

Monitoring Data Quality: Tips for nFORM 2.0 Users

HMRF grant recipients collect and enter data into nFORM to tell the story of how their programs support families in their communities. Ensuring these data are high quality is essential to program monitoring, continuous quality improvement (CQI), and local and cross-site evaluations. High quality data have four important characteristics: they are collected and entered in a **timely** and **accurate** manner, are **complete**, and are **secure**. Grant recipients can mitigate data quality issues by routinely reviewing and updating data collection plans, training and retraining staff, and monitoring program operations and client services.

This tip sheet describes how program staff can use nFORM's tools to monitor and address potential issues with: (1) client information, (2) client survey completion rates, (3) workshop setup, (4) workshop participation data, and (5) individual services data. For each of these data types, this tip sheet provides a checklist of specific data to review, what data tools provide that data, and where to make updates if you find data quality issues. Grant teams can incorporate these checklists into their monitoring process.

If you have any questions after reviewing this tip sheet, contact the nFORM 2.0 help desk by either submitting a ticket through the [help tab](#) of nFORM or emailing us at nform2helpdesk@mathematica-mpr.com. We are happy to help!

To monitor client information...

- Review client statuses
 - Use **Client Status Summary report** to review whether the number of clients within each status aligns with expectations
 - Use **Client Status Detail report** to review each client's status
 - Update an individual client's status in their profile under **Program Information...**



- Or use the **bulk update** feature to update the status for multiple clients.

- ❑ Review clients' assigned service locations and your program's service provider directory
 - Use any detailed operational report to review clients' assigned service locations
 - Use **Program Information** section of a client's profile to add or change assigned service locations
 - Use **Grantee Configuration page** to review, add, or edit existing service locations:

nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Clients Workshops Service Providers Reports **Settings** Help

Grantee Configuration Users

Grantee Configuration

Grantee Locations

View	Location	Additional Information
View	Center City	
View	Eastside Site	
View	Northwest Side	
View	Southeast Side	
View	The Equator	
View	Westside Site	This site enrolls clients from zip codes 11111 and 11112

- ❑ Review case manager assignments
 - Use **Caseload Summary report** to see if updates are needed to case manager assignments

Caseload Summary as of: 2/28/2025

Grantee	Staff Grantee Location	Staff with Case Management Capability	Staff User Account Type	User Account Active?	Number of Active clients	Total number of clients
Cloud Grantee 1 RF (LE)		Dreego, Rachel	Case Manager	N	10	10
Cloud Grantee 1 RF (LE)		Graham, Aubrey	Case Manager	Y	7	7
Cloud Grantee 1 RF (LE)		Knowles, Giselle	Site Administrator	N	5	5
Cloud Grantee 1 RF (LE)		Sullivan, Jazmin	Case Manager	N	4	4
Cloud Grantee 1 RF (LE)		Houston, Whitney	Site Administrator	N	9	9

- Use **Caseload Detail report** to make sure all newly enrolled and returning clients have been assigned to a case manager, or whether any clients require reassignment

Caseload Detail as of: 2/28/2025

Staff Grantee Location	Staff with Case Management Capability	Assigned Client Study ID	Couple ID	Client Last Name	Client First Name	Client Status	Client Grantee Location	Application Form Completed by	Enrollment Date	Most Recent Service Contact Date	Most Recent Workshop Session Attended Date
	Dreego, Rachel	0132324		King	Daniel	Active	Southeast Side	Dreego, Rachel	6/2/2022	8/6/2024	12/10/2024
	Dreego, Rachel	0132337	3385	Hayes	Condola	Active	Southeast Side	Dreego, Rachel	6/21/2022	6/21/2022	3/2/2023
	Dreego, Rachel	0150539		Prenny	Kelli	Active	Southeast	Dreego, Rachel	6/22/2022	6/22/2022	12/10/2024

- Review service assignments (if your program is conducting a local evaluation)
 - Use **Applicant Characteristics** tab of query tool to filter by enrollment date, population (if applicable), and selected characteristics, like age, to see if clients appear to be assigned to groups as intended. This cannot be used to determine baseline equivalence.

Cloud Grantee 3 RF (LE)

Grant Year Overview Enrollment **Applicant Characteristics**

Enable Accessibility Mode Enrollment Start Date 09/30/2024

Current Selections

Grantee Name Cloud Grantee 3 RF (LE)

Enrollment Start Date 09/30/2024

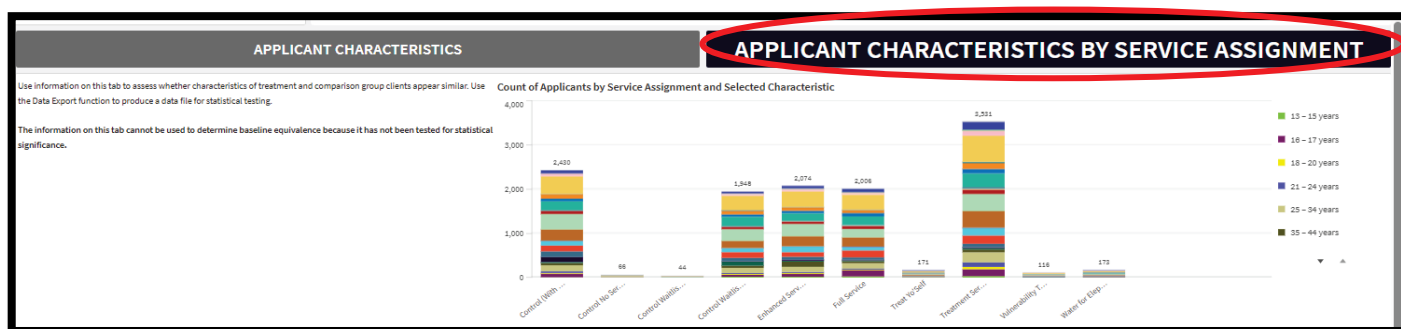
Enrollment End Date 02/28/2025

Population Name Community individual

Characteristic Age

SubCharacteristic

Apply Selection



- Use **Local Evaluation Enrollment Summary/Detail report** to review client-level service assignment. If Control (NO services) and Control waitlist (NO services) clients are eligible to receive services after local evaluation period has ended, update to a Treatment category.

