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:

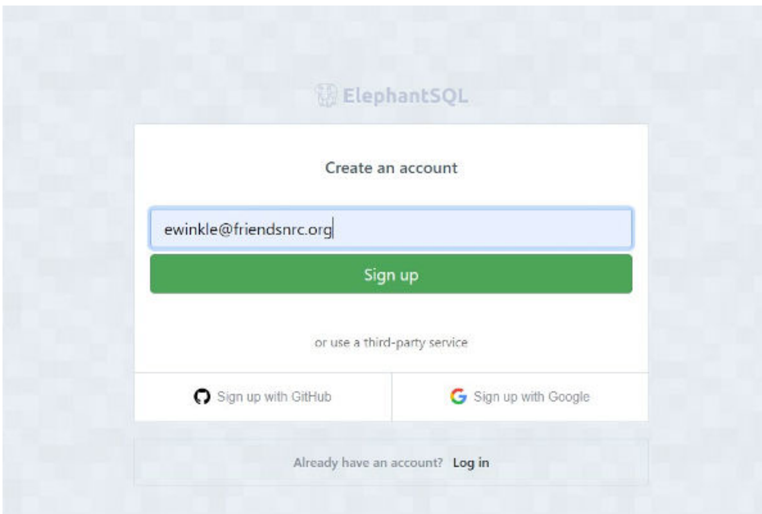
  - Creating discrete programs so data can be sorted according to needs.
  - How to customize agency demographic questions.
  - Solutions for creating custom agency questions for survey administration in addition to the standardized survey items.
  - Managing staff that needs access to the system to administer 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.

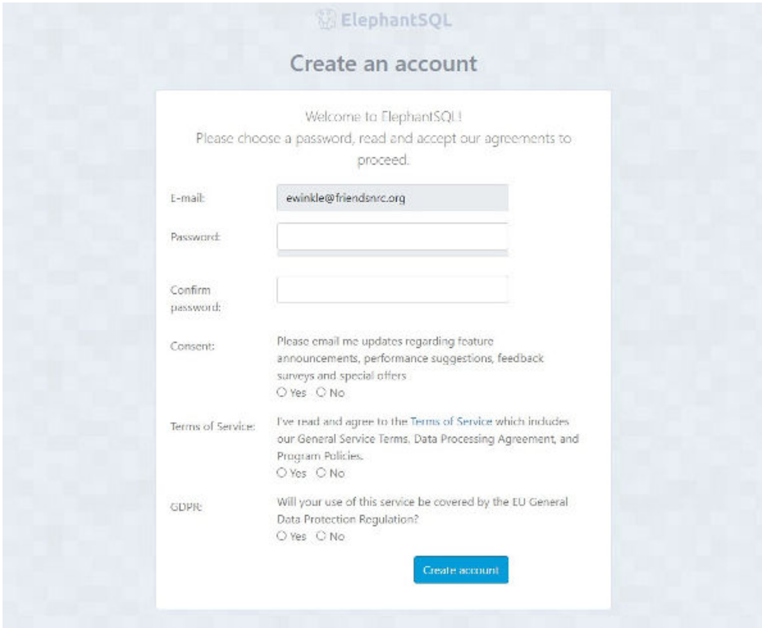
   Here's what the signup page looks like. First, enter the person's email in your organization responsible for managing your data system. This might be your program manager, IT professional, or office manager. *You will need access to this email to complete the Set-up process.*



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.

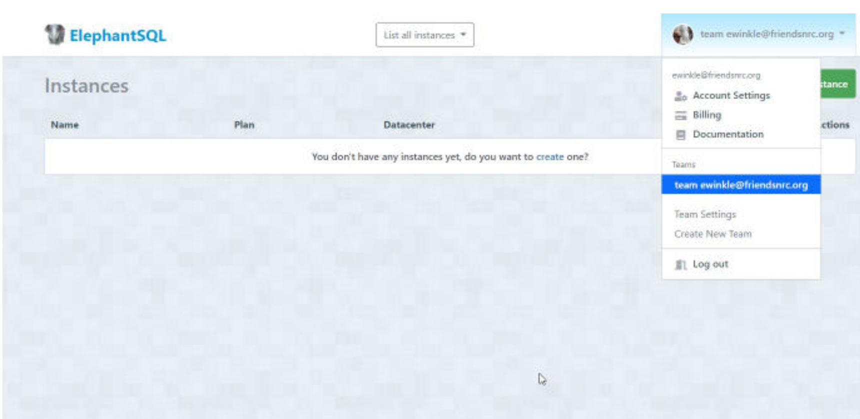
3. That link will take you to a *Create Your Account* page. Fill in your information. Be sure to make a note of the email and password you use. You must agree to the *Terms of Service* and indicate that EU Rules do not bind you.



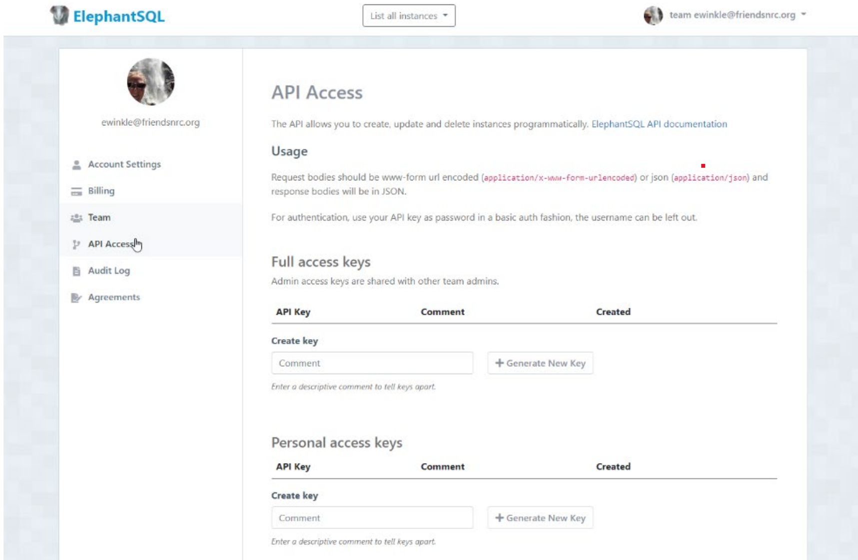
4. For Billing Set-up, you have some options:
    1. You can do monthly billing on a credit card. Just enter your card information under the billing section in account settings. You will be billed monthly for usage (likely $5 per month for a Simple Spider plan)
    2. If you need annual billing, reach 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:

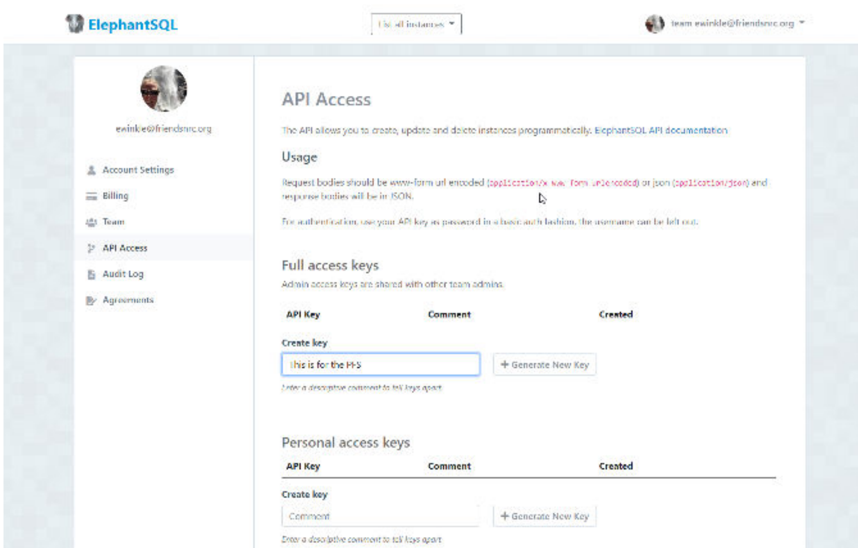
5. In your ElephantSQL account, click on the top right dropdown for an option called *Account Settings.*



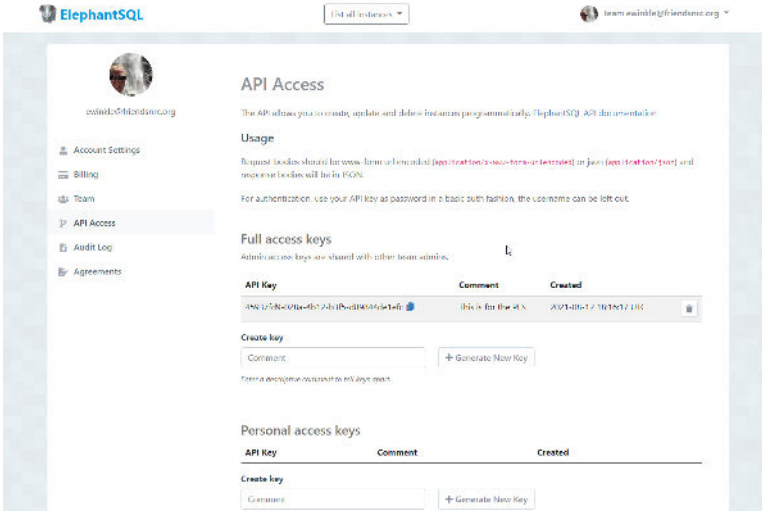
6. Once in account settings, select *API Access* from the left menu.



7. 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*.



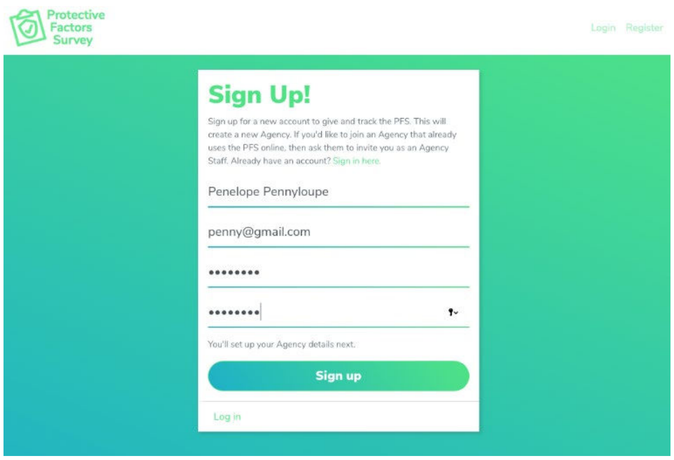
8. Now you have generated a new API Key for your database. That's the long string of random characters in this example below. It starts with '45937fd9'. Click the eye symbol to see the whole string.



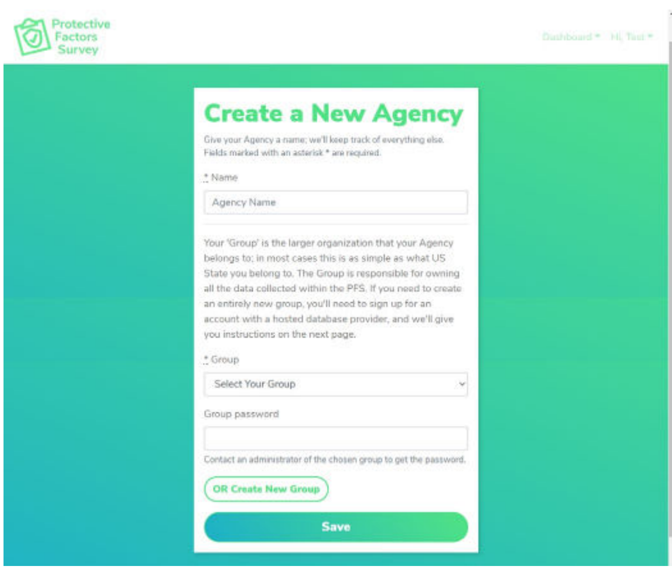
Copy that API Key to your clipboard (clicking will copy it) as you need it when you set up your agency account in PFSODS. (go to page 11 for information on that Set-up)

Setting Up Your Group

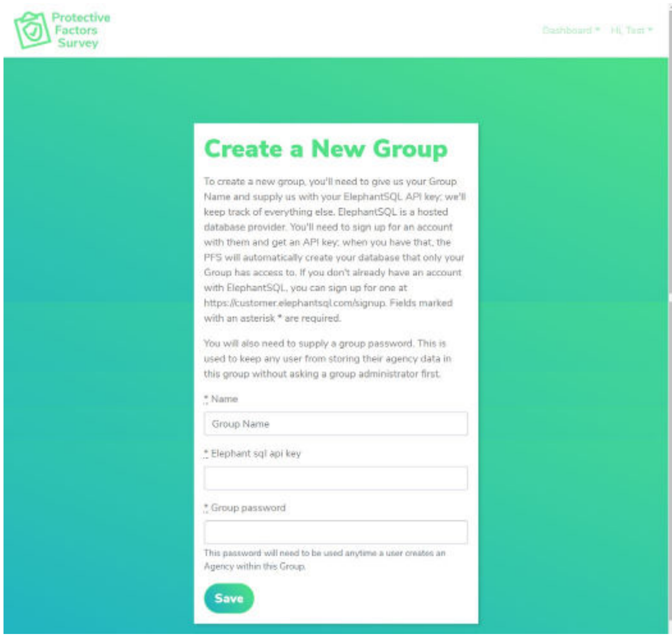
1. Once your database is set up with Elephant SQL or Brand New Box, you need to create your Group in the system. Visit https://pfsonline.friendsnrc.org/users/sign_up and enter your name, email, and create a password.



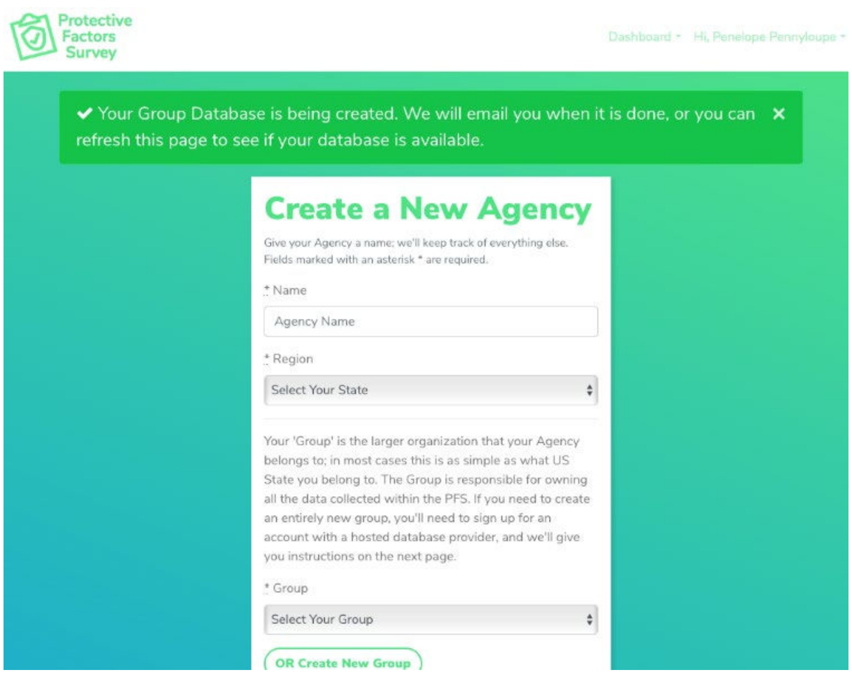
2. At the *Create a New Agency* screen, go to the bottom of the page and click *OR Create a New Group.*



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.

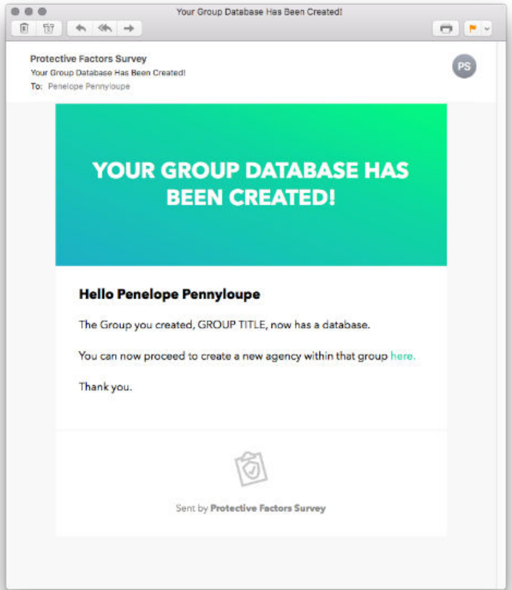


4. You'll see a message that tells you to wait while we automatically create the linkages to your database for you. Then, you'll get an email when it's ready; it usually only takes a few minutes.



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.



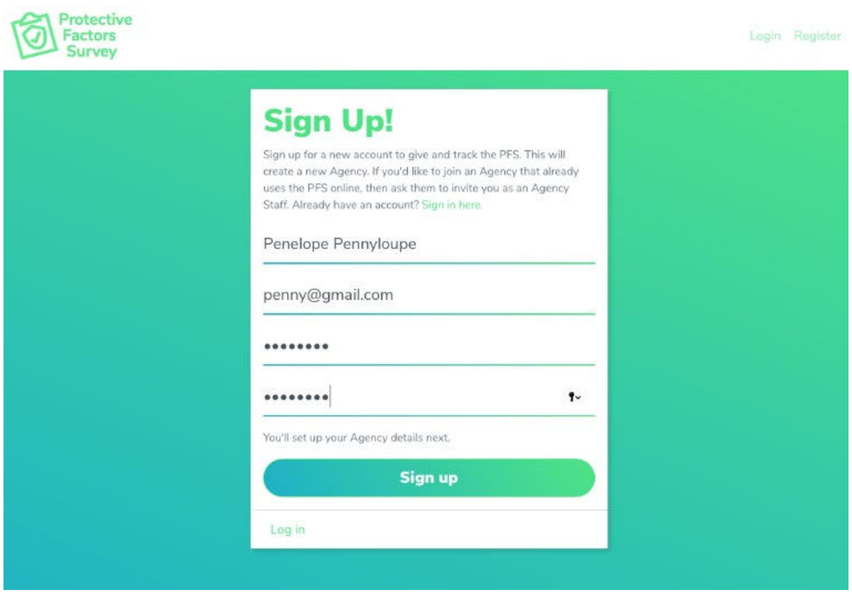
NOTE: Be sure to check your junk or spam folder if you are not finding the email after a couple of minutes.

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.

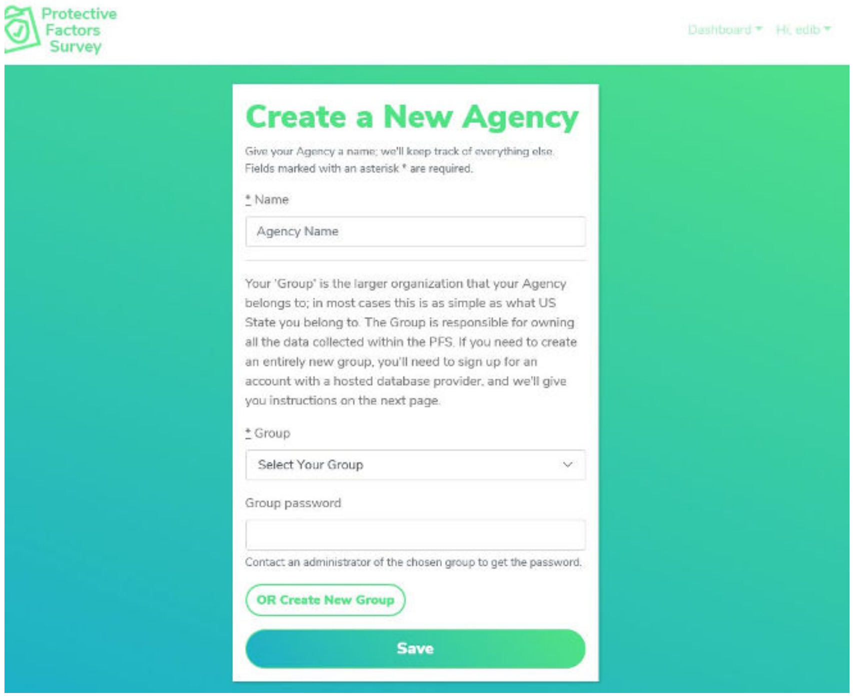
Agency Set-Up

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.

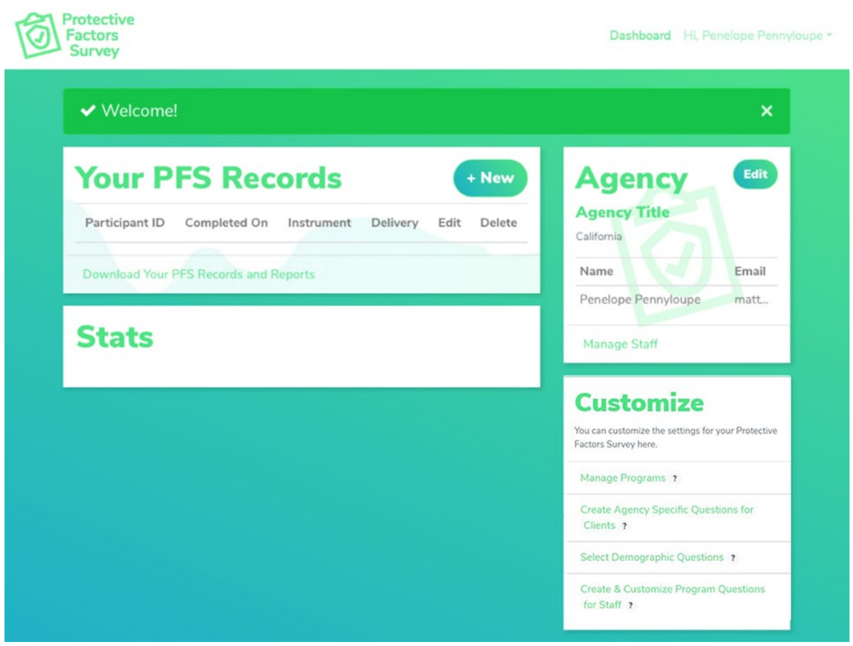


2. It's time to give your Agency a name. Fill out a name and ensure that the proper GROUP is selected in the *Group* field below. Also, you will need the *Group Password* that you designated in the Group Set-Up phase. (If you are setting up an agency using a Group created by another entity, you will 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.



