Using nFORM data tools

Well nFORMed: nFORM and CQI Training Series, Day 5 – June 10, 2026

Data capacity and CQI TTA team, Mathematica

Welcome! In the chat, please share your name, program, and one insight you've learned from the Well nFORMed training series so far.

Today's presenters

Scott Baumgartner

Data Capacity and CQI TTA Team Member

Hannah McInerney

Data Capacity and CQI TTA Team Lead

Housekeeping

Please mute your line

Access closed-captioning by clicking the "CC" icon in the lower left corner, or by pressing CTRL+SHIFT+A

Use the chat to answer polls and ask questions

Recording and slides from today's training will be made available on the HMRF Grant Resource site at https://hmrfgrantresources.info/

Well nFORMed Training Series Roadmap

Today's focus

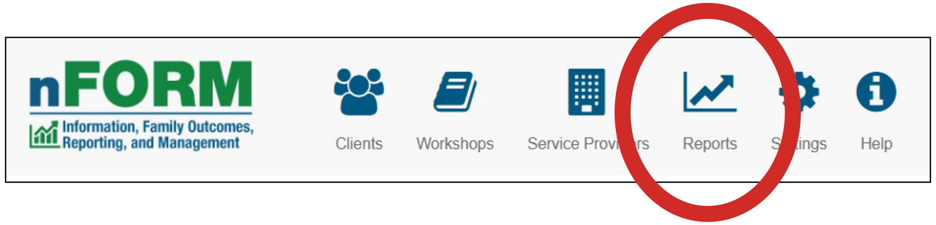
1. Getting started
2. Recruiting and enrolling clients, and administering surveys
3. Recording participation in workshops and other services
4. Fostering a learning culture and planning CQI cycles
5. Overview of nFORM data tools
6. Next steps and Q&A

Using nFORM data and conducting CQI

Your destination: better data, better decisions, better services

Agenda

- Introduction to nFORM data tools
- Operational reports
- Query tool
- Data export
- Performance Progress Report (PPR)
- Questions and answers



How often do you use data to inform your work?

- Daily
- Weekly
- Monthly
- Now and then

Introduction to nFORM data tools

Use nFORM's data tools to manage and monitor your program and inform improvement efforts. Consider what data and which tools to use for each purpose.

Manage
day-to-day programming

Identify
where challenges exist

Understand
what's driving the challenge

Track
whether strategies are working

Monitor
progress over time

nFORM tools include data on HMRF performance measures

Client characteristics and outcomes

- From client entrance and exit surveys

Enrollment and participation

- From program staff entry

Program operations data

- From program staff entry

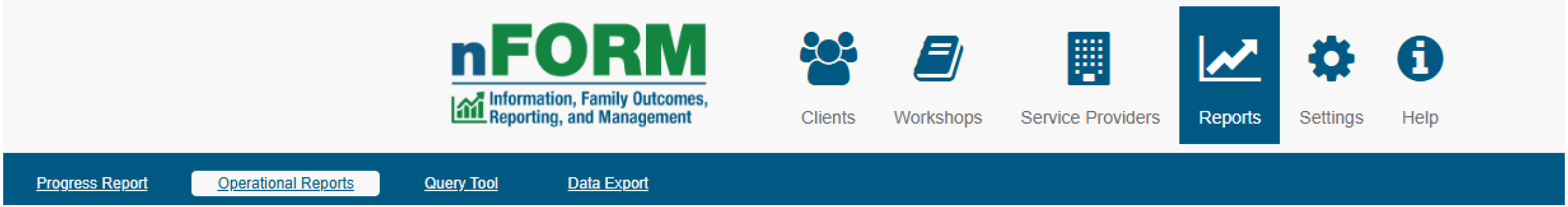
Data tools available on the Reports tab

nFORM
Information, Family Outcomes, Reporting, and Management

PPR	Query Tool	Operational Reports	Data export
Progress on HMRF performance measures	Visualizations of aggregate progress on client measures Explore by different factors	Manage day-to-day operations and track performance Summary and detailed reports Export into Excel	Access all detailed nFORM data except for PII Downloadable Excel data organized on separate tabs

Operational Reports

Operational reports are designed to help grant staff access nFORM data to….