Cloud Grantee 1 RF (LE) Service Assignment Group* from 5/1/2023 - 2/28/2025							
Client Grantee Location	Client ID	Couple ID	Client Last Name	Client First Name	Service Name	Service Category	Enrollment Date
	10132324		King	Daniel	Control (With Services)	Control (With Services)	3/6/2024
	10132337	33854	Hayes	Condola	Control (With Services)	Control (With Services)	3/6/2024
	10155495	33378	Siriboe	Crenshaw	Control Waitlist (With Services)	Control Waitlist (With Services)	3/8/2024
	10155505		Campbell	Nathan	Enhanced Services Plus	Treatment	3/6/2024
	10155518	32880	Ahmal	Dee	Full Service	Treatment	2/9/2024

- ! If needed, update the service assignment for a client in their profile under **Program Information**.

Resources related to monitoring client information

Manuals	nFORM User Manual Module III, Module V, and Module VII
Training videos	Adding service assignments for local evaluations Adding grantee locations and service providers Making bulk updates Enrolling clients and client profiles
Office hours	September 2024: Using nFORM 2.0 data quality indicators to support program monitoring June 2024: Welcome to nFORM! Overview for new (and returning) nFORM users May 2022: Tailoring nFORM for your grantee

To monitor client survey completion rates...

- ☐ Monitor clients who have not completed enrollment
 - Use the **Client Status Summary and Detail report** to identify clients who are statused as Applicant Pending Enrollment

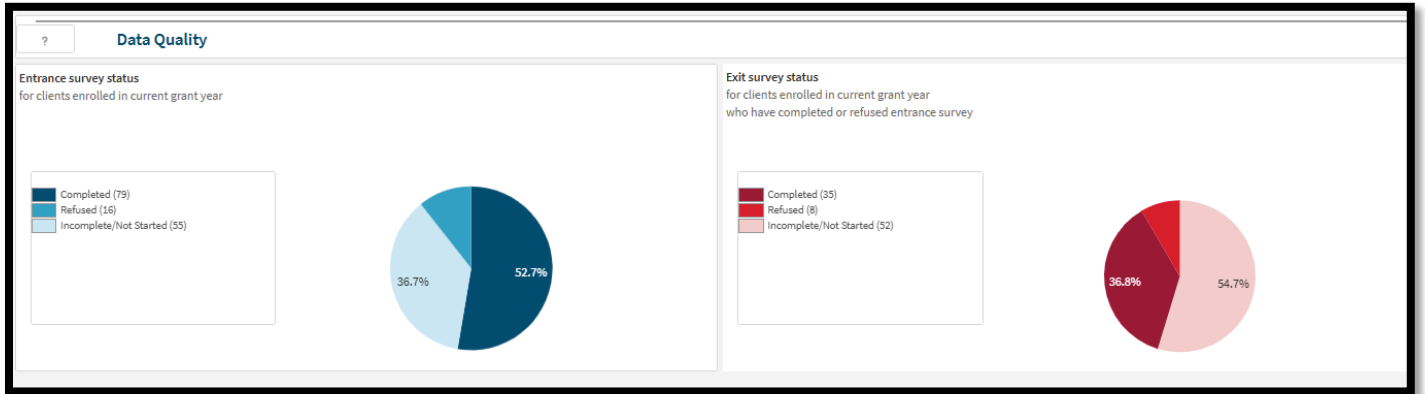


	A	B	C	D	E	F
1	Client Status Report Summary as of 2/28/2025					
2	Grantee	Total (excl Duplicates)	Applicant Pending Enrollment	Active	Completed/ Graduated	Consent Revoked
3	All Grantees	387	53	3787	4	2
4	Cloud Grantee 1 RF (LE)	387	53	3787	4	2
5	2/28/2025 12:43:31 PM					
6						

	A	B	C	D	E	F	G
1	Client Status Report Detail as of 2/28/2025						
2	Client Grantee Location	Client ID	Couple ID	Client Last Name	Client First Name	Enrollment Date	Client Status
3		10132324		King	Daniel	8/15/2022	Moved out of area
4		10132337	33854	Hayes	Condola	11/3/2022	Active
5		10150539		Prenny	Kelli	12/13/2021	Applicant pending enrollment
6		10150542	33377	Walker	Lawrence	10/28/2021	Active
7		10148033	33377	Carter	Molly	9/1/2021	Active
8		10148020		Banks	Tasha	7/19/2021	Active

□ Review survey administration progress

- Use the “Data Quality” panel of the **query tool’s Grant Year Overview tab** to review entrance and exit survey progress



□ Review survey completion and refusal rates

- Use the **Survey Completion Summary report** to identify the number of clients who have completed or refused the ACS, entrance, and exit surveys

Survey Completion Summary*		Number of Clients					
Grantee		Applicant Characteristics		Entrance Survey		Exit Survey	
Population		Completed	Refused	Completed	Refused	Completed	Refused
Cloud Grantee 1 RF (LE)	All	735	19	364	29	169	17
	Community couple	225	3	101	7	45	4
	Community individual	319	10	159	14	77	8
	Reentering individual	191	6	104	8	47	5

*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.

