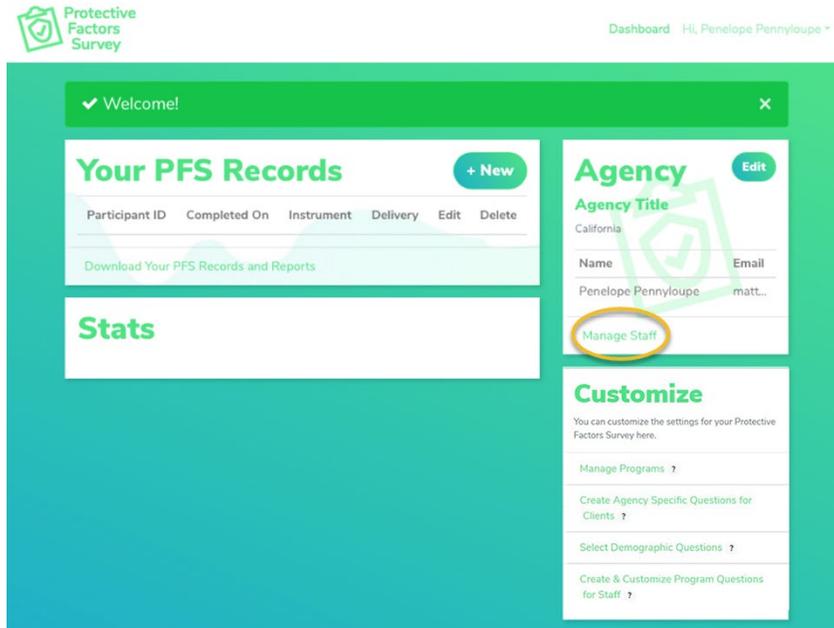
<p>Open-Ended Question</p> <p>Check Box</p> <p>Likert5 - Agreement</p> <p>Likert5 - Frequency</p> <p>Likert7 - Agreement</p> <p>Likert7 - Frequency</p>	<table><thead><tr><th>Question</th><th>Type</th><th>Required?</th><th>Actions</th></tr></thead><tbody></tbody></table>	Question	Type	Required?	Actions
Question	Type	Required?	Actions		

To define questions, click on the button for the type of question you wish to establish and follow the interface. If you want the question to be a required item, click the box and select save changes.

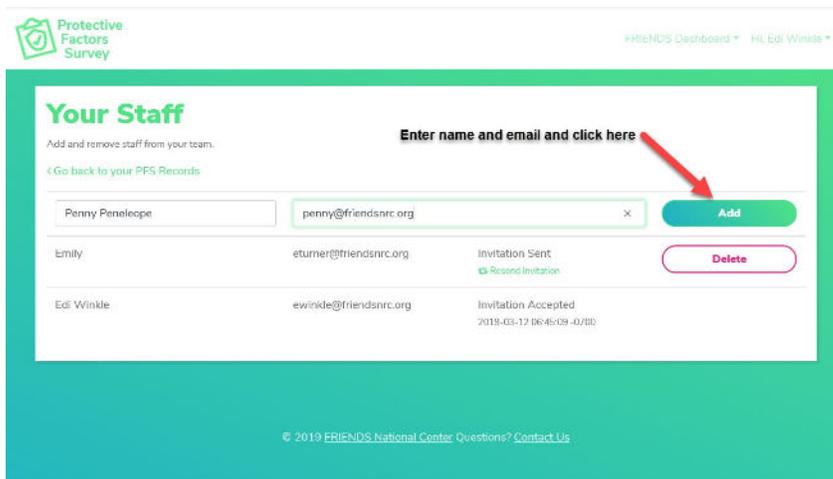
NOTE: These are applicable across all programs at the Agency Level. They cannot be program-specific.

Edit/Add Staff

1. To edit or add staff to your agency, on the main Dashboard, click on *Manage Staff*.

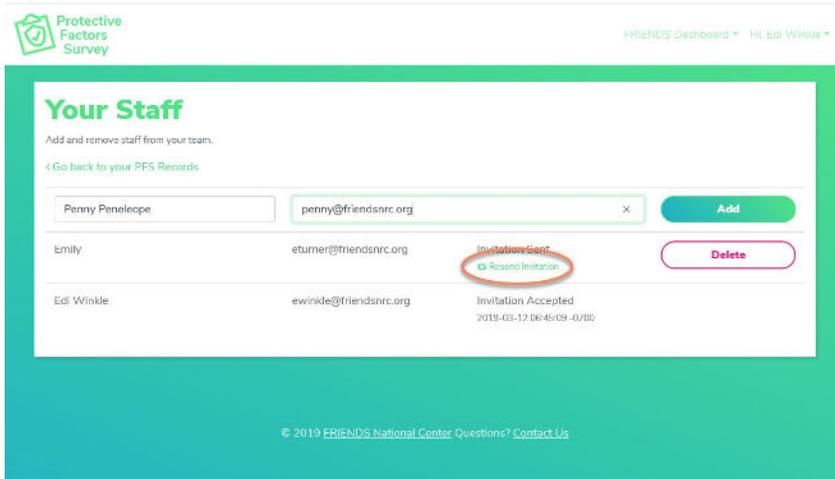


2. To invite staff to participate in the system, enter their name and an email address and click *Add*.



3. If a staff member deletes the email or fails to respond, click the *resend invitation*, and it will generate a new invite for them.

NOTE: Be sure to have your staff check junk or spam folders if they are not finding the email after a couple of minutes



Agency Staff Account Set-up

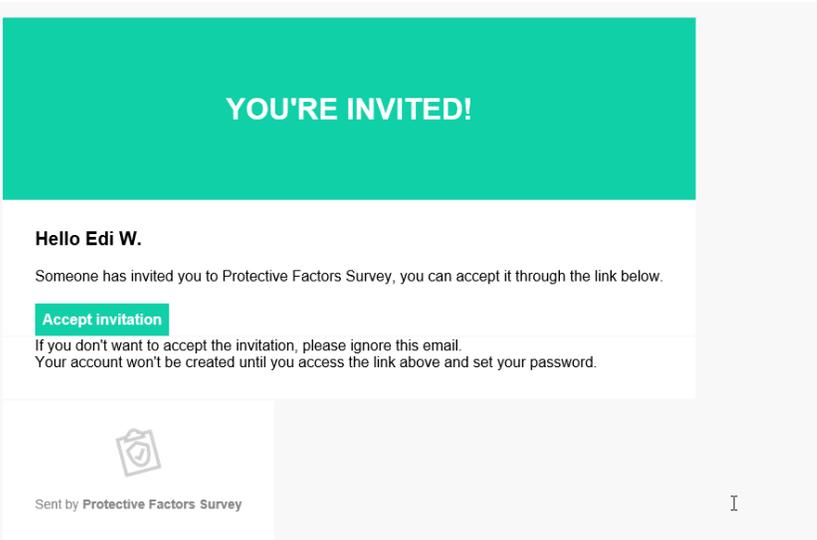
1. You receive an email and don't know what to do next.

NOTE: Be sure to check your junk or spam folder if you don't receive the email after a couple of minutes.

Invitation instructions

Protective Factors Survey <no-reply@friends-pfc.com>
To: FRIENDS Admin

i If there are problems with how this message is displayed, click here to view it in a web browser.
We could not verify the identity of the sender. Click here to learn more.

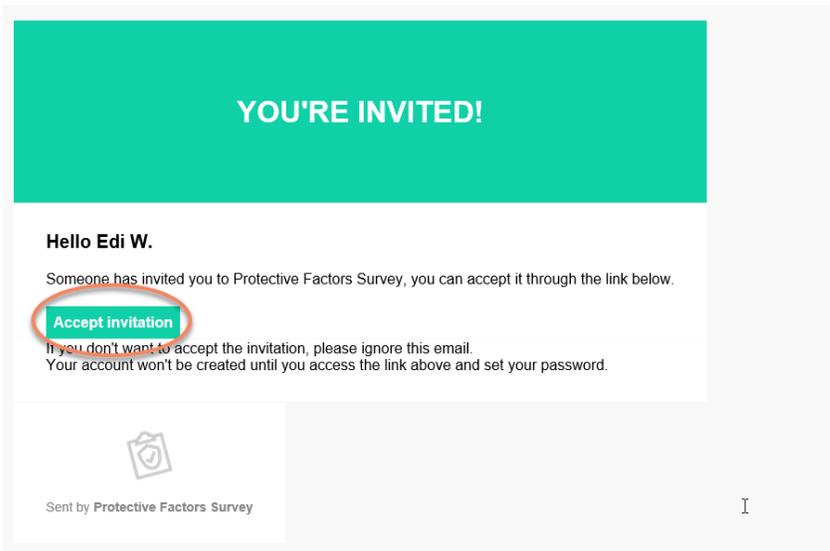


2. Click on the green *Accept Invitation* button

Invitation instructions

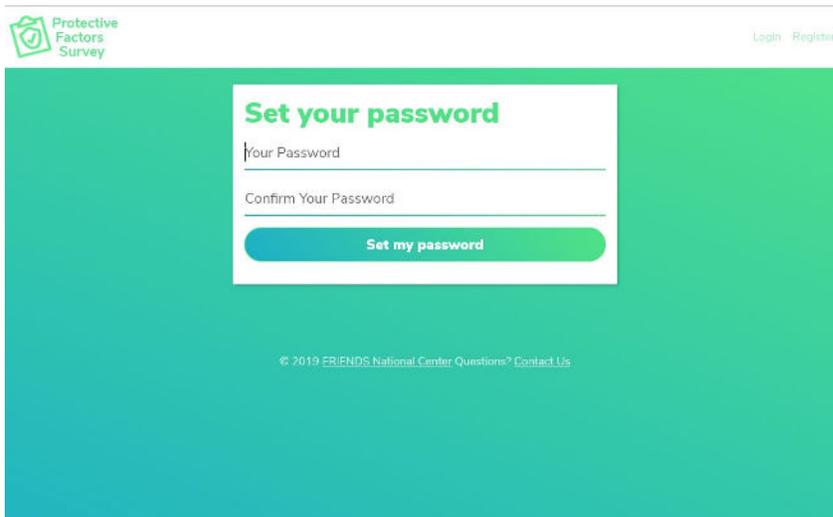
 Protective Factors Survey <no-reply@friends-pfc.com>
To: FRIENDS Admin

 If there are problems with how this message is displayed, click here to view it in a web browser. We could not verify the identity of the sender. Click here to learn more.

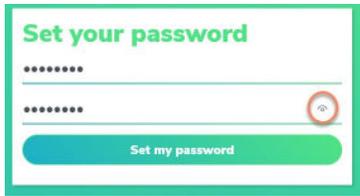


If your email system does not allow you to click through links, hover over the green button with your cursor and then right-click. Next, select copy hyperlink, open a browser window and paste the address into your browser.

3. Once you click the link you will be taken to the system and asked to create a password. Pick something secure, but you will remember.



NOTE: If you want to make sure you know what you typed, click on the eyeball at the end of the line and it will show you.



4. You have successfully set up your account and are ready to start using the system. Visit the **Administering Surveys** on the next page to learn more.

Administering Surveys

You have set up your account and are ready to begin administering the survey. If you need information on choosing the right survey for your agency's needs, visit <https://friendsnrc.org/evaluation/protective-factors-survey/> to learn about the different versions of the survey and to find supporting information on the research behind the tools along with documentation on their validity and reliability.

There are a couple of notes on survey data to be aware of as you proceed.

- Surveys can be administered utilizing various electronic methods from within the system. But you should maintain strict practices around how you support participants in answering the questions. Visit <https://friendsnrc.org/evaluation/protective-factors-survey/> and download a copy of the user manual for the survey type you are using for guidance on best practices in survey administration.
- To view the responses from the client on surveys that are administered electronically, click on the *Completed On* date, and it will show the responses on the screen.
- Surveys administered electronically can only edit the program datasheet questions (completed by staff before administration) after the survey is submitted. This is to protect data integrity.
- Surveys entered by staff from a previous pen and paper administration can be edited for errors in data entry.
- If administering a traditional pre-post version of the survey, the system automatically records the first entry into the system using a client id as the pre-test and all subsequent records as the post-test. If you are entering pen and paper administrations, enter the data chronologically to ensure that you have the proper administrations labeled and pre-tests and post-tests within the system.
- Devices being utilized to administer the survey to clients should have the autofill options turned off so clients can't see previous answers to questions. To learn how to address those features, visit the proper support for your browser type or view the directions below.

Chrome

Click on the three dots to the right of the menu bar and select *Settings*. Choose *Autofill* from the options at the left and then scroll down and select *Addresses and more*. Turn this feature off.