- Include real-time data
- Manage daily HMRF program operations
- Provide contextual information for PPR progress narratives
- Monitor CQI strategies

15 operational reports provide insight into different aspects of operations

Staff info

- Caseload summary
- User account activity

Client info

- Outreach detail
- Enrolled clients' email and phone report
- Zip code report
- Client status report summary

Survey administration

- Survey completion summary
- Survey report – paper survey
- Survey report – refused survey

Enrollment and participation

- Individual service contacts
- Incentives report
- Series session attendance
- Primary workshop participation summary
- Primary workshop participation detail
- Local evaluation enrollment

nFORM operational report enhancements

Enrolled clients phone report expanded to include emails

- Enrolled clients phone report →Enrolled clients phone and email report

New Outreach Detail report

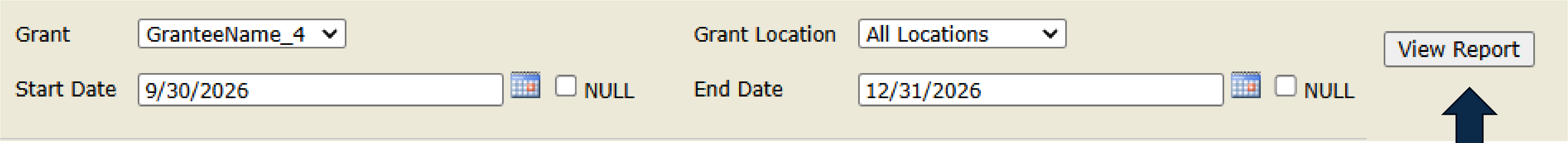
- Includes information on clients not yet enrolled

Enrollment and primary workshop participation along academic and grant year calendar now included in PPR for READY4Life grants

