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Information, Family Outcomes, Reporting, and Management (nFORM) System User Manual

Healthy Marriage and Responsible Fatherhood Grants

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I. Healthy Marriage and Responsible Fatherhood Grants: Data Collection and Performance Reporting Using nFORM

This manual provides a detailed description of the Information, Family Outcomes, Reporting, and Management (nFORM) system, which Healthy Marriage and Responsible Fatherhood (HMRF) grant recipients use to collect, store, and analyze performance measure data required by the Administration for Children and Families (ACF). The manual is designed as a reference for grant recipients to use throughout their grants. It provides answers to many of the questions grant staff may have about nFORM.

A. What is nFORM?

nFORM is a comprehensive web-based information system that is provided free of charge to each HMRF grant recipient. Grant recipients use nFORM to collect information about:

- Client characteristics and outcomes at the beginning and end of the program
- Individual and group-based services
- Program operations including recruitment activities, staff resources, and implementation challenges

Grant recipients also use nFORM to prepare the quantitative and narrative Performance Progress Report (PPR) for ACF. nFORM provides a suite of data tools to support program management, performance monitoring, CQI, and research.

ACF has tasked Mathematica with maintaining and enhancing nFORM, supporting grant recipients in using nFORM and conducting CQI, and conducting analyses of nFORM data to broaden understanding of HMRF programs. Mathematica obtained an exemption from the Health Media Lab Institutional Review Board to analyze grant recipients' nFORM data.

Support for using nFORM and conducting CQI. If grant recipients cannot find answers to their questions in this manual, they may ask the Data Capacity and Continuous Quality Improvement (CQI) Help Desk for assistance by sending an email to nformcqita@mathematica-mpr.com. Grant recipients are encouraged to provide as much detail as possible, including nFORM screen numbers, device and browser specifications, and nFORM-generated ID numbers. ***However, client personally identifiable information (PII), like client name, should never be included in questions to the help desk.***

Grant recipients can access other resources including detailed nFORM and CQI instructions, survey and reporting templates and tools, topic-specific tip sheets, and training videos on the publicly accessible HMRF Grant Resource Site. In addition, the data capacity and CQI TTA team hosts regular office hours to highlight ways to use nFORM and CQI for program monitoring and improvement, and answer grant recipient questions. Recordings and slides from office hours are posted on the resource site.

Minimum system and equipment requirements. nFORM is compliant with Section 508 of the Rehabilitation Act, and works on multiple platforms including desktop computers, laptops, and tablets (specifically iPads [not mini] and Samsung Galaxy tablets). Clients can also complete web-based surveys on mobile devices. Grant recipients offering in-person services to clients should ensure they have the equipment necessary for data collection, including the number of devices they will need to administer client surveys, earbuds for clients who prefer to listen to survey questions, and wipes for cleaning all devices and earbuds before and after each client use.

Grant staff must have sufficient Internet access and use Google Chrome or Microsoft Edge to access nFORM, administer surveys to clients, and allow Javascript dynamic features. nFORM has not been tested with and may not work as intended with other web browsers, such as Mozilla Firefox and Safari. For security reasons, do not use Internet Explorer. Check your browser version by selecting “Help” in the menu bar of the browser and choosing “About.” Be sure to update browsers to their latest versions so they have the most recent bug fixes and security features. Consult your tablet user guide for instructions on how to update your browser version.

Grant recipients should ensure their location(s) have sufficient Internet access. First, determine if staff can use a site’s Internet connection; this use might not be permitted in schools or correctional facilities. Second, check the Internet connection at each location where clients will complete surveys; staff can use Google to identify free speed tests. If the test determines the site’s Internet connection is not strong, consider using mobile hotspots or JetPacks that are optimized to maximize signal strength. Avoid running computer updates or other data-intensive functions while using nFORM with a mobile hotspot or JetPack. Finally, follow the data security procedures in Module I.C to prevent unauthorized users from accessing nFORM or viewing nFORM data.

B. Overview of tasks performed in nFORM

This section provides a brief overview of the tasks that grant staff complete in nFORM. Grant staff should use nFORM in real time so that their HMRF data are accurate and up-to-date. Module II provides a road map on where to access each function in nFORM as well as where in the user manual to find step-by-step instructions for each function.

Initial grant recipient administration tasks. Mathematica will establish an account for an initial site administrator at each grant recipient. That site administrator creates nFORM user accounts for the other grant staff who will use nFORM, customizes nFORM to reflect each of the grant’s service locations, and sets up treatment and control groups if the grant recipient is conducting its own evaluation. Site administrators also add service providers and partner agencies to nFORM so that staff can access that information when recording client referral sources and referring clients to services outside the grant.

Client outreach and enrollment. Grant staff must share a privacy statement with potential applicants during outreach and enrollment and before administering client surveys so that each applicant and client is aware of their data privacy rights. This statement, available in nFORM and on the HMRF Grant Resource site, must be shared before grant staff can enter applicant or client information into nFORM. After grant staff create a new client profile, nFORM automatically generates a unique client ID number. HEART grant recipients that serve couples can also link together partner profiles in nFORM. Site administrators also assign a case manager to each client.

At enrollment, grant staff use nFORM to administer an entrance survey to each new client. If the grant recipient is conducting its own evaluation, staff will record a client’s service assignment (treatment or control group) in nFORM after the client completes the entrance survey.

The entrance survey collects information on client characteristics as well as outcomes related to core components of HMRF programs. Table I.1 shows which surveys are administered to each client population; nFORM automatically accesses the surveys that match the population selected on a client's application form in nFORM.

Table I.1. Client surveys by client population

Client population	Survey
HEART programs	
Adult individual	Adult entrance and exit survey
Adult couple	Adult entrance and exit survey (each partner takes their own survey)
READY4Life programs	
Youth	Youth entrance and exit survey
FORGE Fatherhood programs	
Reentering father	Reentering fathers entrance and exit survey
Community father	Community fathers entrance and exit survey

The surveys in nFORM include skip patterns that automatically direct clients to specific questions based on their previous responses. nFORM provides audio computer-assisted self-interview technology (ACASI) so that clients can opt to listen to English or Spanish-language recordings of survey questions and response options, rather than reading them on the screen.

In nFORM, surveys can only be administered in their intended order—grant staff cannot generate a passcode for a client to access the exit survey until 14 days after the entrance survey is submitted. If a grant recipient's FPS approves administration of paper surveys to clients, each client's responses must be data entered into nFORM.

Workshop and session management. Grant staff use nFORM to create workshops and schedule workshop sessions. nFORM makes it easy to schedule recurring sessions of the workshop and to record attendance for clients who are registered for or drop in to sessions. nFORM also provides functionality for grant staff to reschedule or cancel workshop sessions.

Service contacts, referrals, program supports, and incentives. In nFORM, grant staff record service contacts, referrals, and incentives provided to individual and couples clients. nFORM captures pertinent information such as the length and location of each contact and the issues discussed, what outside services a client is referred to, and whether the client follows up on the referral. Grant staff record the type of incentive and the reason for providing it to the client, in line with ACF guidelines on incentives.

Exit survey. Grant staff use nFORM to administer an exit survey to clients at the end of their last workshop, or 14 days after the entrance survey is completed if the program is structured to last less than 14 days. Like the entrance survey, the exit survey collects information on client characteristics and outcomes related to core components of HMRF programs.

Annual reports to ACF. ACF requires that grant recipients submit a Performance Progress Report (PPR) report each October covering the prior grant year. FPSs may ask grant recipients to submit a PPR at other times on an as-needed basis. Grant recipients use nFORM to prepare both annual and ad hoc PPRs.

To draft the PPR, grant recipients first complete the program operations survey. nFORM then generates the quantitative information for the PPR from the program operations survey, client survey, and client participation data. Grant recipients review this quantitative information to inform their responses to narrative PPR questions about recruitment, enrollment, staffing, and other topics; they enter their narrative responses directly into nFORM. nFORM combines the quantitative data and the narrative responses into a full draft PPR. Grant staff review the draft report for accuracy before marking it as final and submitting it to ACF.

nFORM data tools. nFORM provides grant staff with a suite of data tools for analyzing their client and program operations data. These include the nFORM query tool, which presents data visualizations on a range of topics and allows users to filter visuals on date ranges, population, and other key data points. Detailed and summary level operational reports in Excel help grant recipients manage day-to-day programming by identifying, for example, potential applicants that recruiting staff should contact or outstanding surveys to be completed by clients. nFORM's data export includes record level client and program operations data so that grant recipients can conduct more in-depth analysis; to maintain client confidentiality, the data export does not include PII.

C. Keeping data secure

Grant recipients and Mathematica, in its operation of the nFORM system, play important roles in safeguarding HMRF data. Personally identifiable information—which can be used on its own or in combination with other data to identify individuals—must be safeguarded to protect individuals' safety and confidentiality. Some of the information collected and stored in nFORM, such as client name and contact information, is considered PII and some survey questions ask about sensitive topics. Data that may not be PII on its own, such as the address of a service location, may disclose an individual's identity when combined with other information, such as a client's first name or workshop facilitator. Grant staff that have access to HMRF data should read this section carefully and also view the Keeping Data Secure video on the HMRF Grant Resource site.

nFORM's security features help protect client PII and sensitive information and Mathematica continuously updates these features to meet evolving requirements. nFORM resides in the Amazon Web Services (AWS) cloud which is FedRAMP-authorized to ensure effective, repeatable cloud security. Safeguards used to protect sensitive data in nFORM are consistent with the Privacy Act, the Health Insurance Portability and Accountability Act, the Federal Information Security Management Act, and National Institute of Standards and Technology security and privacy standards. nFORM is governed by an Authority to Operate which certifies the system has undergone a security assessment and meets applicable security standards. Mathematica notifies ACF within one hour of identifying a security incident and coordinates closely with ACF on incident resolution and notification to grant recipients. These and other security features are documented in data sharing and user agreements signed by grant recipients and Mathematica.

Grant recipients also play a critical role in safeguarding HMRF data. nFORM allows grant recipient site administrators to closely control access to different types of data in nFORM and site administrators should carefully consider which staff receive different levels of access. Site administrators should closely monitor their team's nFORM use and adjust access levels as needed on a regular basis. nFORM user accounts cannot be shared across staff, and nFORM users should keep their account passwords private. Site administrators should also control access to data that are stored outside of nFORM, either from nFORM operational reports and data exports, or data collected outside of nFORM.

There are many ways to keep data secure and your grant may already have some procedures in place. Grant recipients are encouraged to update their procedures as needed to include the following:

- Under no circumstances should PII be included in emails or text messages—only refer to clients by their client ID numbers. Never email PII, including to other program staff and the TTA help desk.
- Keep discussions and phone calls about clients confidential and out of earshot of unauthorized people.
- Make sure no one can see PII on your computer monitor and lock your computer when you leave it. Keep your passwords secure and do not allow anyone to use your computer accounts.
- Keep all paper documents with PII locked when not in use. Never leave paper documents containing PII and other sensitive information unattended in your own workspace or in shared work spaces.
- Securely shred hard copies of any paper surveys or other information when no longer needed.
- Do not save PII to any unencrypted device including shared network drives or flash drives.
- Carefully review the recommended options for virtual survey administration via phone, video call, or email and ensure your survey administration plan reflects these options.
- Establish clear procedures for what staff should do if client confidentiality is compromised. Ensure these procedures align with ACF, IRB, and organizational guidelines and train all staff on these procedures.

Be sure to consult with your governing organization and, if applicable, your local evaluator, to determine if you need to seek institutional review board (IRB) exemption or approval. This process will involve a review of your grant's procedures for protecting client confidentiality. The IRB manual on the grant resource site provides further information about IRB review for HMRF grant recipients.

After reading this section and reviewing the Keeping Data Secure video, contact the help desk at nFORMCQITA@mathematica-mpr.com with any questions about how to maintain data security.

D. Reporting security incidents

Grant recipients should immediately report suspected or confirmed cases of unauthorized nFORM access or other nFORM-related security incidents to a site administrator at their grant; the site administrator should immediately report the issue to the help desk by emailing nFORMCQITA@mathematica-mpr.com. Examples include sharing user accounts, allowing unauthorized individuals to access nFORM and view client data, usernames and passwords being obtained by someone other than the user, and changes made to an nFORM user's multifactor authentication process settings without the user's knowledge. Grant recipients should be careful not to include PII when reporting such incidents; client ID numbers or other references can be used. Grant recipients should also inform their own IRB of any security incidents, as applicable.

II. Introduction to nFORM Functions

nFORM is designed to help users easily navigate through the system as they complete case management and reporting tasks. Icons are used to identify each nFORM function, and every nFORM screen is labeled with a screen number that users can reference should they have specific questions requiring assistance. nFORM screen numbers are generally in the upper left or lower right of a screen. In addition, consistent design elements guide grant recipients through the system. These include:

- Clearly labeled buttons such as Save are used throughout nFORM.
- The tool tips icon displays field definitions and information on using the system. Users simply hover their cursor over the icon to view the information.
- Red asterisks are included throughout nFORM to indicate required fields.
- Important messages and instructions appear in italics indicating, for example, if a user tries to save a form with information missing from a required field.
- Plus and minus sign buttons allow users to expand (plus sign) or collapse (minus sign) an information table.
- Arrow buttons allow users to change the order of search results by ordering results either alphabetically or numerically (ascending or descending).
- Calendar functions allow users to quickly select dates for entry. Users can also type in dates using the MM/DD/YYYY format.

A. Navigating through nFORM's main functions

nFORM's Home Page (screen H1, below) displays a description of the system's functions. The nFORM logo appears on the top left of the page; users can click on this logo anywhere in nFORM to be directed back to the home page. The grant recipient's name is displayed across the top of the page, and the user's name is displayed on the top right. At the bottom of the page is an Office of Management and Budget notice in compliance with the Paperwork Reduction Act, and a notice advising users to not enter dummy, mock, fake, or fictitious data in nFORM as this may cause inaccuracies in the required federal reports produced by nFORM.