Internet Edge

Click on the three dots to the right of the menu bar and select *Settings*. Choose *Passwords & autofill* from the left menu and turn off *Save form data*.

Internet Explorer

Click on the *Gear* icon to the right of the menu bar and select *Content* and then click on the *AutoComplete Settings* and ensure forms is unchecked.

Firefox

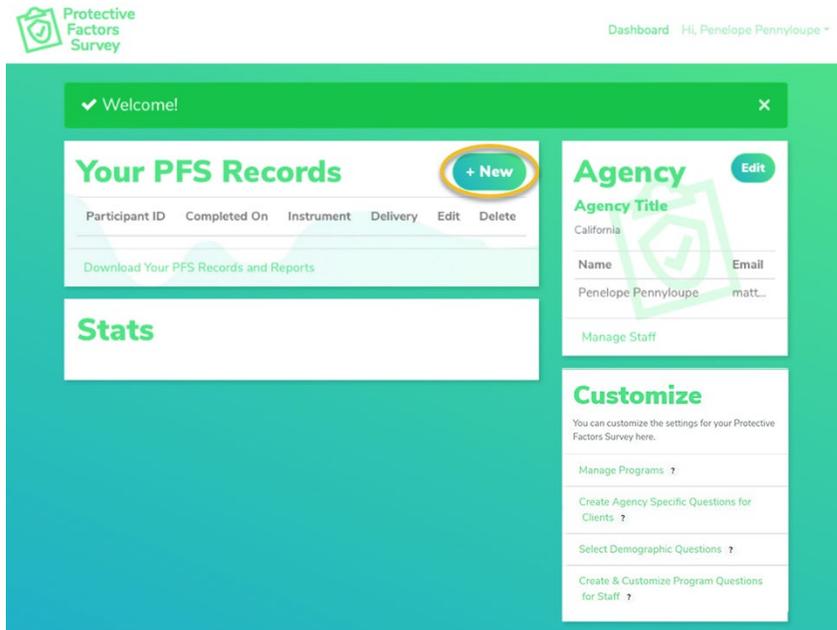
Click on the three lines to the right of the menu bar and select *Options*. Click on the *Privacy & Security* from the left menu, scroll down to *Forms and Autofill*, and unclick the box. Also, scroll to *History* and choose *never remember history*.

Safari

Click on the word Safari at the top of the screen (Safari menu). Then click preferences and choose AutoFill. Next, uncheck “using info from my contacts card/address book card” and “other forms” and then click done.

Initiating Survey

1. To begin a new survey administration, click on the *+New* button in the Your PFS Records box.



2. Select the version of the survey you are administering. Then, click on the version you are using. For this example, we will use the *PFS-2 Retrospective*.



3. Add the participant identifier, survey completion date, program start date, and, if applicable, the program end date. Any item preceded with a ***** is a required item. Click *Next*.

NOTE: The participant identifier is the marker that will link multiple administrations of the survey to the same participant. Agencies should use existing case/client ID numbers without collecting any personally identifying information, such as participant names or birth dates.

Protective Factors Survey

Edi's Agency Dashboard * Hi, Edi Winkie *

PFS-2 - Retrospective Survey

This information is to be completed by staff to collect program information.

* Participant identifier
I 00291901

* Completed on
8/26/2019

* Program start on
8/1/2019

Program end on
mm/dd/yyyy

Back Next

NOTE: To use the calendar feature in the date fields, click on the calendar that appears and select the appropriate date. The view of the calendar will vary based on the browser you are using.

4. This is the program information data. You might have customized the information displayed/collected here in the *Create and Customize Program Questions for Staff* (see pages 21-23). Remember, items preceded by ***** are required to proceed. If you accidentally click a wrong answer, simply click again to unclick that answer. Click *Next*.

This page is to be completed by staff to collect program information. The following pages are to be completed by the participant

Program(s) Participated In:

- Home Visiting Primary
- Parent Ed Groups
- CBCAP funded

How was the survey completed?

- In a face-to-face interview
- By the participant with assistance available from program staff to explain items as needed
- By the participant without program staff present

How was the participant referred to your program?

- Self-Referred
- Child Protective Services
- Court
- Community Program
- Other

Has the participant been reported to Child Protective Services?

- Yes
- No
- Not Sure

If yes, when?

- Before starting the program
- During the program
- After completing the program

If yes, was the report substantiated?

- Yes
- No
- Not Sure
- No, referred to Differential Response
- Yes, referred to Differential Response
- Not Applicable

Identify the type of program that most accurately describes the services the participant is receiving. (Select all that apply)

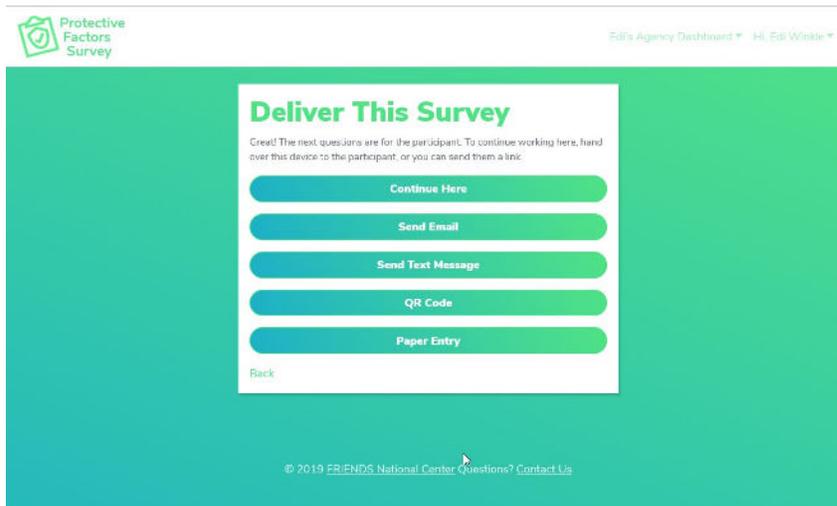
- Advocacy (self, community)
- Healthy Relationships
- Home Visiting
- Homeless/Transitional Housing
- Parent Education
- Parent/Child Interaction
- Parent Support Group
- Planned and/or Crisis Respite
- Resource and Referral
- Skill Building/Ed for Children
- Other

If you are using a specific curriculum, please name it below

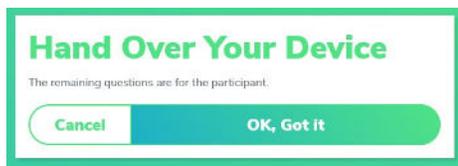
Answer at Pre-Test: Number of hours of service offered to the participant

Answer at Post-Test: Number of hours of service received by the participant

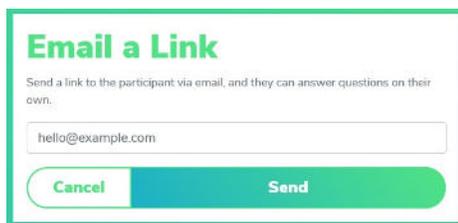
5. You now have options for proceeding with administering the survey. You can:



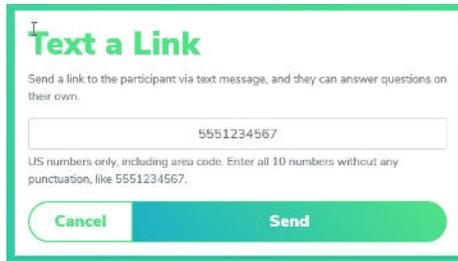
- a. **Continue Here**- you will get a message to hand off your device (phone, tablet, laptop, desktop to the client to begin the survey)



- b. **Send Email**- generate a survey link to the email address of your choice. The designated email address will receive an email with a link. By clicking on the link, the client will be able to complete the survey specific to their client id.



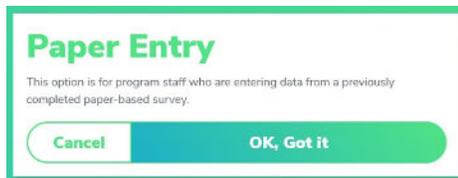
- c. **Send Text Message**- generate a survey link to a cell phone number for administering the survey. This could be your number to have the link ready for a client later or the client's number to complete the survey on their own device.



- d. **QR Code**- this will generate a code that can be scanned for completing the survey specific to the client.



- e. **Paper Entry**- this option allows you to complete data entry from a paper and pencil administration. Choose this if you have the completed survey(s) on hand for data entry. This entry is intended for STAFF ONLY. Do not choose this option for administration directly to a client.

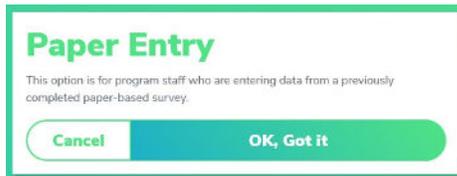


NOTE: The link generated in these various options is ALL CLIENT SPECIFIC. The links can only be used once and are tied to the appropriate client id.

- The client will complete the survey using the link provided. The survey system is designed to respond to the device being used- phone, tablet, laptop, desktop. Once they complete the survey, you will be able to view the results on your Dashboard. Be sure to offer support to the client in completing the survey, even if you are using these electronic options. They may have questions. You should also provide them a heads up that they will receive a link to know to expect it and reach out to you if they have any questions.

Paper Entry Instructions

- Once you enter the program information and click on *Paper Entry*, you will receive this message:



*NOTE: Do not use this option if handing your device to a client. This option does not lock the system to prevent clients from accessing the **Agency Dashboard** after completion and they can access survey data once completed.*

You can begin your data entry now. All survey questions will be on one page and you will just need to scroll down to enter all the items. Once entered, click *+Add Child*.



2. Enter child information. You may enter as many children as needed by clicking *+Add Child* after saving each record. Remember *** indicates a required field.

Child #1 ×

*** Date of Birth



Male

Female

Nonconforming / Nonbinary

Prefer not to Answer

*** Your relationship to child:

Birth Parent

Adoptive Parent

Step-Parent

Grand/Great-Grandparent

Sibling

Other Relative

Foster Parent

Other

Is this child in the home?

Yes

No

Save

3. Once all children are entered, click *Submit*.

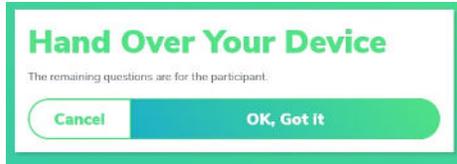
The screenshot shows the 'Protective Factors Survey' interface. At the top left is the logo. Below it is a list of benefit categories, each in a light green rounded rectangle. The categories are: Medicaid, Earned Income Tax Credit (EITC), TANF, Head Start / Early HS, SS, SSDI, Unemployment Benefits, State Health Insurance, None of the above, and Other. The 'Head Start / Early HS' and 'SSDI' categories are highlighted with a darker green background. Below the list is a text prompt: 'Please tell us about your children, or children for whom you are a primary caregiver.' This is followed by a white rounded rectangle containing the text 'Child #1' and '08/29/2015'. Below this is a green button with a plus sign and the text '+ Add Child'. At the bottom is a green button with the text 'Submit'.

4. Once you click submit, you have two options- *Add a new record* or *Go back to your Agency Dashboard*.

The screenshot shows the 'You Are Finished' confirmation screen. At the top left is the logo. The main heading is 'You Are Finished' in bold green text. Below it is the text 'Thanks for completing this survey!'. There are two buttons: a green button with the text 'Add a new record' and a light green button with the text 'Go back to your Agency Dashboard'.

Client Entry

1. Once you enter the program information sheet information, click on *Continue Here*. You will receive this message:



Click *OK, Got It*, and allow the client to access your device (phone, tablet, laptop, or desktop).

2. The client can now proceed to answer the questions in the survey. You may provide guidance as you would in a paper administration following your agency procedures. For our purposes, we are using the PFS-2 Retrospective. As the client answers the questions, they will click *Next*. The device being used will dictate how many items will be on each screen before clicking *Next*. Remember, if they accidentally click on a wrong answer, they can click again, and it will unmark the answer selected.

The image shows a screenshot of the "Protective Factors Survey" interface. At the top left, there is a logo with a shield and the text "Protective Factors Survey". Below the logo, the text "BEFORE: There are things we do as a family that are special just to us." is displayed. Underneath this text are five horizontal bars representing a Likert scale. The second bar from the top is highlighted in a darker green, indicating it is the selected response. The options are: "Not at all like my life", "Not much like my life", "Somewhat like my life", "Quite a lot like my life", and "Just like my life". Below this section, the text "NOW: There are things we do as a family that are special just to us." is displayed. This is followed by another set of five horizontal bars for the same Likert scale. The bottom-most bar is highlighted in a darker green and contains the word "Next".