- School year performance report no longer needed

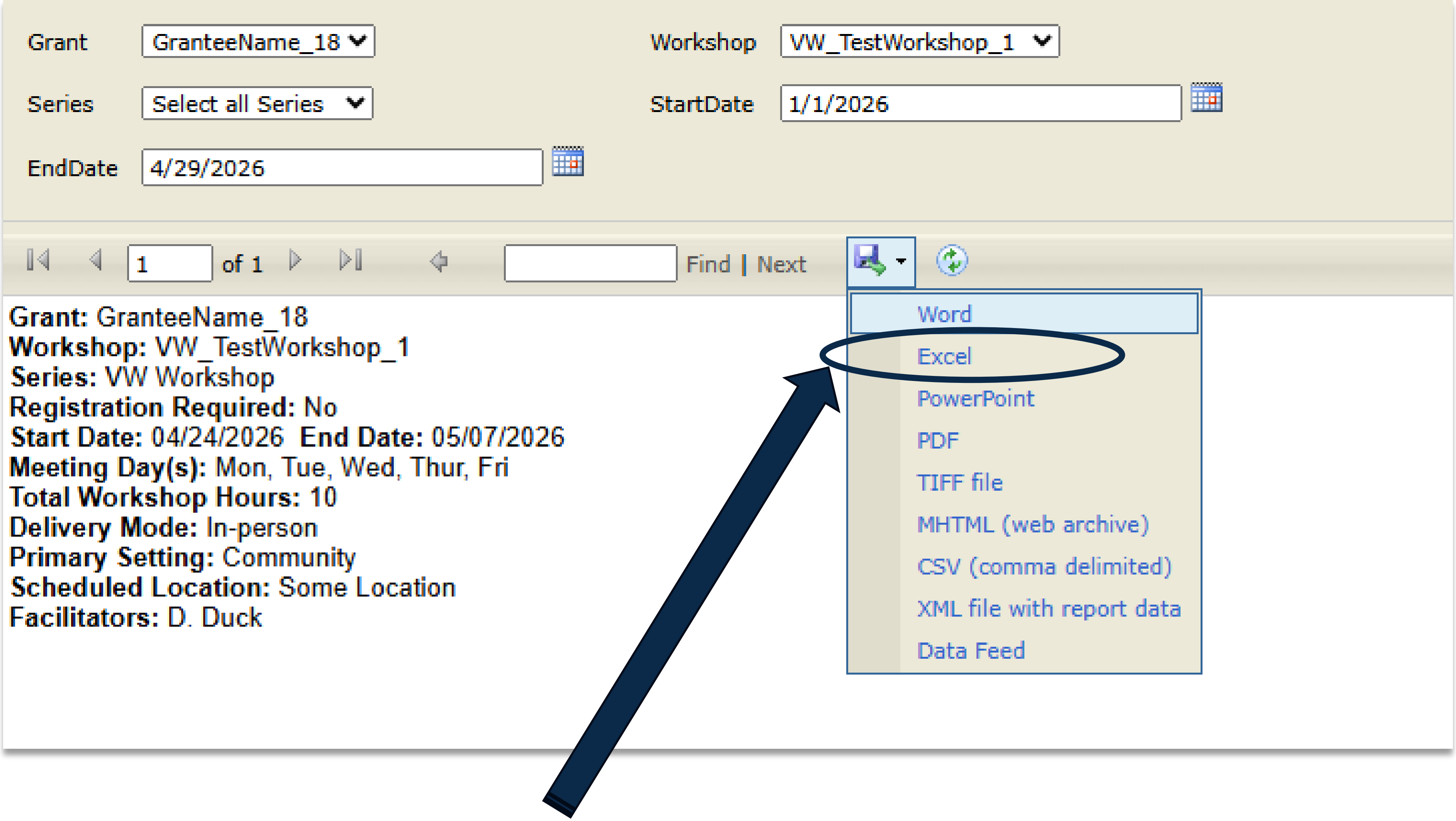
Using operational reports

Set filters to explore data...



...then click the “View Report” button in the upper righthand corner

Download to Excel or another format for analysis



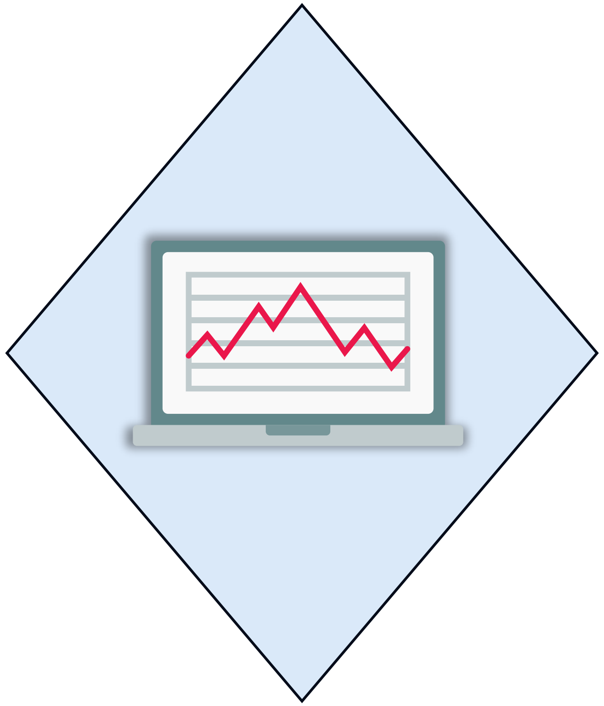
Tips for using operational reports

Review headings and footnotes to identify the types of data included and excluded from a report

Delete client names and other PII if not needed

If **comparing data across reports,** consider the time the report was generated and any filters applied

Use nFORM-generated IDs to link data across operational reports



Example 1: Using operational reports to manage daily program operations

You are the data manager for a HEART program. Your outreach team has been busy recruiting new adult individuals and couples to your program.

You want to see how many applicants are ready to take the entrance survey and complete enrollment, and how many might need more outreach from your team.

How can you use an operational report to see how many applicants need more outreach and how many are ready to take the entrance survey so you can plan next steps?

You pull up the Outreach Detail report. Let's take a look!

Using Outreach Detail Report to manage daily program operations

Grant: HEART Grant 301 | Exclude Will Not Enroll: (•) True ( ) False
Start Date: 9/30/2025 | End Date: 4/16/2026

1 of 1 | Find | Next

Sort by Client Status to see how many applicants are still in Outreach status, and how many are pending enrollment.