The header of the Home Page displays nFORM's six main tabs, which correspond to the main functions of nFORM. These tabs are: Clients, Workshops, Service Providers, Reports, Settings, and Help. These tabs appear at the top of every screen in nFORM. Links to these tabs also appear at the bottom of every screen.

Access to each nFORM tab is determined by the user's level of access to nFORM; users will not see the tabs that they do not have permission to access. The types of nFORM user accounts and the levels of nFORM access are described further in Module IV. Further, the beginning of each module states which types of nFORM users have access to the functionality described in that module.

Following is a brief description of each tab, the tasks that can be completed within that tab, and the module in this user manual that provides detailed steps on the nFORM functionality within that tab.

- On the **Clients** tab, grant recipient staff can create applications for potential applicants and clients who are ready to enroll. Grant staff can also record, view, and edit important information about clients such as client contact information; client status; service contacts, referrals, and incentives; and workshop participation. Grant staff can also assign case managers to clients and administer web-based entrance and exit surveys to clients. Modules V, VI, and VII describe functionality within the Clients tab.
- On the **Workshops** tab, grant recipient staff record, edit, and view details about the workshops offered by their program. The Workshops tab includes creation of workshops, session series, and session occurrences; scheduling and rescheduling workshop sessions and occurrences; registering clients for workshops; and tracking session attendance. Module VI describes the functionality within the Workshops tab.
- Grant recipient staff use the **Service Providers** tab to add, edit, and view the service providers that refer clients to the program and that provide services outside the program. The service provider directory includes the service provider's contact information, and whether the service provider is a partner agency (an organization with which the grant recipient has a partnering agreement such as a memorandum of understanding [MOU]). Module III describes functionality within the Service Providers tab.
- The **Reports** tab is used to record information about program operations, create reports, and analyze performance measures data. This tab includes the program operations survey, progress narrative, and

PPR; operational reports; data export; and the query tool. Module VIII describes the functionality within the Reports tab.

- Grant recipient staff use the **Settings** tab to add, edit, and view grant recipient locations, service assignments (for grant recipients conducting their own local evaluations), and user accounts. Modules III and IV describe functionality within the Settings tab.
- The **Help** tab displays the email address grant staff should use to send inquiries to the data capacity and CQI TTA team (nformcqita@mathematica-mpr.com) and a phone number for grant recipient site administrators to call should they experience any nFORM log-in issues (844-619-6841).

B. Getting started: Logging into nFORM

Each person who uses nFORM must have their own user name and password to access the system. The user name is the user's email address; grant recipient staff or partner agency staff must never share a user name to access nFORM. Mathematica creates a user account for an initial grant recipient site administrator. That site administrator is responsible for configuring grant recipient locations, service providers, and other information in nFORM (see Module III), and creating and managing individual staff accounts for all other nFORM users at the grant recipient (see Module IV).

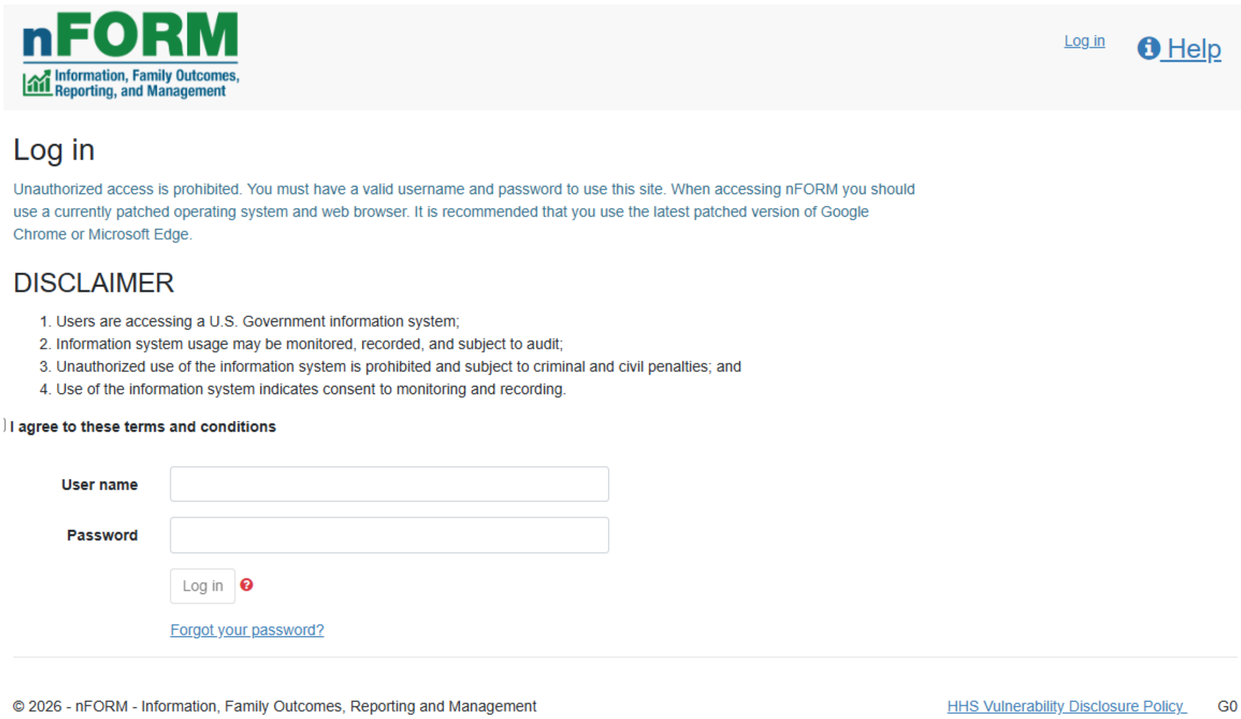
nFORM requires a multifactor authentication process at log in to help protect the security of the data stored in the system. The first level of authentication is entering the user name and password. The second level of authentication is a phone call or text message process using a ten-digit phone number (no extensions). Please note that using a phone number for a landline phone limits a user from accessing nFORM outside of their office. Using a cell phone number provides users with more freedom to access nFORM from various locations. Cell phone users must be in an area with adequate cell phone reception to receive verification phone calls or text messages in a timely fashion.

New user accounts will be created with the new user's preferred authentication method (text message or phone call). Based on that preference, the user will receive either a text message or telephone call each time they log in to nFORM. Users can change the preferred multifactor authentication method at any time by logging into nFORM and modifying their user profile.

Once a user account is set up, the nFORM user will receive an account creation email with an invitation to use the system. Users click on the link in the email to validate their email address. The email address serves as the user name and is not case sensitive. Users are then prompted to create a secure, case-sensitive password that is at least eight characters long and contains at least one letter, one number, and one special character (such as !, @, #, $, or %). After the password is created, the link in the account creation email will no longer be valid. Users are also required to reset their passwords every 60 days. Upon logging into nFORM following the password expiration, users will receive notification to change their password.

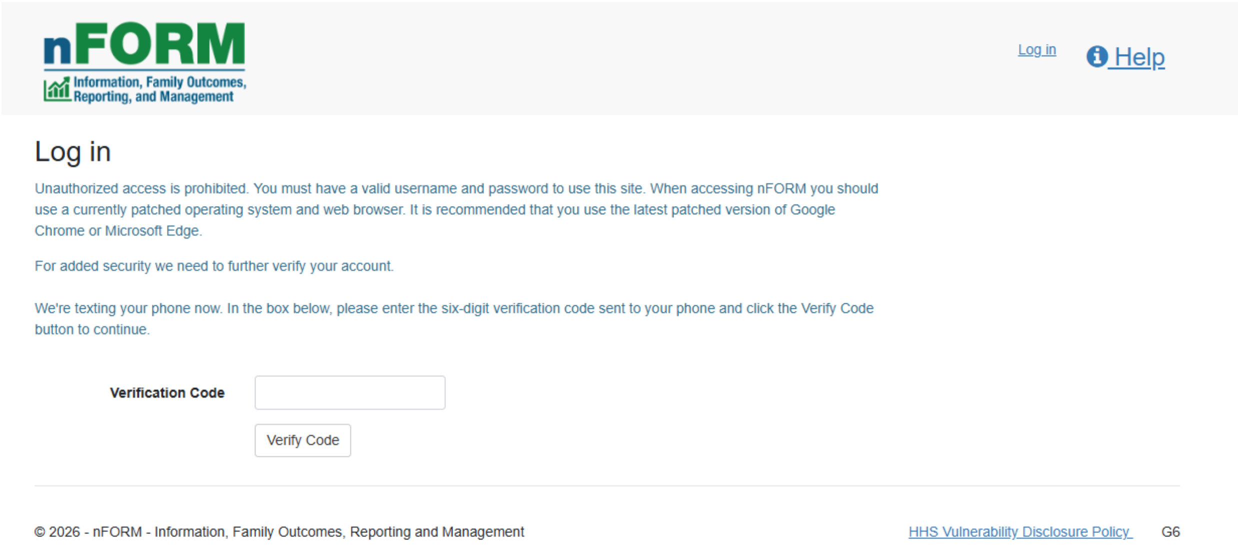
II.B.1. Login process (screen G0)

To log in to nFORM, open your web browser and go to the nFORM URL, which opens the nFORM Log In page. To easily access nFORM, grant recipient staff should bookmark this URL on their computers: https://nform.acf.hhs.gov/nFORM.



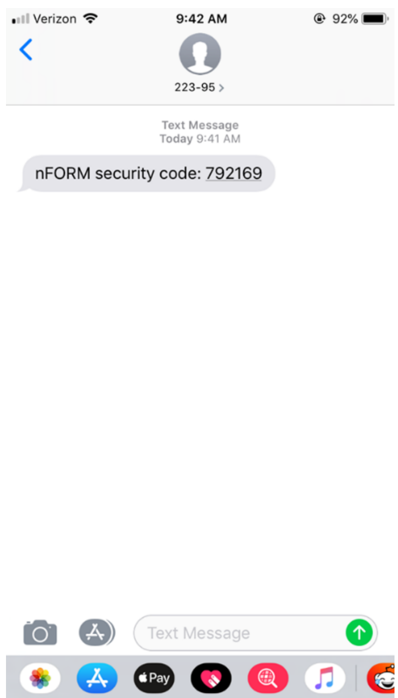
Read the disclaimer and check the box to agree to the terms and conditions. Enter your username (email address) and password and then click on the “Log in” button to begin the multifactor authentication process. Depending on the authentication method selected, a screen message will indicate that the system is either calling or texting your phone. An example message (text message authentication method) is shown below.

You will then receive either a text message or a phone call. For telephone calls, users must answer the phone, listen to the six-digit code read in the automated message, enter that code into the “Verification Code” field on the nFORM screen, and click the “Verify code” button to complete the log-in process. The automated message will repeat the six-digit code 3 times. For text messages, users will be sent a message containing the six-digit code, enter that code into the “Verification Code” field on the nFORM screen, and click the “Verify code” button to complete the log-in process. Users must complete this authentication process within four minutes of clicking on the Log In button, or the six-digit code will expire.

