User Accounts

A user's level of access to nFORM is determined by the user's account type and account permissions.

Site administrators have the broadest access to nFORM, including the ability to input data, view client-level data, and perform administrative functions. Site administrators select the appropriate account type for other nFORM users on their grant's team, create the accounts, and updating the account type or permissions as needed. Typically, a program's data manager and other key staff have site administrator accounts.

Case managers have the ability to input data and view client-level data. Case managers and other frontline staff, such as those who conduct enrollment and administer surveys, often have this user account type.

General users have the most restricted access to nFORM functionality. General users can input data and view limited client-level data. For example, they can search to see if a client is in the system.

This table summarizes the features and functions that each type of account has access to in nFORM:

Account type	Capabilities			
	Input data	**View client-level data**	**Use query tool**	**Administrative functions**
Site administrator	✓	✓	✓	✓
Case manager	✓	✓	✓	None
General user	✓	Limited	✓	None

Points to consider about user accounts:

Because so many nFORM responsibilities fall to the site administrator, it is a good idea for every grant recipient to have at least two site administrators. For example, site administrators are responsible for resetting passwords if their staff get locked out of nFORM after too many failed log-in attempts. If there is only one site administrator and that person is unavailable at a given moment, staff may be unable to access FORM and finish work in time.

Although any user account type can have access to nFORM's data visualization query tool, only three nFORM user accounts at a grant organization can have the query tool permission at the same time. Site administrators can add the query tool permission for users who need to access it, and they can change which staff have access to the query tool at any time.

About a week before data collection in nFORM begins, the nFORM team will create user accounts for initial site administrators at each grant recipient. The initial site administrator will create other user accounts for their staff up to the number of accounts approved by ACF. Site administrators should review section IV of the nFORM user manual on the HMRF Grant Resource site for information on setting up and editing user accounts.

Contact the data capacity and CQI help desk with any questions at nFORMCQITA@mathematica-mpr.com. We are happy to help!