- Use the **Survey Completion Detail report** to filter on clients who have not yet completed their entrance or exit survey to identify potential follow up

Survey Completion Date										
Client Grantee Location	Population	Client ID	Client Last Name	Client First Name	Current Client Status	Application Date	Enrollment Date	Applicant Characteristics Survey	Entrance Survey	Exit Survey
	Community couple	10132324	King	Daniel	Active	10/25/2023	2/12/2024	02/12/2024	02/12/2024	12/10/2024
	Community couple	10132337	Hayes	Condola	Active	10/25/2023	2/12/2024	02/12/2024	02/12/2024	12/10/2024
	Community couple	10150539	Prenny	Kelli	Active	2/9/2024	2/9/2024	02/09/2024		
	Community couple	10150542	Walker	Lawrence	Active	2/9/2024	2/9/2024	02/09/2024		
	Community couple	10148033	Carter	Molly	Active	1/23/2024	1/23/2024	01/23/2024	02/08/2024	02/16/2024
	Community couple	10148020	Banks	Tasha	Active	1/23/2024	1/23/2024	01/23/2024	02/08/2024	02/16/2024
	Community couple	10155479	Dee	Issa	Active	3/6/2024	3/6/2024	03/06/2024	03/06/2024	
	Community couple	10155482	Jackson	Taurean	Active	3/6/2024	3/6/2024	03/06/2024	03/06/2024	
	Community couple	10155495	Siriboe	Crenshaw	Active	3/6/2024	3/6/2024	03/06/2024	03/06/2024	

- Use the **Survey Report – Refused Survey report** to monitor survey refusal trends (e.g., which surveys are refused and why, at which location, by which population)

Cloud Grantee 1 RF (LE) Refused Survey Report Detail* Clients Enrolled 5/1/2023 - 2/28/2025												
Client Grantee Location	Population	Client ID	Client Last Name	Client First Name	Current Client Status	Application Date	Enrollment Date	Survey	Date Client Refused Survey	System Entry Date	#Days difference	Reason
	Community couple	10132324	King	Daniel	Active	10/25/2023	10/31/2023	Entrance	11/16/2023	11/16/2023	0	
	Community couple	10132337	Hayes	Condola	Active	10/25/2023	10/4/2023	ACS	10/4/2023	10/4/2023	0	Privacy concerns
	Community couple	10150539	Prenny	Kelli	Active	2/9/2024	10/4/2023	Entrance	10/4/2023	10/4/2023	0	Not interested
	Community couple	10150542	Walker	Lawrence	Active	2/9/2024	3/6/2024	ACS	3/6/2024	3/6/2024	0	Privacy concerns
	Community couple	10148033	Carter	Molly	Active	1/23/2024	3/6/2024	Entrance	3/6/2024	3/6/2024	0	Not interested
	Community couple	10148020	Banks	Tasha	Active	1/23/2024	2/12/2024	Exit	3/7/2024	3/7/2024	0	
	Community couple	10155479	Dee	Issa	Active	3/6/2024	3/1/2024	ACS	3/1/2024	3/1/2024	0	Other or unspecified
	Community couple	10155482	Jackson	Taurean	Active	3/6/2024	3/6/2024	ACS	3/6/2024	3/6/2024	0	Survey too long
	Community couple	10155495	Sirboe	Crenshaw	Active	3/6/2024	3/6/2024	Entrance	3/6/2024	3/6/2024	0	
	Community couple	10155505	Campbell	Nathan	Active	3/6/2024	3/1/2024	ACS	3/1/2024	3/1/2024	0	Survey too long
	Community couple	10155518	Ahmal	Dee	Active	3/6/2024	3/8/2024	Entrance	3/8/2024	3/8/2024	0	
Center City	Community couple	10155521	DuBois	Tiffany	Active	3/6/2024	2/6/2024	ACS	2/6/2024	2/6/2024	0	Not interested
Center City	Community couple	10156148	DuBois	Derek	Active	3/22/2024	1/29/2025	ACS	1/29/2025	1/29/2025	0	Survey too long
Center City	Community couple	10156151	Pena	Dro	Active	3/22/2024	12/6/2024	Entrance	12/11/2024	12/11/2024	0	Survey too long

□ Review survey item response rates

- Use the **query tool's Client Outcomes tab** to identify whether the number of responses to each survey item is lower than expected

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

Enable Accessibility Mode
Entrance Survey Start Date: 04/01/2021
Entrance Survey End Date: 02/27/2025
Community couple
Community individual
Reentering individual

Current Selections
Grantee Name: Cloud Grantee 1 RF (LE)
Entrance Survey Start Date
Entrance Survey End Date
Population Name
Characteristic
Subcharacteristic
Clear Selection

Analyze clients' program entrance or exit outcomes by selected characteristics and date ranges based on their responses to questions on the entrance and exit surveys and survey submission dates. Select characteristics from the menu to display average results based on those characteristics in addition to overall results. Select any date range from April 1, 2021 through yesterday's date to filter the data to clients who submitted their entrance or exit survey during the selected timeframe and were assigned to populations for which the grant has participation targets. Grant recipients that serve multiple populations should view data for one population at a time using the population buttons. Each partner in a couple is counted separately on this tab since data are based on individual survey responses. For grants conducting local evaluations, this tab displays data for clients in treatment, control (with services), and control wait list (with services) group clients only.

Grant recipients may use the information on this tab to assess whether their clients' experiences in the program are trending in the anticipated directions. The information on this tab does not show effects of the program, which can only be determined with a rigorous evaluation.