HEART Grant 301

Outreach Detail Report*

Application Dates 9/30/2025 - 4/16/2026

Client Location	Client Population	Client Last Name	Client First Name	Client Status	Client Status Change Date	Application Date	Application Form Completed By	Client's Case Manager(s)	Primary Language	Email	Home Phone	Cell Phone	Work Phone	Most Recent Service Contact Date	Total Number of Substantive Service Contacts	Total Number of Informational Service Contacts	Total Number of Reminder Only Service Contacts	Total Number of Referrals
	Adult couple	Flintstone	Fred	Applicant pending enrollment	2/18/2026	2/18/2026	SiteAdmin2, HEART301		English	fflintstone@email.com	315-666-4551							
	Adult couple	Flintstone	Wilma	Applicant pending enrollment	2/18/2026	2/18/2026	SiteAdmin2, HEART301		English		315-222-1551							
	Adult couple	Munster	Herman	Outreach	2/18/2026	2/18/2026	SiteAdmin3, HEART301		English		215-555-1212							
	Adult couple	Munster	Lily	Outreach	2/18/2026	2/18/2026	SiteAdmin3, HEART301		English			212-555-1212						
	Adult couple	Rubble	Barney	Outreach	2/18/2026	2/18/2026	SiteAdmin1, HEART301		English		212-555-1212							
	Adult couple	Rubble	Betty	Outreach	2/18/2026	2/18/2026	SiteAdmin1, HEART301		English			212-555-4646						
New Location	Adult couple	Gump	Forrest	Applicant pending enrollment	4/13/2026	4/13/2026	SiteAdmin1, HEART301	HEART301 SiteAdmin1	English			555-887-5536						
New Location	Adult couple	Gump	Jenny	Applicant pending enrollment	4/15/2026	4/15/2026	SiteAdmin1, HEART301	HEART301 CaseManager;HEART301 CaseManager;HEART301 CaseManager;HEART301 SiteAdmin1;HEART301 SiteAdmin2;HEART301 SiteAdmin3	English			555-754-5555						
New Location	Adult couple	Rascale1	Rocky1	Applicant pending enrollment	3/5/2026	3/5/2026	SiteAdmin2, HEART301		Tagalog	Moonstruck301@cosmo.net	445-445-5455		301-574-5274					
New Location	Adult couple	Rascale1A	Raquel1	Applicant pending enrollment	3/5/2026	3/5/2026	SiteAdmin3, HEART301		English		454-455-5555							
New Location	Adult couple	Smith	Jenny	Applicant pending enrollment	4/13/2026	4/13/2026	SiteAdmin1, HEART301	HEART301 SiteAdmin1						4/13/2026		1		1
New Location	Adult individual	5142	TP1	Applicant pending enrollment	4/15/2026	4/15/2026	SiteAdmin1, HEART301		English			141-241-2414						
New Location	Adult individual	Brown	Charlie	Applicant pending enrollment	3/5/2026	3/5/2026	SiteAdmin2, HEART301		English		212-555-1212							
New Location	Adult individual	Thropp	Elphaba	Outreach	2/23/2026	2/23/2026	SiteAdmin1, HEART301		English	elphie123@google.com								

*This report does not include enrolled clients, or clients with a status of "Pending duplicate", "Duplicate confirmed", or "Consent revoked".

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Check which staff completed each application and any assigned case managers so you can plan next steps with them.

Example 2: Using operational reports to manage daily program operations

You are the data manager for a HEART program. Your outreach team recruited adult individuals and couples to your program more quickly than expected (congrats!), and your case management team is still catching up.

You want to see how many clients still need to be assigned case managers so the clients can begin receiving individual services as soon as possible.

How can you use an operational report to see how many clients still need case managers, and what to consider in assigning case managers?

You pull up the Email and Phone report. Let's take a look!

Using Enrolled Clients Email and Phone Report to manage daily program operations

Grant: HEART Grant 301
Start Date: 9/30/2025
End Date: 4/16/2026
Client Status: All Client Statuses
Workshop: Select Workshop
Series: Select all Series

1 of 1 Find | Next

Sort by case managers to see which clients do not yet have one assigned. Check the client's primary language so you can assign a case manager who speaks that language.

Assign case managers, rerun the report, and then ask the new case managers to contact the clients to begin providing services.