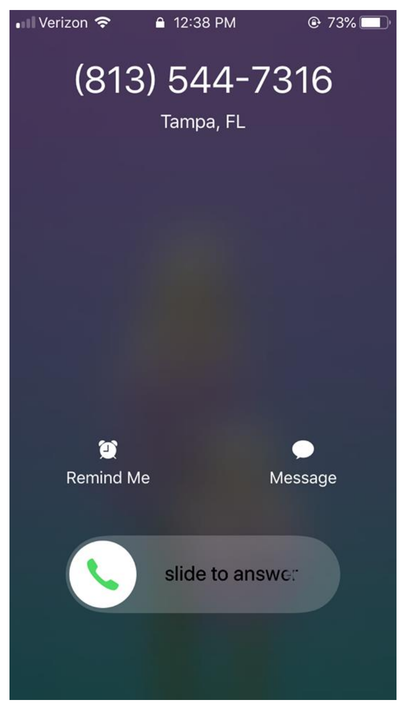


Text Message

Text Message

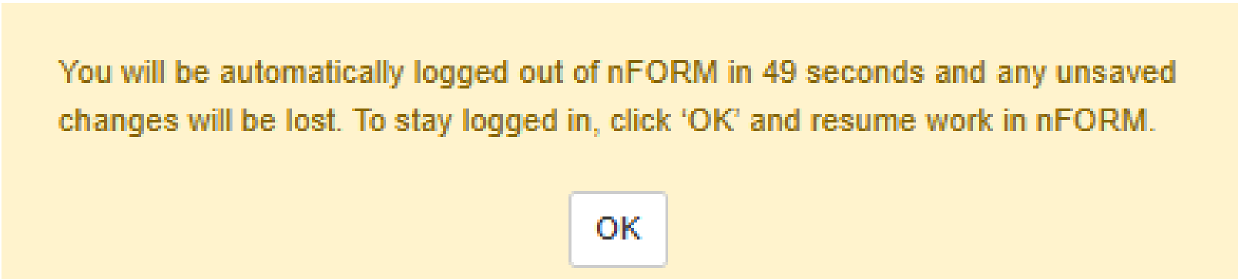


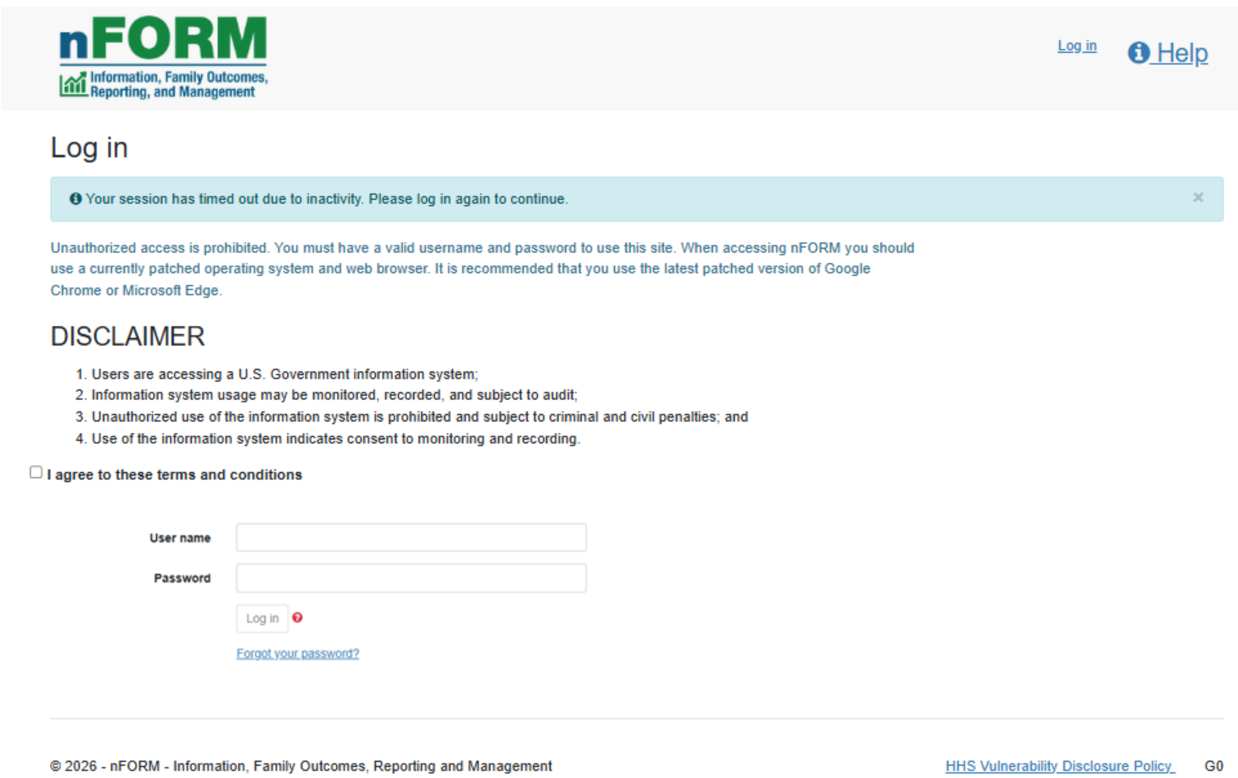
Phone Call



If you do not receive a telephone call or text message, ask a site administrator to review your telephone number for accuracy. If text messaging is selected as the multifactor authentication method, confirm that the telephone number associated with the account is a mobile phone number that receives SMS messages. Using a cell phone for multifactor authentication—either through text messaging or calling—requires good quality cell phone reception in the location where users access nFORM. If cell phone service is poor, users may not receive the text message for authentication or it may be delayed. If a site administrator confirms that the correct telephone number is listed on the user's account and the user is not receiving the text message, poor cell service is likely resulting in the text message not coming through in a timely manner or at all. In these cases, consider changing to the telephone call method or using a landline phone.

nFORM will automatically log users out after 15 minutes of inactivity. Activity in nFORM means saving a screen or navigating to a new screen. Note that typing is not considered an activity in nFORM. A pop-up message will appear in nFORM when there is one minute left before being automatically logged out.





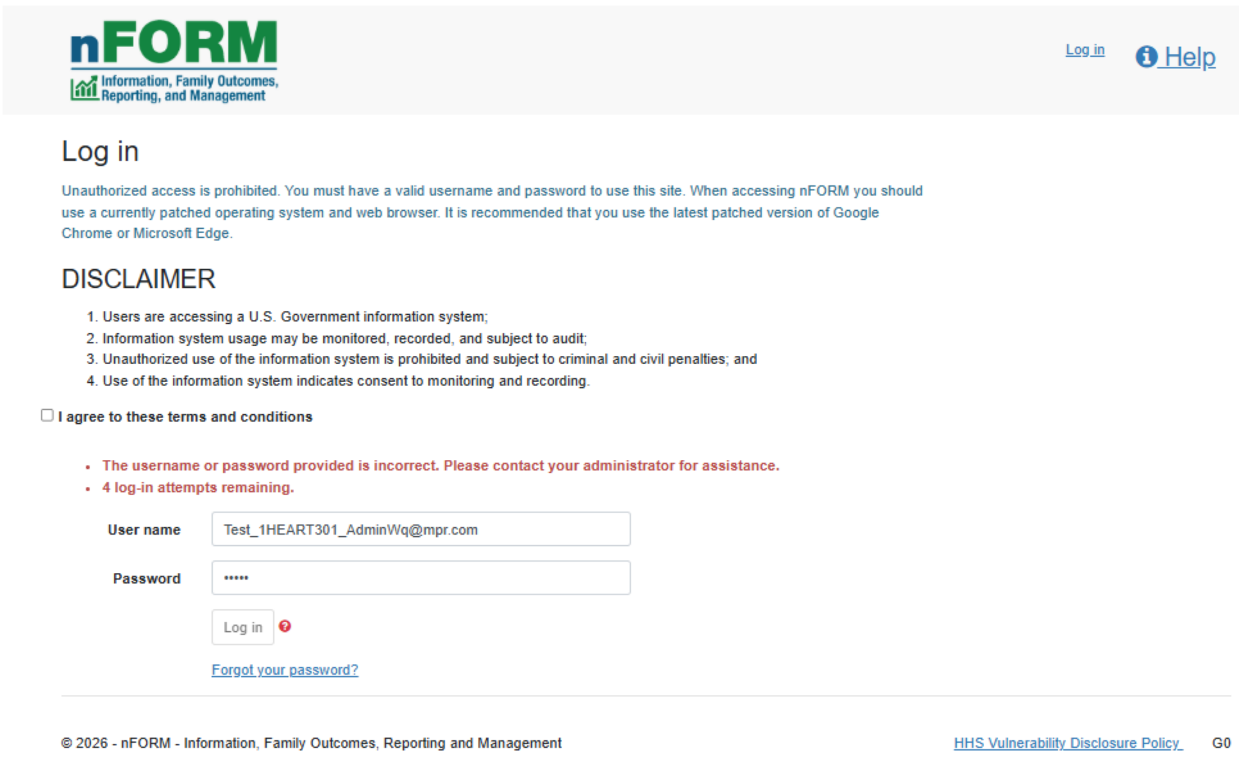
To log off nFORM at any time, click the "Log off" button located in the top right corner of any nFORM page.

II.B.2. Forgot your password?

If you forget your password, click on the "Forgot your password?" link on the Log in page (G0). You will be prompted to enter your user name to receive an email with a link to reset your password. You must complete the password reset within 15 minutes of receiving the email or the link will become inactive. If that occurs, repeat the procedure to have an active link resent to your email.

If you enter the wrong password five times within a single 24-hour period without successfully logging in, your account will be deactivated and you will no longer be able to log in. After each unsuccessful log in, nFORM will remind you how many attempts remain before you will be unable to log into the system without support from a site administrator.

If you exceed the maximum number of login attempts, contact your site administrator to reset your password. You will then receive an email with a link to create a new password. You must click on the link within 15 minutes of receiving the email or the link will become inactive. Check your SPAM folder if you do not receive the email to reset your password.



C. Seeking technical assistance (screen HD1)

As described in Module I, grant recipients can request technical assistance regarding the nFORM system, performance measures, and CQI by sending an email to the data capacity and CQI TTA team at nformcqita@mathematica-mpr.com. Grant recipient users should contact their grant's site administrator with nFORM questions and for assistance with log-in issues; site administrators have the authority and tools to address log-in issues.

If a user is unable to log in to nFORM, the site administrator should first ensure that the user's account is active, and that the correct phone number for the multifactor authentication process is recorded on the user's profile. The user can also reset their password. If a user is still unable to log in, the site administrator should email the nFORM Help Desk at nformcqita@mathematica-mpr.com or, if needed, leave a voicemail at Mathematica's nFORM Log In Help Line: 844-619-6841. We will respond as quickly as possible. Be sure to check whether email responses from the help desk are in your SPAM folder.

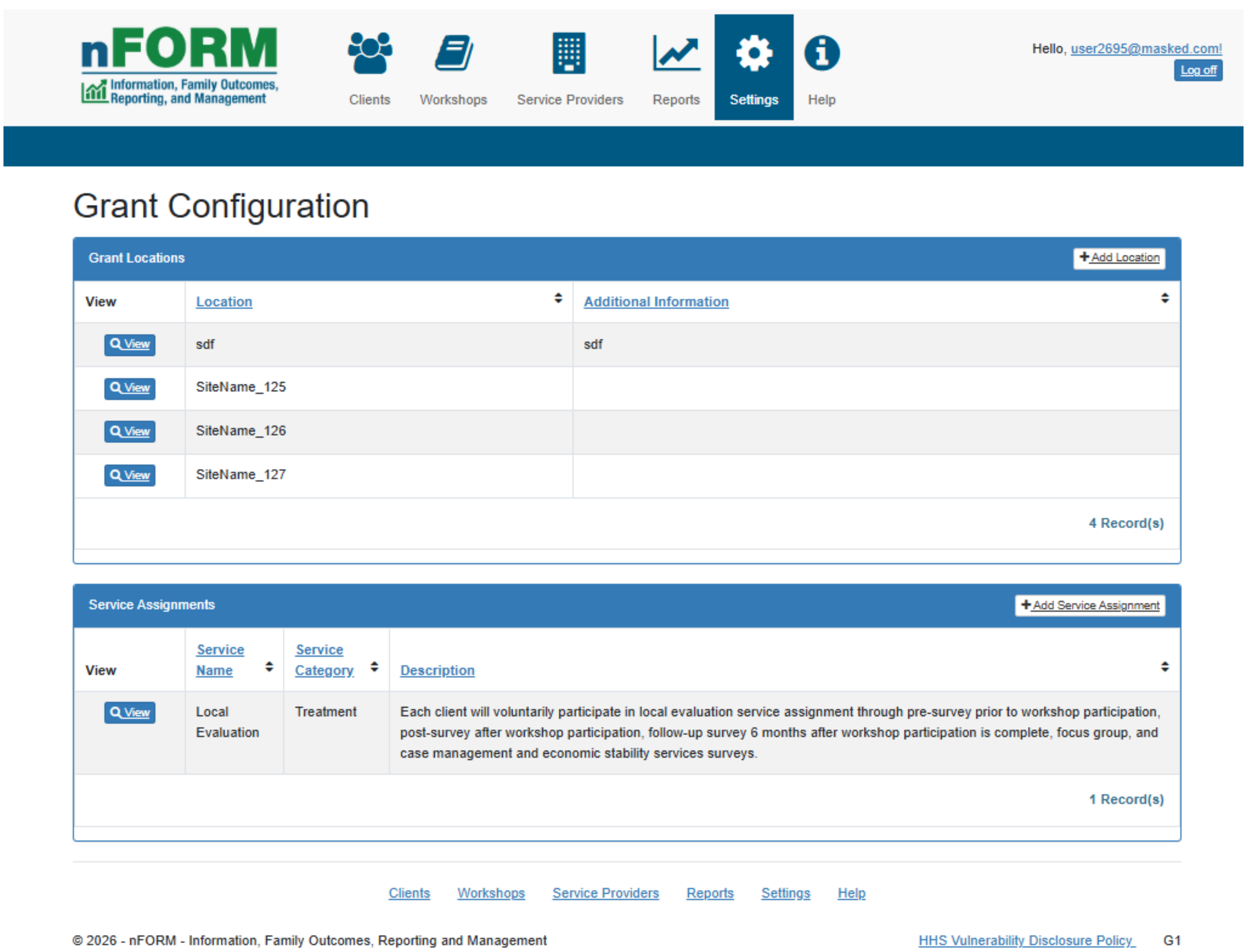
III. Grant Recipient Administrative Functions

Typically the data manager at each grant recipient will have a site administrator account and will use the Settings and Service Providers tabs to set up nFORM to reflect the grant recipient's configuration, including adding the names of all grant recipient office locations, adding service providers that refer clients to the program and provide services outside the program, and creating and maintaining all the nFORM user accounts for grant staff. The Settings tab is also where site administrators will add service assignment categories (research groups) if the grant recipient is conducting its own local evaluation.

All site administrators can perform grant recipient administrative functions in nFORM. Case managers and general users can manage the service provider directory if a site administrator has provided their account with that permission.

A. Grant configuration (screen G1)

The site administrator will use the grant configuration page under the Settings tab to add, edit, and view grant recipient locations and service assignments (if the grant recipient is conducting its own local evaluation). If a grant recipient is not conducting a local evaluation, the service assignments table will not display.