- A progress bar will appear at the top of the screen to show how far they are in completing the survey questions.

The screenshot shows the 'Protective Factors Survey' interface. At the top left is the survey logo. A progress bar at the top indicates 14% completion, with a red arrow pointing to it. Below the progress bar is an 'Introduction' section with the text 'BEFORE: My child misbehaves just to upset me.' followed by five horizontal buttons for response options: 'Not at all like my life', 'Not much like my life', 'Somewhat like my life', 'Quite a lot like my life', and 'Just like my life'. Below this is another section with the text 'NOW: My child misbehaves just to upset me.' followed by the same five response options.

- The client will enter child information. They can enter as many children as needed by clicking *+Add Child* after each record. Remember * indicates a required field.

The screenshot shows a form titled 'Child #1' with a close button (X) in the top right corner. The form contains the following fields and options:

- * Date of Birth:** A text input field with a calendar icon and the placeholder 'mm/dd/yyyy'.
- Gender:** Four buttons: 'Male', 'Female', 'Nonconforming / Nonbinary', and 'Prefer not to Answer'.
- * Your relationship to child:** Eight buttons: 'Birth Parent', 'Adoptive Parent', 'Step-Parent', 'Grand/Great-Grandparent', 'Sibling', 'Other Relative', 'Foster Parent', and 'Other'.
- Is this child in the home?:** Two buttons: 'Yes' and 'No'.
- Save:** A large green button at the bottom.

- Once all children are entered, they will click *Next*.

A screenshot of the survey form showing 85% completion. The form has a green header with the logo and title. Below the header is a progress bar at 85%. The main content area contains the text "Please tell us about your children, or children for whom you are a primary caregiver." followed by a rounded rectangular box containing "Child #1" and "04/02/2012". Below this is a green button with a white plus sign and the text "+ Add Child". At the bottom, there are two buttons: "Back" on the left and "Next" on the right, both with white text on a green background.

- When they click *Next* they will receive this message. There is no navigation back to the *Dashboard* or any other part of the system from this screen. This prevents clients from accessing areas they are not permitted to see within the system.

To re-enter the system, you will need to close the browser window and then reopen and type in the system address.

A screenshot of the "You Are Finished" message. It features a green header with the logo and title. Below the header is a progress bar at 100%. The main content area contains the text "You Are Finished" in a large, bold, green font, followed by "Thanks for completing this survey!" in a smaller, black font.

Understanding PFS Records

The system offers users the opportunity to manage the data collected in the system in various ways. This information is contained in the *Your PFS Records* box on the Dashboard. The features here allow you to view responses, edit errors in data entry, and delete erroneous records.

Your PFS Records + New

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
12345	11/09/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete
1006202101	10/04/2021	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0.1.2	06/29/2021	PFS 1.0 - English	Qr Code Delivery	Edit	Delete
0.0.1	06/29/2021	PFS 1.0 - English	Hand Delivery	Edit	Delete
12345	06/10/2021	PFS-2	Hand Delivery	Edit	Delete

Agency Edit

Brand New Box

PFS Test

Name	Email
Edi W.	admin@...
Test	mattkirkl...
Nathan Clark	nathan...
Josh Fike	josh@br...
Matt Kirkland	matt@br...
matt	mattkirkl...
FRIENDS	friends...
Edi	ewinkle...
Vickie Ybarra	vickie.yb...

Manage Staff

Viewing Participant Responses

1. The Participant Responses are displayed by Participant ID in the *Your PFS Records* box. The records are sorted by the Completed On date and displayed with the most recent records first.
2. To view an individual participant response, find the record in the list you wish to view and click on the *Completed On* date.

Your PFS Records + New

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
12345	11/09/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete
1006202101	10/04/2021	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0.1.2	06/29/2021	PFS 1.0 - English	Qr Code Delivery	Edit	Delete
0.0.1	06/29/2021	PFS 1.0 - English	Hand Delivery	Edit	Delete
12345	06/10/2021	PFS-2	Hand Delivery	Edit	Delete

Agency Edit

Brand New Box

PFS Test

Name	Email
Edi W.	admin@...
Test	mattkirkl...
Nathan Clark	nathan...
Josh Fike	josh@br...
Matt Kirkland	matt@br...
matt	mattkirkl...
FRIENDS	friends...
Edi	ewinkle...
Vickie Ybarra	vickie.yb...

Manage Staff

3. After clicking on the date, you will be taken to a screen to view the response.

Your PFS Record

[Go back to your dashboard](#)

Participant ID	12345
Completed On	11/09/2021
Survey ID	PFS-2 Concrete Supports

Survey Details

Language	English
Delivery	Hand Delivery
Program Start On	11/05/2021
Program End On	

Survey Response

How was the survey completed? By the participant with assistance available from program staff to explain items as needed

4. You can scroll the screen to view the record and use the print option for your browser to print the record if needed.

*NOTE: You can search by participant id and program in the basic search box in the **Download Your PFS Records and Reports** section of the system. In addition, you can click on **Advanced Options** in the box and get more options.*

Editing Participant Responses

1. There are times that records need to be edited, and the system allows for editing various details depending on the method of administration/entry of the survey. The various types of entry are:
 - a. Hand Delivery (you handed the device over to the participant)
 - b. SMS, QR Code, Email Delivery
 - c. Paper Entry (for internal data entry from a paper/pencil administration)
2. Hand Delivery and SMS, QR Code, and Email delivery allow you to edit the program information questions (participant id, survey, and program dates, how was the survey completed, etc.) that are filled out by staff when setting up the survey. These are the only items that can be edited. Participant responses can't be changed once they submit their survey.
3. Paper Entry responses can be edited in their entirety. The system knows that sometimes errors in data entry happen and allows for the ability to correct errors.
4. To edit, find the record in the list you wish to edit and click on the *Edit* option.

Your PFS Records + New

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
12345	11/09/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete
1006202101	10/04/2021	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0.1.2	06/29/2021	PFS 1.0 - English	Qr Code Delivery	Edit	Delete
0.0.1	06/29/2021	PFS 1.0 - English	Hand Delivery	Edit	Delete
12345	06/10/2021	PFS-2	Hand Delivery	Edit	Delete

Agency Edit

Brand New Box

PFS Test

Name	Email
Edi W.	admin@...
Test	mattkirkl...
Nathan Clark	nathan...
Josh Fike	josh@br...
Matt Kirkland	matt@br...
matt	mattkirkl...
FRIENDS	friends...
Edi	ewinkle...
Vickie Ybarra	vickie.yb...

Manage Staff

5. This will take you through the record and allows you to edit the responses. Finally, click the submit button once edits are completed.

NOTE: A reminder that Paper Entry does not lock the system to prevent clients from accessing the Agency Dashboard after completion. DO NOT use this option with clients.

Deleting Participant Responses

1. If a response was entered erroneously or there are errors in the survey that need to be corrected and can't be edited, you may wish to delete the record and start over.
2. Find the record you need to delete and click on the *Delete* option to perform this action.

Your PFS Records + New

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
12345	11/09/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete
1006202101	10/04/2021	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0.1.2	06/29/2021	PFS 1.0 - English	Qr Code Delivery	Edit	Delete
0.0.1	06/29/2021	PFS 1.0 - English	Hand Delivery	Edit	Delete
12345	06/10/2021	PFS-2	Hand Delivery	Edit	Delete

Agency Edit

Brand New Box

PFS Test

Name	Email
Edi W.	admin@...
Test	mattkirkl...
Nathan Clark	nathan...
Josh Fike	josh@br...
Matt Kirkland	matt@br...
matt	mattkirkl...
FRIENDS	friends...
Edi	ewinkle...
Vickie Ybarra	vickie.yb...

Manage Staff

3. The system will ask if you are sure you wish to delete the response; if you are sure, click *OK*.

ncies/pg>wy8

pfsonline.friendsnrc.org says
Are you sure you want to delete this response?

OK Cancel

Records

+ New

leted

	Instrument	Delivery	Edit	Delete
/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete

Agency

Brand New Box

PFS Test

Name

Edi W.

Test

NOTE: This action can't be undone, and the record can't be recovered. Only delete the record if you are confident you don't need it.

Running Reports

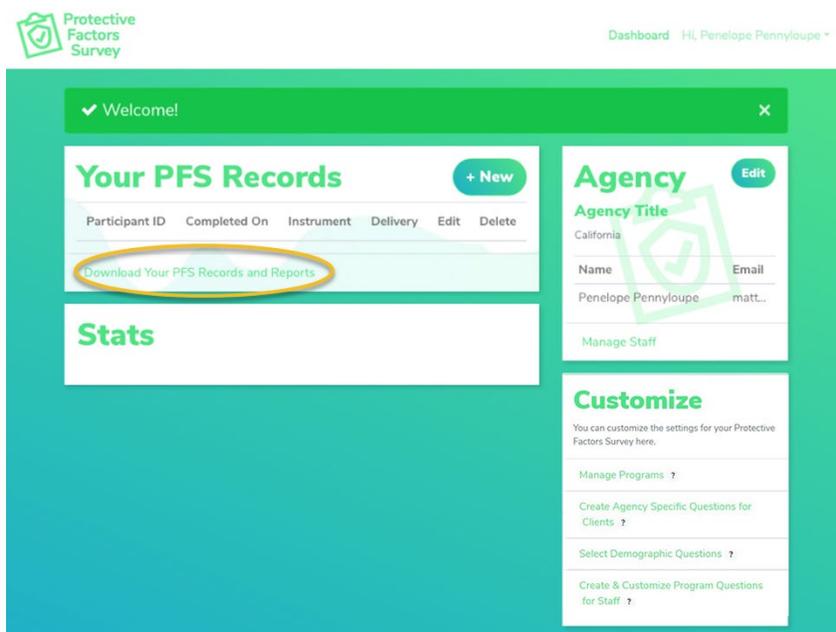
The system has predefined reports that support agencies' understanding and using their data. This section will walk through the predefined reports and guide how to download raw data for use in outside data and statistical programs.

Also, users can run searches of records based on specific search parameters.

The system has the following reports predefined:

- *Participant Data*
- *Child Data*
- *Program Data*
- *PFS Subscales*
- *Custom Questions*

Reports can be accessed from the Dashboard by clicking the link in the *Your PFS Records* block.



Searching and Sorting Records

4. All records are sorted on Instrument Type. You can't combine records across report types (PFS-2 traditional and PFS-2 Retrospective, for example) in any generated reports within the system. You can search by participant id and program in the basic search box or click on *Advanced Options* and get more options.
5. You can navigate your records here in the *Your PFS Records* box. This includes selecting records for editing and downloading raw data into excel for further analysis. You can also view individual responses by clicking on the *Completed On* date.

Your PFS Records

See quick access to all your records. Use the search filters to the right to narrow your results, then download them as: [Excel](#)

[Go back to your dashboard](#)

Participant ID	Completed on	Survey	Delivery	Edit	Delete
08291903	08/29/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09291904	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08291905	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301901	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301902	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301903	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301904	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301905	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09051901	08/28/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09051911	09/05/2019	PFS 1.0 - English	Paper Entry	Edit	Delete
09051911	09/05/2019	PFS 1.0 - English	Paper Entry	Edit	Delete
09181901	09/18/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0521202001	05/21/2020	PFS-2 - Retrospective	Hand Delivery	Edit	Delete

Reports

- [PFS Summary: Participant Data](#)
- [PFS Summary: Child Data](#)
- [PFS Summary: Program Data](#)
- [PFS Summary: PFS Subscales](#)
- [PFS Summary: Custom Questions](#)

Search

Participant ID

Instrument

Matched Pre-Post

Programs:

Home Visiting Primary

Parent Ed Groups

CBCAP funded

[Advanced Options](#)

[Search](#) [Reset](#)

Participant Data Report

1. Click on *PFS Summary: Participant Data* in the Reports block from the Dashboard.

Your PFS Records

See quick access to all your records. Use the search filters to the right to narrow your results, then download them as: [Excel](#)

[Go back to your dashboard](#)

Participant ID	Completed on	Survey	Delivery	Edit	Delete
08291903	08/29/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09291904	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08291905	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301901	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301902	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301903	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301904	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301905	08/30/2019	PFS-2 - Retrospective	Hand	Edit	Delete

Reports

- [PFS Summary: Participant Data](#)
- [PFS Summary: Child Data](#)
- [PFS Summary: Program Data](#)
- [PFS Summary: PFS Subscales](#)
- [PFS Summary: Custom Questions](#)

Search

Participant ID

Instrument

Matched Pre-Post

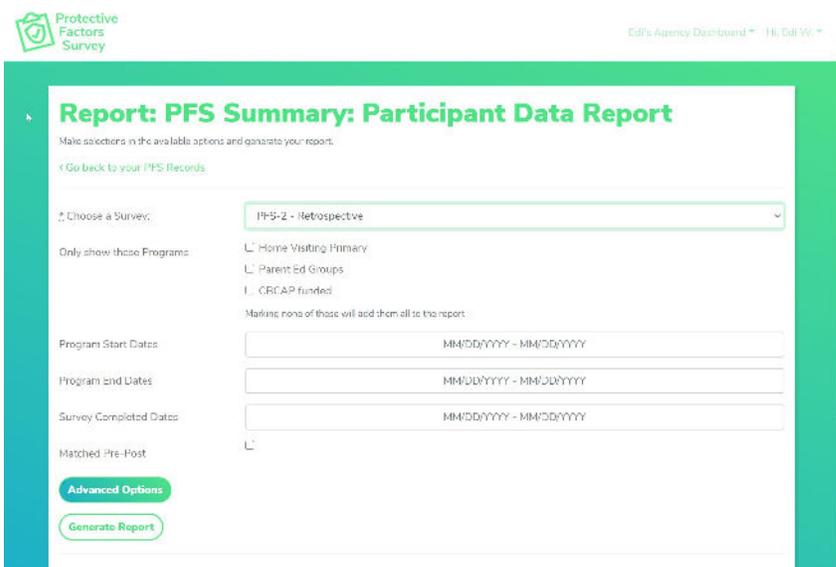
Programs:

Home Visiting Primary

Parent Ed Groups

CBCAP funded

2. Choose the survey and which program(s) you want to display records from. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report* or click *Advanced Options* for more search criteria.