ENROLLED CLIENTS' EMAIL and PHONE REPORT

Grant: HEART Grant 301

Clients Enrolled: 9/30/2025 - 4/16/2026

Client Status: All Client Statuses

Client Location	Client Population	Client Last Name	Client First Name	Client Status	Enrollment Date	Service Assignment Name	Client's Case Manager(s)	Primary Language	Email	Home Phone	Cell Phone	Work Phone
	Adult couple	Mouse	Mickey	Active	2/18/2026			English	fakeemail@fakeemail.com		111-111-1111	
	Adult individual	Chaplan	Charlie	Active	2/12/2026			English		487-555-1212		
	Adult individual	Wilson	William	Active	2/4/2026			English			908-555-1212	
New Location	Adult couple	Bastion1	Billy1	Active	3/4/2026			English		454-545-4555		
New Location	Adult couple	Fredericks1	Leslie1	Active	3/4/2026			Spanish			454-545-4555	
New Location	Adult couple	HEART_301	Marco	Active	3/3/2026			English	xylans8964@xystus.com	785-000-0000		
New Location	Adult couple	HEART301	Leony	Active	3/3/2026			Spanish	xylans8964@xystus.com	785-000-0000		
New Location	Adult couple	Lyons1	Jerome1	Active	3/4/2026			Spanish	Giants@msn.com	454-454-5455	445-455-5554	658-985-6589
New Location	Adult couple	NewGrantHEART301	Juan	Active	4/2/2026			Spanish	xylans8964@xystus.com	785-000-0000		
New Location	Adult couple	NewGrantHEART301	Monica	Active	4/2/2026			English	whitenoise@night.com			
New Location	Adult couple	Sandlewood	Cassandra	Active	2/26/2026			Quiche	casadelupe@nice.com			
New Location	Adult couple	Sandlewwod	Miguel	Active	2/26/2026			English	casadelupe@nice.com			
New Location	Adult couple	Waking1	Wendy1	Active	3/4/2026			English			454-555-4545	
New Location	Adult individual	PinkFlamingo	Rosa	Active	2/26/2026			Spanish	darkwoods@night.com			
New Location	Adult individual	Proud1	Peter1	Active	3/4/2026			English			454-545-4555	
New Location	Adult individual	Suave1	Ricardo1	Active	3/5/2026			Spanish	oldchains@gmail.com	445-454-5455	454-545-5545	656-568-3565
New Location	Adult individual	Xeno1	Stanley1	Active	3/4/2026			Tagalog			454-454-5555	

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

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Example 3: Using operational reports to monitor CQI strategies

You are the program manager for a FORGE grant that serves community fathers in two locations. Clients don't always show up for their case management meetings.

You try something different in one location: texting clients a reminder before each meeting.

How can you use an operational report to see whether your strategy is working?

You pull up the Individual Service Contacts summary report and set the grant location to "all locations". Filter on the start and end date based on when you tried the new strategy. Let's take a look!

Using ISC Summary Report to monitor CQI strategies

GranteeName_66

Individual Service Contacts - Summary Report*

Clients Enrolled 4/1/2026 - 4/29/2026

Grant	Client Location	Client Population	Number of Clients/Couples	Average Number of Substantive Service Contacts@	Average Number of Informational Service Contacts	Average Number of Reminder Only Service Contacts
GranteeName_66	All	All	58	1.0	1.7	3
		Community father	58	1.0	1.7	3
	SiteName_13	All	27	1.3	2.1	3
		Community father	27	1.3	2.1	3
	SiteName_17	All	31	0.7	1.4	3
		Community father	31	0.7	1.4	3

*This report does not include clients with a client status of "Consent revoked," clients with a "Control (NO Services Provided)" or "Control Waitlist (NO Services Provided)" service assignment, or clients with a case status of "Non program." In addition, couples where only one client is enrolled are excluded from this report.

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Location with **new** scheduling approach

Location with **old** scheduling approach

I can see that fathers in the location with a new scheduling approach have an average number of substantive contacts **nearly double** that of the ones in the other location

Example 4: Using operational reports to prepare for PPRs and FPS check-ins

You are the program director for a HEART grant. You're reviewing major activities and accomplishments in recruiting single parents for an upcoming call with your FPS and to plan ahead about your PPR progress narrative.

You are very excited about your new partnership with a Head Start agency in a part of your county where you haven't had much success before.

How can you use an operational report to help you track your progress?

You pull up the Zip Code Report and run the report twice. The first run covers the five months before the partnership started. The second covers the first three months of the partnership. You export both reports into Excel to compare them. Let's take a look!