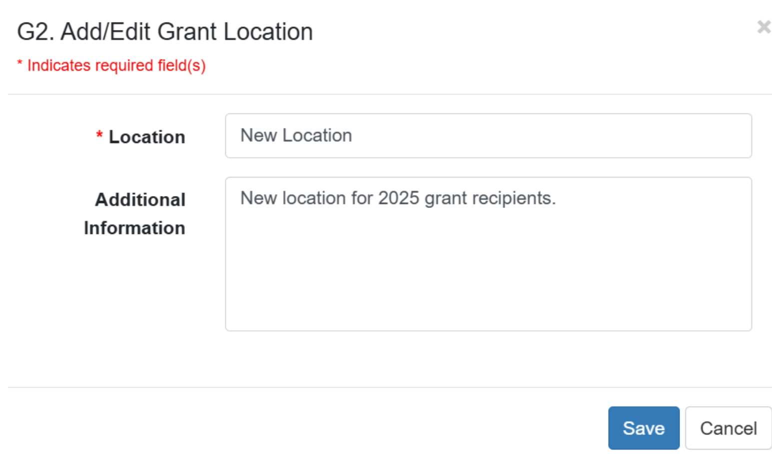


B. Grant locations (screen G2)

Grant recipients that serve clients in multiple office locations can record an nFORM user's primary location and the location where a client will be receiving services. Location is an optional field that allows grant recipients to track data by grant recipient location; however, it does not limit any functions within nFORM. Recording the grant recipient location in the client's Application Form allows grant recipients to view their program's enrollment by grant recipient location in the query tool. Case managers at a specified location are still able to view all clients for their grant recipient, regardless of their location.

Select the +Add Location button in the Grant Locations field to open the Add/Edit Grant Location screen (G2). Enter the name of the grant recipient location in the Location text box and any applicable information in the Additional Information box; select the Save button to complete this process.

To edit details about existing grant recipient locations, select the View button next to the relevant location in the Grant Locations table. This opens the Add/Edit Grant Location screen (G2). Select the Edit button to change the name of the grant recipient location and then click the Save button.



If a grant recipient location has been created in error, site administrators can delete the location in nFORM by selecting the Delete button. nFORM only permits the deletion of grant recipient locations that are not referenced in any other record in nFORM. **Grant recipient locations should only be deleted if created in error; deleting a grant recipient location means that it will no longer appear in the Grant Location dropdown menus in nFORM.** For example, it will no longer appear as an option on the application form.

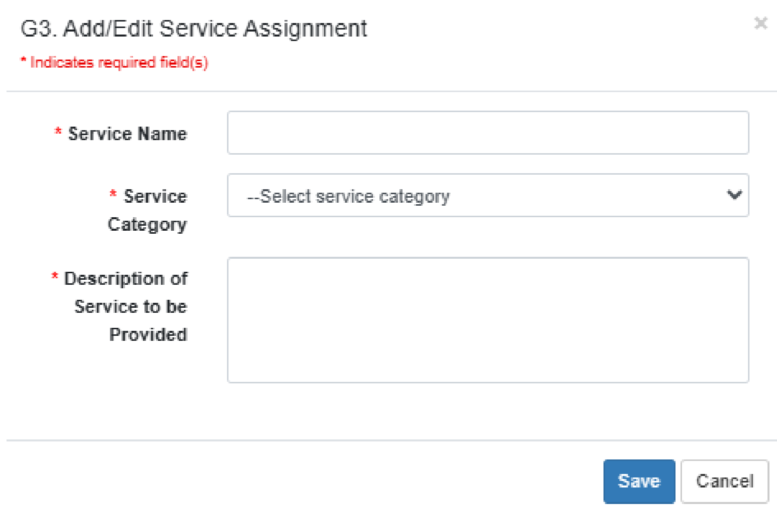
C. Service assignments (screen G3)

For grant recipients conducting their own local evaluations, site administrators can add service assignments to nFORM and view the available service assignments on the Grant Configuration page (G1). The service assignment function enables staff to assign clients to the appropriate service categories after their client record is created.

Site administrators will identify the service name, which is the grant recipient's selected name for a specific research group; the applicable service category (Treatment, Control Waitlist (With Services), Control Waitlist (NO Services Provided), Control (With Services), or Control (NO Services Provided); and a brief description of the service and how it differs from others to which clients may be assigned. The service assignment names have a 500 character limit. Site administrators can create as many service assignments as needed in nFORM. Note that clients assigned to the Control Waitlist (NO Services Provided) and the Control (NO Services Provided) service assignments will not have the Service History or Workshops/Sessions tabs appear in their client profiles and they will not appear in the list of eligible clients for registering clients for session series and for recording attendance.

Select the +Add Service Assignment button in the Service Assignments table on the Grant Configuration page (G1) to open the Add/Edit Service Assignment screen (G3). When all three fields are completed, select Save to add the service assignment to nFORM.

To edit service assignment information, select the View option on the Grant Configuration page to open the Add/Edit Service Assignment screen (G3). Click the Edit button to modify the information or delete the service assignment. Service assignments may be deleted by site administrators only when the service assignments are not referenced in any other record in nFORM. After clicking the Delete button to remove the service assignment, a message will appear asking for confirmation of the deletion. **Service assignments should only be deleted if created in error; deleting a service assignment means that it will no longer appear in dropdown menus in nFORM.**

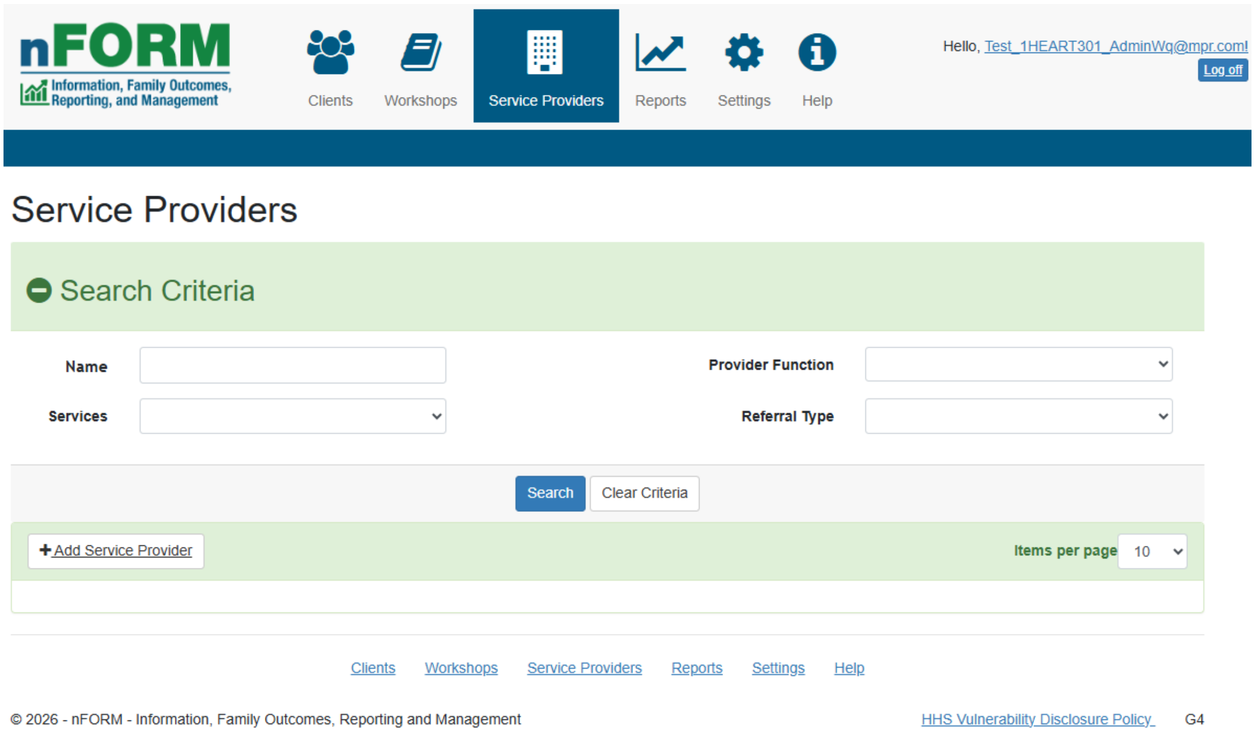


D. Service providers (screens G4 and G5)

Grant recipients will use the Service Providers tab as a directory of the agencies and organizations to whom they refer clients for services and who provide referrals to the grant recipients. After service providers are added to nFORM, users can navigate to the Service Providers tab to search for a provider by type of services, the name of the provider, the provider function, or the referral type. Users can also choose to display all service providers that have been added to the grant recipient's directory.

Add and edit service providers. Site administrators can add and edit service providers that appear on the Service Providers tab. Other users can perform these functions if a site administrator has given them that permission in their user profile.

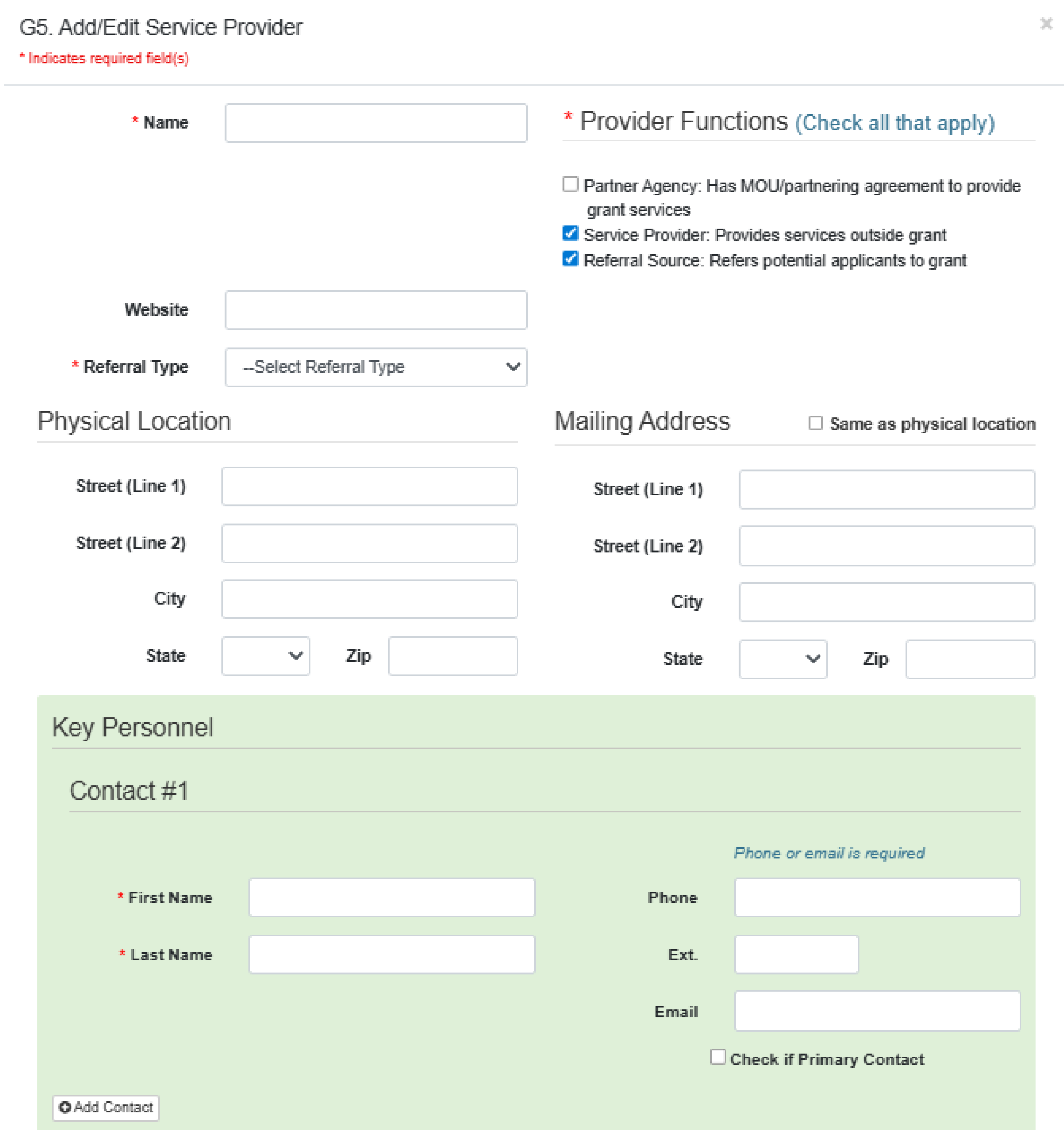
Before adding a new service provider, search the directory on the Service Providers tab (G4) to see if a record for the provider already exists. There is no duplicate detection process for service provider entries in nFORM. Grant recipients are responsible for keeping their service provider directory up-to-date and free of duplicate entries.



If no existing record for a service provider is found, add a new service provider to the system by selecting the +Add Service Provider button on the Service Providers tab (G4); this will open the Add/Edit Service Provider screen (G5).