- Once you click *Generate Report*, scroll down to see the demographic information. Here is a sampling of the type of data generated.

PFS-2 - Retrospective | PFS Summary: Participant Data Report [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13
	Mean Standard Deviation
Average Age	29.62 8.14
Sex/Gender	Count Percent
Number of Families Reported	13 100.0%
Male	1 7.69%
Female	11 84.62%
Nonconforming	1 7.69%
Other Gender	0 0.0%
Decline	0 0.0%

- Remember, you can also download your data for use in other programs for more in-depth analysis. To download, click the *Download Report* button in the upper right corner.

PFS-2 - Retrospective | PFS Summary: Participant Data Report

Download Report

Report Generated: 01/21/2022, Programs: All | Start Dates: 01/01/2000 - 01/21/2021 | End Dates: 01/01/2000 - 01/21/2021 | Completed Dates: 01/01/2000 - 01/21/2021

Total Number of Participant IDs	13
	Mean Standard Deviation
Average Age	26.62 8.14
Sex/Gender	Count Percent
Number of Families Reported	13 100.0%
Male	1 7.69%
Female	11 84.62%
Nonconforming	1 7.69%
Other Gender	0 0.0%
Decline	0 0.0%

Child Data Report

1. Click on *PFS Summary: Child Data* in the Reports block from the Dashboard.

The screenshot shows a dashboard with two main sections: 'Your PFS Records' and 'Reports'. The 'Your PFS Records' section contains a table with columns for Participant ID, Completed on, Survey, Delivery, Edit, and Delete. The 'Reports' section lists several report options, with 'PFS Summary: Child Data' circled in orange. Below the reports is a 'Search' section with input fields for Participant ID and Instrument, and checkboxes for 'Matched Pre-Post' and 'Programs' (Home Visiting Primary, Parent Ed Groups, CBCAP funded).

2. Choose the survey and which program(s) you want to display records from. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report* or click *Advanced Options* for more search criteria.

Report: PFS Summary: Child Data Report

Make selections in the available options and generate your report.

[Go back to your PFS Records](#)

Choose a Survey:

Only show these Programs:

- Home Visiting Primary
- Parent Ed Groups
- CBCAP funded

Marking none of these will add them all to the report.

Program Start Dates:

Program End Dates:

Survey Completed Dates:

Matched Pre Post:

[Advanced Options](#)

[Generate Report](#)

- Once you click *Generate Report*, scroll down to see the child data. Here is the type of data generated.

PFS-2 - Retrospective | PFS Summary: Child Data [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
	Mean	Standard Deviation
Average Number of Children Per Participant ID	1.69	0.75
Sex (all children)	Count	Percent
Number of Children Reported	22	169.23%
Male	12	54.55%
Female	10	45.45%
Nonconforming	0	0.0%
Other Gender	0	0.0%
Decline	0	0.0%
Age Data	Mean	Standard Deviation

- Remember, you can also download your data for use in other programs for more in-depth analysis. To download, click the *Download Report* button in the upper right corner.

PFS-2 - Retrospective | PFS Summary: Child Data [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
	Mean	Standard Deviation
Average Number of Children Per Participant ID	1.69	0.75
Sex (all children)	Count	Percent
Number of Children Reported	22	169.23%
Male	12	54.55%
Female	10	45.45%
Nonconforming	0	0.0%
Other Gender	0	0.0%
Decline	0	0.0%
Age Data	Mean	Standard Deviation

Program Data Report

1. Click on *PFS Summary: Program Data* in the Reports block from the Dashboard.

Participant ID	Completed on	Survey	Delivery	Edit	Delete
08291903	08/29/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09291904	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08291905	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301901	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301902	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301903	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301904	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301905	08/30/2019	PFS-2 - Retrospective	Hand	Edit	Delete

2. Choose the survey and program(s) from which you want to display records. You can narrow it by program dates, survey dates, and only matched pre-post records. Click *Generate Report*, or click *Advanced Options* for more search criteria.

Report: PFS Summary: Program Data Report

Make selections in the available options and generate your report.

Go back to your PFS Records

Choose a Survey: PFS-2 - Retrospective

Only show these Programs:
 Home Visiting Primary
 Parent Ed Groups
 CBCAP funded

Marking none of those will add them all to the report.

Program Start Dates: MM/DD/YYYY - MM/DD/YYYY

Program End Dates: MM/DD/YYYY - MM/DD/YYYY

Survey Completed Dates: MM/DD/YYYY - MM/DD/YYYY

Matched Pre-Post:

Advanced Options

Generate Report

3. Once you click *Generate Report*, scroll down to see the program data. Here is the type of data generated.

PFS-2 - Retrospective | PFS Summary: Program Data Report [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
How was the client referred?	Count	Percent
Number of Families Reported	13	100.0%
Self-Referral	9	69.23%
Child Protective Services	0	0.0%
Court	0	0.0%
Community Program	3	23.08%
Other	1	7.69%
How was the survey completed?	Count	Percent
Number of Families Reported	13	100.0%
Face-To-Face	6	46.15%

Remember, you can also download your data for use in other programs for more in-depth analysis. To download, click the *Download Report* button in the upper right corner.

PFS-2 - Retrospective | PFS Summary: Program Data Report [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
How was the client referred?	Count	Percent
Number of Families Reported	13	100.0%
Self-Referral	9	69.23%
Child Protective Services	0	0.0%
Court	0	0.0%
Community Program	3	23.08%
Other	1	7.69%
How was the survey completed?	Count	Percent
Number of Families Reported	13	100.0%
Face-To-Face	6	46.15%

PFS Subscales Report

1. Click on *PFS Summary: PFS Subscales* in the Reports block from the Dashboard.

Your PFS Records

See quick access to all your records. Use the search filters to the right to narrow your results, then download them as: [Excel](#)

[Go back to your dashboard](#)

Participant ID	Completed on	Survey	Delivery	Edit	Delete
08291903	08/29/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09291904	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08291905	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301901	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301902	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301903	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301904	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301905	08/30/2019	PFS-2 - Retrospective	Hand	Edit	Delete

Reports

- [PFS Summary: Participant Data](#)
- [PFS Summary: Child Data](#)
- [PFS Summary: Program Data](#)
- [PFS Summary: PFS Subscales](#)
- [PFS Summary: Custom Questions](#)

Search

Participant ID:

Instrument:

Matched Pre-Post:

Programs:

- Home Visiting Primary
- Parent Ed Groups
- CBCAP funded

2. Choose the survey and program(s) from which you want to display records. You can narrow it by program dates, survey dates, and only matched pre-post records. Click *Generate Report* or click *Advanced Options* for more search criteria.

Report: PFS Summary: PFS Subscales Report

Make selections in the available options and generate your report.

[Go back to your PFS Records](#)

Choose a Survey:

Only show these Programs:

- Home Visiting Primary
- Parent Ed Groups
- CBCAP funded

Marking none of those will add them all to the report.

Program Start Dates:

Program End Dates:

Survey Completed Dates:

[Advanced Options](#)

[Generate Report](#)

3. Once you click *Generate Report*, scroll down to see the PFS Subscale Data specific to your survey type selected. Here is the kind of data generated.

PFS-2 - Retrospective | PFS Summary: PFS Subscales Report

[Download Report](#)

Report Generated 0/2/2021, Programs: All | Start Dates: 01/01/2000 - 0/2/2021 | End Dates: 01/01/2000 - 0/2/2021 | Completed Dates: 01/01/2000 - 0/2/2021

Total Number of Participant IDs	13							
	PRE-TEST			POST-TEST			Matched Pre/Post	
	Count	Mean	Standard Deviation	Count	Mean	Standard Deviation	Count	% Who Improved
Family Functioning / Resiliency	13	0.72	0.65	13	2.74	0.59	13	100.0
Nurturing and Attachment	13	0.54	0.75	12	2.35	0.79	12	100.0
Social Supports	13	1.3	0.75	13	2.32	0.81	13	100.0
Caregiver / Practitioner Relationship	13	1.79	0.98	13	2.56	1.14	13	84.62
Concrete Support	0	NaN	0.0	13	2.25	0.9	0	NaN

The primary purpose of the PFS and PFS-2 is to provide feedback to agencies for continuous improvement and evaluation purposes. It is not intended to be used for making clinical diagnoses, decisions regarding out-of-home placements, or legal adjudications.

Remember, you can also download your data for use in other programs for deeper analysis. To download, click the *Download Report* button in the upper right corner.

PFS-2 - Retrospective | PFS Summary: PFS Subscales Report

[Download Report](#)

Report Generated 0/2/2021, Programs: All | Start Dates: 01/01/2000 - 0/2/2021 | End Dates: 01/01/2000 - 0/2/2021 | Completed Dates: 01/01/2000 - 0/2/2021

Total Number of Participant IDs	13							
	PRE-TEST			POST-TEST			Matched Pre/Post	
	Count	Mean	Standard Deviation	Count	Mean	Standard Deviation	Count	% Who Improved
Family Functioning / Resiliency	13	0.72	0.65	13	2.74	0.59	13	100.0
Nurturing and Attachment	13	0.54	0.75	12	2.35	0.79	12	100.0
Social Supports	13	1.3	0.75	13	2.32	0.81	13	100.0
Caregiver / Practitioner Relationship	13	1.79	0.98	13	2.56	1.14	13	84.62
Concrete Support	0	NaN	0.0	13	2.25	0.9	0	NaN

The primary purpose of the PFS and PFS-2 is to provide feedback to agencies for continuous improvement and evaluation purposes. It is not intended to be used for making clinical diagnoses, decisions regarding out-of-home placements, or legal adjudications.

Custom Questions Report

1. Click on *PFS Summary: Custom Questions* in the Reports block from the Dashboard.

Your PFS Records

See quick access to all your records. Use the search filters to the right to narrow your results, then download them as: [Excel](#)

[Go back to your dashboard](#)

Participant ID	Completed on	Survey	Delivery	Edit	Delete
08291903	08/29/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09291904	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08291905	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301901	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301902	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301903	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301904	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301905	08/30/2019	PFS-2 - Retrospective	Hand	Edit	Delete

Reports

- [PFS Summary: Participant Data](#)
- [PFS Summary: Child Data](#)
- [PFS Summary: Program Data](#)
- [PFS Summary: PFS Subscales](#)
- [PFS Summary: Custom Questions](#)

Search

Participant ID:

Instrument:

Matched Pre-Post:

Programs:

- Home Visiting Primary
- Parent Ed Groups
- CBCAP funded

2. Choose the survey and program(s) from which you want to display records. You can narrow it by program dates, survey dates, and only matched pre-post records. Click *Generate Report* or click *Advanced Options* for more search criteria.

Report: PFS Summary: PFS Subscales Report

Make selections in the available options and generate your report.

[Go back to your PFS Records](#)

Choose a Survey:

Only show these Programs:

- Home Visiting Primary
- Parent Ed Groups
- CBCAP funded

Marking none of those will add them all to the report.