Using Zip Code Summary Report to provide context for progress narratives

ZIP CODE SUMMARY REPORT*

Grant: GranteeName_18

Clients Enrolled: 9/1/2025 - 1/31/2026

Client Status: All Client Statuses

Workshop: Workshop_Test_1

Client Location	Client Population	Zip Code	# Clients
SiteName_125	Adult individual	20871	3
SiteName_125	Adult individual	14048	34
SiteName_125	Adult individual	26589	16
SiteName_125	Adult individual	55447	21

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

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ZIP CODE SUMMARY REPORT*

Grant: GranteeName_18

Clients Enrolled: 2/1/2026 - 4/29/2026

Client Status: All Client Statuses

Workshop: Workshop_Test_1

Client Location	Client Population	Zip Code	# Clients
SiteName_125	Adult individual	20871	11
SiteName_125	Adult individual	14048	14
SiteName_125	Adult individual	26589	13
SiteName_125	Adult individual	55447	7

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

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Comparing the report for two different time periods shows me that in the five months before the partnership, we enrolled **only 3 clients from Zip Code 20871….**

But we've enrolled **11 clients in the three months** since we've been getting referrals from the Head Start agency!

Reflections in the chat

How might you use nFORM's operational reports?

What questions do you have about the operational reports?

The Query Tool

nFORM Query Tool

Designed to help track, monitor, and analyze data collected in nFORM

Seven different tabs with different data visualizations

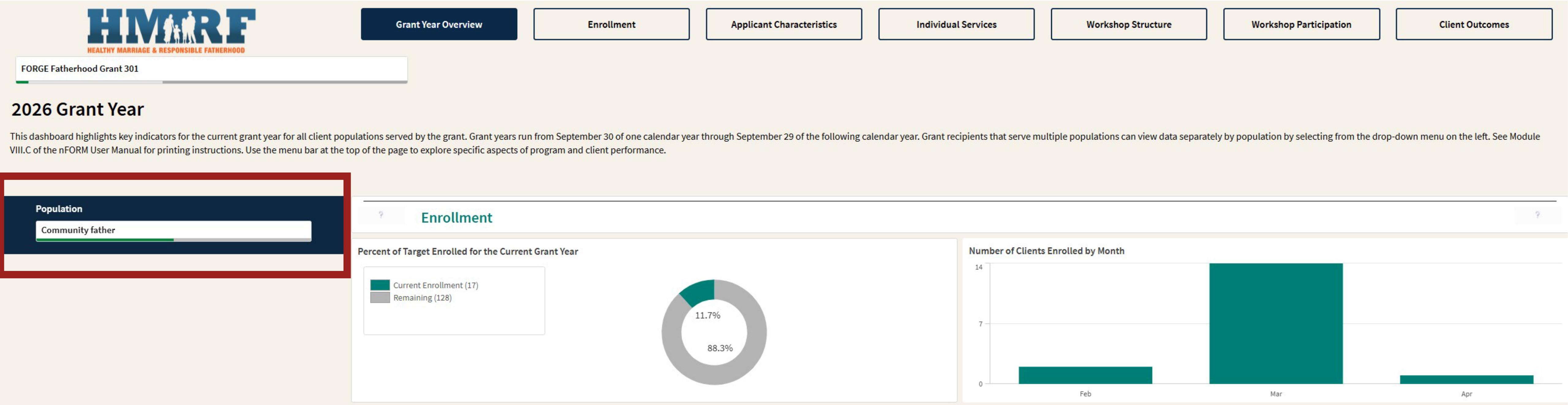
- Switch from visuals to data tables
- Filters available on each tab
- Visualizations can be printed

Only counts clients in populations for which you have enrollment/ participation targets

- Tool tips explain which clients are included in calculations

- Grant year overview
- Enrollment
- Applicant characteristics
- Individual services
- Workshop structure
- Workshop participation
- Client outcomes

nFORM Query Tool: Grant Year Overview tab



nFORM Query Tool: Grant Year Overview tab (contd.)

?