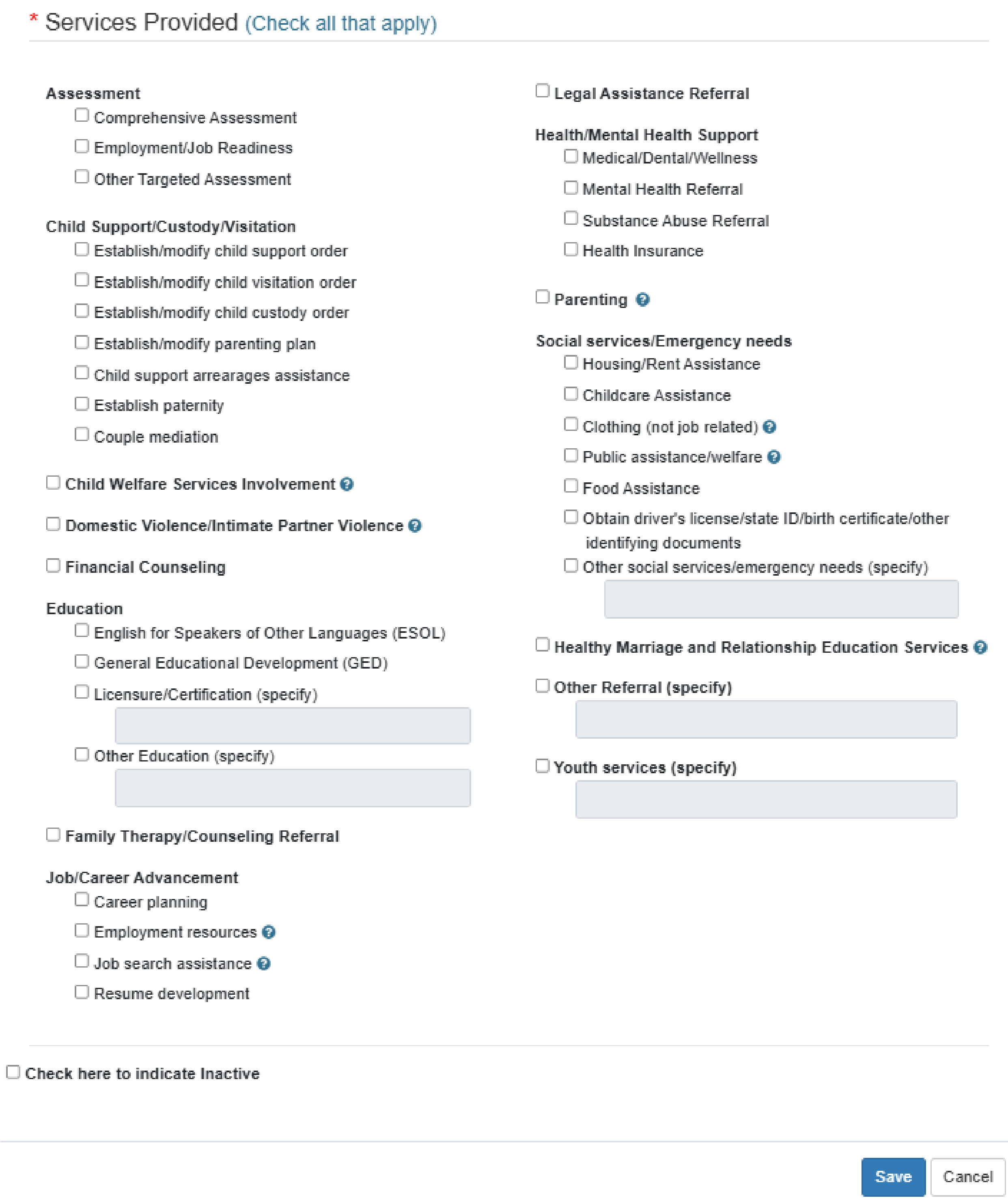
Enter the service provider's name and website (if available) in the top section of screen G5. The Name field has a 500 character limit. Check the applicable provider function check boxes. Providers may be a partner agency with which a grant recipient has a partnering agreement, such as an MOU; a servicer provider that provides services outside of the grant; and/or a referral source, which is an organization that refers potential applicants to the grant. If Referral Source box is checked, select the Referral Type from the drop-down menu.

In the second section of the Add/Edit Service Provider screen, enter a physical address and mailing address (if different) for the service provider. Enter key personnel in the highlighted area that follows, including their contact information. Use the check box to indicate the primary contact for the service provider. Each service provider must have at least one contact name. If a primary contact is unavailable for a service provider, enter a placeholder, such as "TBD" or "Front Desk."



Select the +Add Contact button to add as many contacts as needed. Contacts can also be removed by selecting the –Remove Contact option.

If the Service Provider function is checked, scroll down on the Add/Edit Service Provider screen to the Services Provided section and check all the services offered by the service provider. Additional information about some service categories can be viewed by hovering your cursor over the tool tips icon.



* Services Provided (Check all that apply)

Assessment
- ☐ Comprehensive Assessment
- ☐ Employment/Job Readiness
- ☐ Other Targeted Assessment

Child Support/Custody/Visitation
- ☐ Establish/modify child support order
- ☐ Establish/modify child visitation order
- ☐ Establish/modify child custody order
- ☐ Establish/modify parenting plan
- ☐ Child support arrearages assistance
- ☐ Establish paternity
- ☐ Couple mediation

☐ **Child Welfare Services Involvement**

☐ **Domestic Violence/Intimate Partner Violence**

☐ **Financial Counseling**

Education
- ☐ English for Speakers of Other Languages (ESOL)
- ☐ General Educational Development (GED)
- ☐ Licensure/Certification (specify)
- ☐ Other Education (specify)

☐ **Family Therapy/Counseling Referral**

Job/Career Advancement
- ☐ Career planning
- ☐ Employment resources
- ☐ Job search assistance
- ☐ Resume development

☐ **Legal Assistance Referral**

Health/Mental Health Support
- ☐ Medical/Dental/Wellness
- ☐ Mental Health Referral
- ☐ Substance Abuse Referral
- ☐ Health Insurance

☐ **Parenting**

Social services/Emergency needs
- ☐ Housing/Rent Assistance
- ☐ Childcare Assistance
- ☐ Clothing (not job related)
- ☐ Public assistance/welfare
- ☐ Food Assistance
- ☐ Obtain driver's license/state ID/birth certificate/other identifying documents
- ☐ Other social services/emergency needs (specify)

☐ **Healthy Marriage and Relationship Education Services**

☐ **Other Referral (specify)**

☐ **Youth services (specify)**

☐ **Check here to indicate Inactive**

Save Cancel

After entering all relevant information for a service provider, select Save to add the service provider to nFORM.

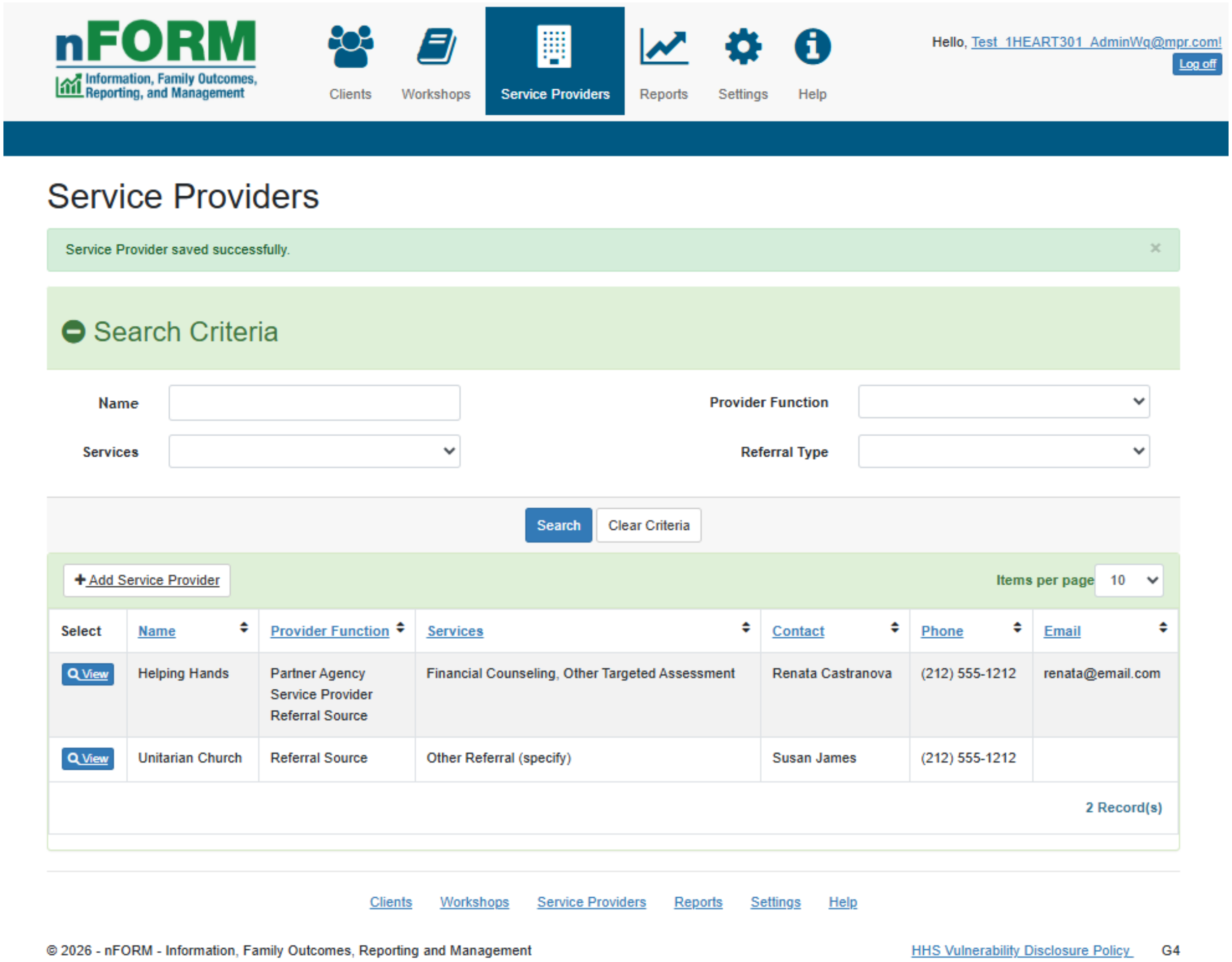
To view or edit information for an existing service provider, click on the View button next to the applicable service provider on G4 to open the Add/Edit Service Provider screen. Click the Edit button to modify information about the service provider and then click Save to save all of the changes made. If one or more referrals to a service provider are recorded, grant recipients will not be able to uncheck that function from the service provider's profile. You can also mark a service provider as Inactive at the bottom of this screen to indicate that the grant is no longer working with that provider.

Site administrators may delete service providers only when the service providers are not referenced in any other record in nFORM. After clicking the Delete button to remove the service provider, a message will appear asking for confirmation of the deletion. **Service providers should only be deleted if they were created in error because the deletion removes the service provider as an option to be selected in other areas of nFORM.** If your grant recipient is no longer referring clients to a service provider or receiving referrals from that organization, but the service provider is already referenced in other nFORM records, check the box to mark the provider as inactive rather than deleting the service provider.

Find service providers. After service providers are added to nFORM, users can easily search for a specific service provider by its name, service type, provider function and/or referral type on the Service Providers tab (G4).

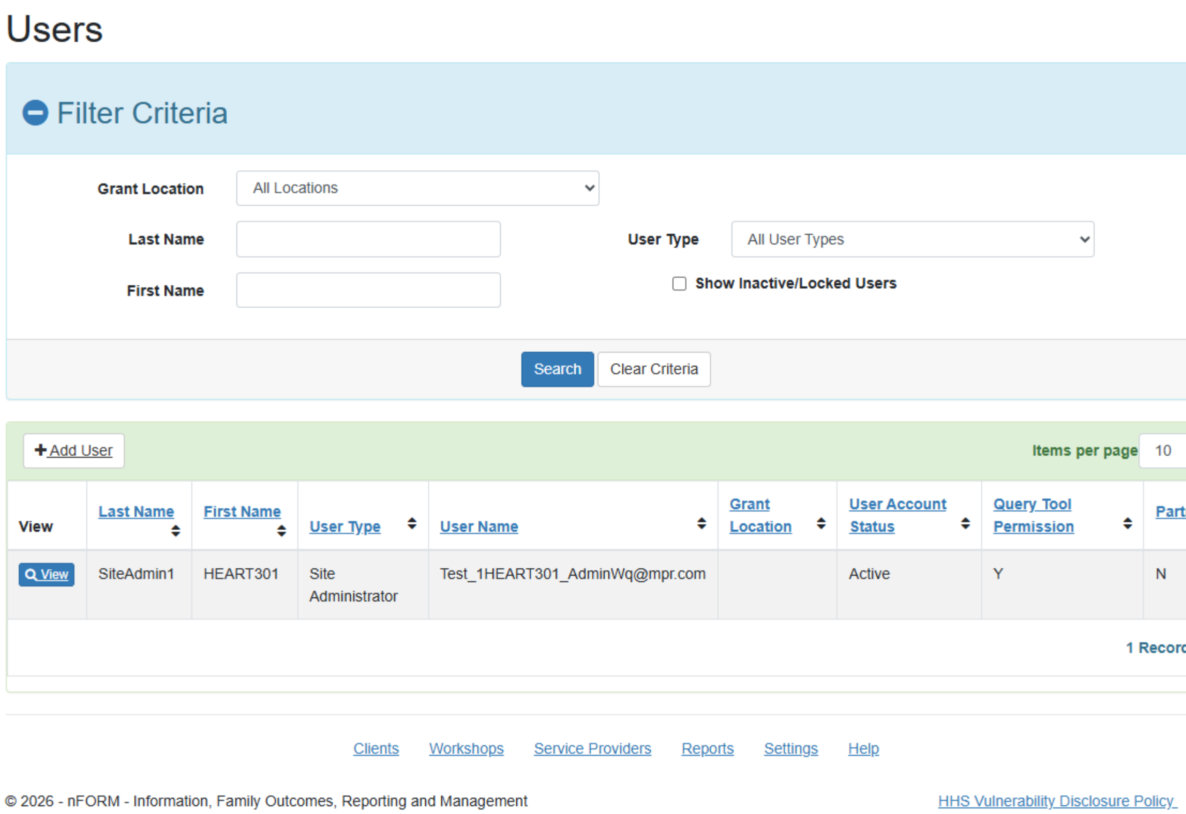
After entering a name and/or selecting a service category, provider function or referral type from the dropdown menu, select the Search button to display the service providers that match the search criteria. After you enter search terms into the Name field (for example, "Goodwill"), service providers with the search term anywhere in their name will display. Selecting a type of service, function and/or referral from the filter dropdown menus will return all service providers that offer the selected service, act as a service provider, referral source, or partner agency, and/or are categorized as a specific type of referral source. Clicking Search without entering any text in the name field or selecting an option from the other drop-down menus will return all service providers for your grant recipient.