Characteristic
PROGRAM ENTRANCE
PROGRAM EXIT

ENTRANCE OUTCOME
How often accepts child the way he or she is
Feels they and their child understand each other
Hits, spanks, grabs, or uses physical punishment
Yells, shouts, or screams at child when he/she is mad at him/her
Tells about what child did wrong
In past month, saw child every day or almost every day (%)
In past month, saw child one to three times a week (%)
In past month, saw child one to three times a month (%)
In past month, did not see child (%)
I would like to learn new job skills
I feel confident in my ability to conduct an effective job search for a job I want
Believes that it is better for children if their parents are married
Believes that living together is just the same as being married
Satisfaction with current relationship
In past month, spoke to child on phone every day or almost every day (%)
In past month, spoke to child on phone one to three times a week (%)

NUMBER OF INDIVIDUAL CLIENTS
Average Score/Percent
968 1.7
820 2.5
651 8.3
658 21.9
663 53.1
17 21.6
23 28.4
40 48.4
1 1.2
2128 1.9
2118 1.9
2189 1.1
2195 1.4
1213 1.4
150 91.9
54 20.4

! Use survey PDFs and the **data export** to see how many clients should have responded to each item

- ❑ Review unexpected survey item response trends
 - Use the **Survey Response Data tab** of the **data export** to conduct in-depth reviews of survey data, considering whether responses might not be an accurate reflection of clients' characteristics or experiences (for example, because clients may have misunderstood a question or are concerned about how their answer will be perceived)

Resources related to monitoring client survey completion	
Manuals	nFORM User Manual Module V.D, Module VIIA Performance Measures and Data Collection Logistics Manual —all modules
Tip sheets and training videos	Examine survey administration with nFORM Options for administering surveys virtually Tips for survey scripts Training video: Administering surveys
Office hours	September 2024: Using nFORM 2.0 data quality indicators to support program monitoring October 2023: Examining survey administration with nFORM data tools April 2022: nFORM 2.0 survey administration: Grantee experiences and strategies

To monitor workshop setup...

- ❑ Review **screen W1 (Workshops)** to determine:
 - Does each workshop represent a distinct program component and curriculum?
 - For each workshop, are target population, registration requirements, open or cohort enrollment, primary or optional designation, and total hours correct?
 - Do primary workshop hours match your target?



Workshop Name	Population	Registration Required	Enrollment	Type	Total Hours
A Love Thing	Community couple	Yes	Cohort	Primary	20
Amor Extra 2 years only	Community individual	No	Other	Primary	4
Best forever or not	Reentering individual	Yes	Other	Primary	4
Better than other	Community individual	Yes	Other	Primary	18

- ❑ Review **Screen W2 (Add/Edit Workshop)** to examine or edit details like activities/elements or curricula

W2: Add/Edit Workshop

* Indicates required field(s)

Program: Fatherhood FIRE

* Population: Community couple

* Workshop Name: A Love Thing

Description: Love to love

Workshop Details

* Registration Required: ☒ Yes ☐ No

* Enrollment: Cohort

* Total Hours to be Offered: 20

* Activities (Check all that apply):
☒ Economic stability
☒ Promote or sustain marriage
☒ Responsible parenting

* Type: ☒ Primary ☐ Optional ☐ Not in Use

* Curriculum or other group service: OTHER
 Specify: xyz

- ❑ Review **Screen W4 (Session Series)** to determine:
 - Do session series for each workshop have the correct number of sessions?
 - Are workshop series clearly labeled?
 - Are series locations and facilitators up to date?

Session Series

Filter Criteria

Workshop: CI Relationship Workshop

+ Add Session Series

Items per page: 10

Series Name	Workshop	Location	Facilitators	# of Sessions	Start Date	Registration
Q End of Year Series 2	CI Relationship Workshop	B107 Building	Christina Bush	4	12/28/2023	Q View
Q October 13, 2021 Start Date	CI Relationship Workshop	Town Meeting Center	Mr. Schmidt	10	10/13/2021	Q View
Q CC Workshop Series	CI Relationship Workshop	Cloud Grantee 3 RF Agency	Dr. Talkalot	4	6/18/2021	Q View
Q March 15 start	CI Relationship Workshop	YMCA	facilitator 1	20	3/15/2021	Q View

- ❑ Review **Screen W5 (Add/Edit Session Series)** to examine or edit details like maximum number of clients or recurring session days/times

W5. Add/Edit Session Series

* Indicates required field(s)

Workshop Name: Best forever or not

Registration Required: ☒ Yes ☐ No

Total Hours to be Offered: 4

Enrollment: Other

Type: Primary

Structure: Single

Curriculum or other group service: OTHER (Python)

Description: Looking for forever

Session Series Details

* Session Series Name:

* Agency Providing: --Select agency

* Max # of Clients: ☐ No Limit

Location

* Location Name:

* Street:

* State: --Select

* Zip:

Facilitators: 1 (# of Facilitators)

* Enter Facilitator (Enter all that apply):

* Add Facilitator

Date & Time

* # of Sessions:

* Session Start Date:

* Session Start Time: -- -- AM

* Session End Time: -- -- AM

Session Duration: hour(s) and minutes

Recur Every: ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thur ☐ Fri ☐ Sat



Review the **Workshop Characteristics** and **Series** tabs of data export for workshop setup details

To monitor workshop participation...



- Review individual workshop session details
 - Use nFORM **screen W7 (Sessions)** to determine, for example, if any sessions need to be rescheduled because they fall on a holiday or if attendance needs to be recorded for past sessions

Sessions

▲ 705 sessions are pending attendance.