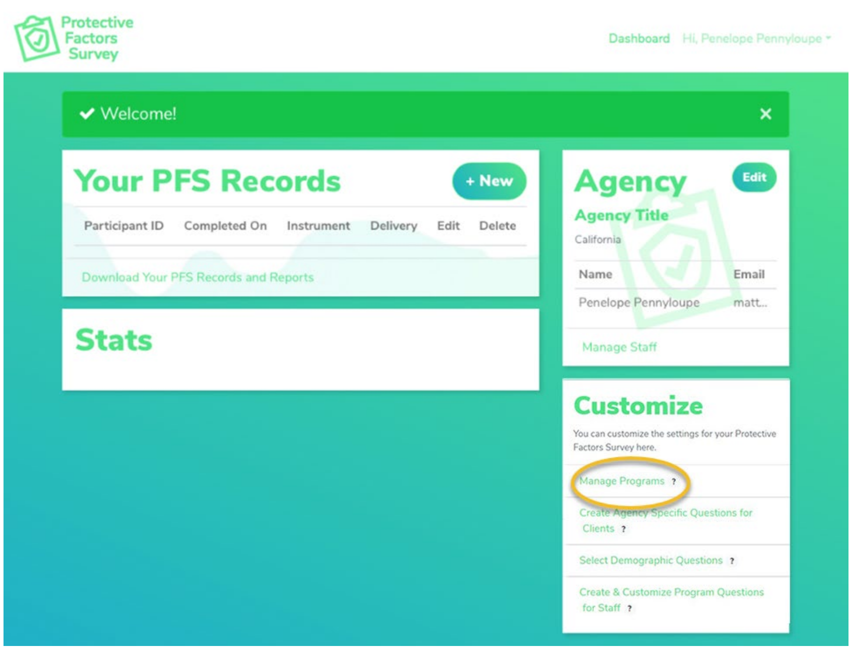
3. 🎉 Tada! 🎉 You're in! You're now looking at the *PFS Dashboard*.



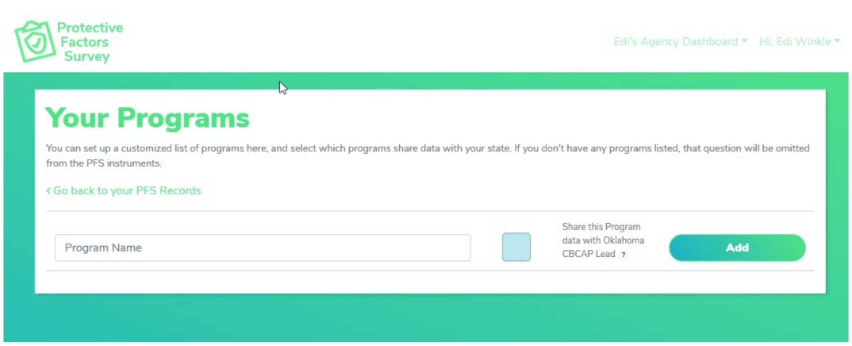
Program Set-up

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.

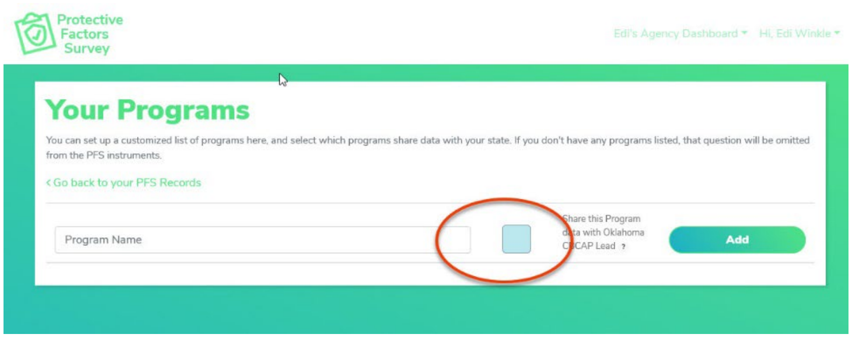


1. **Programs need to be set up before any data entry.** Programs are a critical data organizing step and MUST be done before data entry. If you need to share data with your CBCAP Lead (or other

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.

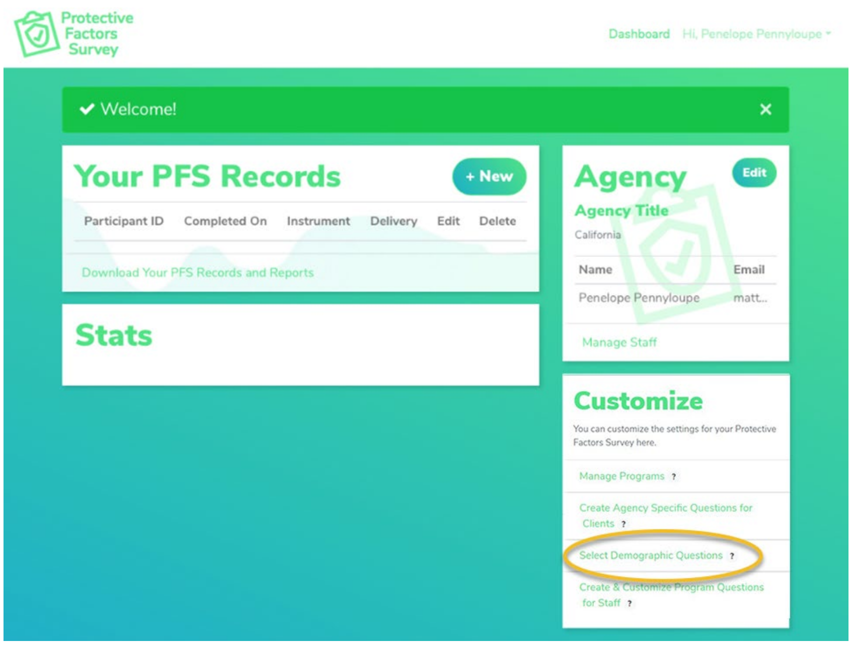


To add a program you are sharing data on, add a program name, click the box, and click *Add*.

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.



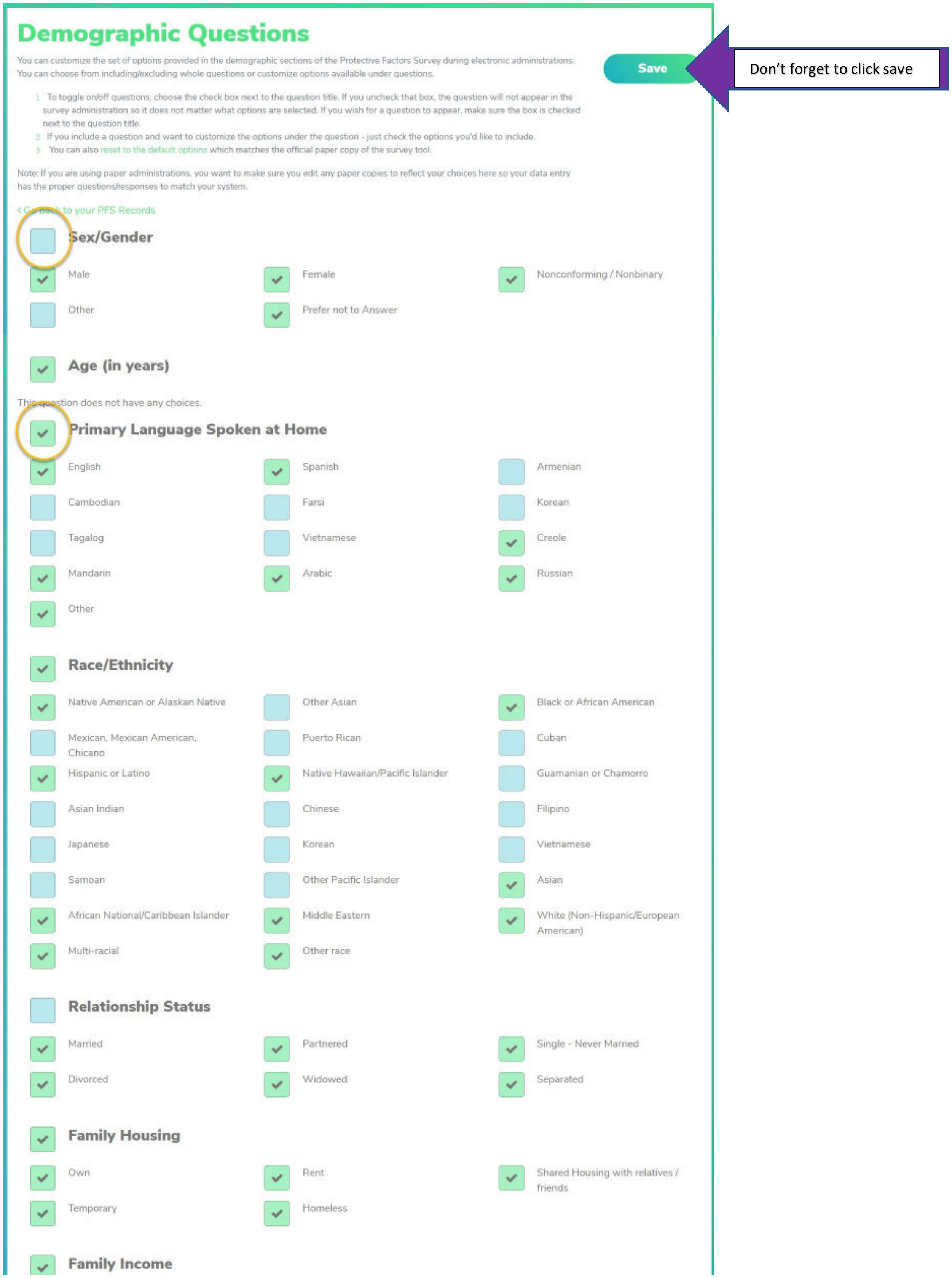
You can customize the options provided in the demographic sections of the Protective Factors Survey during electronic administrations. For example, you can choose from including/excluding whole questions or customize options available under questions.

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.

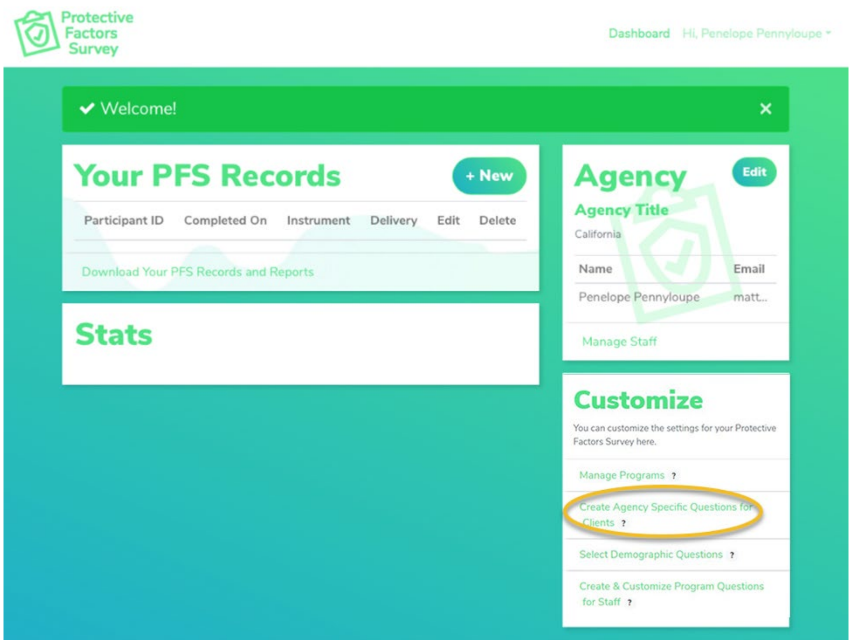
NOTE: If you are using paper administrations, you want to make sure you edit any paper copies to reflect your choices, so your data entry has the right questions/responses to match your system. These customizations will apply to all programs in your agency and will appear on every survey administration.



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.
Save
Don't forget to click save
to your PFS Records
Sex/Gender
Male
Female
Nonconforming / Nonbinary
Other
Prefer not to Answer
Age (in years)
stion does not have any choices.
Primary Language Spoken at Home
English
Spanish
Armenian
Cambodian
Farsi
Korean
Tagalog
Vietnamese
Creole
Mandarin
Arabic
Russian
Other
Race/Ethnicity
Native American or Alaskan Native
Other Asian
Black or African American
Mexican, Mexican American, Chicano
Puerto Rican
Cuban
Hispanic or Latino
Native Hawaiian/Pacific Islander
Guamanian or Chamorro
Asian Indian
Chinese
Filipino
Japanese
Korean
Vietnamese
Samoan
Other Pacific Islander
Asian
African National/Caribbean Islander
Middle Eastern
White (Non-Hispanic/European American)
Multi-racial
Other race
Relationship Status
Married
Partnered
Single - Never Married
Divorced
Widowed
Separated
Family Housing
Own
Rent
Shared Housing with relatives / friends
Temporary
Homeless
Family Income

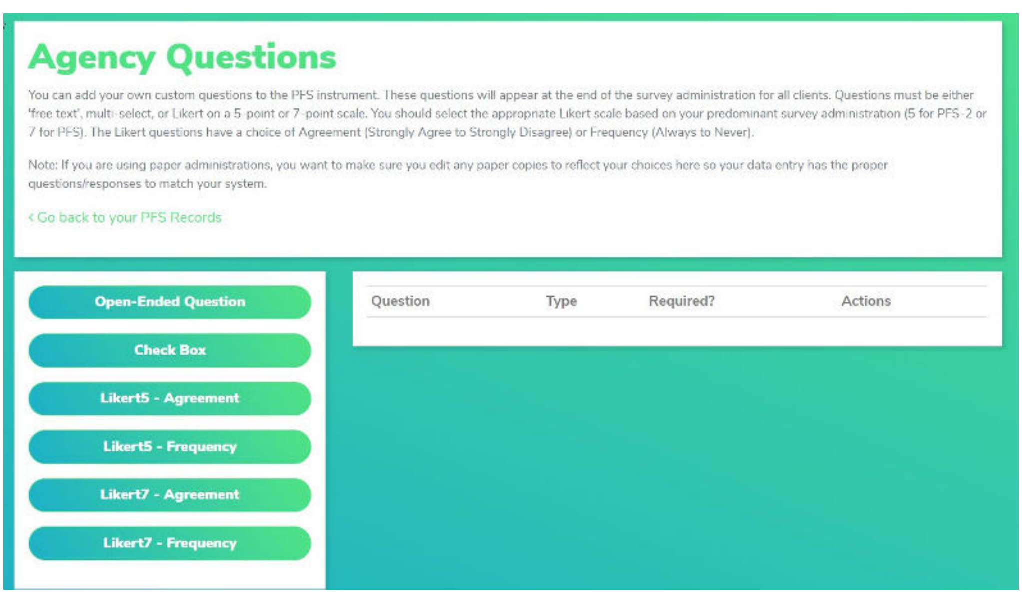
Create Custom Questions for Clients

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.

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)

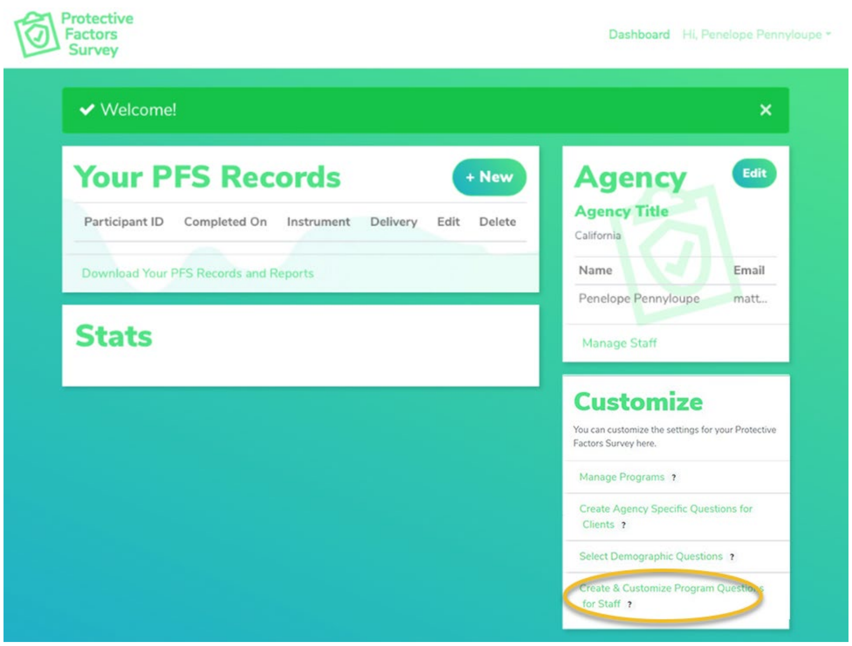


To define questions, click on the button for the type of question you wish to establish and follow the interface. If you want the question to be a required item, click the box and select save changes.

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

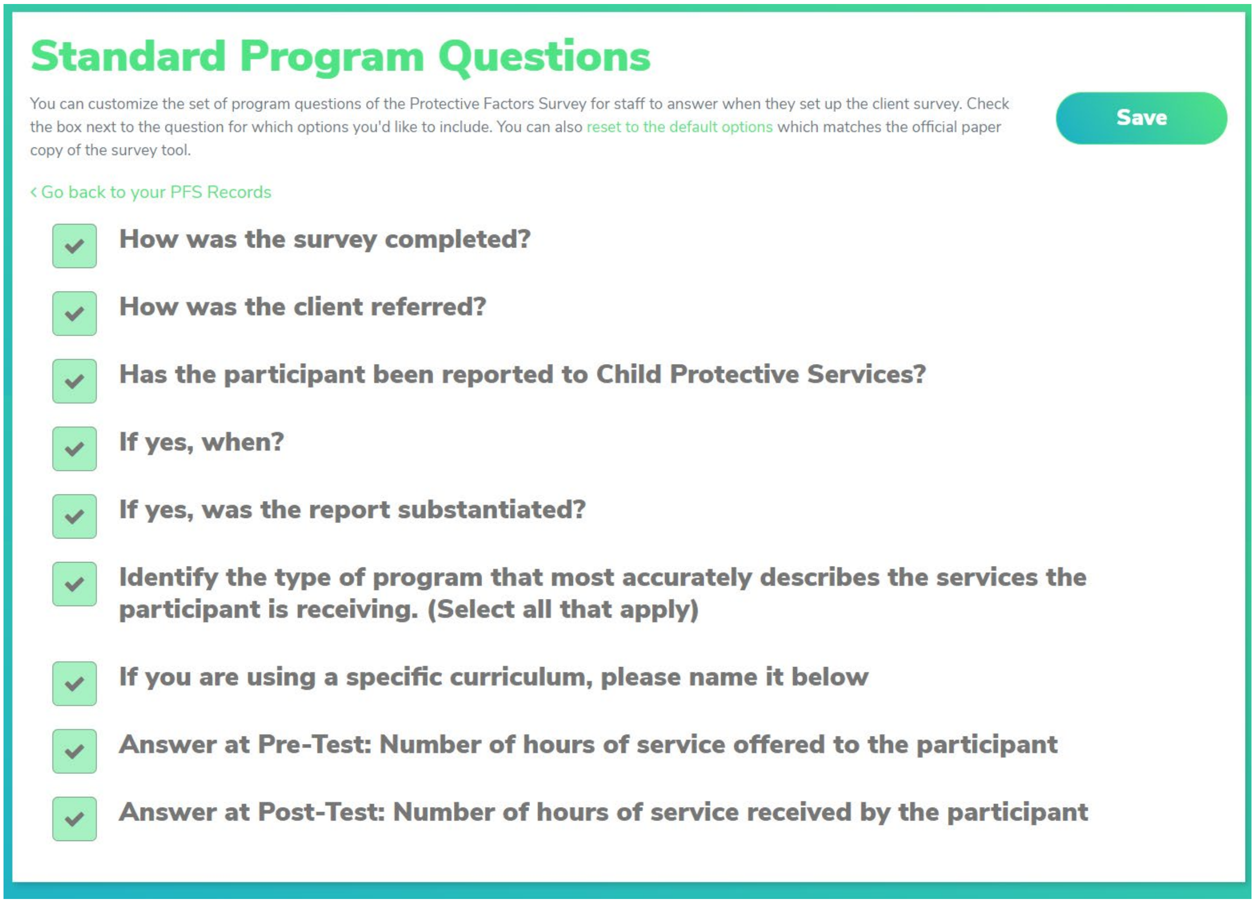
Create and Customize Program Questions for Staff

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.

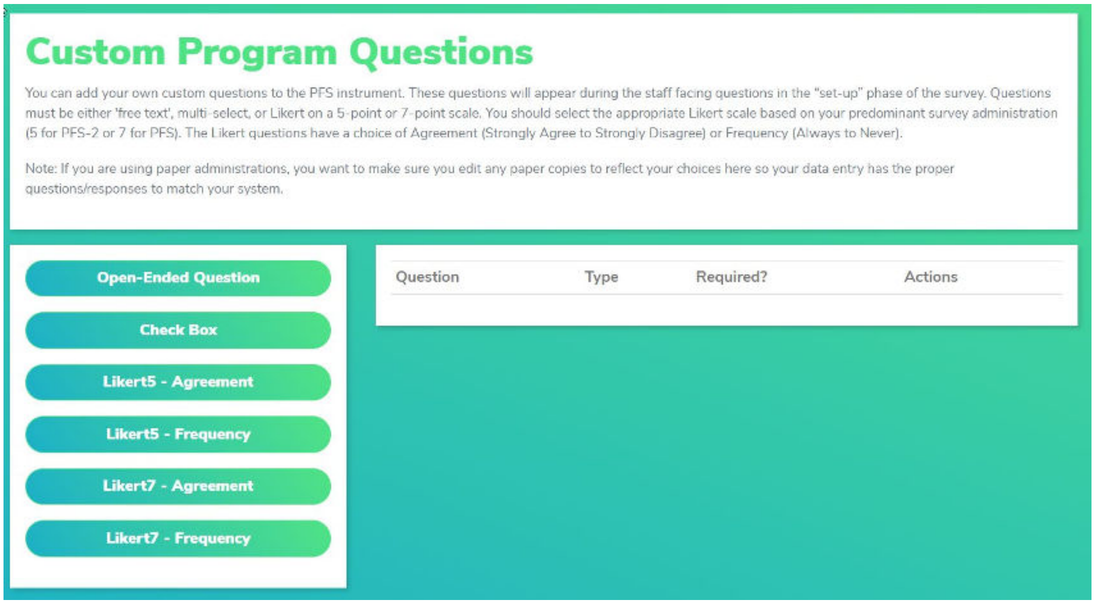


Next, you can add your custom questions to the PFS instrument. These questions will appear during the staff facing questions in the “Set-up” phase of the survey.