You can sort the returned results by service provider name, provider function, types of services, contact name, phone number, and email address by using the arrow button next to each column heading.


nFORM
Information, Family Outcomes, Reporting, and Management
Clients
Workshops
Service Providers
Reports
Settings
Help
Hello, Test_1HEART301_AdminWq@mpr.com!
Log off
Service Providers
Service Provider saved successfully.
Search Criteria
Name
Provider Function
Services
Referral Type
Search
Clear Criteria
Add Service Provider
Items per page 10
Select | Name | Provider Function | Services | Contact | Phone | Email
View | Helping Hands | Partner Agency Service Provider Referral Source | Financial Counseling, Other Targeted Assessment | Renata Castranova | (212) 555-1212 | renata@email.com
View | Unitarian Church | Referral Source | Other Referral (specify) | Susan James | (212) 555-1212
2 Record(s)
Clients Workshops Service Providers Reports Settings Help
© 2026 - nFORM - Information, Family Outcomes, Reporting and Management
HHS Vulnerability Disclosure Policy
G4

IV. Adding and Editing nFORM User Accounts

Grant recipient site administrators add nFORM user accounts for grant recipient staff in the Settings tab by opening the Users page (U1). On the Users page, site administrators can create new user accounts, edit existing user permissions, reset passwords, deactivate, and lock user accounts for users within their own grant recipient. The Users page also lists each user's last name, first name, user type, user name, grant recipient location, whether the account is currently active, whether the user has permission to view the Query Tool, and whether the user is from a partner agency. Site administrators can filter for users based on grant recipient location, first and last name, and user type. By default, inactive users are hidden on the page, but can be viewed by clicking the Show Inactive Users button. Site administrators can sort the users listed on this screen by any of the columns, and view a user's profile by selecting the View button to the left of the user's name. Site administrators are the only nFORM users with this account management functionality; all other users manage their own accounts only.



U1

Site administrators are the only users who can add and edit user accounts for their grant recipient under the Settings tab.

Mathematica created a user account for an initial site administrator at each grant recipient. That site administrator is responsible for creating and managing individual staff accounts for all other users at the grant recipient.

Access to nFORM functionality and information in the system is determined by user type and permissions. That is, users have expanded or restricted access to the system based on the type of account they are assigned and the permissions provided by the site administrator.

Site administrator accounts have the capability to input data, view client-level data, and perform administrative functions. Case manager accounts have the ability to input data and view client-level data. General user accounts have the most restricted access to nFORM functionality; general users can input data and view limited client-level data, such as searching to see if a client is in the system. Site administrators select the appropriate user type when creating a new account.

Site administrators can provide case managers and general users with additional permissions in the user's profile. Site administrators do this by checking a box next to the permission(s) they want to give to the user. If a permission is selected, the user has additional functionality or access to information in nFORM. The user permissions are:

- Case Manager Assignment, which allows users to assign case managers to clients.
- Enrollment, which allows users to enroll new clients and edit enrolled clients' information.
- Query Tool, which allows users to view the Query Tool. This permission is limited to three active user accounts for each grant recipient.
- Service Provider Management, which allows users to add and edit service providers.
- Sessions Series Management, which allows users to add and edit session series.

The following Table IV.1 lists each type of nFORM user and each user's access to specific nFORM functions.

Table IV.1. nFORM functionality by user type

	Grant recipient user roles		
Tasks	**Site administrator**	**Case manager**	**General**
User management: Other people's accounts			
User List	Yes	No	No
Add, Deactivate, and Lock Users	Yes	No	No
View and Edit User Profiles	Yes	No	No
Reset Passwords	Yes	No	No
User management: Own account			
View and Edit User Profile	Self	Self	Self
Change Password	Self	Self	Self
Client management			
All Clients List	Yes	Yes	Yes
My Clients List	Yes	Yes	No
Add/Edit Client Application	Yes	Yes	Optional
Add/Edit Client Program Info (Individually and in bulk)	Yes	Yes	Optional
View Client Profile	Yes	Yes	Optional

Tasks	Grant recipient user roles		
	Site administrator	Case manager	General
Generate Survey Passcode (Individually and in bulk)	Yes	Yes	Optional
Assign/Unassign Case Managers (Individually and in bulk)	Yes	Optional	No
Record Service Assignment	Yes	Yes	Optional
Edit Local Evaluation Status/Service Assignment	Yes	No	No
Service management			
View Client Service History	Yes	Yes	No
Add/Edit and View Individual Services (Individually and in bulk)	Yes	Yes	No
Delete Client Service	Yes	No	No
Workshop management			
View Workshop List/Details	Yes	Yes	Yes
Add/Edit and Delete Workshops	Yes	No	No
Session series management			
View Session Series List/Details	Yes	Yes	Yes
Register Clients in Session Series	Yes	Yes	Yes
Add/Edit Session Series	Yes	Optional	Optional
Cancel/Reinstate Session Series	Yes	Optional	Optional
Delete Session Series	Yes	No	No
Session occurrence management			
View/Edit Session Occurrence List/Details	Yes	Yes	Yes
Cancel/Reinstate/Reschedule Session	Yes	Yes	Yes
View/Record Client Attendance	Yes	Yes	Yes
Generate Roster	Yes	Yes	Yes
Administrative operations			
Add/Edit/Inactivate/Delete Service Providers	Yes	Optional	Optional
View Service Provider Listing/Details	Yes	Yes	Yes
View/Add/Edit/Delete Grant Locations	Yes	No	No
View/Add/Edit/Delete Service Assignments	Yes	No	No
Reporting and other functionality			
Complete Program Operations Survey	Yes	No	No
Generate PPR	Yes	No	No
Complete Progress Narrative	Yes	No	No
Generate Operational Reports[a]	Yes	Yes	Optional
Export nFORM Data	Yes	No	No
Access Query Tool[b]	Optional	Optional	Optional

Note: All optional tasks are granted by permissions selected by a site administrator.

[a] Access to specific operational reports varies by user account type and permissions selected by a site administrator; see Module VIII for which reports are accessible by user type.

[b] Up to three nFORM user accounts at each grant recipient can be given permission to use the query tool.

As indicated in the above table, only site administrators can delete information in nFORM. Site administrators can delete only the following information from nFORM: individual client service contacts, workshops, workshop session series, messages/reminders, service providers, grant recipient locations, and service assignments. This information can only be deleted when it is not referenced in any other nFORM record. Client records cannot be deleted from nFORM; this is a quality control feature to prevent erroneous client deletions from the system.

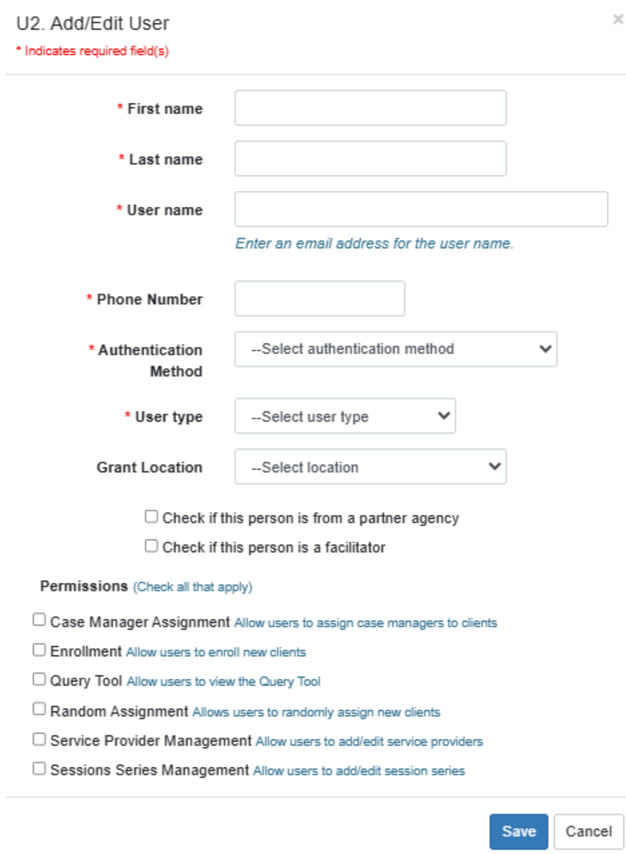
Given the potential risks of inadvertently deleting information, nFORM automatically asks site administrators to confirm each requested deletion. Site administrators using Chrome may be given the option to prevent these confirmations from appearing, but should not choose to do that.

A. Add user accounts (Screens U1 and U2)

Before creating a new user account, first search existing users in nFORM on the Users screen (U1) to avoid creating multiple user accounts for the same person. If an active user account already exists for the user, then there is no need to create another user account. If an account exists for the user but it is deactivated, the site administrator can re-activate the user account on the User Profile screen (U3). If the existing account is locked, the site administrator will need to contact the data capacity and CQI TTA team to unlock the account. If no user account exists, create a new user account. To create a new user account, select the +New User button on the Users screen (U1) to open the Add/Edit User screen (U2). To comply with FISMA security standards, user accounts should be set up for individuals only. Multiple individuals should never share a single nFORM user account. In addition, no two user accounts (whether activated, deactivated, or locked) can share the same email address. Active, deactivated, and locked user accounts are explained in more detail in Module IV.B.

Fill in the required information about the user:

- First and last name
- User name (the user’s email address). nFORM does not allow creation of two user accounts with the same email address.
- Ten digit phone number at which the user will receive the multifactor authentication phone call or SMS text message. Telephone numbers that include extensions are not compatible with nFORM's multifactor authentication process.
- The preferred authentification method (phone call or SMS text message). If SMS text is preferred, the ten digit phone number must be for a phone that can receive texts.
- The user type—site administrator, case manager, or general user
- The following information should be entered but is not required:
- Grant location of the user. If the user is at multiple locations, note the primary location. This field does not limit the user’s ability to access nFORM data across locations.
- If the new user is from a partner agency.

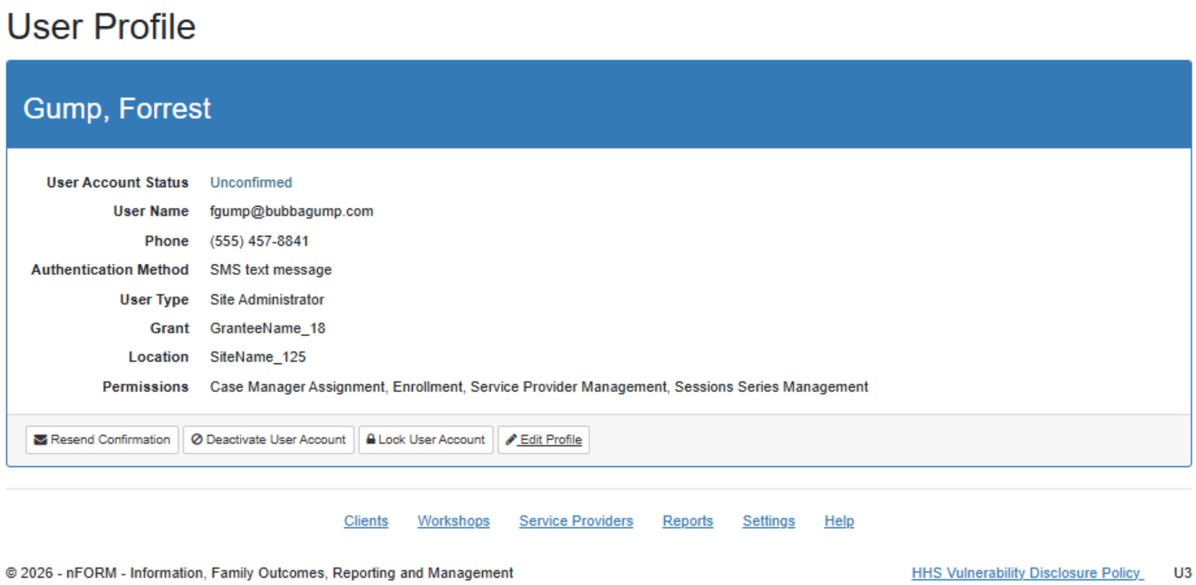


The user permissions will automatically be selected based on the default permissions for the user type selected. Edit these permissions by selecting or de-selecting the boxes to provide the new user with the desired access to nFORM functions. Note that the query tool is the only permission that can be selected or deselected for site administrators.

After completing the necessary fields, select the Save button to add the new user to nFORM. The new user will then appear in the list of users on the Users page (U1). An email will be automatically sent to the email address entered for the new user; this email provides instructions for setting a password and logging into nFORM, as described in Module II.

B. Edit user profiles (screen U3)

Site administrators can access and edit user profiles by selecting the View button next to a user's name on the Users page to open that user's User Profile screen (U3). Individual users can access and edit their own profiles at any time by clicking on their user name in the upper right hand corner of any nFORM screen to open the User Profile screen. Case managers and general users can reset their own passwords and edit their profile information and multifactor authentication settings. Case managers and general users cannot activate, deactivate, or lock their own user accounts, nor can they access any other user's profile.



Reset passwords. To reset a user's password, click the Reset Password button on the User Profile screen (U3). An email with a link will be sent to the user. The link will only be active for 15 minutes once the email is sent. The user should follow the instructions in the email to reset his or her password. Passwords must be at least 8 characters long, and contain at least one number and at least one special character (! @ # $ % ^ & *).

Edit user profiles. To edit a user's profile information, click the Edit Profile button on the User Profile screen (U3) to open the Add/Edit User screen (U2). Then click the Edit button on the bottom of the Add/Edit User screen to make the fields editable. The profile information and multifactor authentication information can be modified.

Site administrators can also change the user permissions of individual accounts by selecting or deselecting the user permission check boxes at the bottom of the Add/Edit User screen (U2).

After all edits have been made to the user profile, click the Save button. The User Profile screen (U3) will then display a message that the user profile was updated successfully.