Filter Criteria

Workshop: --Select workshop

Session Series: --Select session series

Session Status: --Select session status

Items per page: 10

Occurrence	Session Series	Facilitators	Status	Info	Roster	Attendance
Tue 12/27/2022 10:00 AM	End of 2022 Session Series (2)	Milly Noles	Session Complete	Cancel	Generate	ViewEdit
Mon 12/26/2022 10:00 AM	End of 2022 Session Series (2)	Milly Noles	Session Complete	Cancel	Generate	ViewEdit

- Use nFORM **screen W10 (Session Occurrence Details)** to review details for each upcoming session and make needed updates on or before the session date

W10. Session Occurrence Details

* Indicates required field(s)

Session Series Name: End of 2022 Session Series (2)

Agency Providing: ServiceTestProviderPA

Max # of Clients: N/A ☒ No Limit

Workshop Total Hours: 18 hours

Current Series Duration: 18 hour(s) and 0 minutes

Occurrence Details

Session Name:

* Session Date: 12/27/2022

* Session Start Time: 10:00 AM

* Session End Time: 2:30 PM

Session Duration: 4 hour(s) and 30 minutes

* Location Name: The Big Building

* Street: 2 R St

* City: Santa * State: FL

* Zip: 30046 Phone:

* Enter Facilitator: Facilitator #1
(Enter all that apply)
Milly Noles

- Use nFORM **screen W9 (Track Session Attendance)** to record attendance for completed sessions and adjust session details after the session, if needed

W9. Track Session Attendance

* Indicates required field(s)

Workshop Name: Workshop 10 - MCT Test
 Session Series Name: 08/2023 Clients (1)

Workshop Total Hours: 15 hours
 Current Series Duration: 15 hour(s) and 0 minutes

Occurrence Details

Session Name:

* Session Date: 8/10/2023

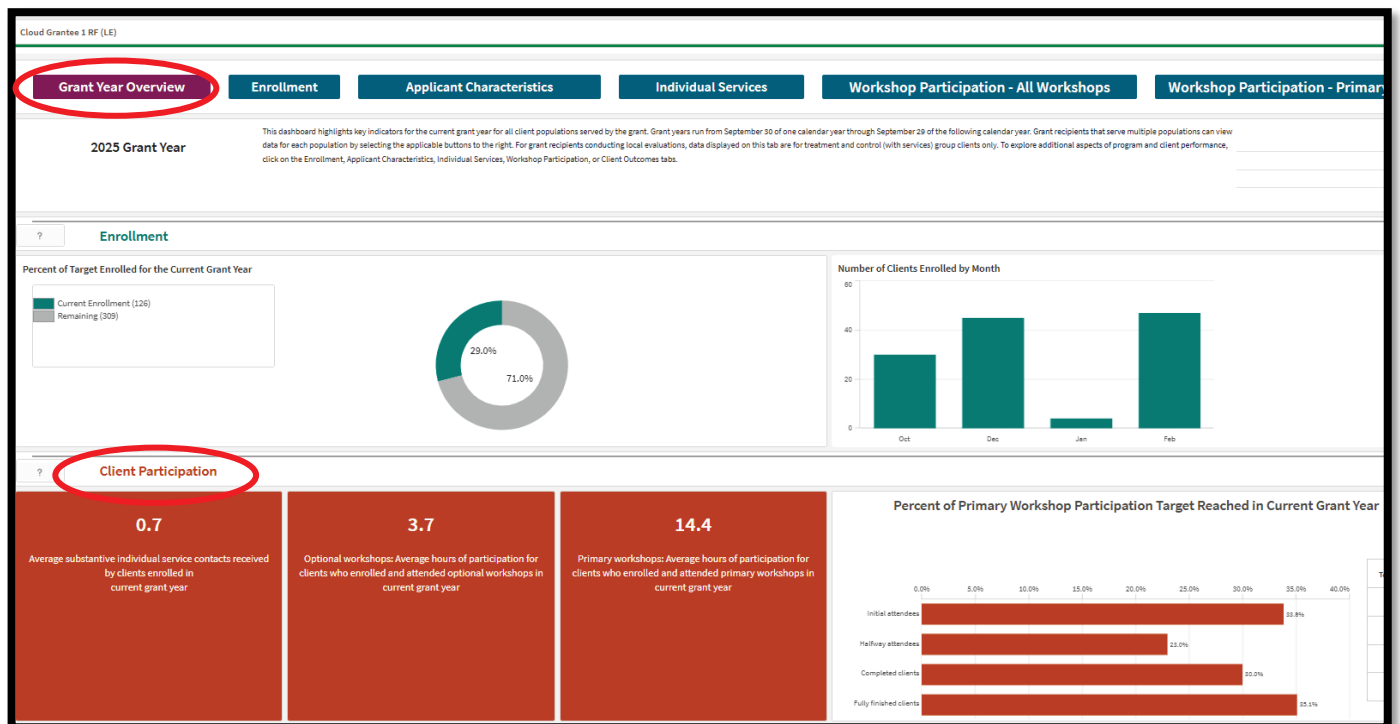
* Session Start Time: 7:00 AM
 * Session End Time: 12:00 PM

Session Duration: 5 hour(s) and 0 minutes

* Location Name: D402 Building
 * Street: 1 S St
 * City: Smalls * State: TX
 * Zip: 55555 Phone:

* Enter Facilitator (Enter all that apply): Facilitator #1

- Review overall workshop attendance and participation
 - Use the **Grant Year Overview** tab of the **query tool** to see aggregate data on client participation in primary and optional workshops and the number of sessions pending attendance



- Review detailed workshop attendance data
 - Use the **Series Session Attendance report** to review session-level attendance data (for example, has attendance been fully recorded for each session?)