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)

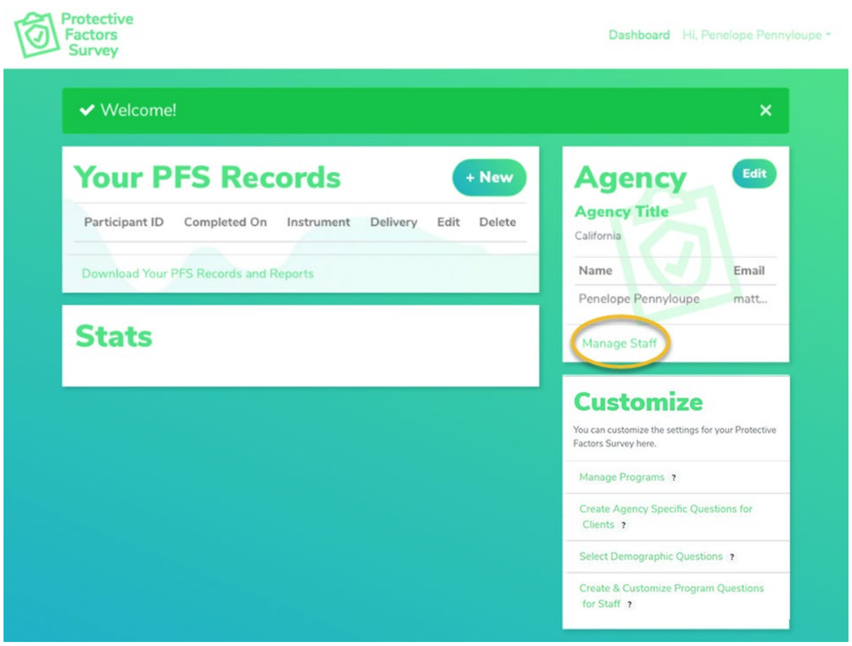


To define questions, click on the button for the type of question you wish to establish and follow the interface. If you want the question to be a required item, click the box and select save changes.

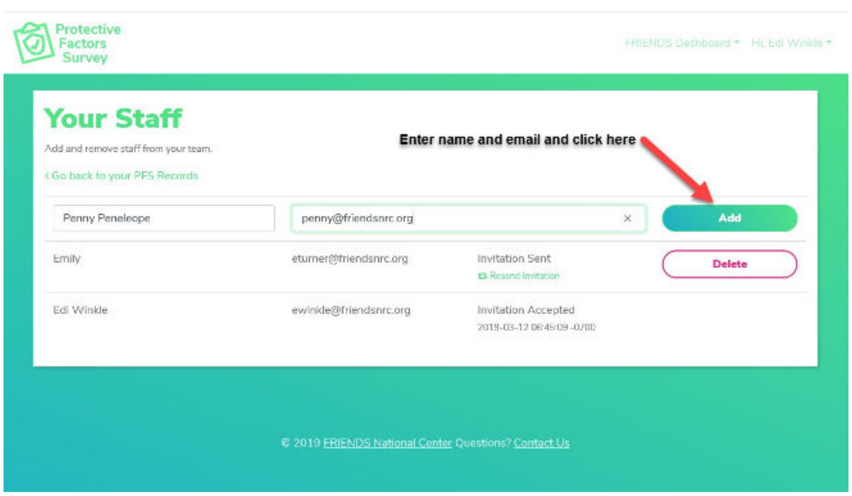
NOTE: These are applicable across all programs at the Agency Level. They cannot be program-specific.

Edit/Add Staff

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

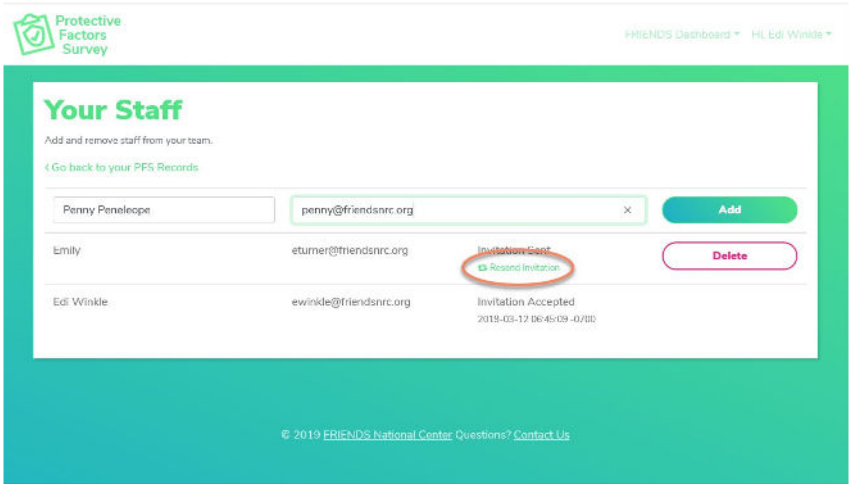


2. To invite staff to participate in the system, enter their name and an email address and click *Add*.



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.

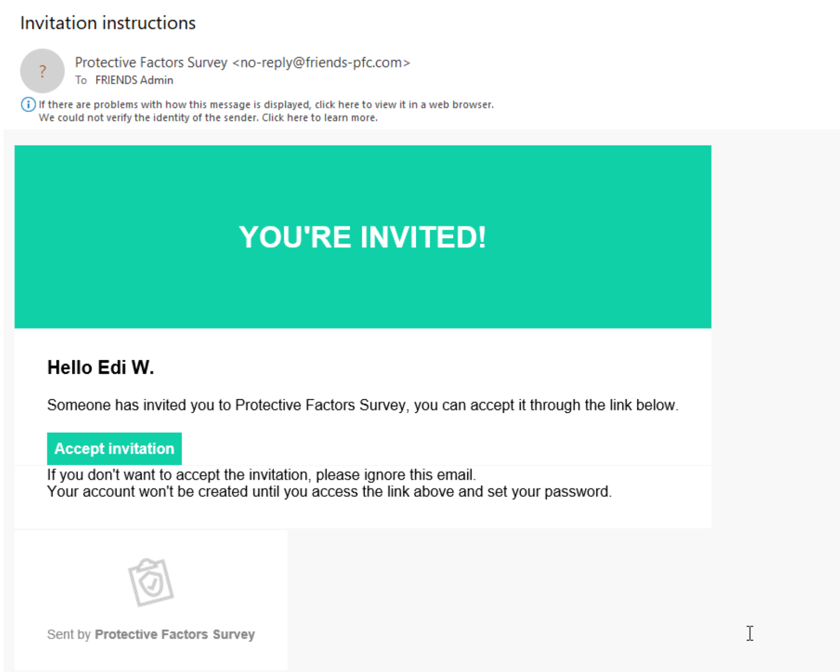
NOTE: Be sure to have your staff check junk or spam folders if they are not finding the email after a couple of minutes



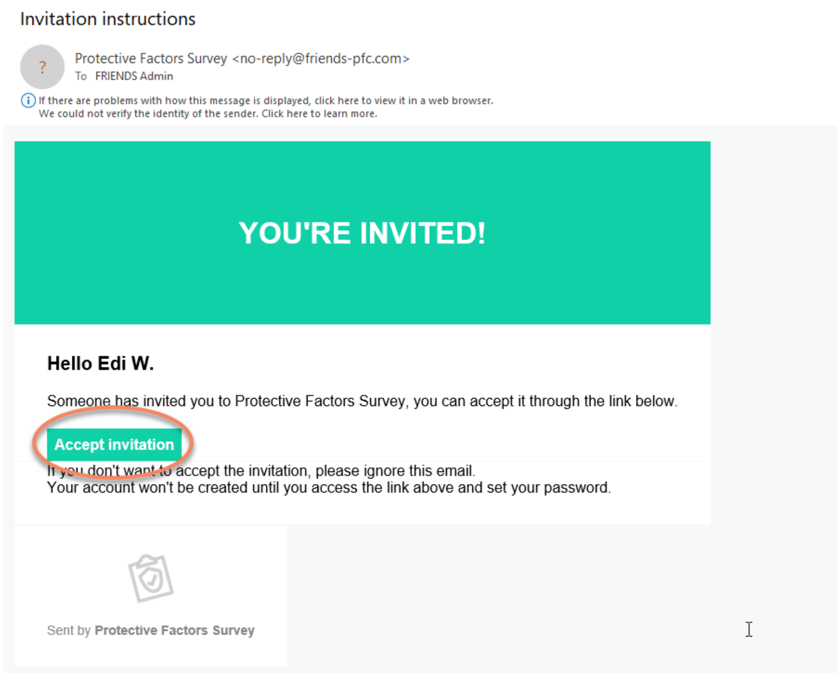
Agency Staff Account Set-up

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.

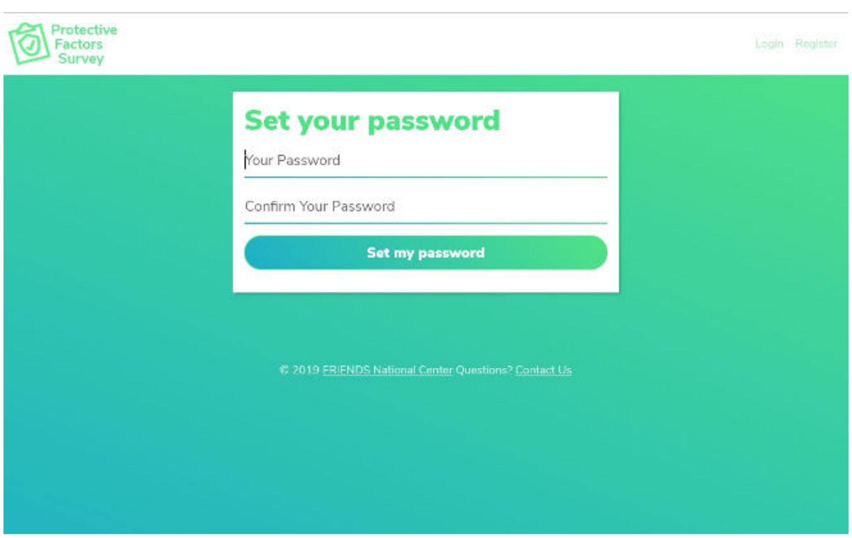


2. Click on the green *Accept Invitation* button

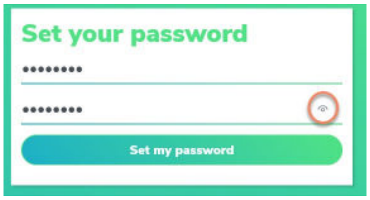


If your email system does not allow you to click through links, hover over the green button with your cursor and then right-click. Next, select copy hyperlink, open a browser window and paste the address into your browser.

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

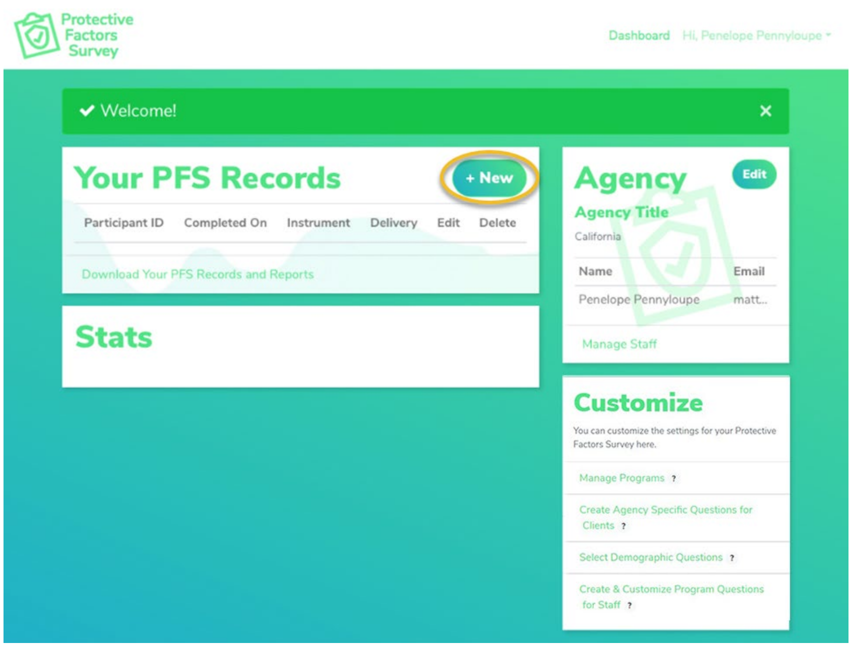
Click on the three lines to the right of the menu bar and select *Options*. Click on the *Privacy & Security* from the left menu, scroll down to Forms and Autofill, and unclick the box. Also, scroll to *History* and choose *never remember history*.

Safari

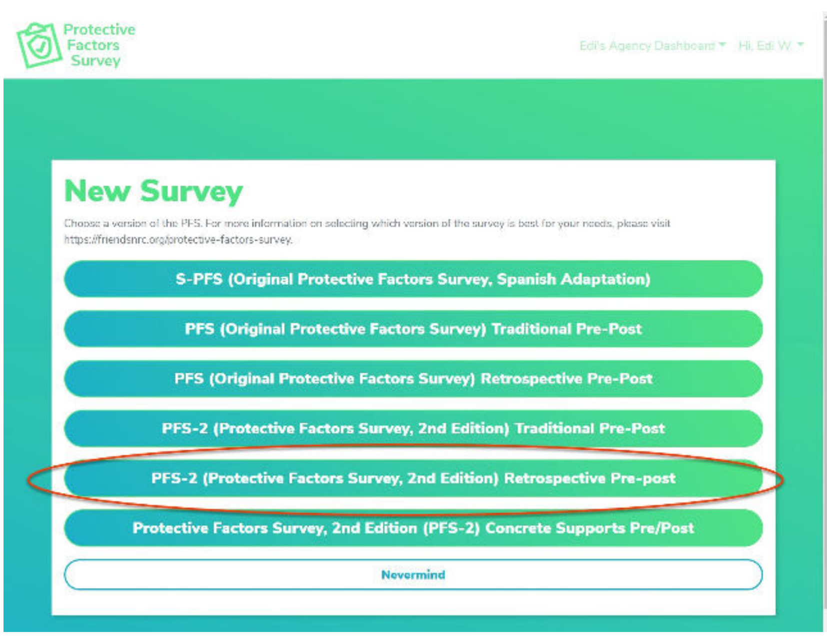
Click on the word Safari at the top of the screen (Safari menu). Then click preferences and choose AutoFill. Next, uncheck "using info from my contacts card/address book card" and "other forms" and then click done.

Initiating Survey

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

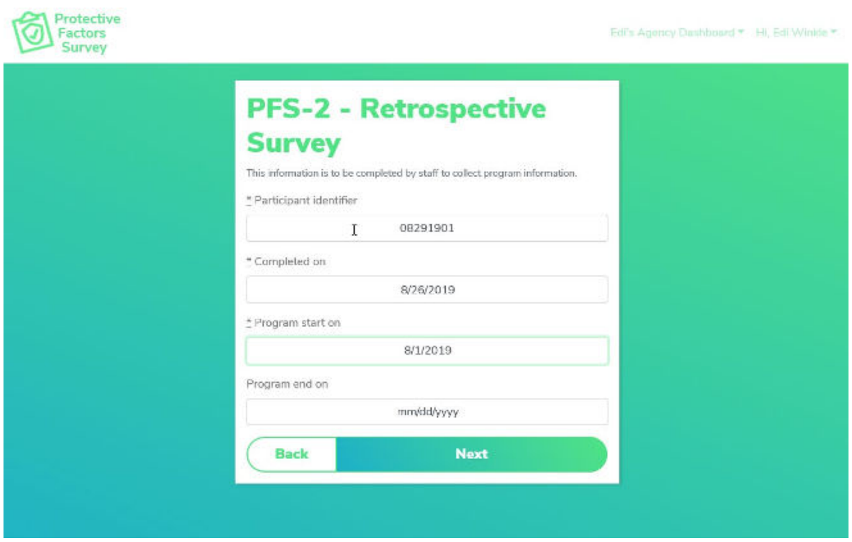


2. Select the version of the survey you are administering. Then, click on the version you are using. For this example, we will use the *PFS-2 Retrospective*.



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.



   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.*


Protective Factors Survey

Edi's Agency Dashboard Hi, Edi W.

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

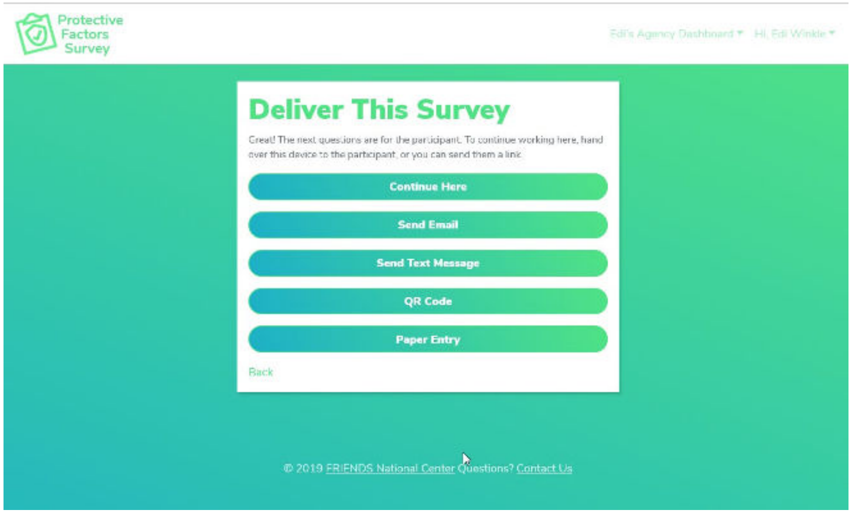
15

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

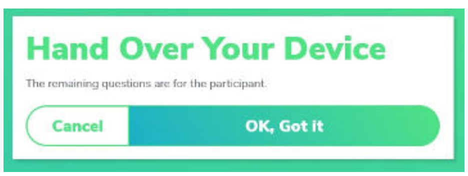
12

Back Next

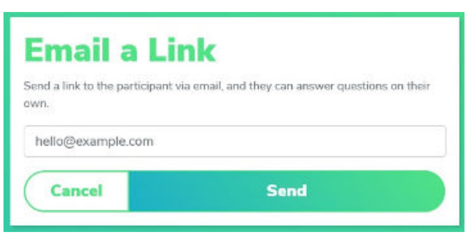
5. You now have options for proceeding with administering the survey. You can:



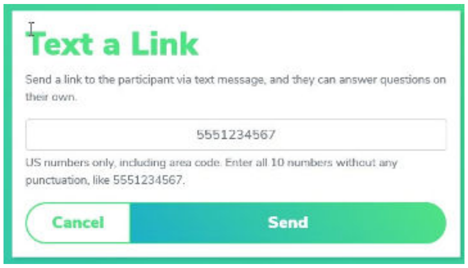
a. **Continue Here**- you will get a message to hand off your device (phone, tablet, laptop, desktop to the client to begin the survey)



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.

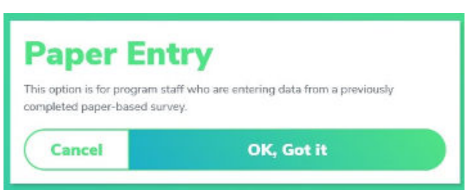


c. **Send Text Message**- generate a survey link to a cell phone number for administering the survey. This could be your number to have the link ready for a client later or the client's number to complete the survey on their own device.



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.

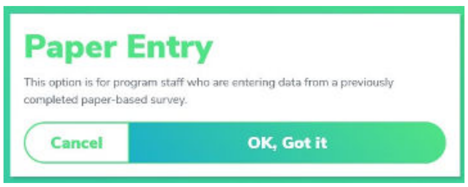


NOTE: The link generated in these various options is ALL CLIENT SPECIFIC. The links can only be used once and are tied to the appropriate client id.