Deactivate user accounts. Deactivate a user account by clicking the Deactivate User Account button on the User Profile screen (U3). A message that the user account was deactivated successfully will display at the top of the User Profile screen. By default, only active user accounts are displayed on the User Screen (U1). When site administrators opt to view all users on screen U1, the value in the Active column will change from a Y to N to note that the account is now inactive. That user will not be able to log into nFORM with an inactive user account.

As a security measure, users will automatically have their nFORM account deactivated if they have not logged in for more than 60 days. These accounts will then appear with an N in the Active column on the Users screen (U1). Users at risk of having their accounts automatically deactivated will receive three emails reminding them to log into nFORM before their account becomes inactive. Users will receive these reminders two weeks, one week, and one day before their account is scheduled to become deactivated.

Activate a deactivated user account. To activate a previously deactivated user account, site administrators should select the user's account on the Users page and open the User Profile screen (U3). Click the Activate User Account button on this screen. A message that the user account was successfully activated will display at the top of the User Profile screen. This user will once again be visible by default on the Users screen (U1). The Active column on the Users screen (U1) will change from N to Y to note that the account is active and the user can now log in to nFORM.

When a user account is re-activated, the user can access nFORM using their old password. The user will be prompted to enter a new password if their password has expired. For added security, users should reset their password after their account is re-activated. If the user does not log in on the same day on which their account is re-activated due to inactivity, the account will be deactivated again overnight, and will need to be activated again.

Lock user accounts. Lock an active or deactivated user account by clicking the Lock User Account button on the User Profile screen (U3). Site administrators will see a message that the account was successfully locked at the top of the User Profile screen. Like inactive user accounts, these user accounts will no longer be included by default on the Users screen (U1). When site administrators opt to view all users on screen U1, the Active column will display a value of N to indicate that the account is now locked. Users with locked accounts will not be able to log into nFORM. Site administrators will not be able to unlock these accounts, and should contact the data capacity and CQI TTA team for support to unlock an account if needed. **Deactivated accounts that have not been activated within 30 days of becoming deactivated will become automatically locked.**

V. Creating Applications and Enrolling Clients

The Clients tab is used by all site administrators, all case managers, and general users with enrollment permission to complete tasks associated with client outreach, recruitment and enrollment. Creating client records in nFORM enables grant recipient staff to track referrals to HMRF programs and clients' participation in them.

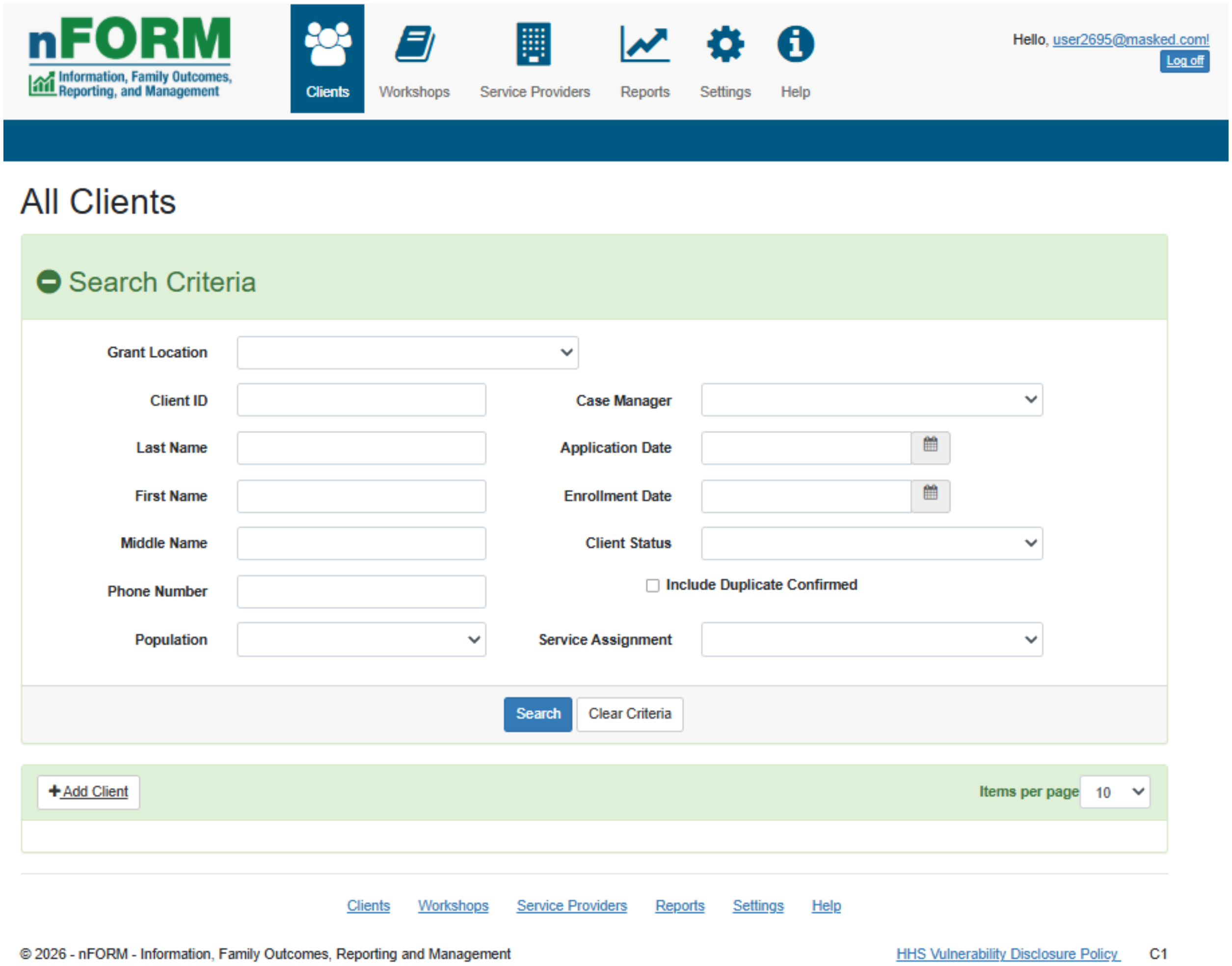
All site administrators, all case managers, and general users with enrollment permission can create client profiles and enroll clients. Potential applicants are individuals who are referred to or interested in participating in the program. Clients include anyone served by HMRF grant funding, and, if a grant recipient is conducting a local evaluation, control group members who may or may not receive grant funded services. The following individuals are not considered grant funded program clients and should not be entered as clients in nFORM:

- Individuals under age 13
- Individuals who participate in the same workshops and services as HEART, READY4Life, or FORGE Fatherhood clients, but who are not specifically served with HMRF grant funding
- Supporting individuals, co-parents, and partners served by FORGE Fatherhood and READY4Life grants unless they are separately enrolled in the program
- Individuals in control groups who are not receiving any services from the grant recipient and who will not be completing the entrance or exit surveys. This includes local evaluation control groups based on external administrative data; if the control group individuals were entered into nFORM, but not administered the entrance survey, they would always have a "pending enrollment" status.

Entering these clients into nFORM will affect the usefulness of the grant recipient performance measures.

A. Complete application for potential clients (screens C1 and C2)

Grant recipients can create applicant records for potential clients who express interest in the grant program during outreach and recruitment. When creating an application, first search existing clients in nFORM on the All Clients page (C1). Search by the applicant's first and last name to determine whether the applicant is already entered as a client in nFORM. Ask applicants about other names that may be used and search those names as well. Some first names may be entered in shortened or alternative versions (e.g., Bill, Billy, Will, Willy in place of William). For example, nFORM would not flag William Smith and Bill Smith as duplicate entries. nFORM will, however, return names that begin with the letters searched, for example, searching for "Will" will return William in the search results provided Will was the only search criterion. Applicants may also go by more than one name (e.g., a middle name) or use nicknames. You may also search for the applicant by their phone number if they provided one.



Search all possible names an applicant uses to determine if a record already exists in nFORM. If it is unclear whether a client already has an existing record in nFORM by name alone, open the profile of the possible match to further verify (e.g., by confirming birthdate).

If the applicant already has a record in the system, do not create another application for them. Advise the client's assigned case manager so the case manager can follow up as needed. For example, if in the existing record the applicant is pending enrollment, their case manager can ask them to complete the entrance survey (see Module V.D below).

If there is not already a record for the applicant in nFORM, select the +Add Client button on the All Clients page (C1) in the Clients tab to open the Application Form (C2).

Complete the Application Form (C2) for the applicant. In the top portion of the screen, enter the application date and the name of the grant staff member completing the form. The Form Completed by drop-down menu is populated with all staff members at the grant who have nFORM user accounts, with active users listed before inactive users. The application date is prefilled as the current date; grant staff may only enter the application date as the current or an earlier date.

Select the Application Status of Outreach to indicate that grant staff are still recruiting the applicant. Select Ready to enroll if the applicant has been successfully recruited and is ready to enroll in services. (See Module V.B for details on completing an application form for applicants who are ready to enroll.)


C2. Application Form

* Indicates required field(s)

* Application Date 2/23/2026

* Form Completed by SiteAdmin1, HEART301

* Application Status
Outreach
Ready to enroll

PRIVACY STATEMENT

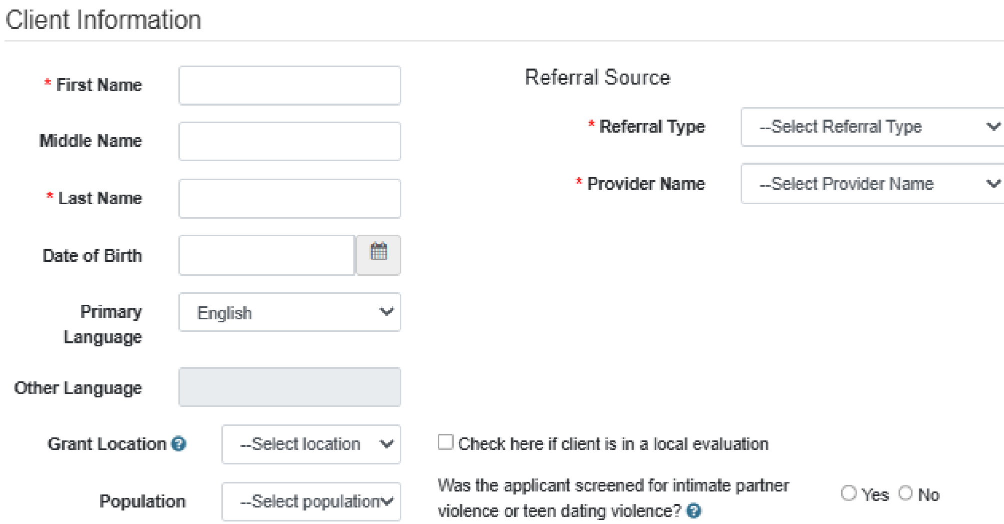
Thank you for participating in this program. Throughout the program we will ask you to provide information so that we can better support you, and to help monitor the program's performance. We hope you will answer all the questions asked by program staff or in surveys, but you may skip any questions you do not want to answer. Your answers will be kept private as required by law. PRINCIPAL PURPOSE: The information you provide will be used primarily to (a) provide you with services, (b) monitor and help improve the performance of Healthy Marriage and Responsible Fatherhood (HMRF) programs, and (c) help understand HMRF services and participants across programs. ROUTINE USES: Your information will be kept private and cannot be used against you in any law enforcement action. Your information may be combined with information from other individuals but you will not be personally identifiable. However, there may be circumstances where disclosure of your personal information may be requested; in these cases, processes are in place to further protect your information for such requests. These requests may include: (a) by a congressional office if you ask that office to help obtain a copy of your records; (b) to coordinate and respond to a data security breach; (c) for research or evaluation purposes; (d) for administrative or legal actions; or (e) by contractors supporting the purpose and uses described here, but only on a must know basis in order to perform their duties. Please see the sources below for more information about these routine uses. DISCLOSURE: This request is voluntary. The relevant SORN is 09-80-0361, OPRE Research and Evaluation Project Records. AUTHORITY: 42 U.S.C. 613 - Research, evaluations, and national studies; 42 U.S.C. 628b - National random sample study of child welfare; 42 U.S.C. 1310 - Cooperative research or demonstration projects; 42 U.S.C. 9836 - Designation of Head Start agencies; 42 U.S.C. Subchapter II-B - Child Care and Development Block Grant; and Pub L. No. 110-161, Division G, Title II, Payments to States for the Child Care and Development Block Grant (121 STAT. 2179).