	B	C	D	E	F	G	H	I	J	K	N
1	Grantee: Cloud Grantee 1 RF (LE) Workshop: Amor Etemo 2 years only Series: Embrace Your Inner Kid Registration Required: No Start Date: 11/15/2021 End Date: 11/17/2021 Meeting Day(s): Mon, Wed Total Workshop Hours: 4 Scheduled Location: Tree of Life Facilitators: Aragon										
2							Number of Sessions *			Attendance	
3							Attended	Missed	Made up	11/15/2021	11/17/2021
4	Client ID	Couple ID (if applicable)	Client	Client Grantee Location	Registration Date	Disenrollment Date					
5	10022010		King, Daniel				1	0	0		Yes
6	10028072	33854	Hayes, Condola				1	0	0		Yes
7	10028124		Prenny, Kelli	Southeast Side			1	0	0		Yes
8	10028292	33377	Walker, Lawrence	Southeast Side			1	0	0		Yes
9	10030154	33377	Carter, Molly	Southeast Side			1	0	0		Yes
10	10030879		Banks, Tasha	Southeast Side			2	0	0	Yes	Yes
11	10038088	33854	Dee, Issa	Southeast Side			1	0	0		Yes
12	10038114		Jackson, Taurean	Southeast Side			1	0	0		Yes
13	10038428	33378	Sinboe, Crenshaw	Southeast Side			1	0	0		Yes
14	10038444		Campbell, Nathan	Southeast Side			1	0	0		Yes
15	10038460	32880	Ahmal, Dee	Southeast Side			2	0	0	Yes	Yes
16	10040102	33344	DuBois, Tiffany	Southeast Side			1	0	0		Yes
17	10040584	33344	DuBois, Derek	Southeast Side			1	0	0		Yes
18	10043840		Pena, Dro	Southeast Side							Yes

- Record outstanding attendance for sessions/make-ups on **screen W9 (Track Session Attendance)**
- For clients registered ahead of sessions, record make-ups in their profiles under **Workshops/Sessions**
- Review primary workshop participation (PWP) data
 - When using the **Grant Year Overview** tab of the **query tool** to review progress towards PWP targets, consider point of time in the grant year and program flow to identify potential issues
 - Use the **Workshop Participation – Primary Workshops** tab of the **query tool** to review PWP progress for a specific group of clients

Cloud Grantee 1 RF (LE)

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

Enable Accessibility Mode

Enrollment Start Date: 05/01/2023 | Enrollment End Date: 03/18/2025

Current Selections:

- Grantee Name: Cloud Grantee 1 RF (LE)
- Enrollment Start Date: 05/01/2023
- Enrollment End Date:
- Population Name: Reentering individual
- Workshop: A Love Thing, Better than often
- Series:

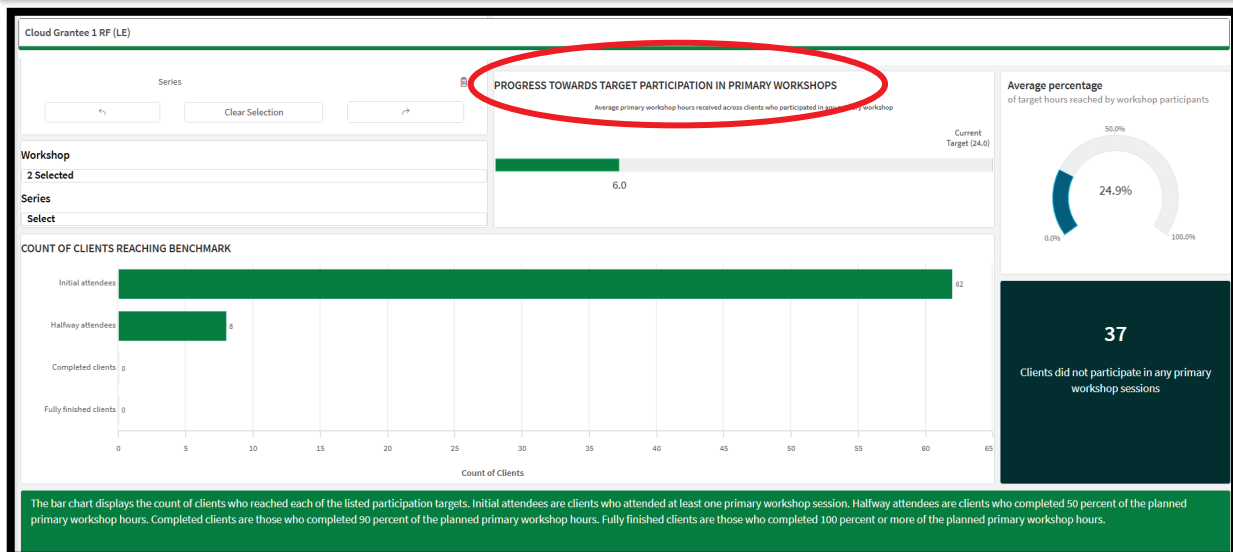
Enable primary workshop participation by client population, enrollment date range, workshop, and session. Select any date range from April 1, 2021 through yesterday's date to filter the data to clients who were enrolled during the selected timeframe and assigned to populations for which the grant has participation targets. Grant recipients that serve multiple populations should view data for one population at a time using the population buttons to the right. For couples populations, enrollment and participation are counted for the couple rather than individual partners.

Note that data for this tab are only available for clients who were assigned to populations for which the grantee has enrollment targets.