Program Start Dates:

Program End Dates:

Survey Completed Dates:

[Advanced Options](#)

[Generate Report](#)

3. Once you click *Generate Report*, scroll down to see the Custom Question Data specific to your survey type selected.

Remember, you can also download your data for use in other programs for deeper analysis. To download, click the *Download Report* button in the upper right corner.

Exporting Data

1. You can export data from within the system for your Agency. To do this, click on *Download Your PFS Records and Reports*.
2. From there, click the *Excel* link. This will give you the agency in a .csv file.

Protective Factors Survey

Edi's Agency Dashboard | Hi, Edi W.

Your PFS Records

See quick access to all your records. Use the search filters to the right to narrow your results, then download them as [Excel](#).

[Go back to your dashboard](#)

Participant ID	Completed on	Survey	Delivery	Edit	Delete
08291903	08/29/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09291904	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08291905	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301901	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301902	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301903	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301904	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301905	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09051901	08/28/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09051911	09/05/2019	PFS 1.0 - English	Paper Entry	Edit	Delete

Reports

- [PFS Summary: Participant Data](#)
- [PFS Summary: Child Data](#)
- [PFS Summary: Program Data](#)
- [PFS Summary: PFS Subscales](#)

Search

Participant ID:

Instrument:

Matched Pre-Post:

Programs:

- Home Visiting Primary
- Parent Ed Groups
- CBCLM funded

[Advanced Options](#)

Using the Group Dashboard (for Group Users only)

Accessing the Group Dashboard

1. After logging into the system, you will see options in the upper right corner. To access the Group Dashboard, click on *Group Dashboard* in the upper right corner. (The system will default into agency view when you log in).

Protective Factors Survey

Group Dashboard PFS Test Data Dashboard Hi, Edi W.

FRIENDS National Center is happy to announce some improvements and changes in the Protective Factors Survey Online Data System. [Click here](#) to read about new ways to customize the PFS.

Your PFS Records

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
100014	04/26/2022	SPFS-2	Hand Delivery	Edit	Delete
100013	04/26/2022	SPFS-2 - Retrospective	Paper Entry	Edit	Delete
100012	04/05/2022	SPFS-2 - Retrospective	Hand Delivery	Edit	Delete
100011	04/05/2022	SPFS-2	Hand	Edit	Delete

Agency PFS Test Data

Name	Email
Emily	eturn...
Edi W.	admin...
Matt Kirkland	matt...
Ashley Hutton	ashle...
Edi	ewink...
Cassandra	cfirma...

Clicking *Group Dashboard* will change your view from Agency to Group and will shift to this:

Protective Factors Survey

Group Dashboard Dashboard Hi, Edi W.

PFS Test Agencies

Name	Created On	Agency Users	Stats	Responses
Brand New Box	2019-03-07	Users	Stats	Responses
Test Agency 2	2019-03-07	Users	Stats	Responses
FRIENDS	2019-03-07	Users	Stats	Responses
CPPR	2019-03-07	Users	Stats	Responses
Cassandra's Testing site	2019-03-07	Users	Stats	Responses

Group PFS Test

Name	Email
Matt Kirkland	matt@b...
Edi	ewinkle...
MaryJo Caruso	mjcarus...
Ashley Hutton	ashley...
Ashley	ashley+...
Edi W.	admin...

Manage Group Staff

Password

Anyone creating a new Agency in this group will need this password.

Records will be replaced by the list of Agencies in your Group.

Edit/Add Staff to Group

1. To edit or add staff to your Group, click *Manage Group Staff* on the Group Dashboard.

The screenshot shows the 'Protective Factors Survey' Group Dashboard. On the left, there is a table titled 'PFS Test Agencies' with columns for Name, Created On, Agency Users, Stats, and Responses. On the right, there is a 'Group' section for 'PFS Test' with a list of staff members (Name and Email) and a 'Manage Group Staff' link circled in red. Below the staff list is a 'Password' section.

Name	Created On	Agency Users	Stats	Responses
Brand New Box	2019-03-07	Users	Stats	Responses
Test Agency 2	2019-03-07	Users	Stats	Responses
FRIENDS	2019-03-07	Users	Stats	Responses
CPPR	2019-03-07	Users	Stats	Responses
Cassandra's Testing site	2019-03-07	Users	Stats	Responses

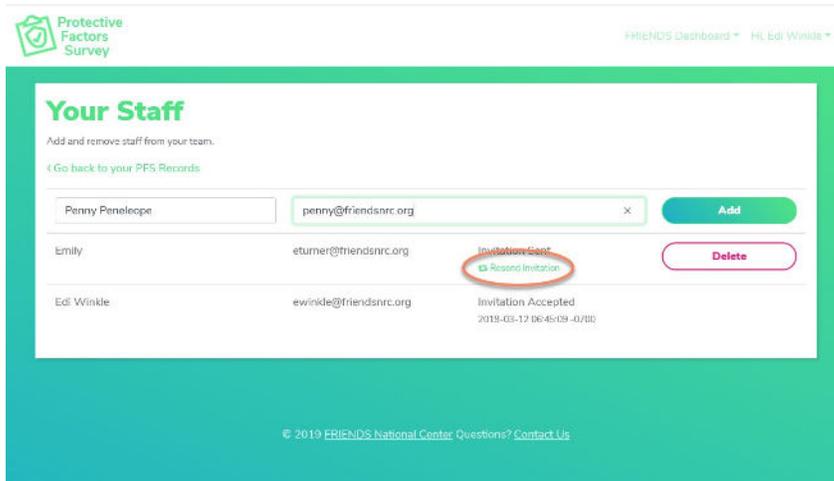
Name	Email
Matt Kirkland	matt@b...
Edi	ewinkle...
MaryJo Caruso	mjcarus...
Ashley Hutton	ashley...
Ashley	ashley+...
Edi W.	admin...

2. To add staff to the Group, enter their name and an email address and click *Add*.

The screenshot shows the 'Your Staff' page. At the top, it says 'Add and remove staff from accessing this group.' Below that is a link '< Go back to your group'. There are two input fields for 'Name' and 'Email', followed by a green 'Add' button. Below the input fields is a table of staff members with 'Delete' buttons for each. Red arrows point to the 'Add' button and the input fields.

Name	Email	Invitation Accepted	Delete
Matt Kirkland	matt@brandnewbox.com	2019-03-07 14:35:56 -0800	Delete
Edi	ewinkle@friendsnrc.org	2019-03-12 06:45:09 -0700	Delete
MaryJo Caruso	mjcaruso@friendsnrc.org	2019-09-05 09:25:00 -0700	Delete
Ashley Hutton	ashley@brandnewbox.com	2019-03-08 14:07:12 -0800	Delete

3. If a staff member deletes the email or fails to respond, click the resend invitation, and it will generate a new invite for them.

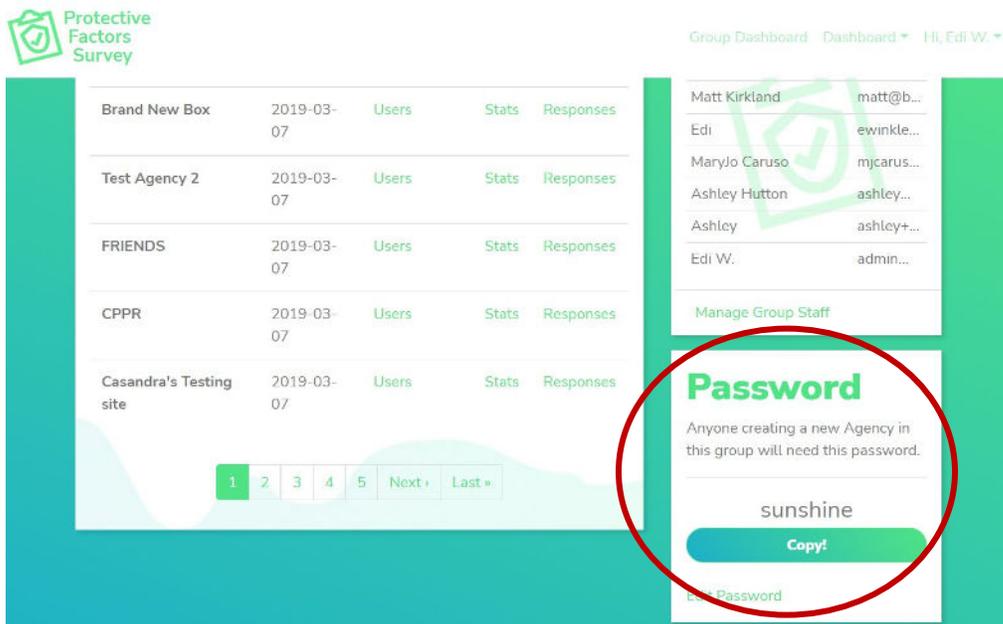


NOTE: Be sure to have your staff check junk or spam folders if they are not finding the email after a couple of minutes

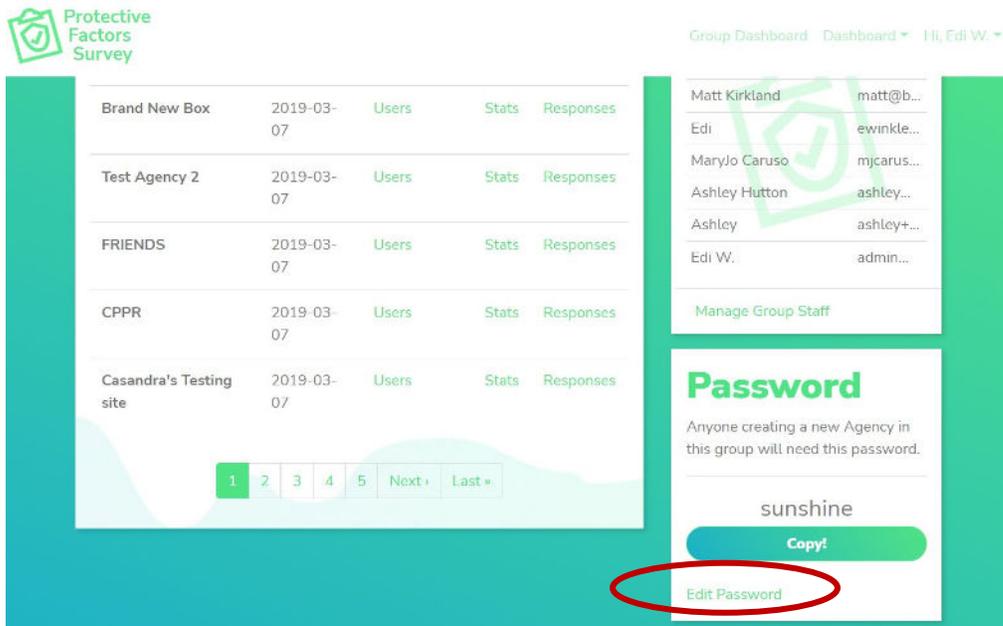
If invited staff are already a part of the system (perhaps through work with another agency), it will show Invitation Accepted with the date/time stamp. They will automatically have access to the Group the next time they log into the system.

Edit Group Password

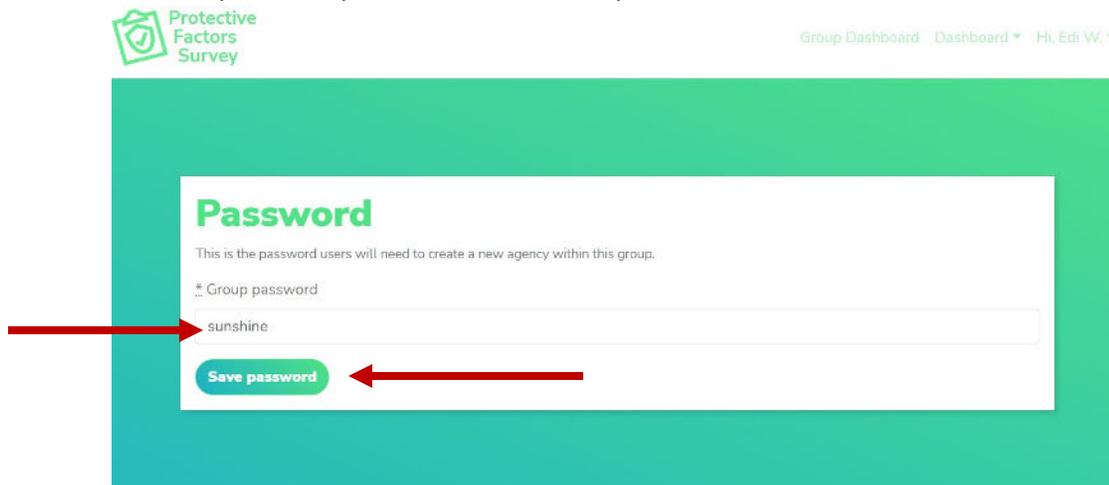
1. Your Group Password is just below the Group Staff box on the Group Dashboard.