6. 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

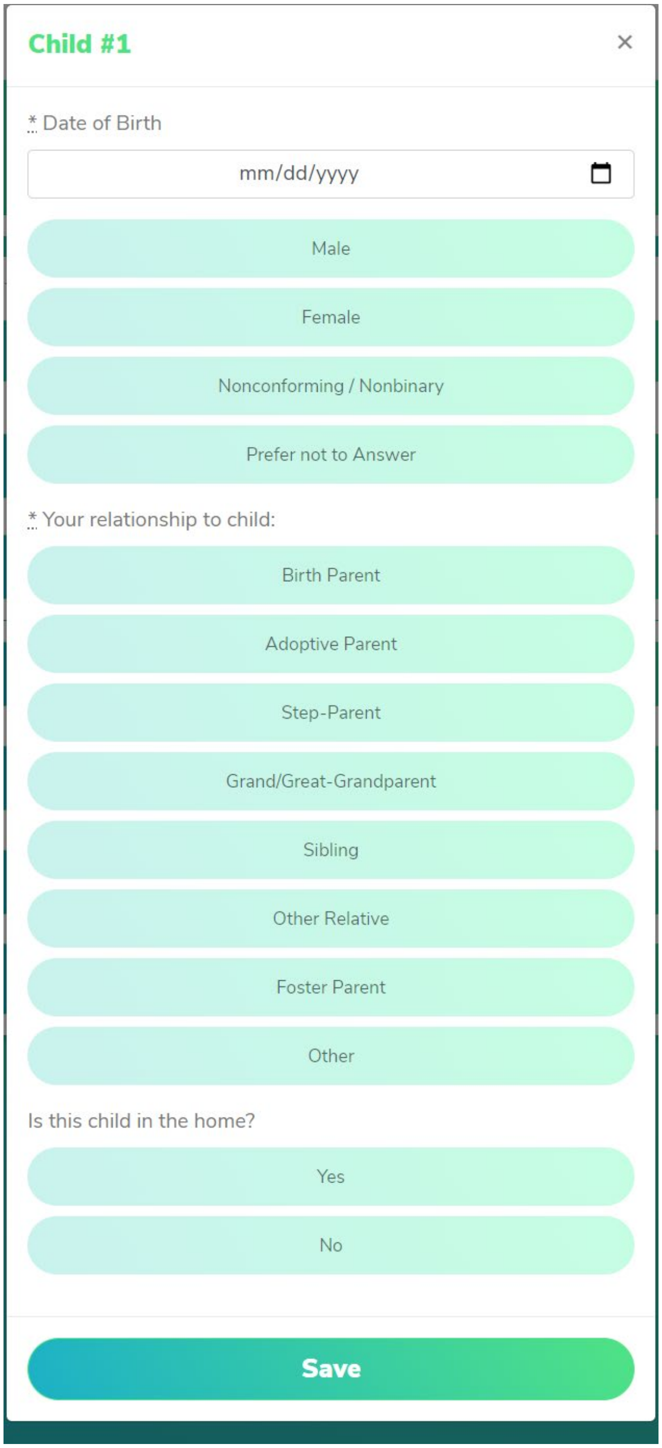
1. Once you enter the program information and click on *Paper Entry,* you will receive this message:



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.*

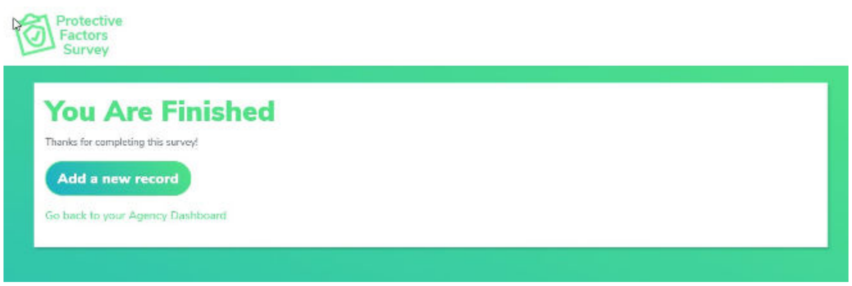
You can begin your data entry now. All survey questions will be on one page and you will just need to scroll down to enter all the items. Once entered, click *+Add Child*.

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.



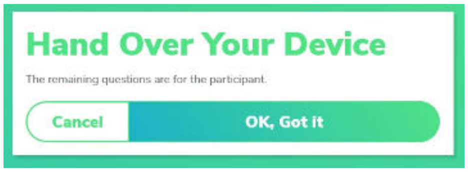
3. Once all children are entered, click *Submit*.

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



Client Entry

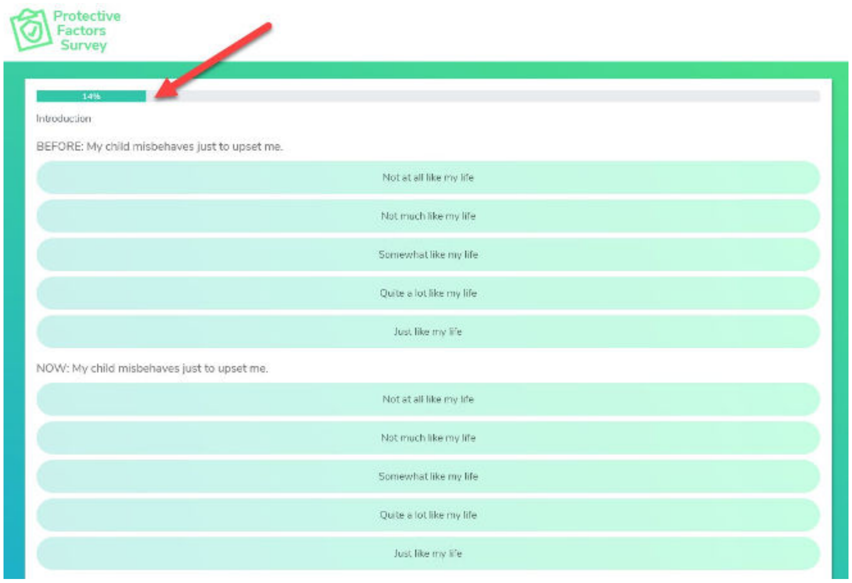
1. Once you enter the program information sheet information, click on *Continue Here.* You will receive this message:



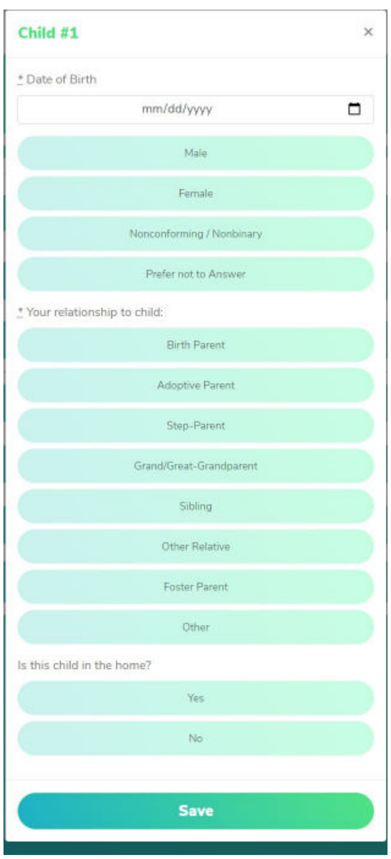
Click *OK, Got It*, and allow the client to access your device (phone, tablet, laptop, or desktop).

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.

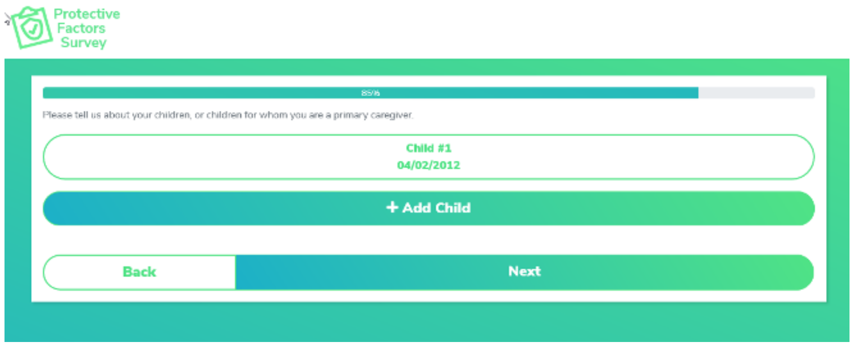
3. A progress bar will appear at the top of the screen to show how far they are in completing the survey questions.



4. 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.



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

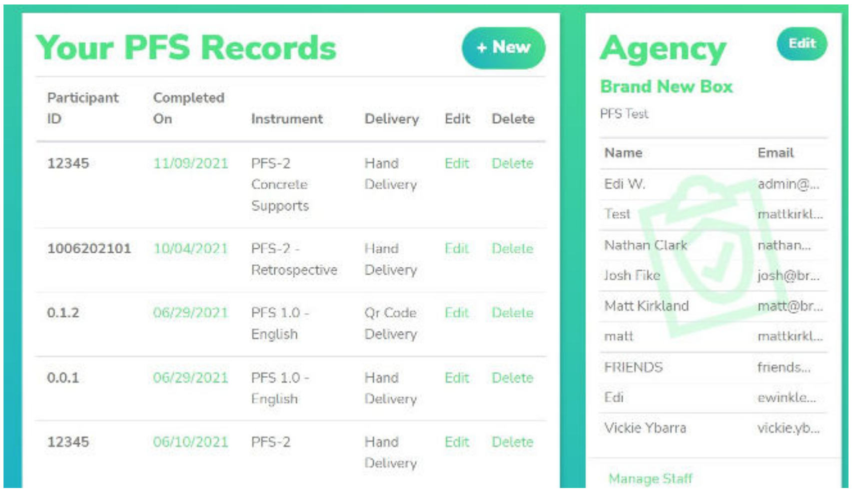


6. When they click *Next* they will receive this message. There is no navigation back to the *Dashboard* or any other part of the system from this screen. This prevents clients from accessing areas they are not permitted to see within the system.

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

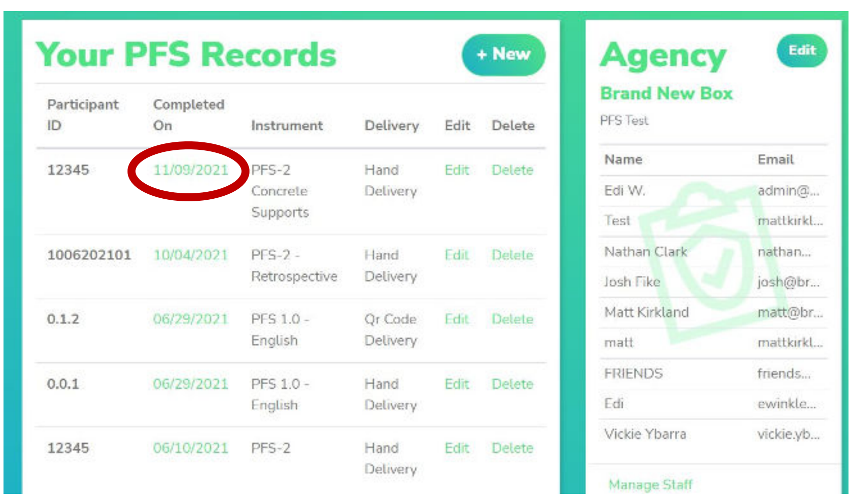
Understanding PFS Records

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.

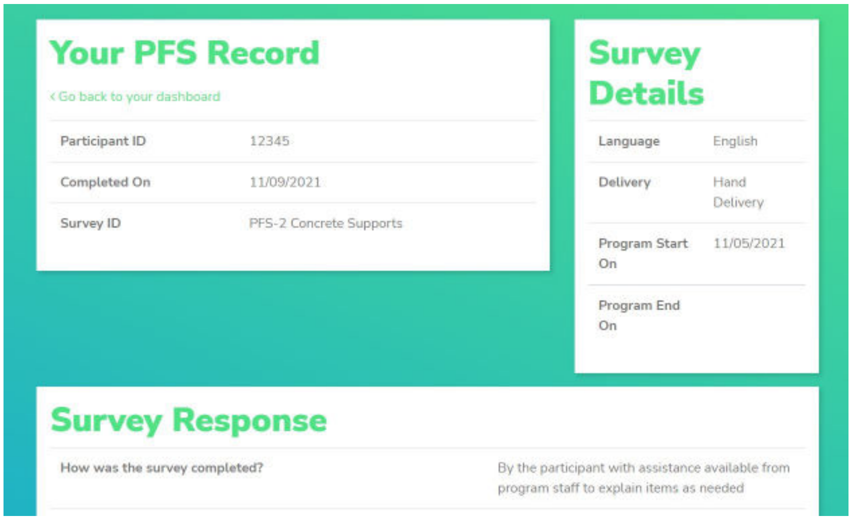


Viewing Participant Responses

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.



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

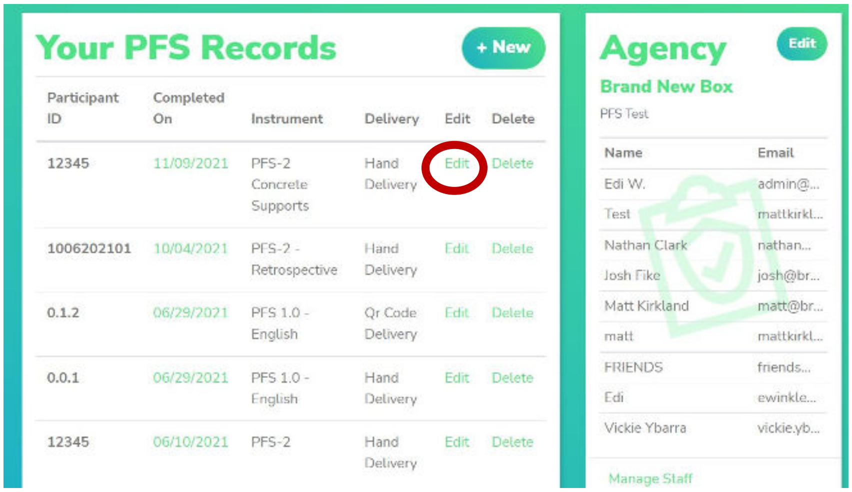


4. You can scroll the screen to view the record and use the print option for your browser to print the record if needed.

   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.

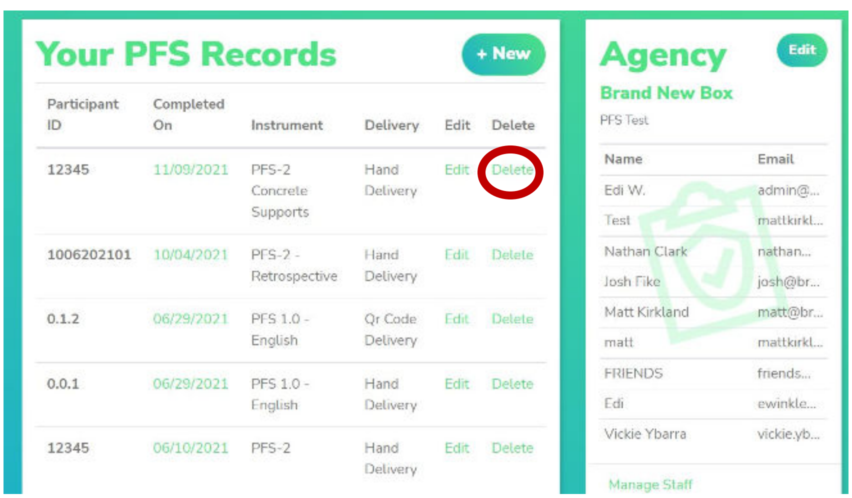


5. This will take you through the record and allows you to edit the responses. Finally, click the submit button once edits are completed.

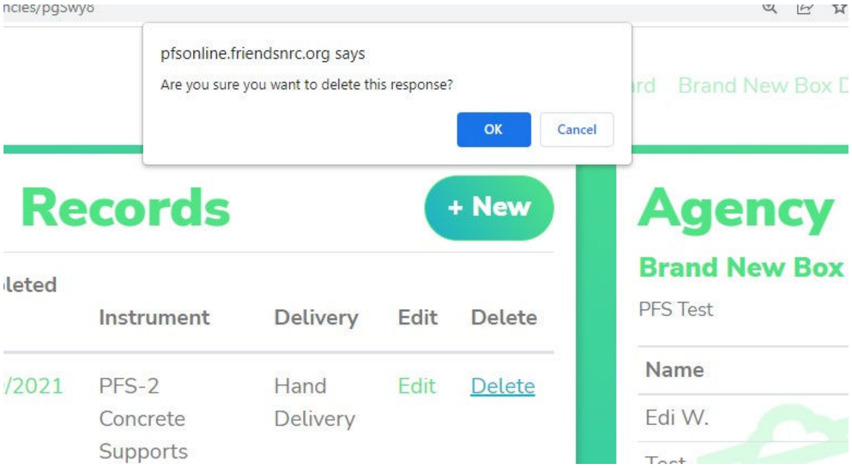
*NOTE: A reminder that Paper Entry does not lock the system to prevent clients from accessing the **Agency Dashboard** after completion. DO NOT use this option with clients.*

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.



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 Reports

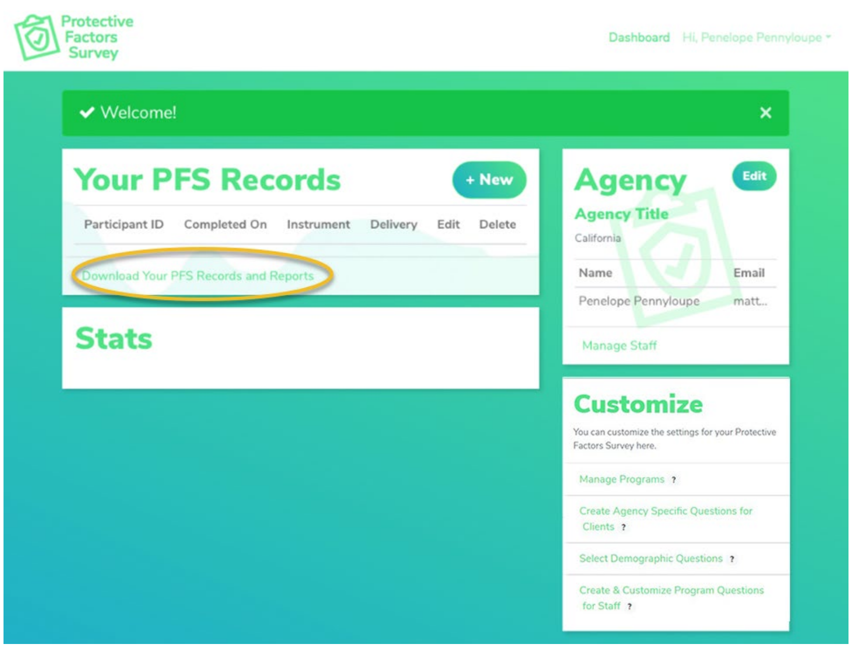
The system has predefined reports that support agencies' understanding and using their data. This section will walk through the predefined reports and guide how to download raw data for use in outside data and statistical programs.

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*

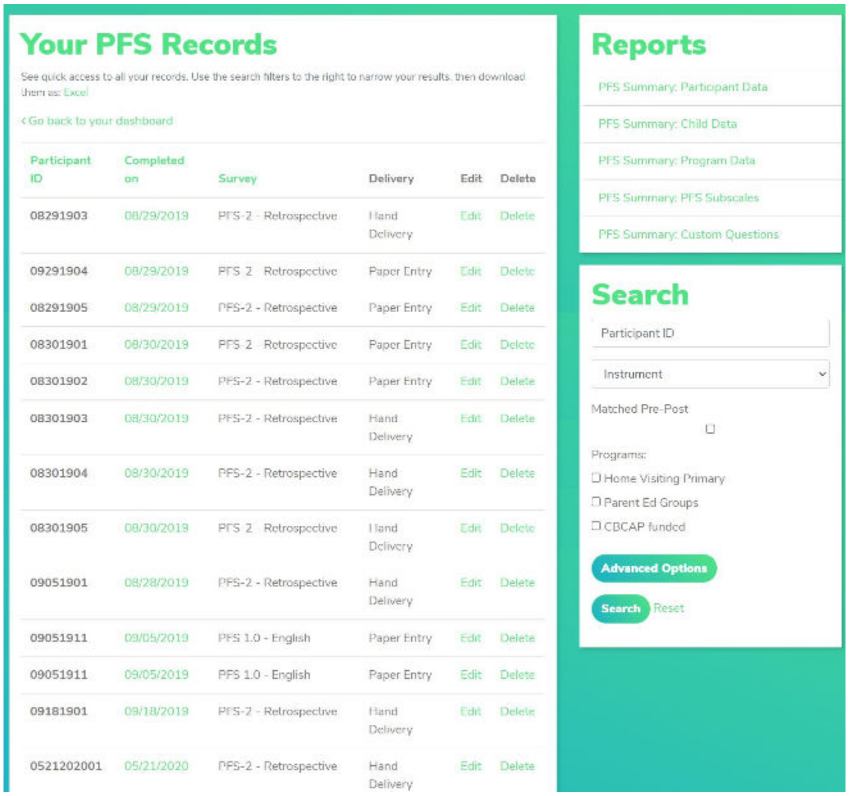
Reports can be accessed from the Dashboard by clicking the link in the *Your PFS Records* block.



Searching and Sorting Records

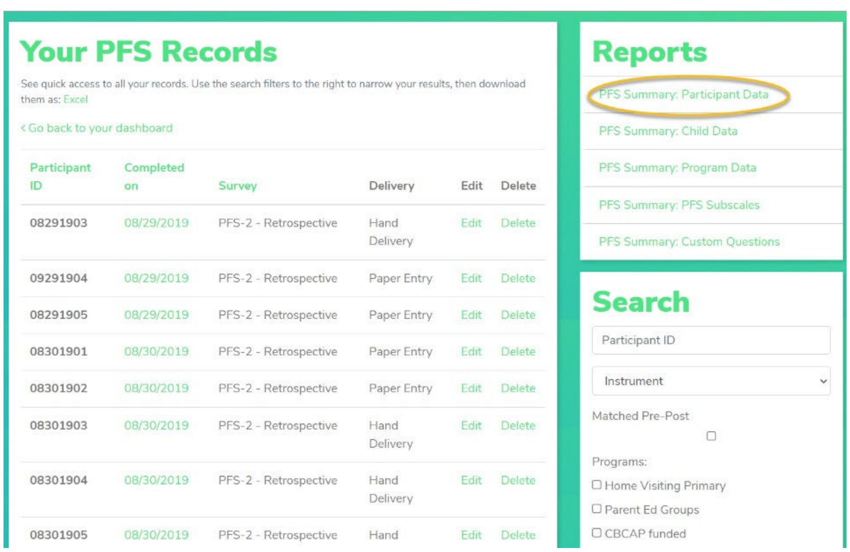
4. All records are sorted on Instrument Type. You can't combine records across report types (PFS-2 traditional and PFS-2 Retrospective, for example) in any generated reports within the system. You can search by participant id and program in the basic search box or click on *Advanced Options* and get 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.

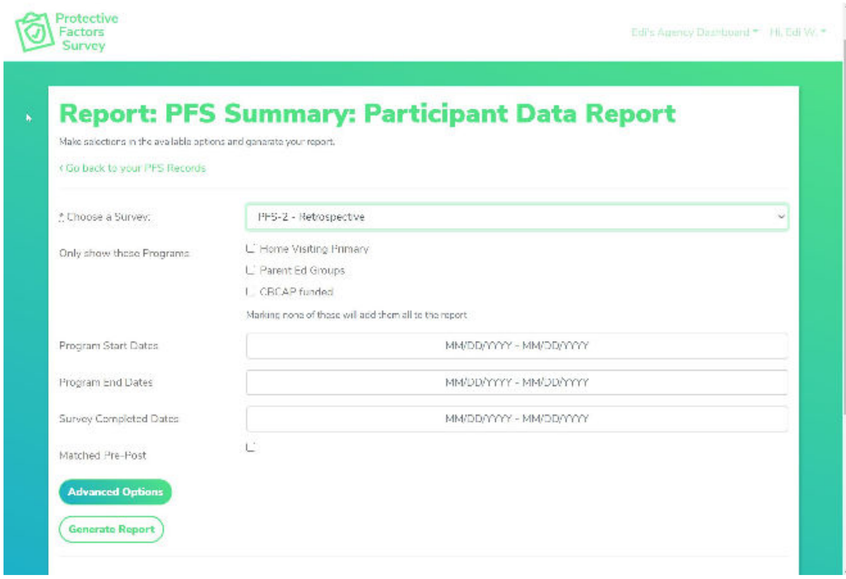


Participant Data Report

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



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.