PROGRESS TOWARDS TARGET PARTICIPATION IN PRIMARY WORKSHOPS

Average primary workshop hours reached across clients who participated in any primary workshop

Average percentage of target hours reached by workshop participants



- Use the **Primary Workshop Participation Detail report** to see client-level progress towards targets

Cloud Grantee 1 RF (LE)													
Participation in Primary Workshop(s)* - Detail Report													
Clients Enrolled 5/1/2023 - 3/19/2025													
Location	Client Population	Client ID	Couple (if applicable)	Client First Name	Client Last Name	Current Client Status	Enrollment Date	Entrance Survey Completion Date	Most Recent Primary Workshop Session Attended Date	Exit Survey Completion Date	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)
	Community couple	10132324		King	Daniel	10/25/2023	6/24/2024				0	24	0.0%
	Community couple	10132337		Hayes	Condola	10/25/2023	6/24/2024				0	24	0.0%
	Community couple	10150539		Prenny	Kelli	2/9/2024	8/8/2023	8/8/2023	8/8/2023		13	16	81.3%
	Community couple	10150542	339	Walker	Lawrence	2/9/2024	8/8/2023		8/10/2023		23	16	143.8%
	Community couple	10148033	339	Carter	Molly	1/23/2024	8/8/2023		8/10/2023		23	24	95.8%
	Community couple	10148020		Banks	Tasha	1/23/2024	8/8/2023		8/10/2023		23	24	95.8%
	Community couple	10155479		Dee	Issa	3/6/2024	8/8/2023		8/8/2023		13	24	54.2%
	Community couple	10155482		Jackson	Taurean	3/6/2024	8/8/2023		8/8/2023		13	24	54.2%
	Community couple	10155495		Sirboe	Orenshawm	3/6/2024	8/8/2023		8/8/2023		13	24	54.2%
	Community couple	10155505		Campbell	Nathan	3/6/2024	8/8/2023		8/8/2023		13	24	54.2%
	Community couple	10155518		Ahmal	Dee	3/6/2024	8/8/2023		8/8/2023		13	24	54.2%
	Community couple	10155521	342	DuBois	Tiffany	3/6/2024	8/8/2023		8/8/2023		13	24	54.2%
	Community couple	10156148	342	DuBois	Derek	3/22/2024	10/3/2023	10/3/2023	12/10/2024		4	16	25.0%
	Community couple	10156151		Pena	Dro	3/22/2024	10/4/2023		12/10/2024		5	16	31.3%

Resources related to monitoring workshop setup and participation

Manuals	nFORM User Manual Module VI, Module VII
Tip sheets	Recording make-up attendance for workshop sessions in nFORM Review workshop participation in the QPR/PPR Setting up workshops properly in nFORM 2.0
Office hours	October 2024: Using nFORM 2.0 data quality indicators to support program monitoring April 2023: Using nFORM 2.0 data to monitor workshop participation March 2023: Using nFORM 2.0 data to monitor primary workshop completion

To monitor individual services...

- ☐ Review number and most common type of individual service contacts (ISCs) and referrals
 - Use the **Individual Services tab** of the **query tool**, Client Issues/Needs and Referrals view, and filter on a service date range and population type (if applicable)



Grant Year Overview

Enrollment

Applicant Characteristics

Individual Services

Enable Accessibility Mode

Service Start Date

01/01/2023

Current Selections

Grantee Name

Cloud Grantee 3 RF (LE)

Service Start Date

01/01/2023

Service End Date

03/23/2025

Population Name

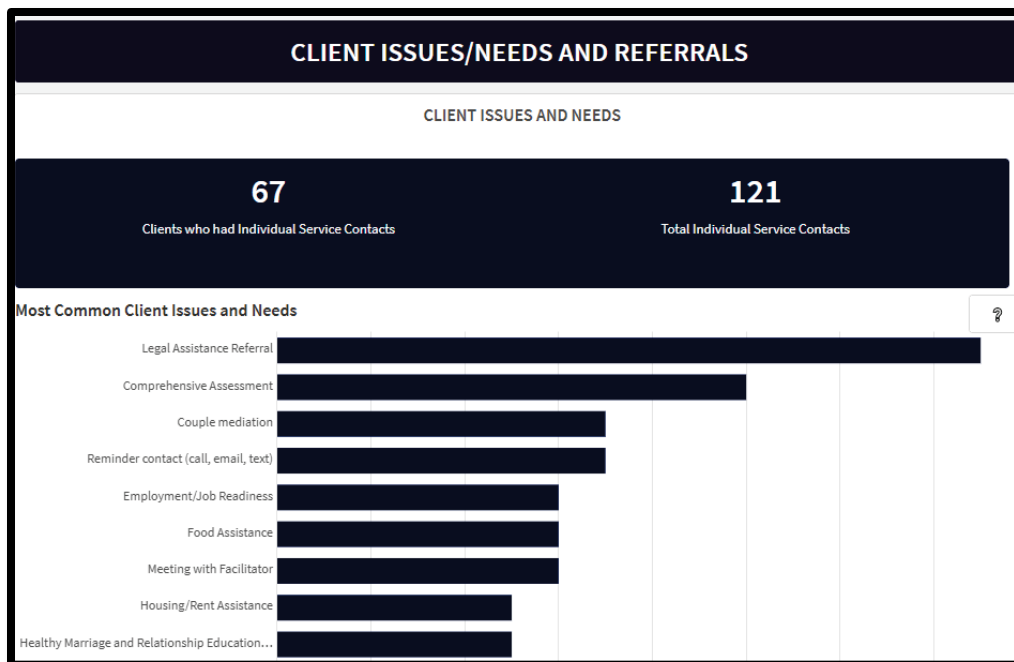
Community individual

Service Category Name

Referral Name

Clear Selection

Analyze the most common incentive individual service multiple population couple, then two manual for more are for treatment



- ☐ Review the average number of substantive ISCs provided and referrals needing follow-up
 - Use the **Grant Year Overview** tab of the **query tool**, Client Participation and Data Quality panels to assess whether information aligns with expectations – if not, retrain staff on the data entry process
- ☐ Review substantive and reminder-only ISC provision at the client level
 - Use the **Individual Service Contacts** report to potentially identify clients that may require updates or follow up if they have not yet received the expected number