2. To edit the Group Password, click *Edit Password* in the bottom left corner of the box.



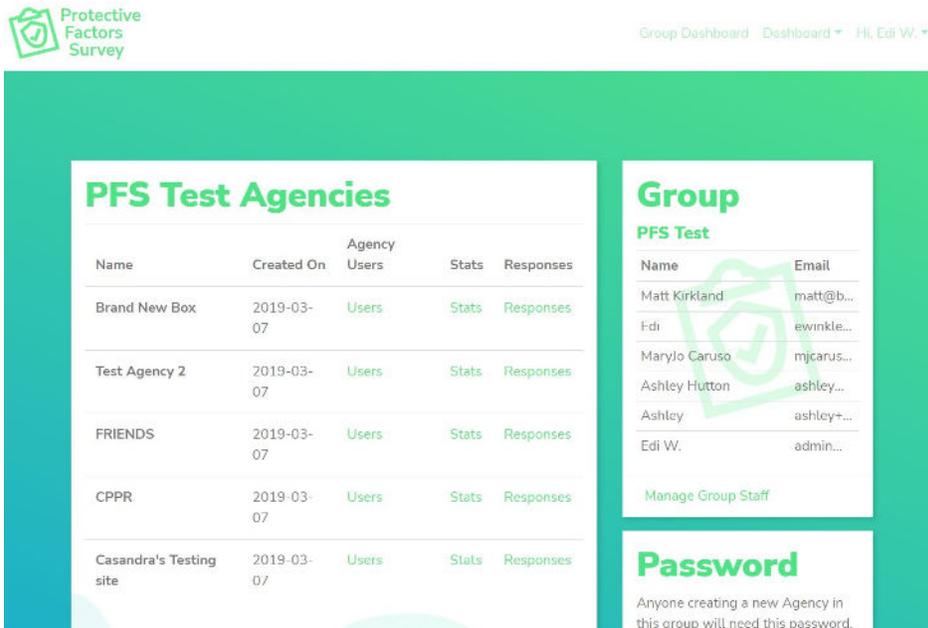
3. Enter the password you desire for the Group and click *Save Password*.



NOTE: You will need to provide this password to Agencies setting up in the system the first time to allow them access to save to your database.

Navigating Agencies on the Group Level

The Group Dashboard provides an overview of the Agencies inside the Group. In addition, users can find out several key pieces of information from the Agencies interface.



The screenshot shows the 'Protective Factors Survey' Group Dashboard. The main content area is titled 'PFS Test Agencies' and contains a table with the following data:

Name	Created On	Agency Users	Stats	Responses
Brand New Box	2019-03-07	Users	Stats	Responses
Test Agency 2	2019-03-07	Users	Stats	Responses
FRIENDS	2019-03-07	Users	Stats	Responses
CPPR	2019-03-07	Users	Stats	Responses
Cassandra's Testing site	2019-03-07	Users	Stats	Responses

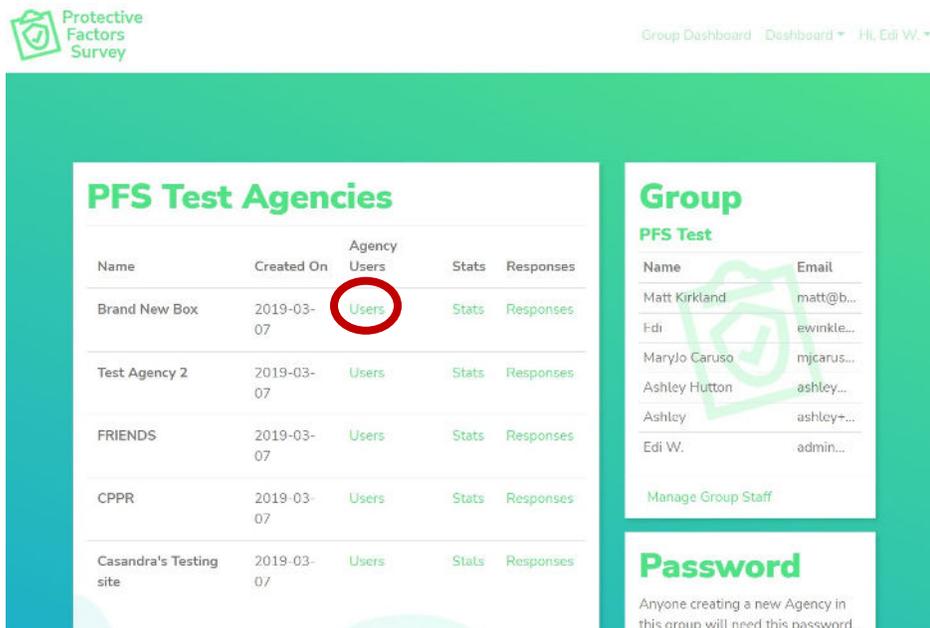
To the right of the Agencies table is a 'Group' section for 'PFS Test' with a list of staff members:

Name	Email
Matt Kirkland	matt@b...
Fdi	ewinkle...
MaryJo Caruso	mjcarus...
Ashley Hutton	ashley...
Ashley	ashley+...
Edi W.	admin...

Below the staff list is a 'Manage Group Staff' link. At the bottom right is a 'Password' section with the text: 'Anyone creating a new Agency in this group will need this password.'

View Agency Information

1. From the Group Dashboard you will see the Agencies block.
2. In this interface, you can see several details about an agency.
3. To see the users assigned to an agency, click on the *Users* option in the agency line.



This screenshot is identical to the one above, but with a red circle highlighting the 'Users' link in the 'Agency Users' column of the 'Brand New Box' row in the 'PFS Test Agencies' table.

4. This will bring up a pop-up box with the agency staff listed with their emails.
5. To see how many surveys an agency has in the system, click on the *Stats* option.

Protective Factors Survey

Group Dashboard Dashboard Hi, Edi W.

PFS Test Agencies

Name	Created On	Agency Users	Stats	Responses
Brand New Box	2019-03-07	Users	Stats	Responses
Test Agency 2	2019-03-07	Users	Stats	Responses
FRIENDS	2019-03-07	Users	Stats	Responses
CPPR	2019-03-07	Users	Stats	Responses
Cassandra's Testing site	2019-03-07	Users	Stats	Responses

Group PFS Test

Name	Email
Matt Kirkland	matt@b...
Fdi	ewinkle...
MaryJo Caruso	mjcarus...
Ashley Hutton	ashley...
Ashley	ashley+...
Edi W.	admin...

Manage Group Staff

Password

Anyone creating a new Agency in this group will need this password.

6. Clicking *Stats* will bring up a pop-up box that states how many surveys the agency has in the system.

*NOTE: This will only display the surveys that the **Group Dashboard** has permission to see. This is determined by the Programs in the agency that are assigned to surveys, and the Share Data option must be checked in the program set up to allow data sharing (refer to instructions on p. 16-17 for more information).*

Viewing Participant Responses Inside an Agency

From the Group Dashboard, users can also view and manage agency data. First, find the agency in the list you wish to access and click the *Responses* option. After clicking, users can view responses, edit errors in data entry, and delete erroneous records.

Protective Factors Survey

Group Dashboard Dashboard Hi, Edi W.

PFS Test Agencies

Name	Created On	Agency Users	Stats	Responses
Brand New Box	2019-03-07	Users	Stats	Responses
Test Agency 2	2019-03-07	Users	Stats	Responses
FRIENDS	2019-03-07	Users	Stats	Responses
CPPR	2019-03-07	Users	Stats	Responses
Cassandra's Testing site	2019-03-07	Users	Stats	Responses

Group

PFS Test

Name	Email
Matt Kirkland	matt@b...
Edi	ewinkle...
Marylo Caruso	mjcarus...
Ashley Hutton	ashley...
Ashley	ashley+...
Edi W.	admin...

Manage Group Staff

Password

Anyone creating a new Agency in this group will need this password.

1. The Participant Responses are displayed by Participant ID in the Your PFS Records box. The records are sorted by the Completed On date and displayed with the most recent records first.
2. To view an individual participant response, find the record in the list you wish to view and click on the *Completed On* date.

Your PFS Records

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
12345	11/09/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete
1006202101	10/04/2021	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0.1.2	06/29/2021	PFS 1.0 - English	Qr Code Delivery	Edit	Delete
0.0.1	06/29/2021	PFS 1.0 - English	Hand Delivery	Edit	Delete
12345	06/10/2021	PFS-2	Hand Delivery	Edit	Delete

Agency

Brand New Box

PFS Test

Name	Email
Edi W.	admin@...
Test	mattkirk...
Nathan Clark	nathan...
Josh Fike	josh@br...
Matt Kirkland	matt@br...
matt	mattkirk...
FRIENDS	friends...
Edi	ewinkle...
Vickie Ybarra	vickie.yb...

Manage Staff

3. After clicking on the date, you will be taken to a screen to view the response.

Your PFS Record

[← Go back to your dashboard](#)

Participant ID	12345
Completed On	11/09/2021
Survey ID	PFS-2 Concrete Supports

Survey Details

Language	English
Delivery	Hand Delivery
Program Start On	11/05/2021
Program End On	

Survey Response

How was the survey completed? By the participant with assistance available from program staff to explain items as needed

4. You can scroll the screen to view the record and use the print option for your browser to print the record if needed.

*NOTE: You can search by participant id and program in the basic search box in the **Download Your PFS Records and Reports** section of the system. In addition, you can click on **Advanced Options** in the box and get more options.*

Editing Participant Responses Inside an Agency

1. There are times that records need to be edited, and the system allows for editing various details depending on the method of administration/entry of the survey. The various types of entry are:
 - a. Hand Delivery (you handed the device over to the participant)
 - b. SMS, QR Code, Email Delivery
 - c. Paper Entry (for internal data entry from a paper/pencil administration)
2. Hand Delivery and SMS, QR Code, and Email delivery allow you to edit the program information questions (participant id, survey, and program dates, how was the survey completed, etc.) that are filled out by staff when setting up the survey. These are the only items that can be edited. Participant responses can't be changed once they submit their survey.
3. Paper Entry responses can be edited in their entirety. The system knows that sometimes errors in data entry happen and allows for the ability to correct errors.
4. To edit, find the record in the list you wish to edit and click on the *Edit* option.

Your PFS Records + New

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
12345	11/09/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete
1006202101	10/04/2021	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0.1.2	06/29/2021	PFS 1.0 - English	Qr Code Delivery	Edit	Delete
0.0.1	06/29/2021	PFS 1.0 - English	Hand Delivery	Edit	Delete
12345	06/10/2021	PFS-2	Hand Delivery	Edit	Delete

Agency Edit

Brand New Box

PFS Test

Name	Email
Edi W.	admin@...
Test	mattkirkL...
Nathan Clark	nathan...
Josh Fike	josh@br...
Matt Kirkland	matt@br...
matt	mattkirkL...
FRIENDS	friends...
Edi	ewinkle...
Vickie Ybarra	vickie.yb...

Manage Staff

5. This will take you through the record and allows you to edit the responses. Finally, click *Submit* once edits are completed.

NOTE: A reminder that Paper Entry does not lock the system to prevent clients from accessing the Agency Dashboard after completion. DO NOT use this option with clients.

Deleting Participant Responses Inside an Agency

1. If a response was entered erroneously or there are errors in the survey that need to be corrected and can't be edited, you may wish to delete the record and start over.
2. Find the record you need to delete and click on *Delete* to perform this action.