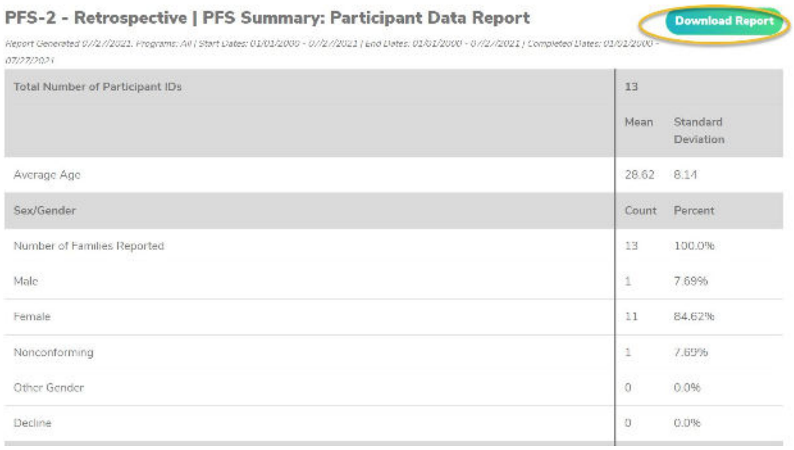
3. Once you click *Generate Report*, scroll down to see the demographic information. Here is a sampling of the type of data generated.

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	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%

4. 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

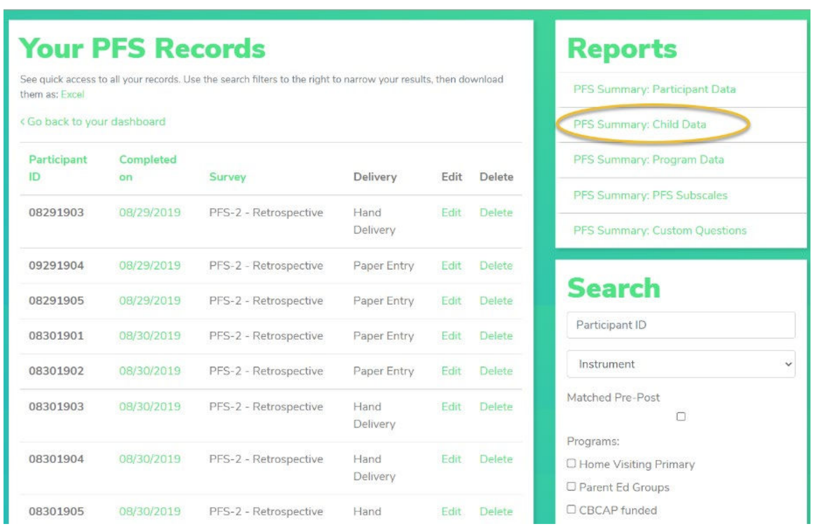
Download Report

Report Generated 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

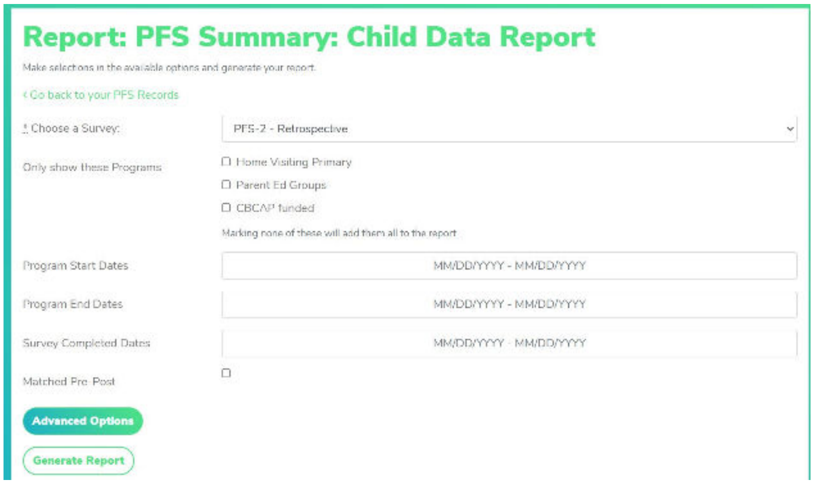
Total Number of Participant IDs	13	
	Mean	Standard Deviation
Average Age	28.62	8.14
Sex/Gender	Count	Percent
Number of Families Reported	13	100.0%
Male	1	7.69%
Female	11	84.62%
Nonconforming	1	7.69%
Other Gender	0	0.0%
Decline	0	0.0%

Child Data Report

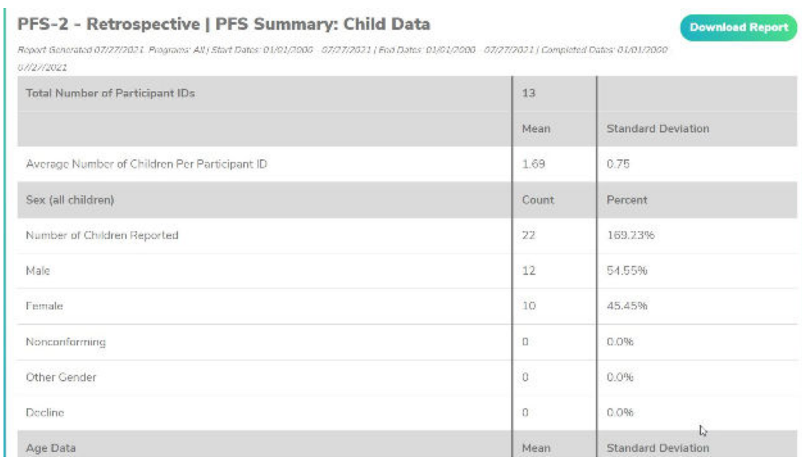
1. Click on *PFS Summary: Child Data* in the Reports block from the Dashboard.



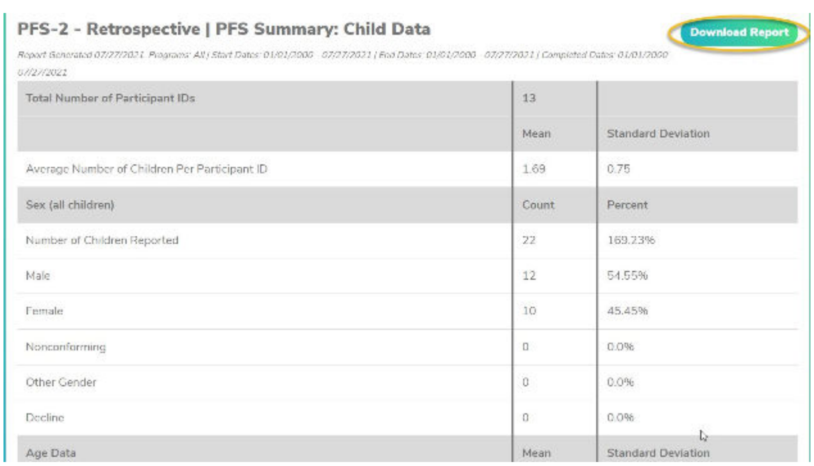
2. Choose the survey and which program(s) you want to display records from. You can also narrow it by program dates, survey dates, and only matched pre-post records. Finally, click *Generate Report or* click *Advanced Options* for more search criteria.



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

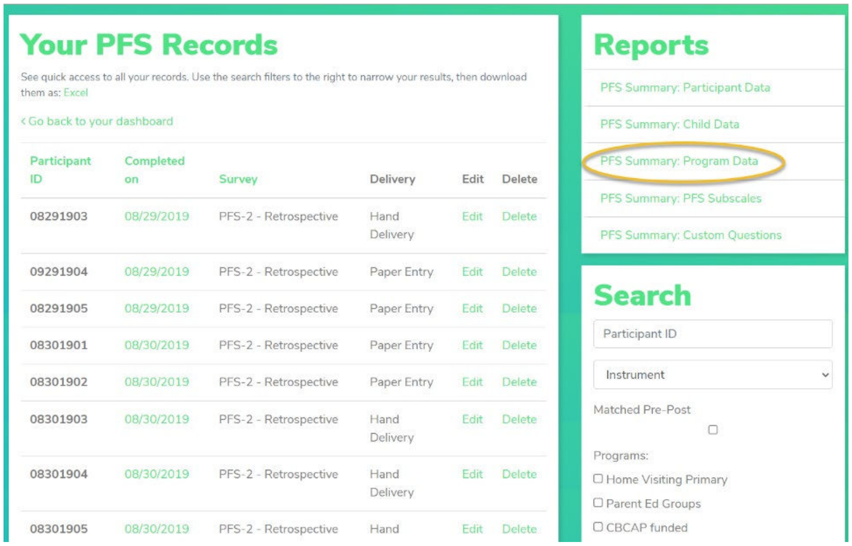


4. Remember, you can also download your data for use in other programs for more in-depth analysis. To download, click the *Download Report* button in the upper right corner.

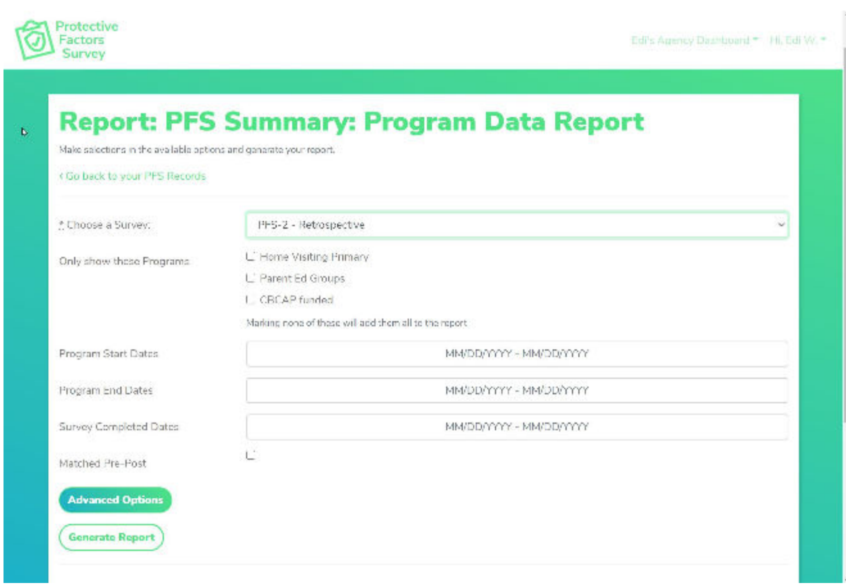


Program Data Report

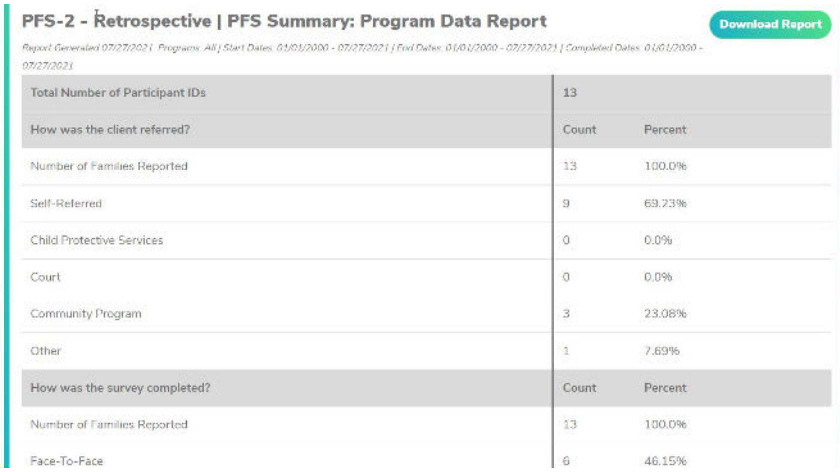
1. Click on *PFS Summary: Program Data* in the Reports block from the Dashboard.



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.



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

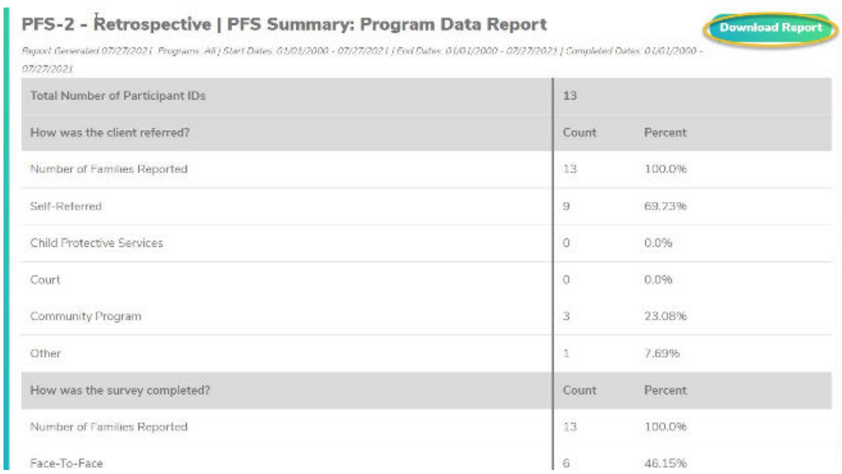


PFS-2 - Retrospective | PFS Summary: Program Data Report Download Report

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-Referred	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.



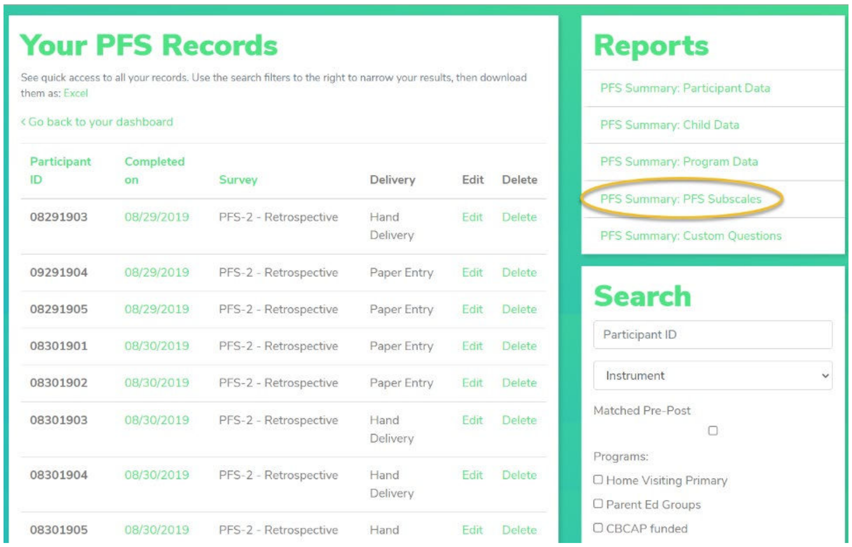
PFS-2 - Retrospective | PFS Summary: Program Data Report Download Report

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-Referred	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%

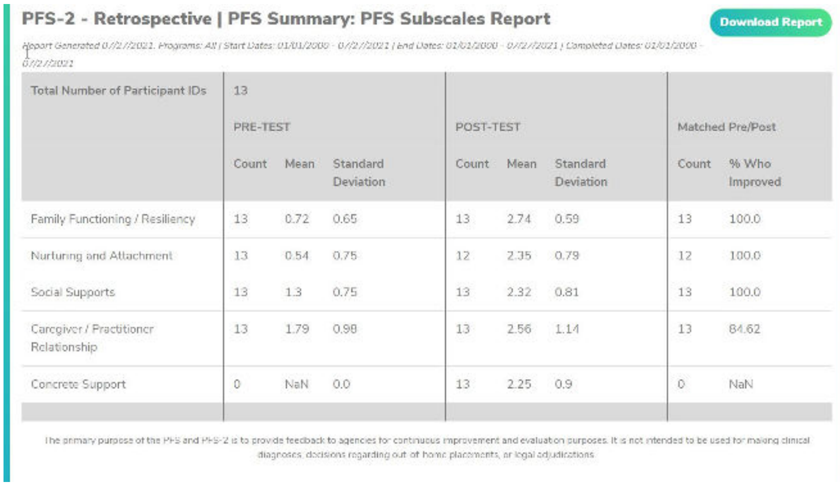
PFS Subscales Report

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



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.

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

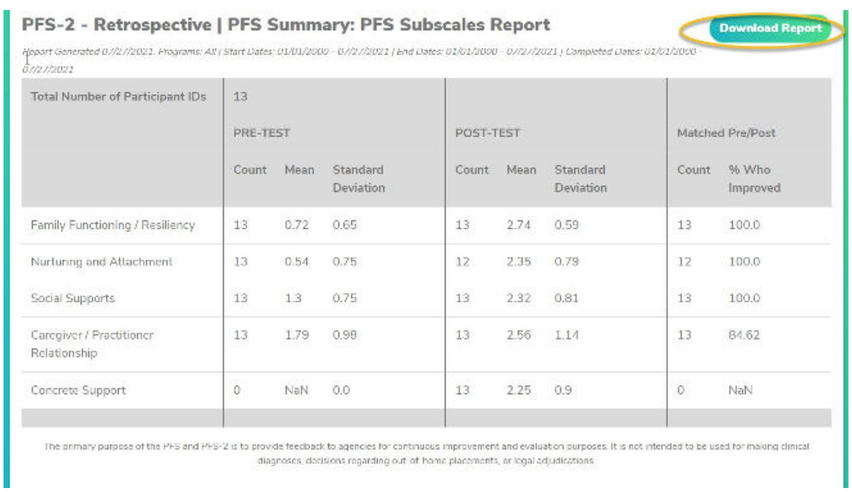
Download Report

Report Generated 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							
	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

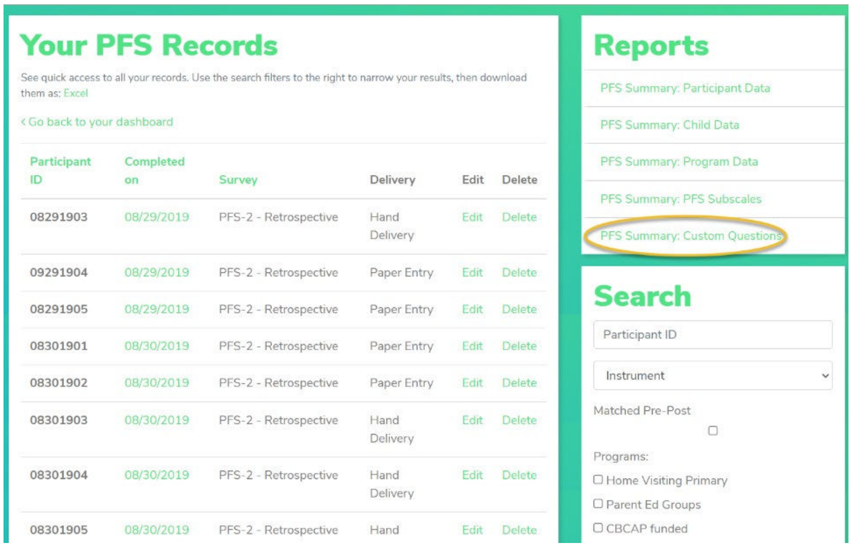
Report Generated 07/27/2021. Programs: All | Start Dates: 01/01/2000 - 07/27/2021 | End Dates: 01/01/2000 - 07/27/2021 | Completed Dates: 01/01/2000 - 07/27/2021

Total Number of Participant IDs	13							
	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.



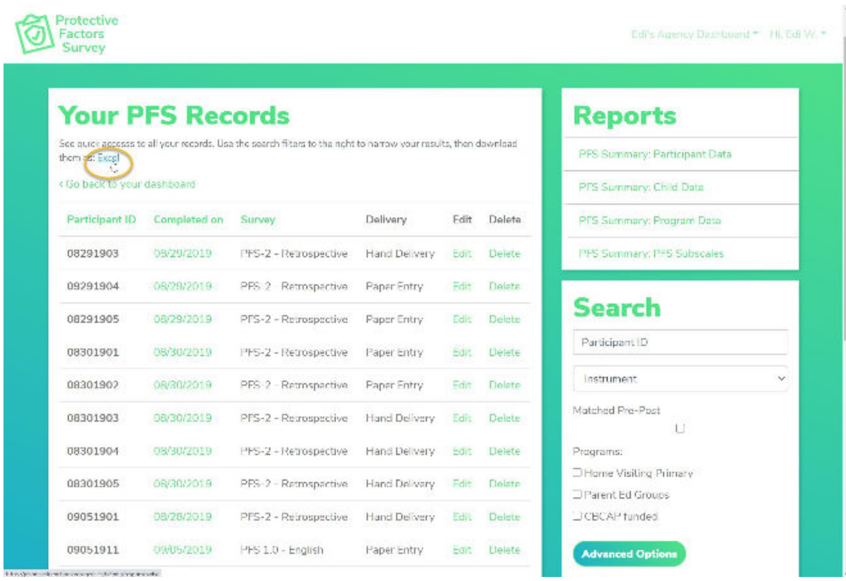
2. Choose the survey and program(s) from which you want to display records. You can narrow it by program dates, survey dates, and only matched pre-post records. Click *Generate Report* or click *Advanced Options* for more search criteria.