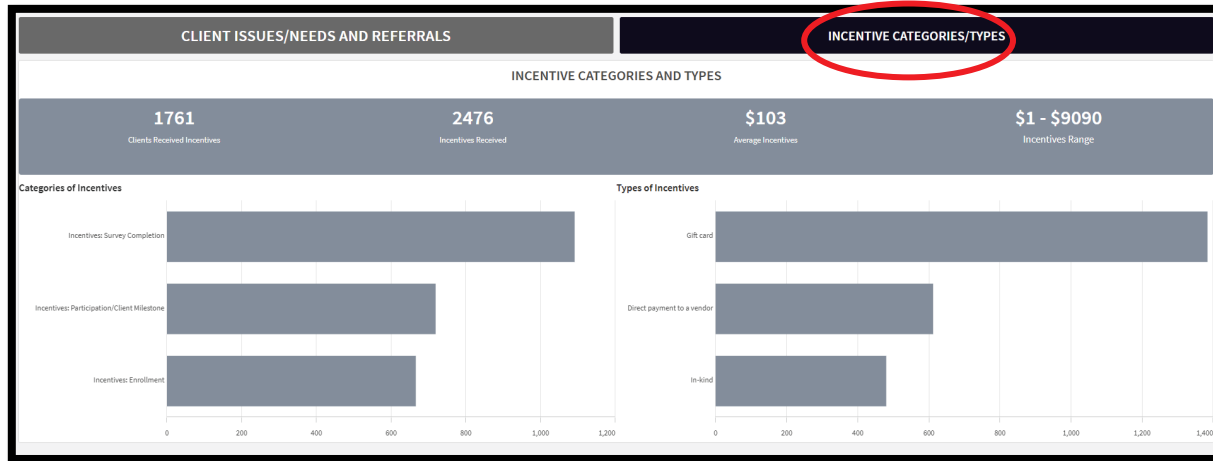
Cloud Grantee 1 RF (LE) Individual Service Contacts - Detail Report*												
Clients Enrolled 5/1/2023 - 3/19/2025												
Client Grantee Location	Population	Client ID	Couple ID (if applicable)	Client Last Name	Client First Name	Current Client Status	Enrollment Date	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of Substantive Service Contacts@	Total Number of Reminder Only Service Contacts	
Not specified	Community couple	10132324		King	Daniel	Active	2/12/2024		2/12/2024	1		
Not specified	Community couple	10132337		Hayes	Condola	Active	2/12/2024	Test Site Administrator. 504	2/12/2024	1		
Not specified	Community couple	10150539		Prenny	Kelli	Active	2/9/2024		2/9/2024	1		

- ☐ Monitor clients with outstanding referral follow-ups
 - Use the **Caseload Summary Detail** report to see clients with referrals that require follow-up

Caseload Detail as of: 2/28/2025														
Staff Grantee Location	Staff with Case Management Capability	Assigned Client Study ID	Couple ID	Client Last Name	Client First Name	Client Status	Client Grantee Location	Application Form Completed by	Enrollment Date	Most Recent Service Contact Date	Most Recent Workshop Session Attended Date	# of referrals requiring follow-up	# of incentives provided	
	Case Manager, Test	10132324		King	Daniel	Active	Southeast Side	Dreego, Rachel	6/2/2022	8/6/2024	12/10/2024		7	
	Case Manager, Test	10132337	3385	Hayes	Condola	Active	Southeast Side	Dreego, Rachel	6/21/2022	6/21/2022	3/2/2022	4		

- ☐ Review trends and other details about ISC provision and referrals

- Use the **Individual Services tab** of the **data export** to drill down further. For example, consider whether all needs and issues covered during individual service contacts have been recorded
- Use the **Referrals tab** to monitor the number and types of referrals provided to clients
- ❑ Review incentives and program supports provided
 - Use the **Individual Services tab** of the **query tool** (Incentives Categories/Types view) to see the number, types, and amounts of incentives provided. Consider whether the data align with your program's approved incentive plan, and if any incentives exceed the ACF maximum (\$350 per client)



- Use the **Incentives Detail report** to determine whether any incentives should be added or corrected

Cloud Grantee 1 RF (LE)													
Incentives Detail Report													
Clients Enrolled 5/1/2023 - 2/28/2025													
Client Grantee Location	Population	Client ID	Couple ID	Client Last Name	Client First Name	Current Client Status	Service Assignment Name	Enrollment Date	Total Incentives	Enrollment	Participation/Client Milestone	Survey Completion	
Community couple		10132324		King	Daniel	Active		2/12/2024	\$150.00	\$0.00	\$0.00	\$150.00	
Community couple		10132337	33854	Hayes	Condola	Active		2/12/2024	\$201.00	\$0.00	\$0.00	\$201.00	
Community couple		10150539		Prenny	Kelli	Active	Full Service	2/9/2024	\$0.00	\$0.00	\$0.00	\$0.00	

- ! Add ISCs, referrals and incentives as needed to individual client's profile under **Service History**. Record select service contacts for multiple clients using the **bulk update** feature.

Resources related to monitoring individual services	
Manuals	nFORM User Manual Module VII.B, Module VII.B2, Module VII.B3
Tip sheets and training videos	ACF Guidance on Program Incentives Video: Recording Participation in Individual Services
Office hours	November 2024: Using nFORM 2.0 data quality indicators to support program monitoring November 2023: Using nFORM 2.0 to monitor ISCs February 2023: Using nFORM 2.0 data to monitor ISCs and referrals March 2022: Using nFORM 2.0 to monitor client receipt of individual service contacts

This tip sheet was prepared by Leah Pranschke and Hannah McInerney of Mathematica, Washington, DC, (2025) under contract with the Office of Planning, Research and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services (HHSP233201500035I/75P00120F37054). OPRE Project Officers: Rebecca Hjelm and Harmanpreet Bhatti. Mathematica Project Director: Grace Roemer