Your PFS Records + New

Participant ID	Completed On	Instrument	Delivery	Edit	Delete
12345	11/09/2021	PFS-2 Concrete Supports	Hand Delivery	Edit	Delete
1006202101	10/04/2021	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
0.1.2	06/29/2021	PFS 1.0 - English	Qr Code Delivery	Edit	Delete
0.0.1	06/29/2021	PFS 1.0 - English	Hand Delivery	Edit	Delete
12345	06/10/2021	PFS-2	Hand Delivery	Edit	Delete

Agency Edit

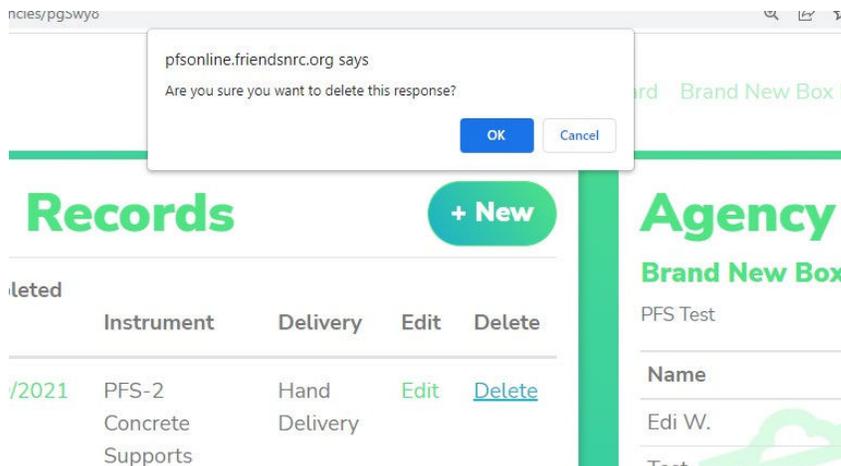
Brand New Box

PFS Test

Name	Email
Edi W.	admin@...
Test	mattkirkL...
Nathan Clark	nathan...
Josh Fike	josh@br...
Matt Kirkland	matt@br...
matt	mattkirkL...
FRIENDS	friends...
Edi	ewinkle...
Vickie Ybarra	vickie.yb...

Manage Staff

3. The system will ask if you are sure you wish to delete the response; if you are sure, click *OK*.



NOTE: This action can't be undone, and the record can't be recovered. Only delete the record if you are confident you don't need it.

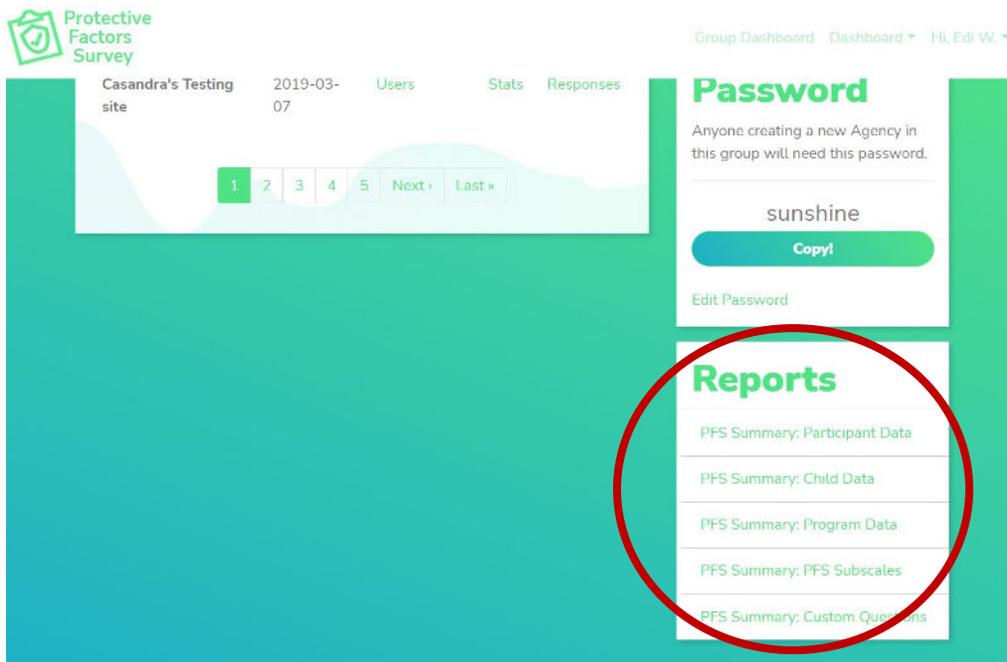
Running Group Reports

The system supports running multi-agency data across the various predefined reports. The Group reports are the same that support agencies. This section will walk through the predefined reports in the Group Dashboard and guide how to download raw data for use in outside data and statistical programs.

The system has the following reports predefined:

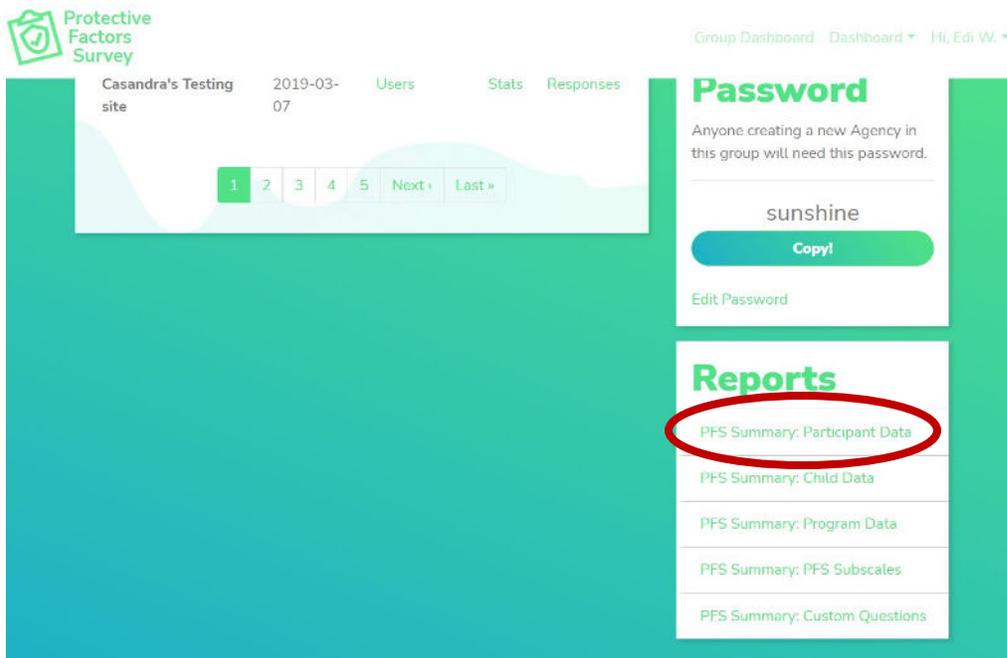
- Participant Data
- Child Data
- Program Data
- PFS Subscales
- Custom Questions

Reports can be accessed from the Group Dashboard by clicking the appropriate report in the Reports block in the lower right corner (you might need to scroll to see the box).



Group Participant Data Report

1. Click on *PFS Summary: Participant Data* in the Reports block from the Dashboard.



2. Here you can choose to run a single agency report or across all agencies while narrowing down among programs.
3. Start by choosing the survey you wish to run the report about.

- Next, choose *Agency/All Agencies*. The programs will display based on which agency you choose. Checking no programs boxes selects all programs. If you wish to narrow it down, select the appropriate programs. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report* or click *Advanced Options* for more search criteria.

Report: PFS Summary: Participant Data Report

Make selections in the available options and generate your report.

[Go back to your PFS Test Group Dashboard](#)

Choose a Survey:

Choose an Agency:

Only show these Programs

- Cassandra's Spanish PFS test
- CFSS
- FRIENDS Focused Parenting
- FRIENDS Parent Support
- Home Visiting

- Once you click *Generate Report*, scroll down to see the demographic information. Here is a sampling of the type of data generated.

PFS-2 - Retrospective | PFS Summary: Participant Data Report [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2020 - 07/27/2021 | End Dates: 01/01/2020 - 07/27/2021 | Completed Dates: 01/01/2020 - 07/27/2021

Total Number of Participant IDs	13	
Average Age	Mean	Standard Deviation
Average Age	28.62	8.14
Sex/Gender	Count	Percent
Number of Families Reported	13	100.0%
Male	1	7.69%
Female	11	84.62%
Nonconforming	1	7.69%
Other Gender	0	0.0%
Decline	0	0.0%

- Remember, you can also download your data into a word document. To download, click the *Download Report* button in the upper right corner.

PFS-2 - Retrospective | PFS Summary: Participant Data Report

Download Report

Report Generated: 01/21/2022, Programs: All | Start Dates: 01/01/2000 - 01/21/2021 | End Dates: 01/01/2000 - 01/21/2021 | Completed Dates: 01/01/2000 - 01/21/2021

Total Number of Participant IDs	13	
Average Age	Mean: 26.62 Standard Deviation: 8.14	
Sex/Gender	Count	Percent
Number of Families Reported	13	100.0%
Male	1	7.69%
Female	11	84.62%
Nonconforming	1	7.69%
Other Gender	0	0.0%
Decline	0	0.0%

Group Child Data Report

1. Click on *PFS Summary: Child Data* in the Reports block from the Dashboard.

The screenshot shows the Protective Factors Survey dashboard. The main content area displays a site named 'Casandra's Testing site' with a date of '2019-03-07'. There are tabs for 'Users', 'Stats', and 'Responses'. A navigation bar at the bottom of the main content area shows a sequence of numbers 1 through 5, with '1' highlighted in green, and 'Next' and 'Last' buttons. On the right side, there is a 'Password' section with the text 'Anyone creating a new Agency in this group will need this password.' and a password field containing 'sunshine' with a 'Copy!' button. Below the password section is a 'Reports' section with a list of report options: 'PFS Summary: Participant Data', 'PFS Summary: Child Data' (circled in red), 'PFS Summary: Program Data', 'PFS Summary: PFS Subscales', and 'PFS Summary: Custom Questions'.

2. Here you can choose to run a single agency report or across all agencies while narrowing down among programs.
3. Start by choosing the survey you wish to run the report on.
4. Next, choose *Agency/All Agencies*. The programs will display based on which agency you choose. Checking no programs boxes selects all programs. If you wish to narrow it down, select the appropriate programs. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report* or click *Advanced Options* for more search criteria.

Report: PFS Summary: Child Data Report

Make selections in the available options and generate your report.

[Go back to your PFS Test Group Dashboard](#)

Choose a Survey: Select a Survey

Choose an Agency: All Agencies

Only show these Programs

- Cassandra's Spanish PFS test
- CFSS
- FRIENDS Focused Parenting
- FRIENDS Parent Support
- Home Visiting

- Once you click *Generate Report*, scroll down to see the child data. Here is the type of data generated.

PFS-2 - Retrospective | PFS Summary: Child Data Download Report

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
	Mean	Standard Deviation
Average Number of Children Per Participant ID	1.69	0.75
Sex (all children)	Count	Percent
Number of Children Reported	22	100.00%
Male	12	54.55%
Female	10	45.45%
Nonconforming	0	0.0%
Other Gender	0	0.0%
Decline	0	0.0%
Age Data	Mean	Standard Deviation

- Remember, you can also download your data into a word document. To download, click the *Download Report* button in the upper right corner.

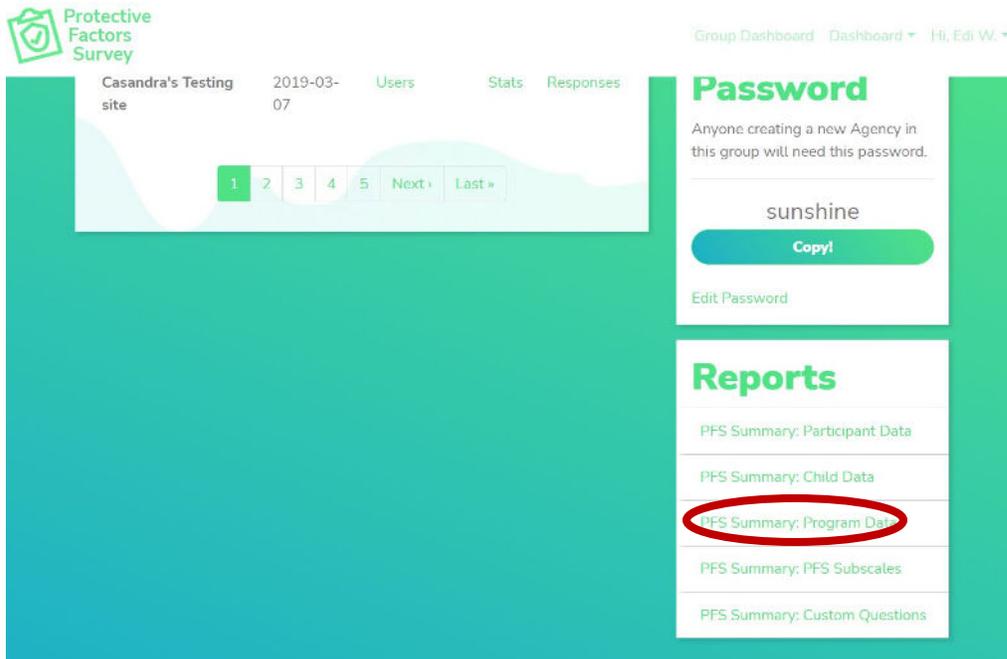
PFS-2 - Retrospective | PFS Summary: Child Data Download Report

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
	Mean	Standard Deviation
Average Number of Children Per Participant ID	1.69	0.75
Sex (all children)	Count	Percent
Number of Children Reported	22	100.00%
Male	12	54.55%
Female	10	45.45%
Nonconforming	0	0.0%
Other Gender	0	0.0%
Decline	0	0.0%
Age Data	Mean	Standard Deviation

Group Program Data Report

1. Click on *PFS Summary: Program Data* in the Reports block from the Dashboard.



2. Here you can choose to run a single agency report or across all agencies while narrowing down among programs.
3. Start by choosing the survey you wish to run the report on.
4. Next, choose *Agency/All Agencies*. The programs will display based on which agency you choose. Checking no programs boxes selects all programs. If you wish to narrow it down, select the appropriate programs. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report* or click *Advanced Options* for more search criteria.