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

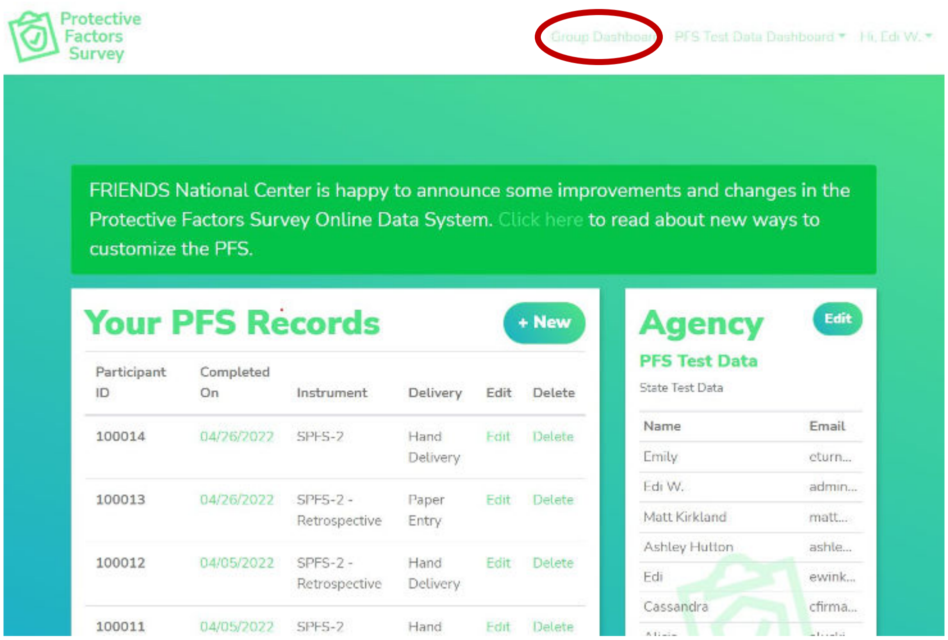
1. You can export data from within the system for your Agency. To do this, click on *Download Your PFS Records and Reports*.
2. From there, click the *Excel* link. This will give you the agency in a .csv file.



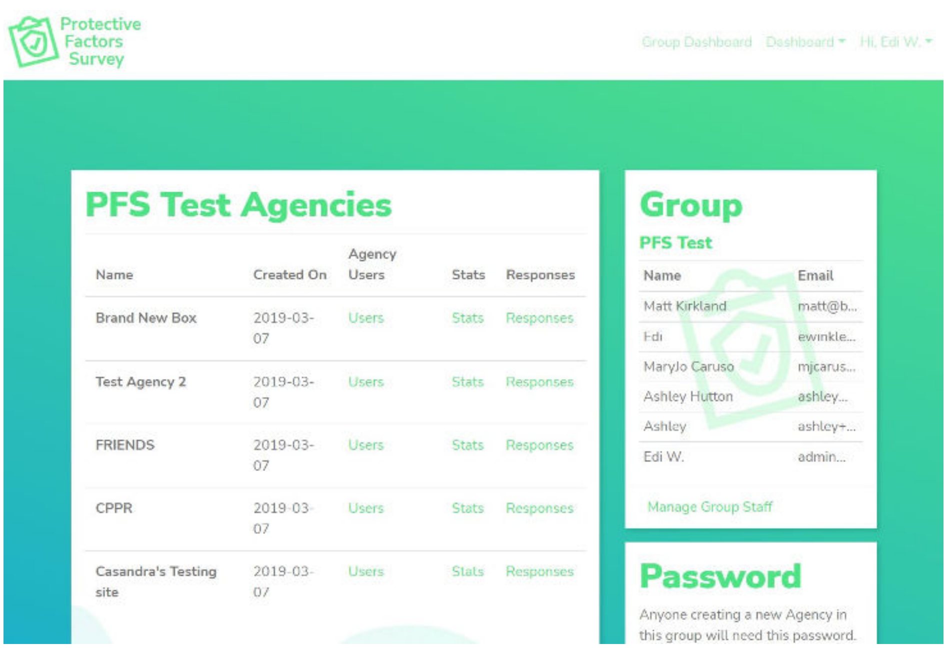
Using the Group Dashboard (for Group Users only)

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).



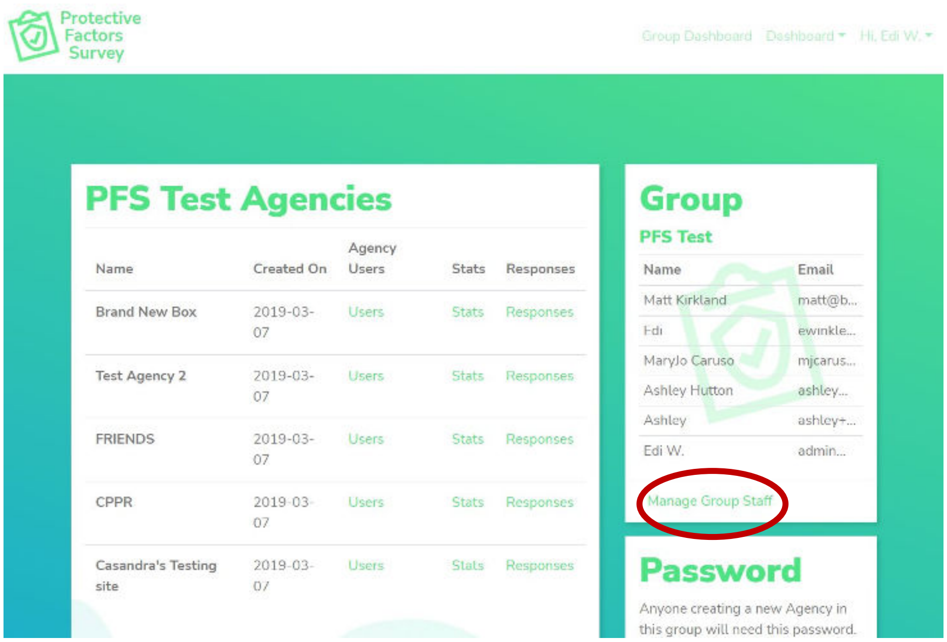
Clicking *Group Dashboard* will change your view from Agency to Group and will shift to this:



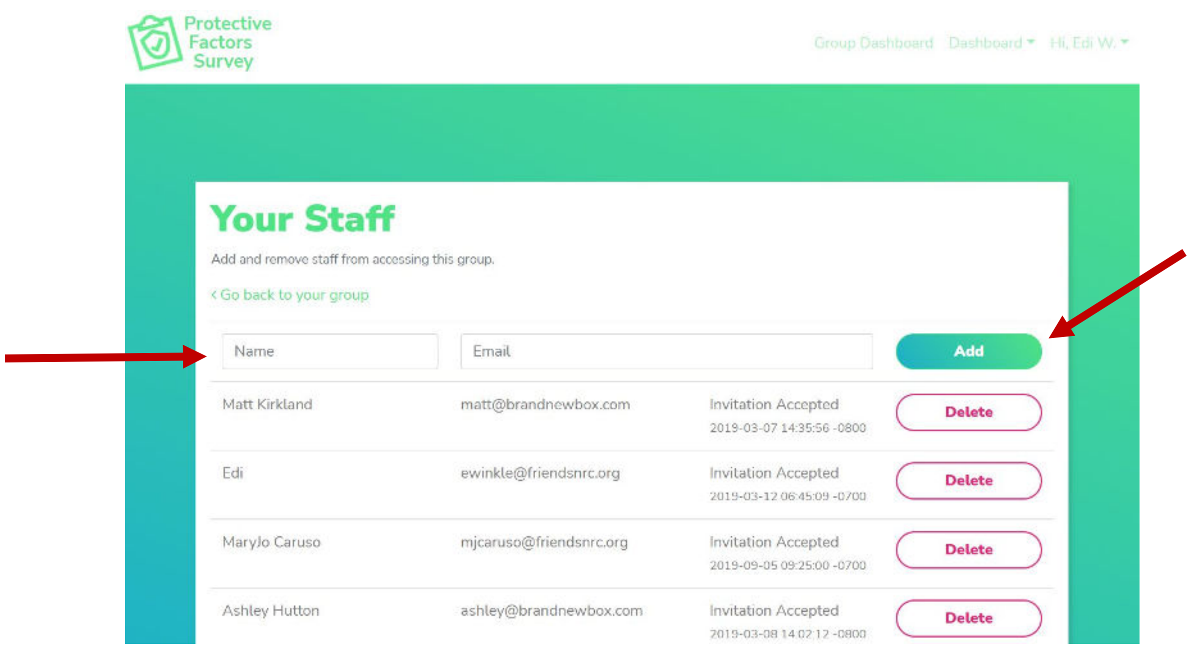
Records will be replaced by the list of Agencies in your Group.

Edit/Add Staff to Group

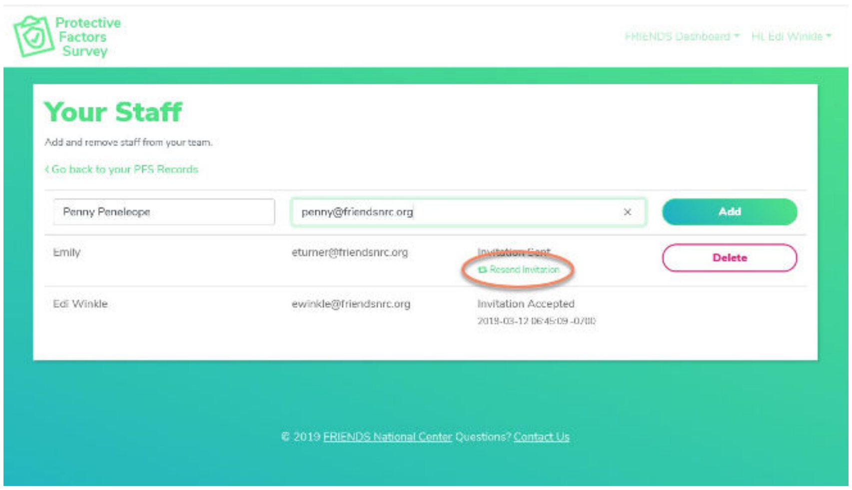
1. To edit or add staff to your Group, click *Manage Group Staff* on the Group Dashboard.



2. To add staff to the Group, 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.

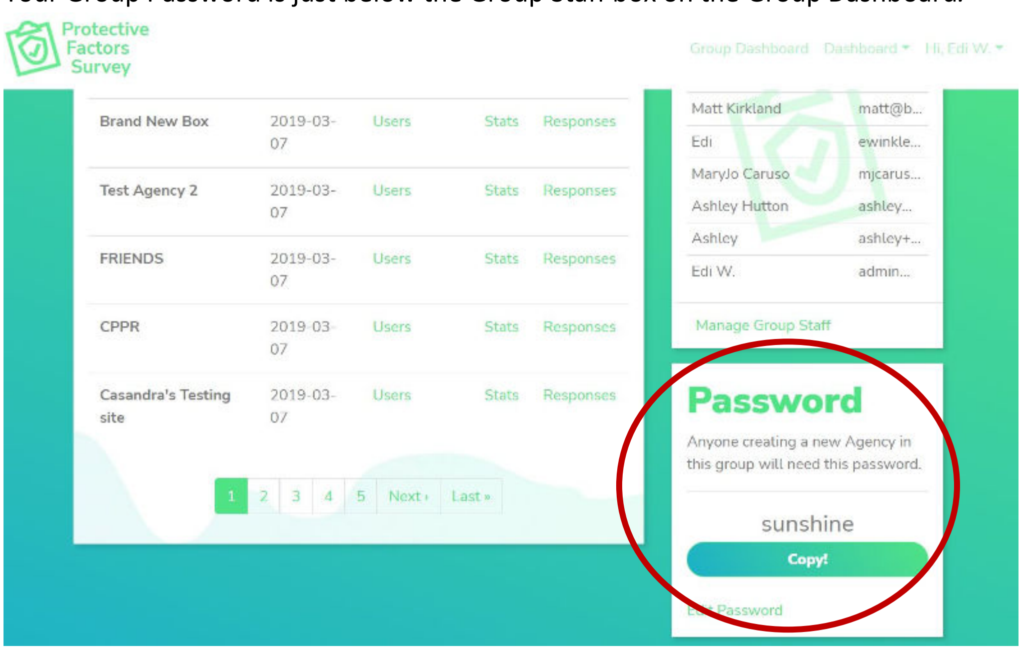


NOTE: Be sure to have your staff check junk or spam folders if they are not finding the email after a couple of minutes

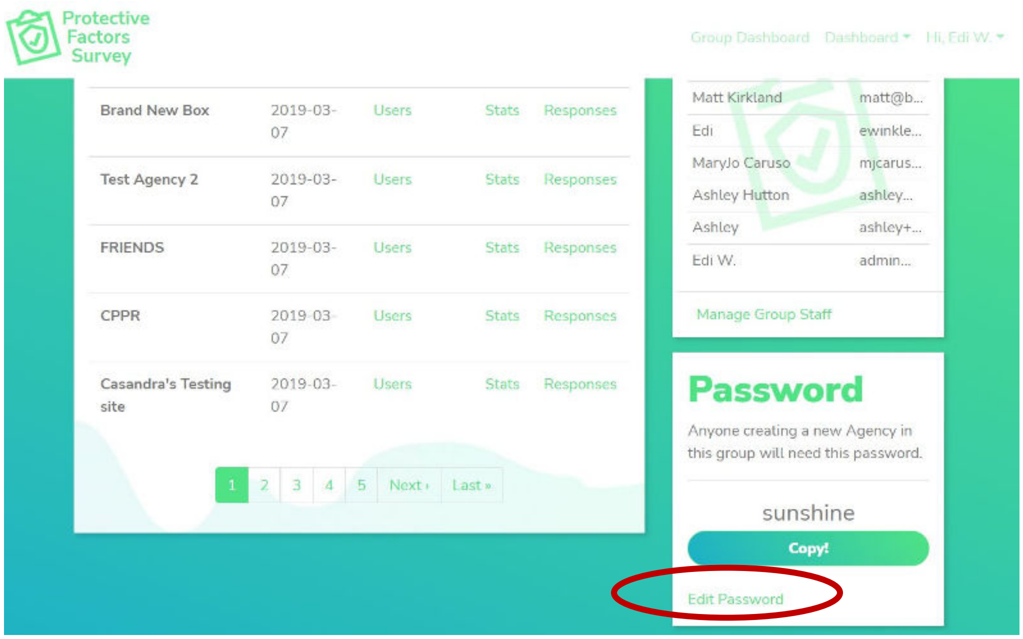
If invited staff are already a part of the system (perhaps through work with another agency), it will show Invitation Accepted with the date/time stamp. They will automatically have access to the Group the next time they log into the system.

Edit Group Password

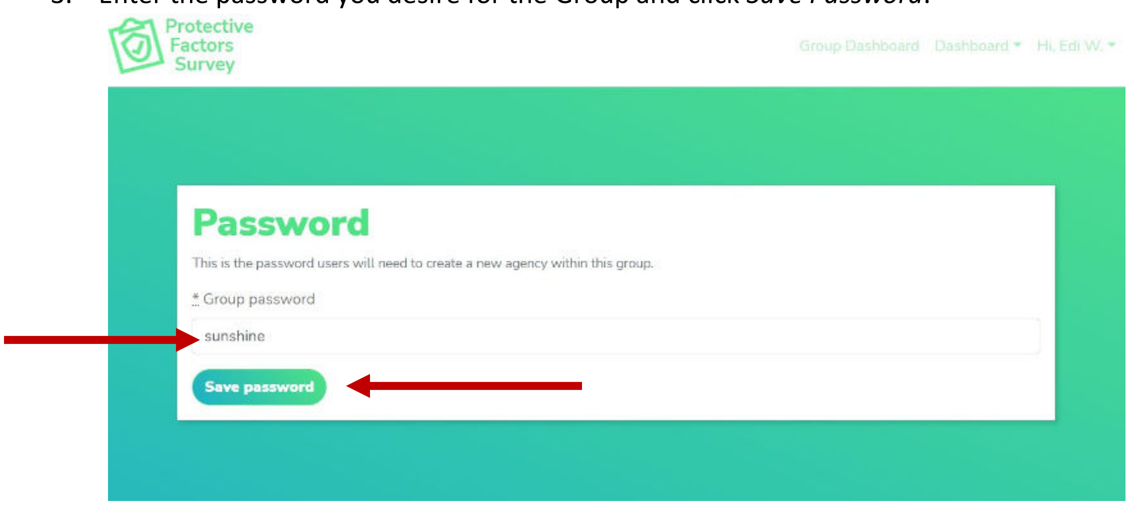
1. Your Group Password is just below the Group Staff box on the Group Dashboard.



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



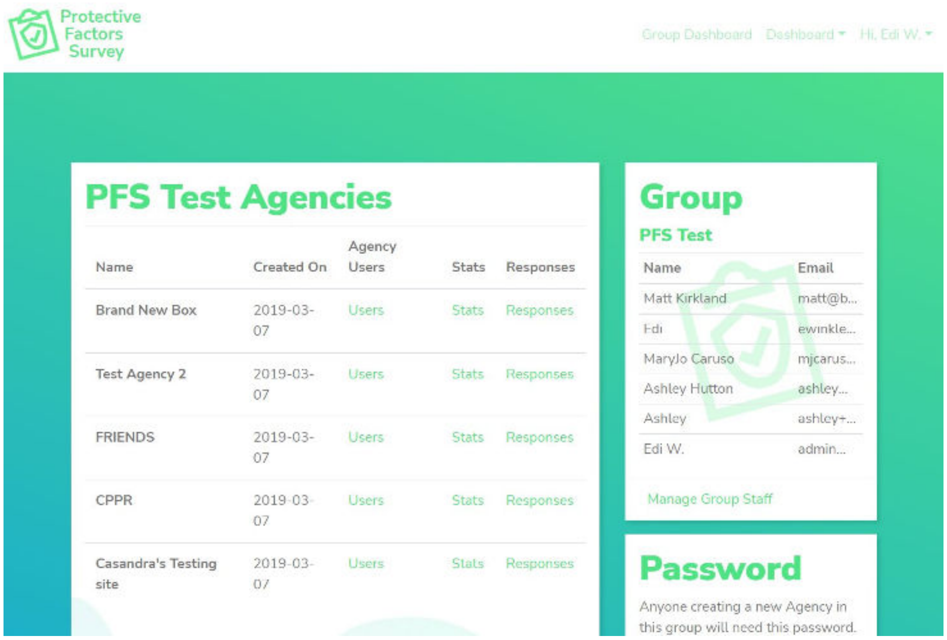
3. Enter the password you desire for the Group and click *Save Password*.



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.

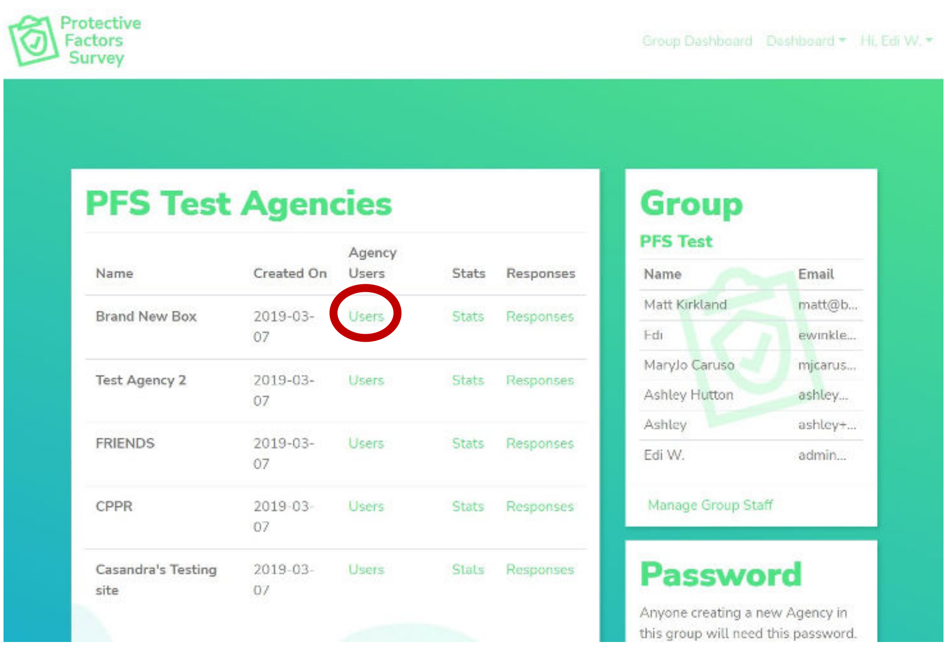
Navigating Agencies on the Group Level

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.

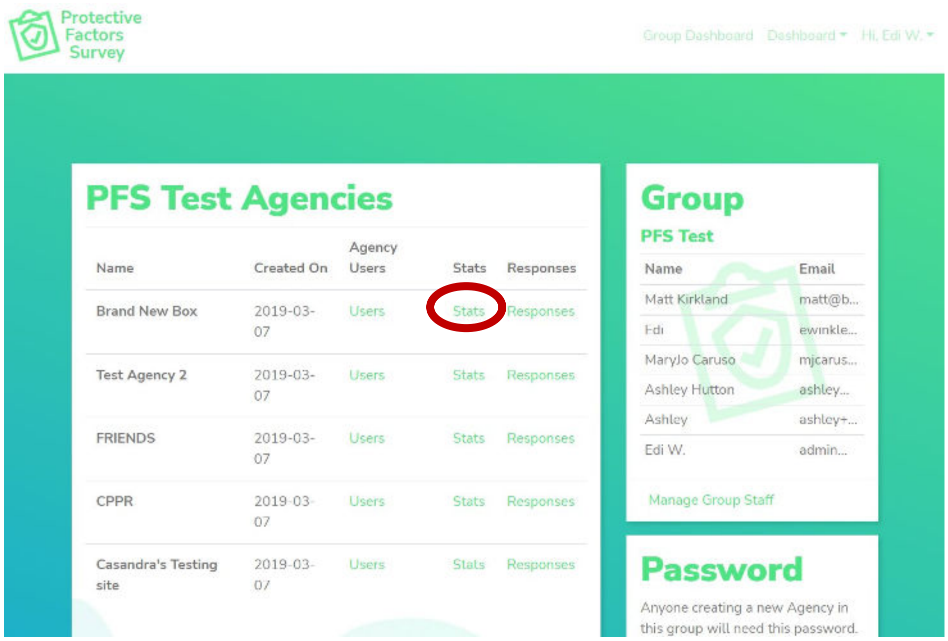


View Agency Information

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.



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.