Client Participation

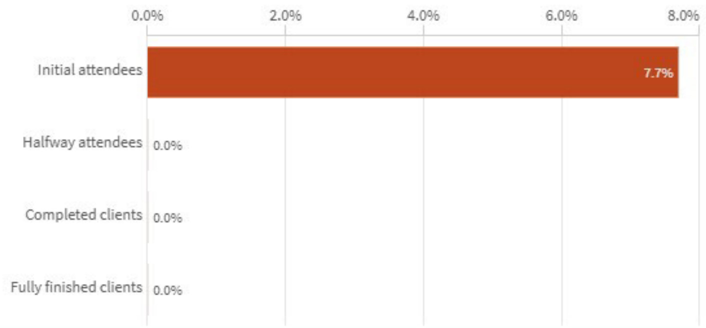
0.3
Average substantive individual service contacts received by clients enrolled in current grant year

0.0
Optional workshops: Average hours of participation for clients who enrolled and attended optional workshops in current grant year

0.0
Primary workshops: Average hours of participation for clients who enrolled and attended primary workshops in current grant year

Percent of Primary Workshop Participation Target Reached in Current Grant Year

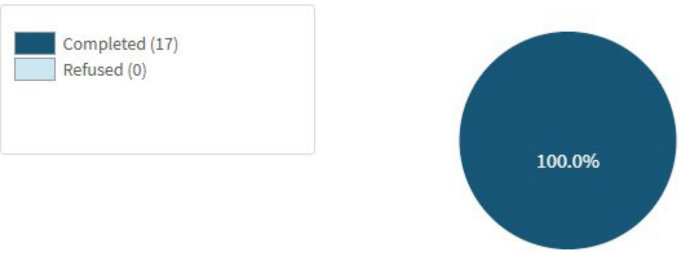
Show Table



Total clients achieving benchmark	Target count of clients for benchmark
10	130
0	105
0	95
0	85

Data Quality

Entrance survey status
for clients enrolled in current grant year



Exit survey status
for clients enrolled in current grant year
who have completed or refused entrance survey

2
Number of referrals needing follow-up for current year enrollees

0
Number of sessions from all grant years still pending attendance

Data export

Data export is a cumulative Excel file of data recorded in nFORM

Does not include personally identifiable information, such as client names, contact information, or service notes

You can link and merge data across tabs and operational reports

- Client and couple ID
- Workshop, series, and session ID
- Location, population, enrollment date, service assignment name and category (if applicable), current client status

Data export tabs

- Client Info
- Service Contacts
- Referrals
- Incentives – Program Supports
- Workshop Characteristics
- Series
- Series Facilitators
- Session Attendance
- Service Providers
- Survey Response Data
- Program Operations Survey

Site administrators submit data export requests on nFORM's Reports tab

Use data type and date filters to select exact data needed to answer your questions and conduct analyses

Data Export

Request Data Export

Follow these steps to request a data export Excel file. Customize the data types and clients to include in your file (Steps 1 and 2), then carefully review your selections and submit your request (Step 3).

1. Select Data Type(s).

You may select more than one data type. If you would like all available data, select all four data types. Files with multiple data types selected will not include any duplicate tabs; for example, if you select Surveys and Workshops your file will only include one Client Info tab. For security purposes, the file will not contain personally identifiable information.

- ☐ Surveys (tabs: Client Info, Survey Response Data)
- ☐ Workshops (tabs: Client Info, Workshop Characteristics, Series, Series Facilitators, Session Attendance)
- ☐ Individual Services (tabs: Client Info, Service Contacts, Referrals, Incentives-Program Supports, Service Providers)
- ☐ Program Operations (tabs: Workshop Characteristics, Series, Series Facilitators, Service Providers, Program Operations Survey)

2. Enter Client Enrollment Date Range

Use the calendar feature to select and retain accurate dates between 4/1/2021 and today's date. If you are selecting only program operations data, you do not need to enter an enrollment date range.

Start Date ____ **End Date** ____

3. Carefully review selections, then click "Submit Request".

Your request will appear as a pending file below. If needed, select "Clear filter selections" and revise your selections before submitting your request. If you navigate away from this screen before submitting your request, selections will not be saved.

Submit Request

Clear Filter Selections

Performance Progress Report (PPR)

The performance progress report (PPR)

Grant recipients are required to submit the PPR to ACF by October 30 of each year

Components in nFORM

- Program operations survey
- Quantitative performance data
- Qualitative progress narrative

PPR presents related narrative and numeric data together

PERFORMANCE PROGRESS REPORT
Administration for Children and Families (ACF), Office of Family Assistance (OFA)
Healthy Marriage and Responsible Fatherhood Grant Program

B-01 PERFORMANCE NARRATIVE

1. Target Population

Describe the population(s) your program intends to serve. Did you serve the intended population(s) during the reporting period? Review the information in Table B-01.1. The Applicant Characteristics tab of the nFORM query tool provides additional demographic information about the population your program is serving.