5. Once you click *Generate Report*, scroll down to see the program data. Here is the type of data generated.

PFS-2 - Retrospective | PFS Summary: Program Data Report [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
How was the client referred?	Count	Percent
Number of Families Reported	13	100.0%
Self-Referral	9	69.23%
Child Protective Services	0	0.0%
Court	0	0.0%
Community Program	3	23.08%
Other	1	7.69%
How was the survey completed?	Count	Percent
Number of Families Reported	13	100.0%
Face-To-Face	6	46.15%

6. Remember, you can also download your data into a word document. To download, click the *Download Report* button in the upper right corner.

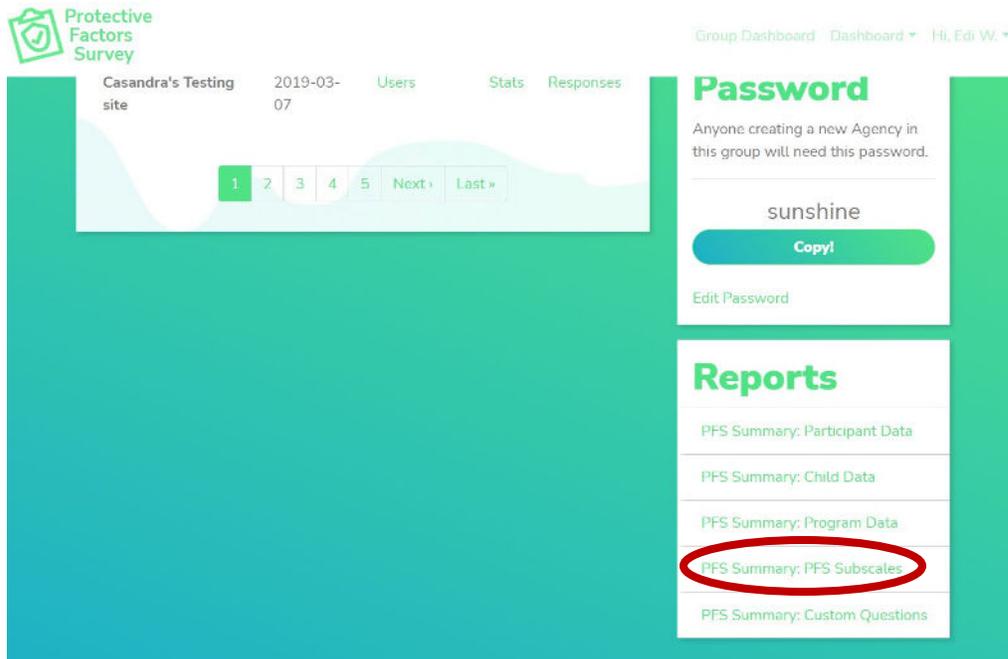
PFS-2 - Retrospective | PFS Summary: Program Data Report [Download Report](#)

Report Generated: 07/27/2021 | Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13	
How was the client referred?	Count	Percent
Number of Families Reported	13	100.0%
Self-Referral	9	69.23%
Child Protective Services	0	0.0%
Court	0	0.0%
Community Program	3	23.08%
Other	1	7.69%
How was the survey completed?	Count	Percent
Number of Families Reported	13	100.0%
Face-To-Face	6	46.15%

Group PFS Subscales Report

1. Click on *PFS Summary: PFS Subscales* in the Reports block from the Dashboard.



2. Here you can choose to run a single agency report or across all agencies while narrowing down among programs.
3. Start by choosing the survey you wish to run the report on.
4. Next, choose *Agency/All Agencies*. The programs will display based on which agency you choose. Checking no programs boxes selects all programs. If you wish to narrow it down, select the appropriate programs. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report* or click *Advanced Options* for more search criteria.



5. Once you click *Generate Report*, scroll down to see the PFS Subscale Data specific to your survey type selected. Here is the kind of data generated.

PFS-2 - Retrospective | PFS Summary: PFS Subscales Report

[Download Report](#)

Report Generated: 0/2/2022, Programs: All | Start Dates: 01/01/2020 - 0/2/2022 | End Dates: 01/01/2020 - 0/2/2022 | Completed Dates: 01/01/2020 - 0/2/2022

Total Number of Participant IDs	PRE-TEST			POST-TEST			Matched Pre/Post	
	Count	Mean	Standard Deviation	Count	Mean	Standard Deviation	Count	% Who Improved
	13							
Family Functioning / Resiliency	13	0.72	0.65	13	2.74	0.59	13	100.0
Nurturing and Attachment	13	0.54	0.75	12	2.35	0.79	12	100.0
Social Supports	13	1.3	0.75	13	2.32	0.81	13	100.0
Caregiver / Practitioner Relationship	13	1.79	0.98	13	2.56	1.14	13	84.62
Concrete Support	0	NaN	0.0	13	2.25	0.9	0	NaN

The primary purpose of the PFS and PFS-2 is to provide feedback to agencies for continuous improvement and evaluation purposes. It is not intended to be used for making clinical diagnoses, decisions regarding out-of-home placements, or legal judgments.

- Remember, you can also download your data into a word document. To download, click the *Download Report* button in the upper right corner.

PFS-2 - Retrospective | PFS Summary: PFS Subscales Report

[Download Report](#)

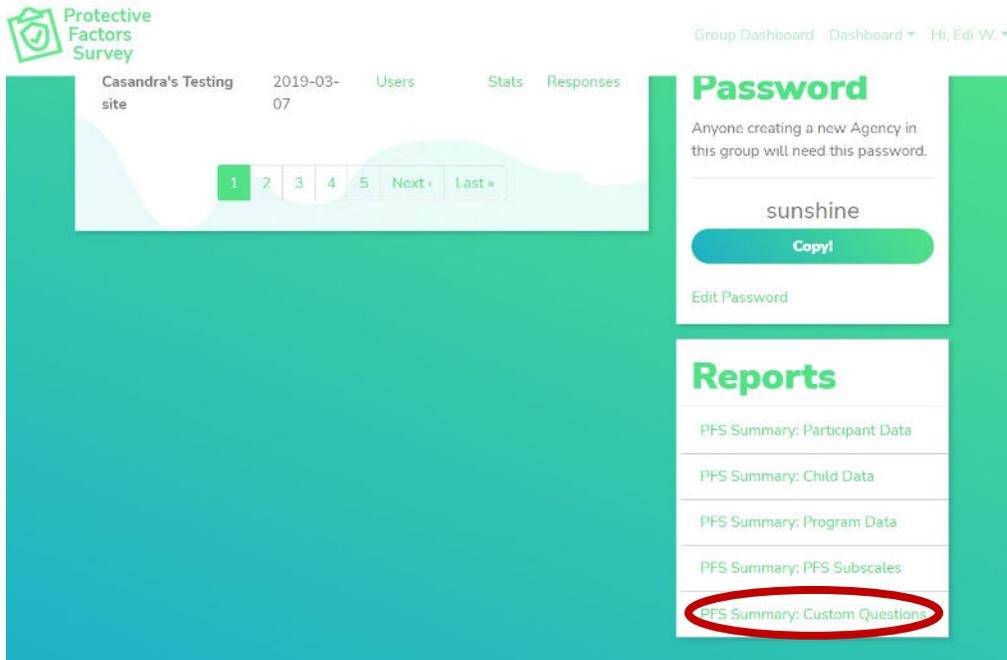
Report Generated: 0/2/2022, Programs: All | Start Dates: 01/01/2020 - 0/2/2022 | End Dates: 01/01/2020 - 0/2/2022 | Completed Dates: 01/01/2020 - 0/2/2022

Total Number of Participant IDs	PRE-TEST			POST-TEST			Matched Pre/Post	
	Count	Mean	Standard Deviation	Count	Mean	Standard Deviation	Count	% Who Improved
	13							
Family Functioning / Resiliency	13	0.72	0.65	13	2.74	0.59	13	100.0
Nurturing and Attachment	13	0.54	0.75	12	2.35	0.79	12	100.0
Social Supports	13	1.3	0.75	13	2.32	0.81	13	100.0
Caregiver / Practitioner Relationship	13	1.79	0.98	13	2.56	1.14	13	84.62
Concrete Support	0	NaN	0.0	13	2.25	0.9	0	NaN

The primary purpose of the PFS and PFS-2 is to provide feedback to agencies for continuous improvement and evaluation purposes. It is not intended to be used for making clinical diagnoses, decisions regarding out-of-home placements, or legal judgments.

Group Custom Questions Report

1. Click on *PFS Summary: Custom Questions* in the Reports block from the Dashboard.



2. Here you can choose to run a single agency report or across all agencies while narrowing down among programs.
3. Start by choosing the survey you wish to run the report on.
4. Next, choose *Agency/All Agencies*. The programs will display based on which agency you choose. Checking no programs boxes selects all programs. If you wish to narrow it down, select the appropriate programs. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report* or click *Advanced Options* for more search criteria.



5. Once you click *Generate Report*, scroll down to see the Custom Question Data specific to your survey type selected.

- Remember, you can also download your data into a word document. To download, click the *Download Report* button in the upper right corner.

NOTE: The Group Custom Questions Report will NOT aggregate data across agencies – even if the questions are the same at multiple agencies. The report will list each question asked at each agency and give agency-level data for each question on the Custom Questions Report. If you need to aggregate data, you must add the data together through the word download or Excel export and complete the calculations.

Exporting Data to Excel

- You can export data from within the system for each Agency in your Group. The data must be downloaded from the Agency interface on the Group Dashboard and can ONLY be downloaded one agency at a time. Once downloaded, you can append records to combine into one spreadsheet.
- To export, find the Agency you wish to download data for from the *Agencies* block on the Group Dashboard. Then, click on *Responses* for that Agency.

The screenshot shows the 'Protective Factors Survey' Group Dashboard. At the top left is the logo. At the top right are navigation links: 'Group Dashboard', 'Dashboard', and 'Hi, Edi W.'. The main content is divided into two columns. The left column is titled 'PFS Test Agencies' and contains a table with the following data:

Name	Created On	Agency Users	Stats	Responses
Brand New Box	2019-03-07	Users	Stats	Responses
Test Agency 2	2019-03-07	Users	Stats	Responses
FRIENDS	2019-03-07	Users	Stats	Responses
CPPR	2019-03-07	Users	Stats	Responses
Casandra's Testing site	2019-03-07	Users	Stats	Responses

The 'Responses' link for the first row is circled in red. The right column is titled 'Group PFS Test' and contains a table with the following data:

Name	Email
Matt Kirkland	matt@b...
Fdi	ewinkle...
MaryJo Caruso	mjcarus...
Ashley Hutton	ashley...
Ashley	ashley+...
Edi W.	admin...

Below the staff table is a 'Manage Group Staff' link. At the bottom of the right column is a 'Password' section with the text: 'Anyone creating a new Agency in this group will need this password.'

- Once you click on *Responses*, you will be at that agency's Your PFS Records block. From there, click the *Excel* link. This will give you the data for that agency in a .csv file.

Your PFS Records

See quick access to all your records. Use the search filters to the right to narrow your results, then download them as Excel.

[Go back to your dashboard](#)

Participant ID	Completed on	Survey	Delivery	Edit	Delete
08291903	08/29/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08291904	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08291905	08/29/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301901	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301902	08/30/2019	PFS-2 - Retrospective	Paper Entry	Edit	Delete
08301903	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301904	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
08301905	08/30/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09051901	08/28/2019	PFS-2 - Retrospective	Hand Delivery	Edit	Delete
09051911	09/05/2019	PFS 1.0 - English	Paper Entry	Edit	Delete

Reports

[PFS Summary: Participant Data](#)

[PFS Summary: Child Data](#)

[PFS Summary: Program Data](#)

[PFS Summary: PFS Subscales](#)

Search

Participant ID

Instrument

Matched Pre-Post

Programs:

- Home Visiting Primary
- Parent Ed Groups
- CBAIF-funded

[Advanced Options](#)