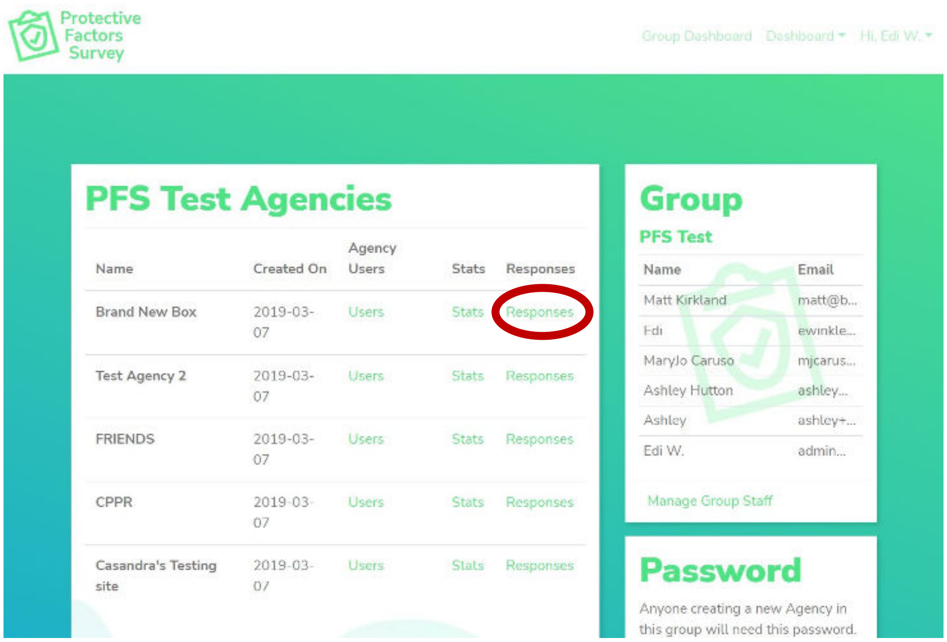


6. Clicking *Stats* will bring up a pop-up box that states how many surveys the agency has in the system.

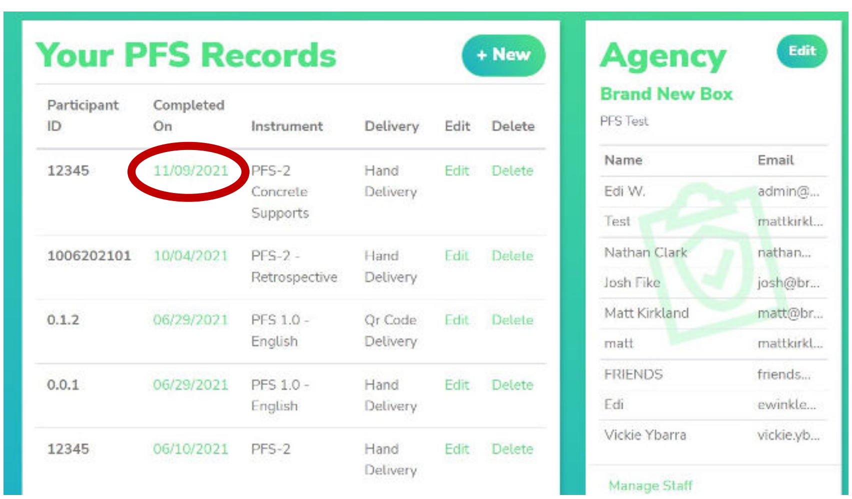
*NOTE: This will only display the surveys that the **Group Dashboard** has permission to see. This is determined by the Programs in the agency that are assigned to surveys, and the Share Data option must be checked in the program set up to allow data sharing (refer to instructions on p. 16-17 for more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

Viewing Participant Responses Inside an Agency

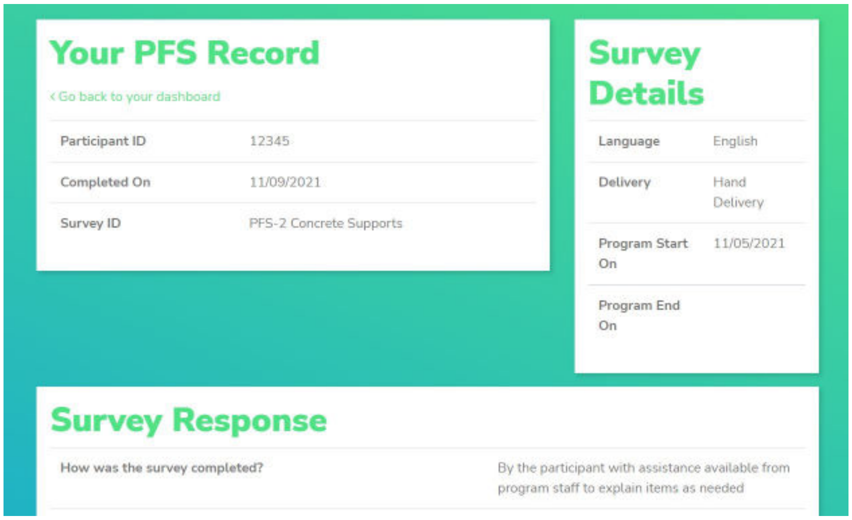
From the Group Dashboard, users can also view and manage agency data. First, find the agency in the list you wish to access and click the *Responses* option. After clicking, users can view responses, edit errors in data entry, and delete erroneous records.



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.



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

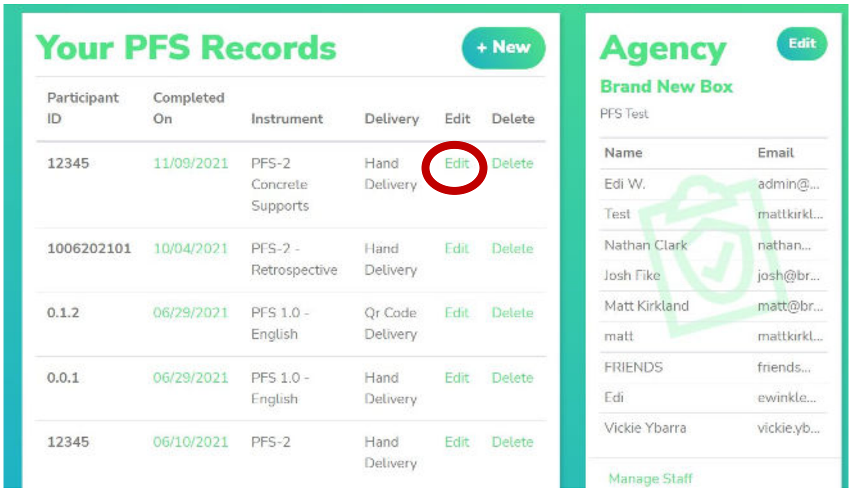


4. You can scroll the screen to view the record and use the print option for your browser to print the record if needed.

   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.

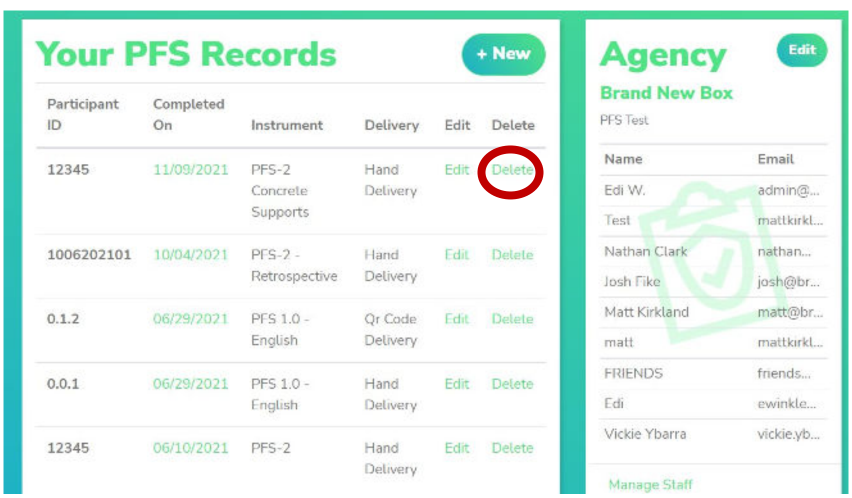


5. This will take you through the record and allows you to edit the responses. Finally, click S*ubmit* once edits are completed.

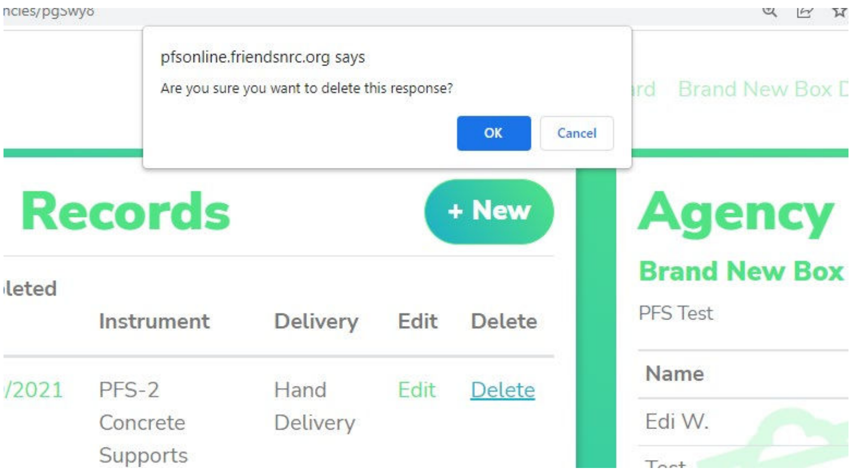
NOTE: A reminder that Paper Entry does not lock the system to prevent clients from accessing the Agency Dashboard after completion. DO NOT use this option with clients.

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.



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.

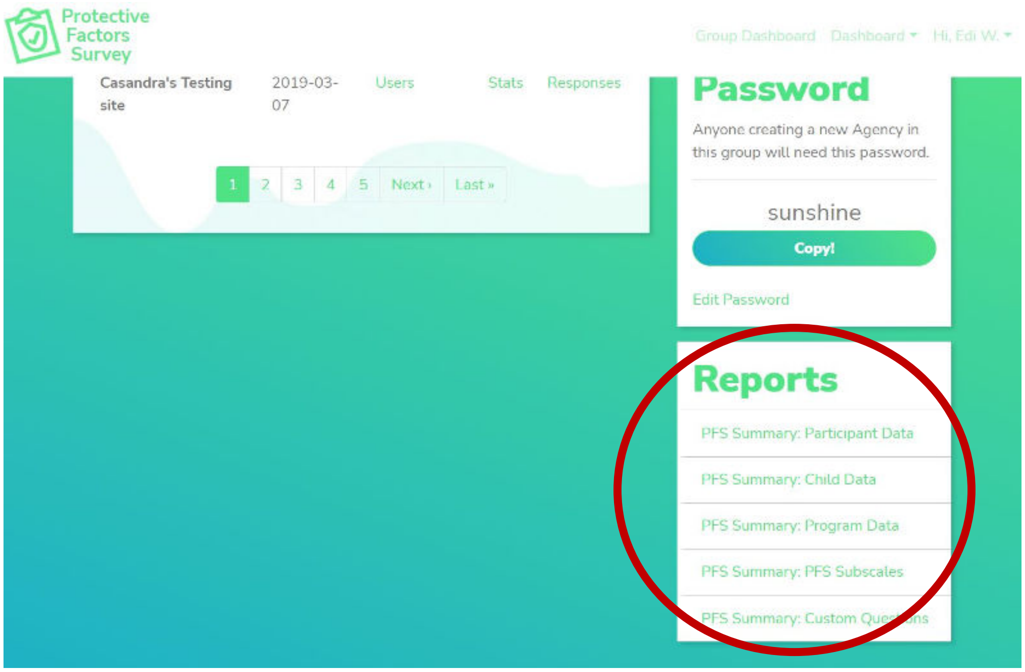
Running Group Reports

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:

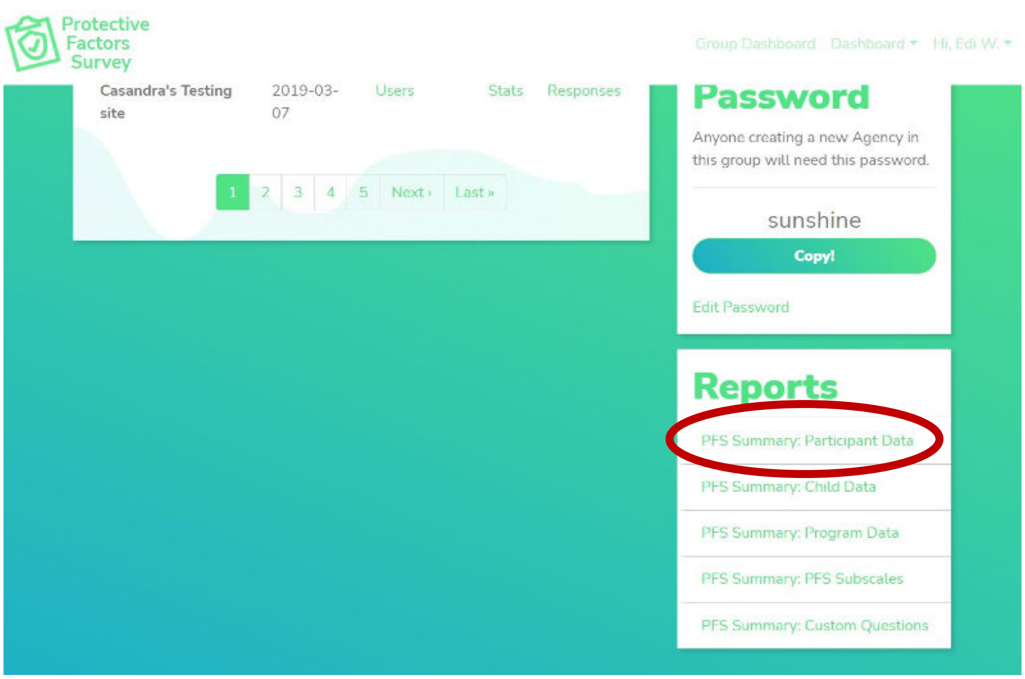
- Participant Data
- Child Data
- Program Data
- PFS Subscales
- Custom Questions

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

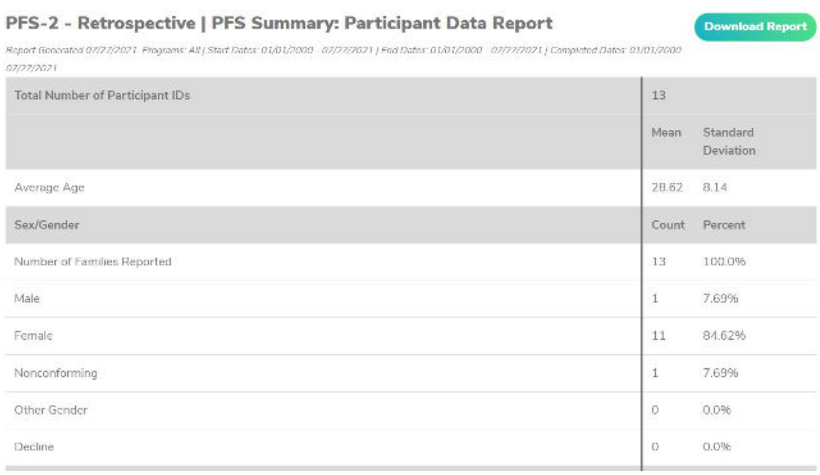
1. Click on *PFS Summary: Participant Data* in the Reports block from the Dashboard.



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.

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 demographic information. Here is a sampling of the type of data generated.

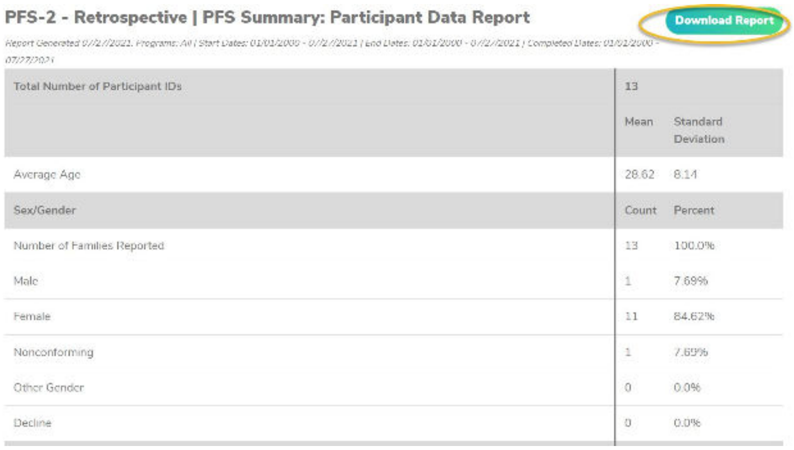


PFS-2 - Retrospective | PFS Summary: Participant Data Report Download Report

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	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%

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



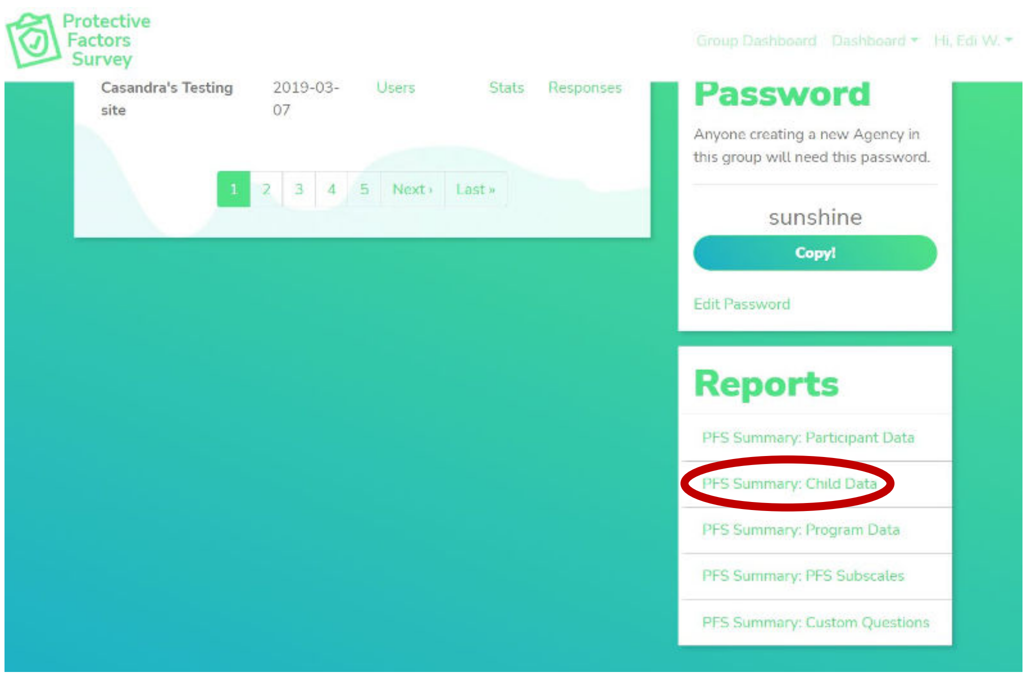
PFS-2 - Retrospective | PFS Summary: Participant Data Report Download Report

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

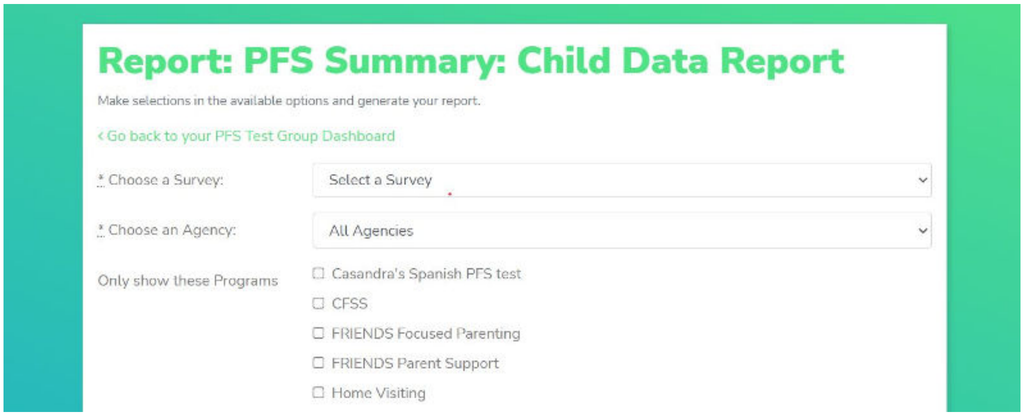
Total Number of Participant IDs	13	
	Mean	Standard Deviation
Average Age	28.62	8.14
Sex/Gender	Count	Percent
Number of Families Reported	13	100.0%
Male	1	7.69%
Female	11	84.62%
Nonconforming	1	7.69%
Other Gender	0	0.0%
Decline	0	0.0%

Group Child Data Report

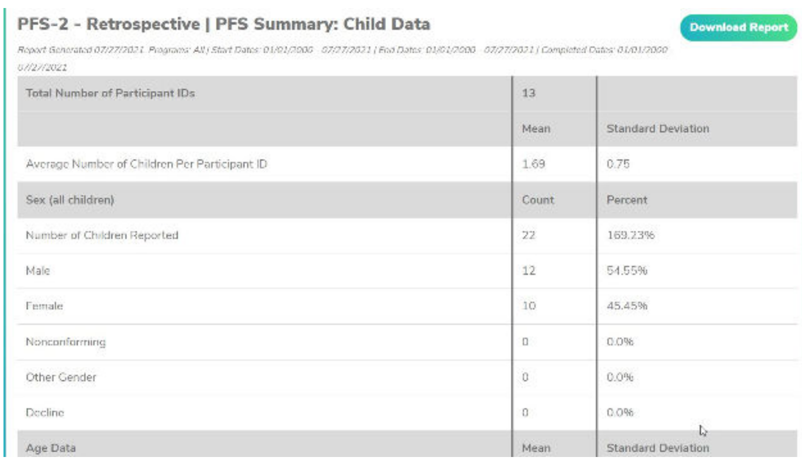
1. Click on *PFS Summary: Child Data* in the Reports block from the Dashboard.



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 child data. Here is the type of data generated.