Our HEART program aims to serve adult individuals and couples in our community who would like to develop strong relationship and parenting skills. Our goal is to serve a mix of male and female adults of all ages. Based on enrollments in the reporting period we are reaching our target demographic, as shown in Table B-01.1.

Table B-01.1. Demographic characteristics	Percent of applicants
1. Sex	
a. Female	40.0%
b. Male	60.0%
2. Age	
a. 13 – 15 years	0.0%
b. 16 – 17 years	0.0%
c. 18 – 20 years	0.0%
d. 21 – 24 years	20.0%
e. 25 – 34 years	40.0%
f. 35 – 44 years	0.0%
g. 45 – 54 years	20.0%
h. 55 years or older	20.0%

READY4Life programs can easily compare grant year and academic year progress

Table B-02.4. Enrollment targets and actual enrollment	Number of adult couples[a]	Number of adult individuals	Number of youth
1. Enrollment target for the grant year			
2. Enrolled since beginning of grant year through end of reporting period			
3. Percent of grant-year target met to date			
4. Enrolled since beginning of academic year through end of academic year[b] (READY4Life grants only)			
5. Percent of grant-year target met to date, based on academic year enrollment (READY4 Life grants only)			

Progress Report

Annual Progress Report (Required)

Start Date	End Date	Due Date	Step 1: Program Operations Survey	Step 2: Draft Progress Report	Step 3: Progress Narrative	Step 4: Final Progress Report
09/30/2024	09/29/2025	10/30/2025	View/Edit	Generate	View/Edit	Not Available
09/30/2023	09/29/2024	10/30/2024	View/Edit	Generate	View/Edit	Not Available
09/30/2022	09/29/2023	10/30/2023	Start	Generate	View/Edit	Not Available
09/30/2021	09/29/2022	10/30/2022	View/Edit	Generate	View/Edit	Not Available
09/30/2020	09/29/2021	10/30/2021	View/Edit	Generate	View/Edit	Not Available

Ad-hoc Progress Report (if requested by ACF)

Completing the progress narrative in nFORM

R6. Add/Edit Progress Narrative

Report End Date: 09/29/2025

- B-01 PERFORMANCE NARRATIVE
- B-02 MAJOR ACTIVITIES & ACCOMPLISHMENTS
- B-03 PROBLEMS
- B-04 SIGNIFICANT FINDINGS AND EVENTS
- B-05 DISSEMINATION ACTIVITIES
- B-06 OTHER ACTIVITIES
- B-07 ACTIVITIES PLANNED FOR NEXT REPORTING PERIOD
- B-08 SELECTED PARTICIPANT OUTCOMES

☐ Check this box to confirm all narrative responses are final and ready to be shared with ACF. Then click Save. As a reminder, generate the final progress report in Step 4 and submit it to Grant Solutions.

Save & Continue | Save | Cancel

R6. Add/Edit Progress Narrative

DRAFT

Report End Date: 09/29/2025

B-01 PERFORMANCE NARRATIVE

B-01 PERFORMANCE NARRATIVE
1. Target Population
Describe the population(s) your program intends to serve. Did you serve the intended population(s) during the reporting period? Review the information in Table B-01.1. The Applicant Characteristics tab of the nFORM query tool provides additional demographic information about the population your program is serving.
0 / 6000 characters

Questions?

Wrap up

Review nFORM user manual module VIII for more information on data tools

All nFORM and CQI resources are posted on HMRF Grant Resource site at https://hmrfgrantresources.info/

After reviewing resources, contact the data capacity and CQI TTA help desk with any questions at **nFORMCQITA@mathematica-mpr.com**

Data security reminders

- Never text or email personally identifiable information (PII) like client names – including to the help desk
- Never take screenshots of client PII from nFORM
- Everyone who interacts with client data should watch the **Keeping Data Secure training video** and review **Module I of the nFORM user manual**

Well nFORMed Training Series Roadmap

Today's focus

Tomorrow's focus

1. Getting started
2. Recruiting and enrolling clients, and administering surveys
3. Recording participation in workshops and other services
4. Fostering a learning culture and planning CQI cycles
5. Overview of nFORM data tools
6. Next steps and Q&A

Using nFORM data and conducting CQI

Your destination: better data, better decisions, better services