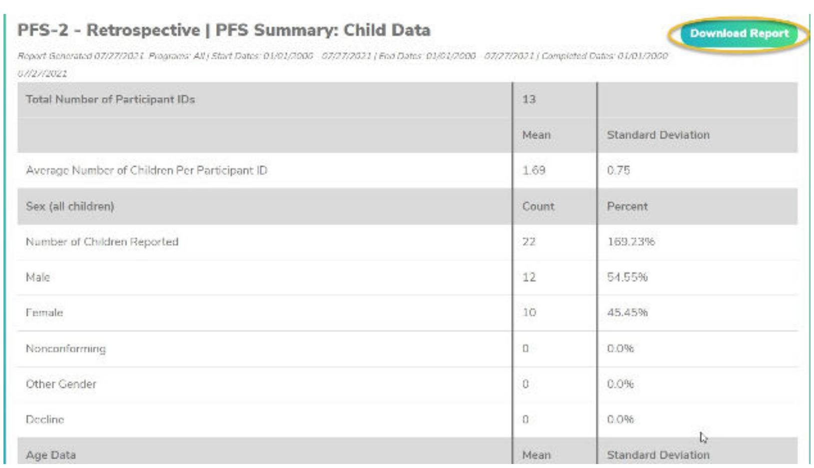


PFS-2 - Retrospective | PFS Summary: Child Data

Download Report

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

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



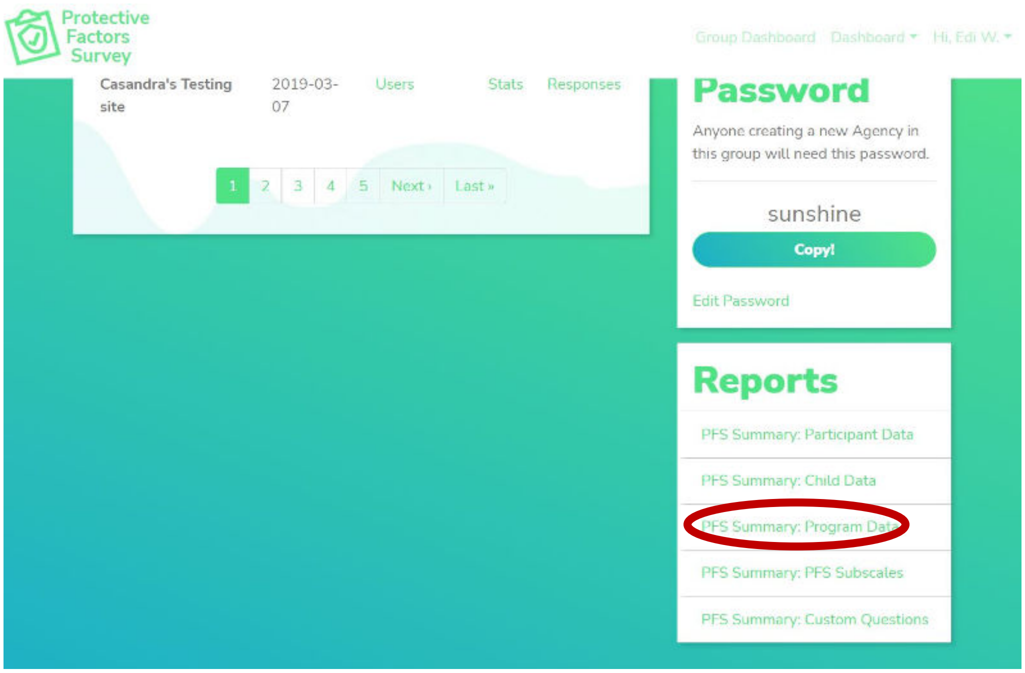
PFS-2 - Retrospective | PFS Summary: Child Data

Download Report

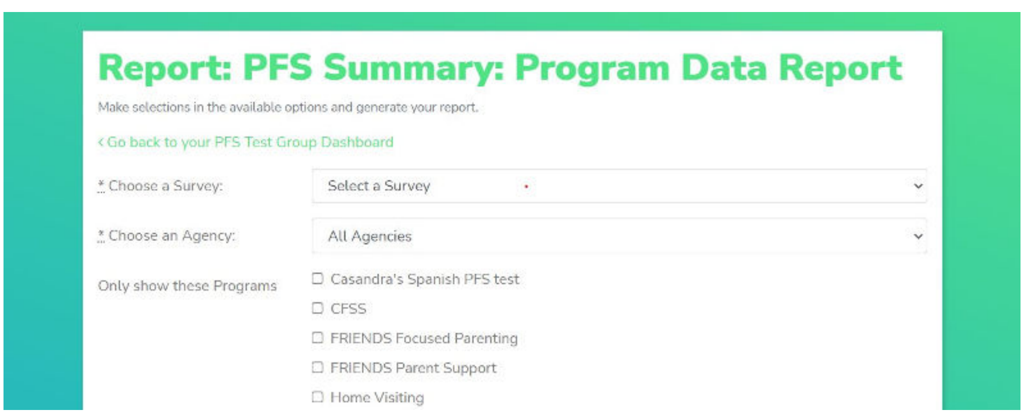
Total Number of Participant IDs	13	
	Mean	Standard Deviation
Average Number of Children Per Participant ID	1.69	0.75
Sex (all children)	Count	Percent
Number of Children Reported	22	169.23%
Male	12	54.55%
Female	10	45.45%
Nonconforming	0	0.0%
Other Gender	0	0.0%
Decline	0	0.0%
Age Data	Mean	Standard Deviation

Group Program Data Report

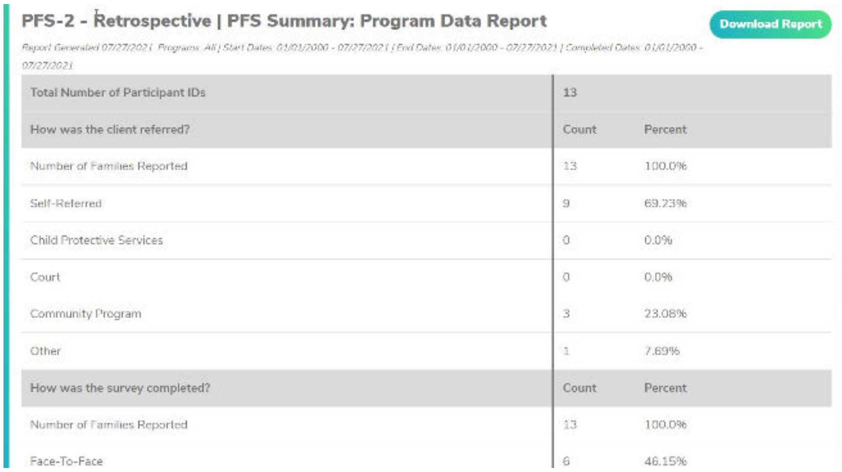
1. Click on *PFS Summary: Program Data* in the Reports block from the Dashboard.



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.



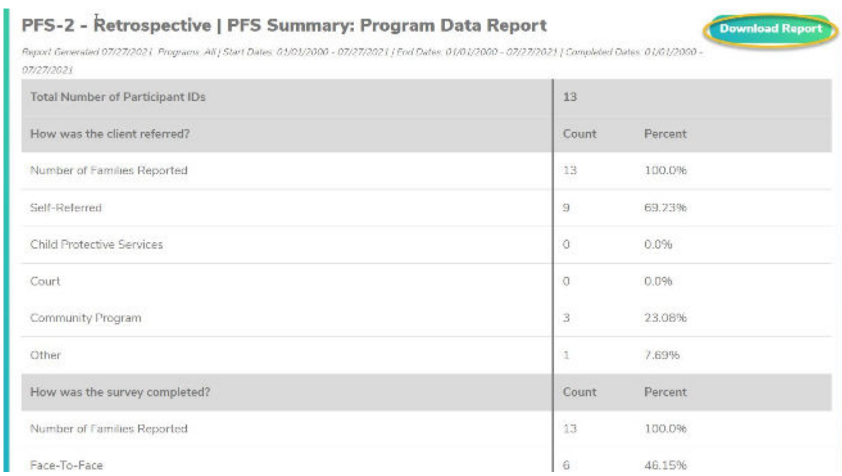
PFS-2 - Retrospective | PFS Summary: Program Data Report

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-Referred	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

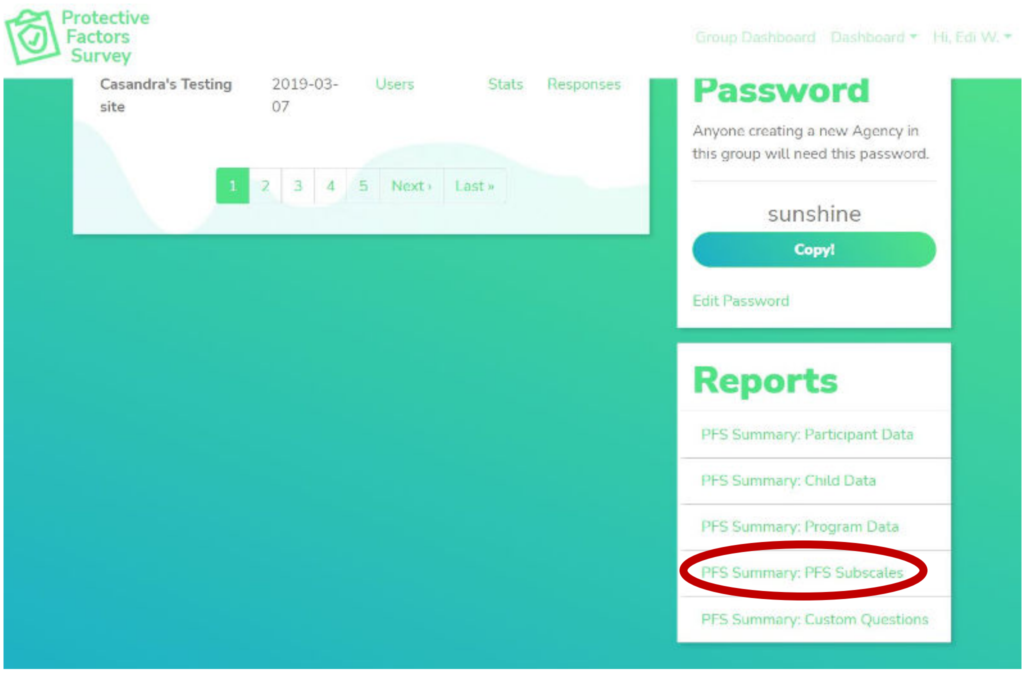
Download Report

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

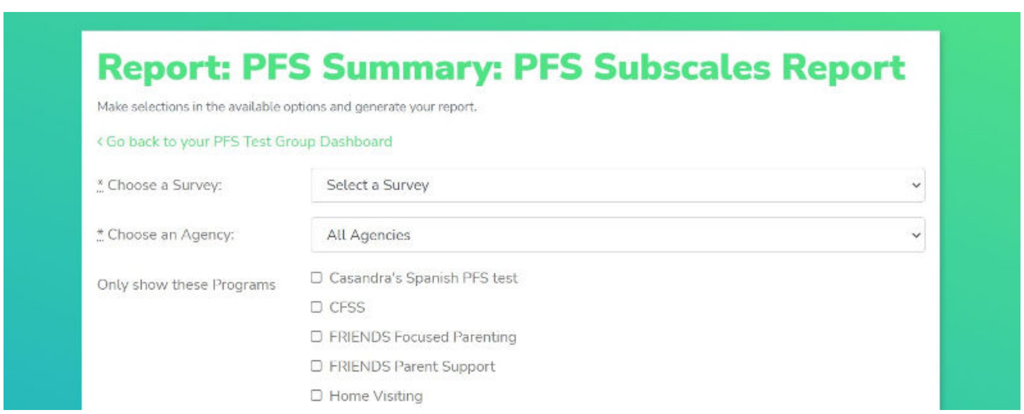
Total Number of Participant IDs	13	
How was the client referred?	Count	Percent
Number of Families Reported	13	100.0%
Self-Referred	9	69.23%
Child Protective Services	0	0.0%
Court	0	0.0%
Community Program	3	23.08%
Other	1	7.69%
How was the survey completed?	Count	Percent
Number of Families Reported	13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

Group PFS Subscales Report

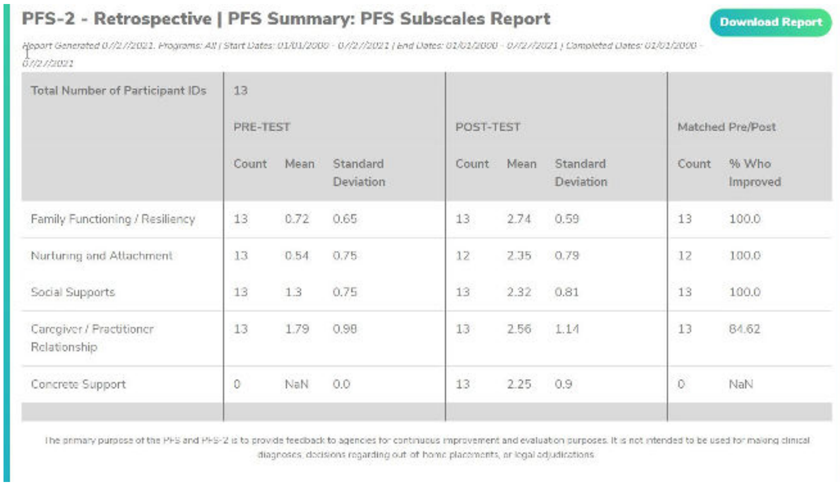
1. Click on *PFS Summary: PFS Subscales* in the Reports block from the Dashboard.



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

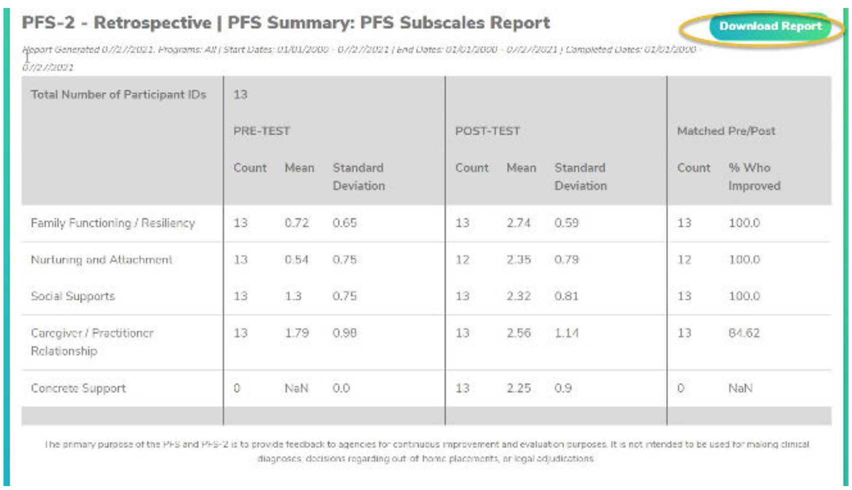
Download Report

Report Generated 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							
	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.

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: PFS Subscales 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

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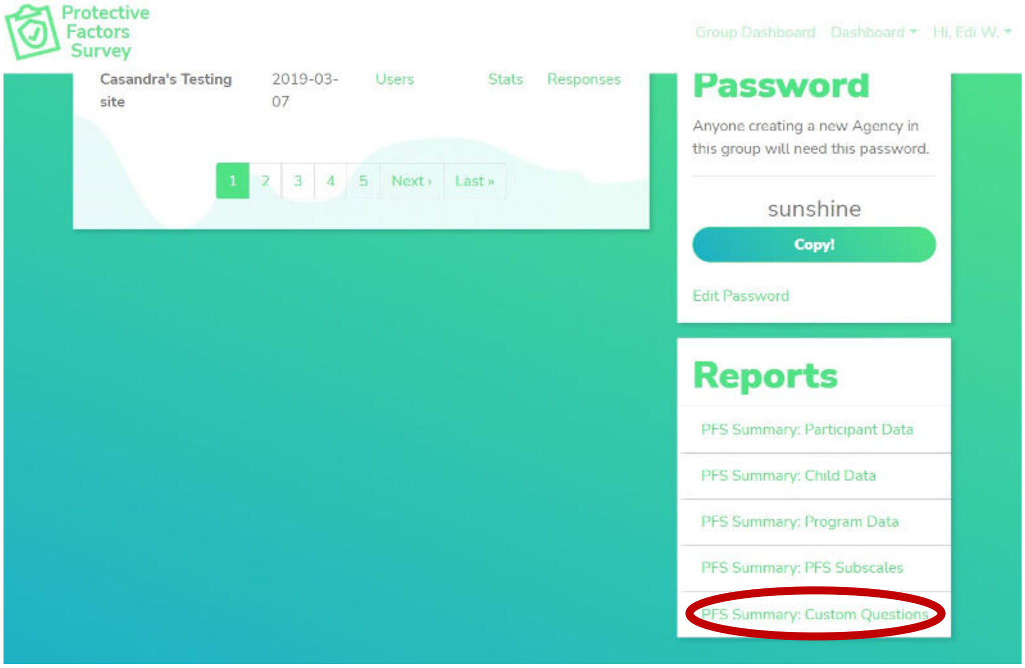
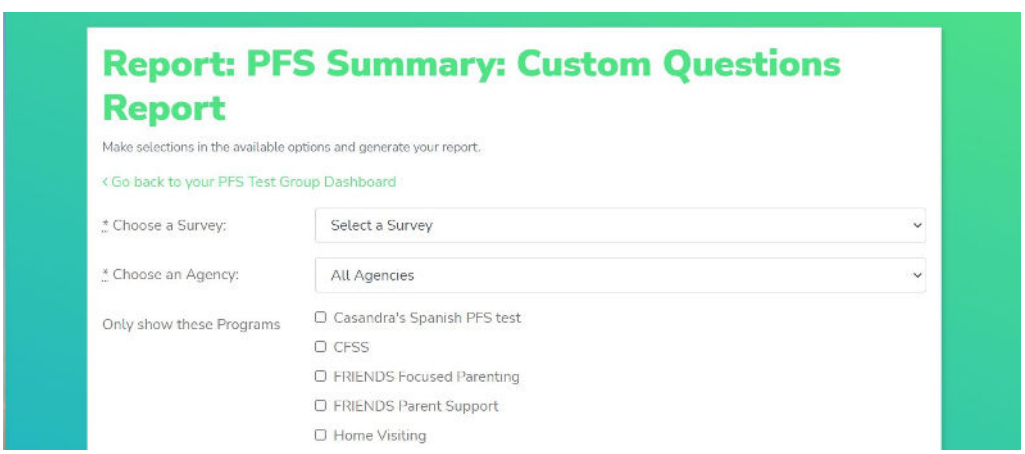
The primary purpose of the PFS and PFS-2 is to provide feedback to agencies for continuous improvement and evaluation purposes. It is not intended to be used for making clinical diagnoses, decisions regarding out of home placements, or legal adjudications.

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.



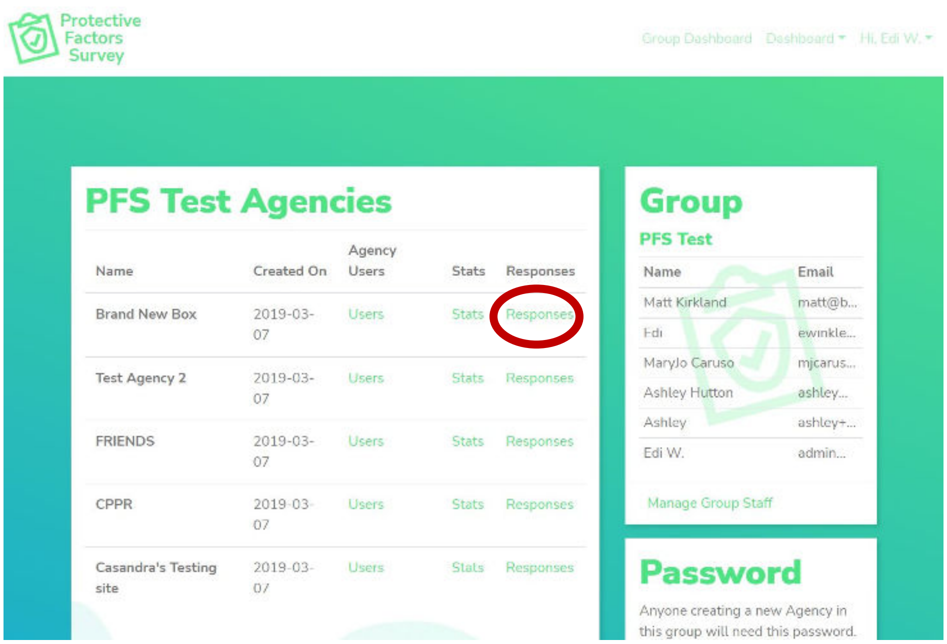
5. Once you click *Generate Report*, scroll down to see the Custom Question Data specific to your survey type selected.

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

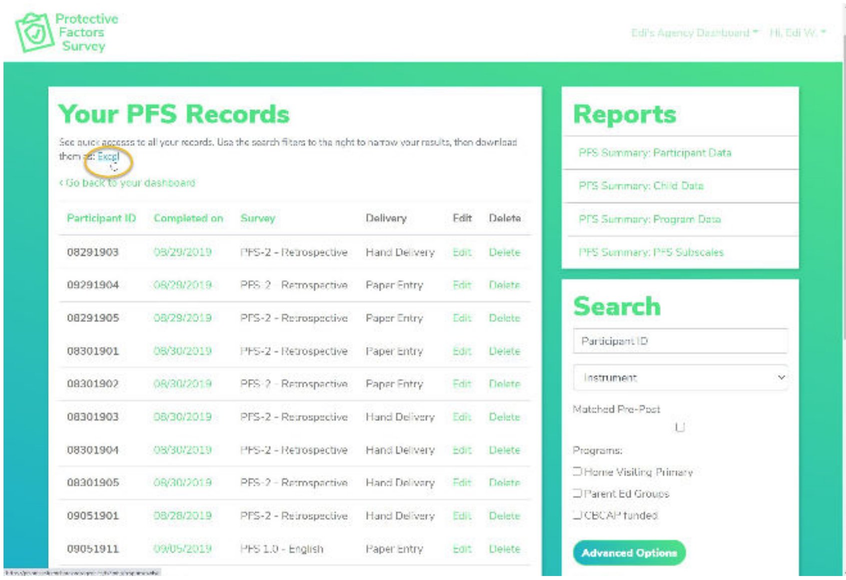
   NOTE: The Group Custom Questions Report will NOT aggregate data across agencies – even if the questions are the same at multiple agencies. The report will list each question asked at each agency and give agency-level data for each question on the Custom Questions Report. If you need to aggregate data,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

Exporting Data to Excel

1. 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.
2. 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.



3. 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.


Protective Factors Survey
Your PFS Records
« 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
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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
CBCAP funded
Advanced Options