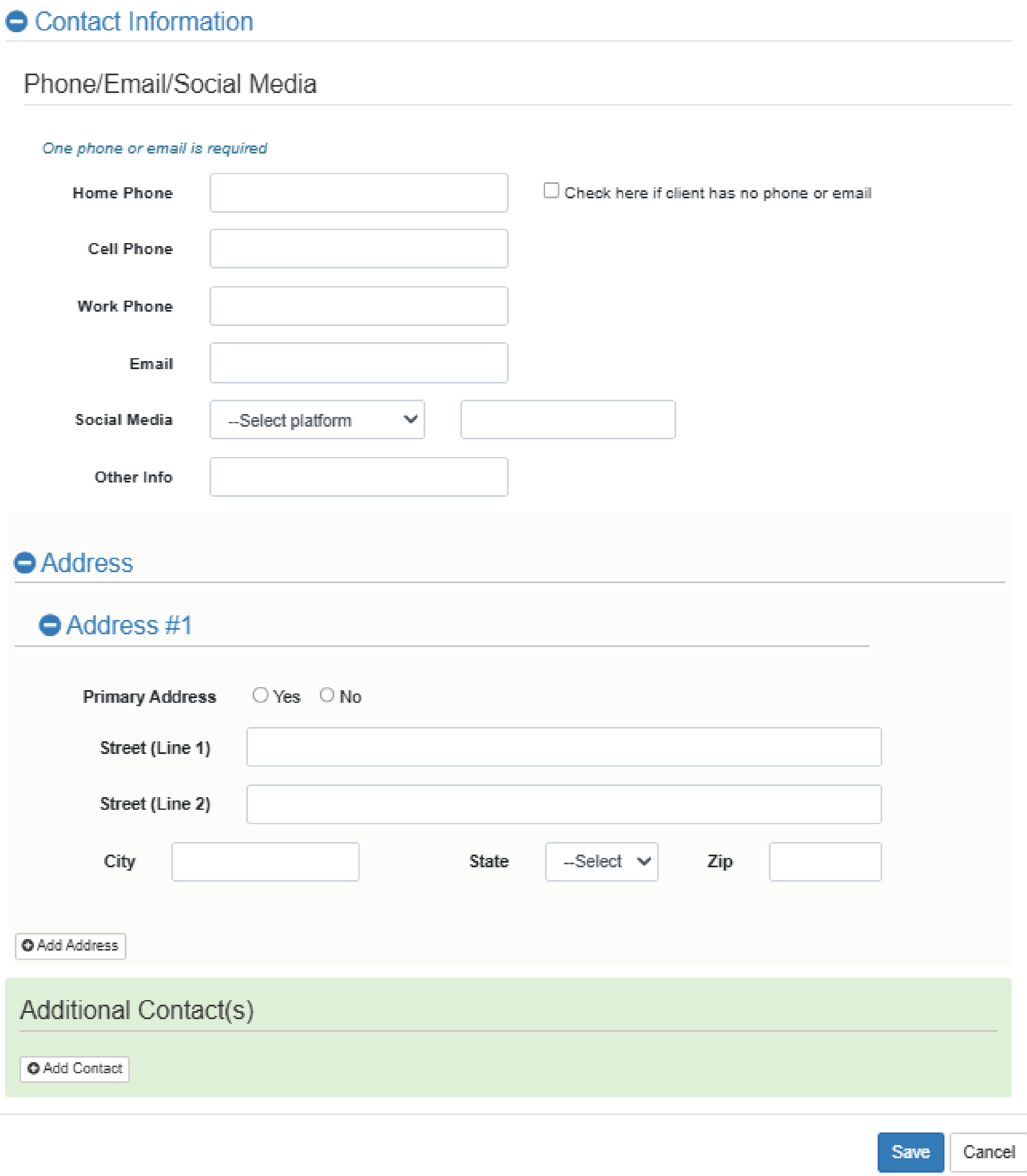
* Check to indicate that the privacy statement has been offered to the applicant either verbally or in writing.

Grant recipient staff must then present the Privacy Act Statement to the applicant exactly as written in the application form, either verbally or in writing. The statement explains the purpose of the data collection and the extent to which client information will be kept confidential. Check the box indicating the client has been offered the privacy statement in order to save the form.

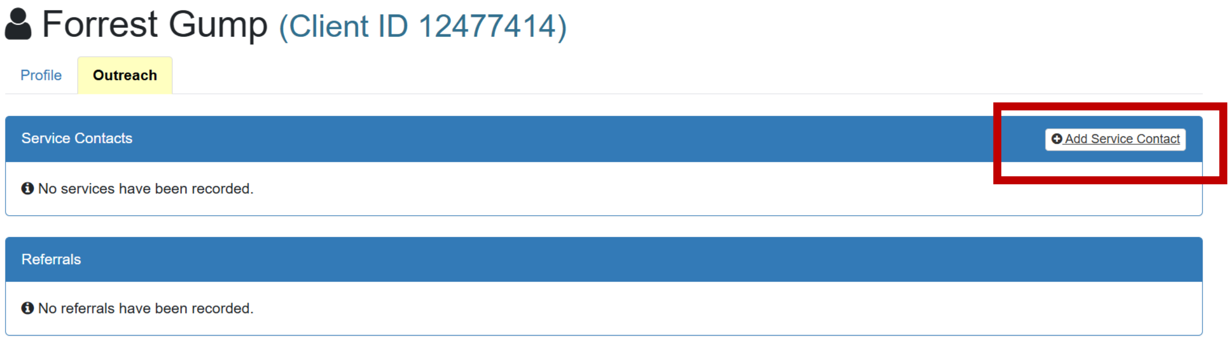
For Outreach applicants, grant staff are required to collect the first and last name of potential clients, how they were referred to the program, the referral provider name (for any referral type other than "Self referral"), and a phone number or email. All other fields on the Application Form are optional when Outreach is selected for an applicant.

The Provider Name drop down menu populates with all organizations in the service provider directory who provide the selected Referral Type. See Module III.D for more information on adding and editing service providers.

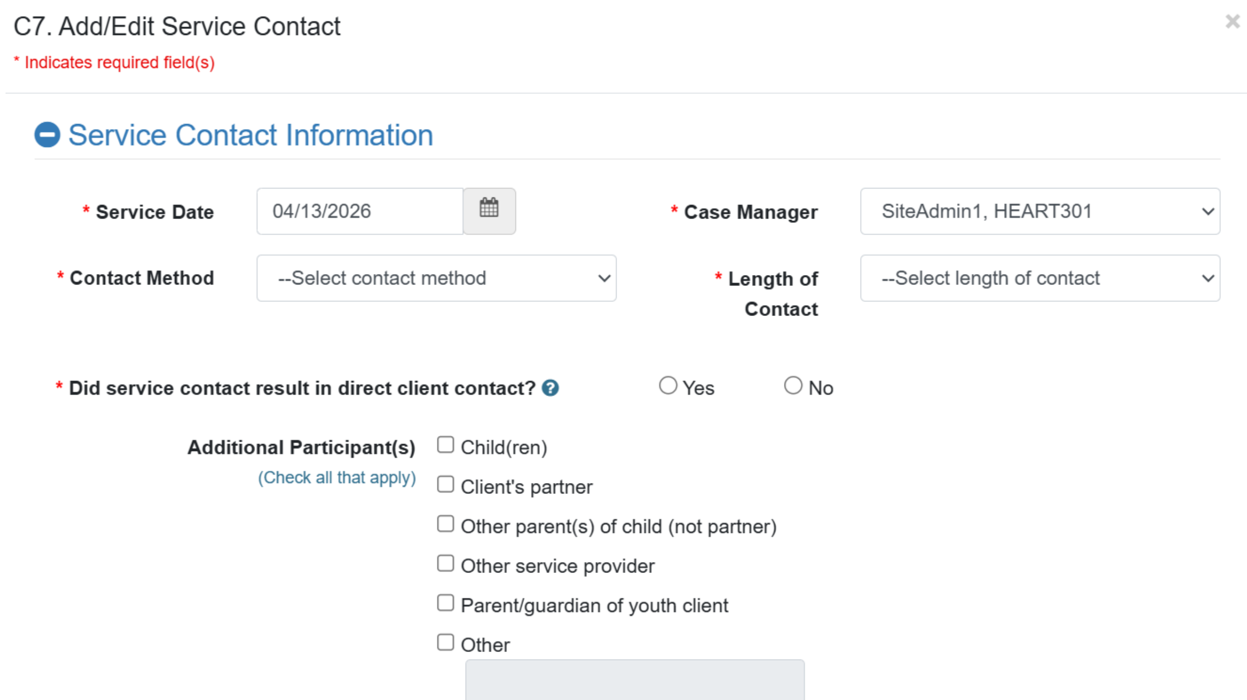

Client Information
* First Name
Middle Name
* Last Name
Date of Birth
Primary Language
English
Other Language
Grant Location
--Select location
Population
--Select population
Referral Source
* Referral Type
--Select Referral Type
* Provider Name
--Select Provider Name
Check here if client is in a local evaluation
Was the applicant screened for intimate partner violence or teen dating violence?
Yes
No



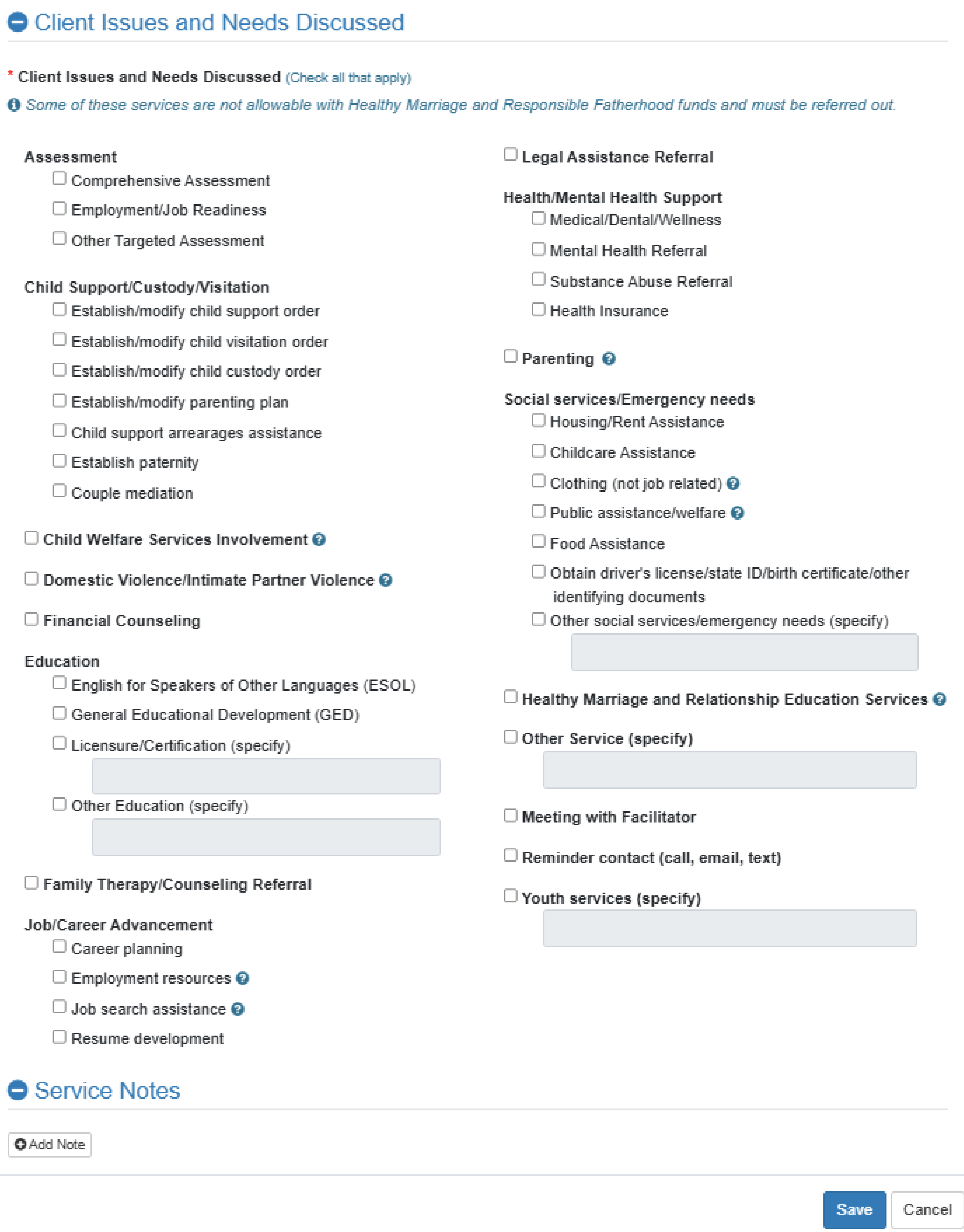
Once the required fields are completed for an Outreach applicant, select Save to create or update the applicant's record in nFORM. nFORM will automatically assign a unique client ID number, and create a Profile tab for the applicant that displays key information, and an Outreach tab where grant staff can document their outreach attempts and other service contacts and referrals. To record a service contact, open on the Outreach tab, and select "+Add Service Contact".



For each interaction, select a service date, case manager, contact method, and length of contact. You will also document how you conducted the contact, how long the contact lasted, if direct client contact was made, and if there were any additional participants present during the contact.



Be sure to select all client issues and needs discussed during the outreach contact and include any relevant service notes.



Client Issues and Needs Discussed

* **Client Issues and Needs Discussed** (Check all that apply)

Some of these services are not allowable with Healthy Marriage and Responsible Fatherhood funds and must be referred out.

Assessment
- ☐ Comprehensive Assessment
- ☐ Employment/Job Readiness
- ☐ Other Targeted Assessment

Child Support/Custody/Visitation
- ☐ Establish/modify child support order
- ☐ Establish/modify child visitation order
- ☐ Establish/modify child custody order
- ☐ Establish/modify parenting plan
- ☐ Child support arrearages assistance
- ☐ Establish paternity
- ☐ Couple mediation

☐ **Child Welfare Services Involvement**

☐ **Domestic Violence/Intimate Partner Violence**

☐ **Financial Counseling**

Education
- ☐ English for Speakers of Other Languages (ESOL)
- ☐ General Educational Development (GED)
- ☐ Licensure/Certification (specify)
- ☐ Other Education (specify)

☐ **Family Therapy/Counseling Referral**

Job/Career Advancement
- ☐ Career planning
- ☐ Employment resources
- ☐ Job search assistance
- ☐ Resume development

☐ **Legal Assistance Referral**

Health/Mental Health Support
- ☐ Medical/Dental/Wellness
- ☐ Mental Health Referral
- ☐ Substance Abuse Referral
- ☐ Health Insurance

☐ **Parenting**

Social services/Emergency needs
- ☐ Housing/Rent Assistance
- ☐ Childcare Assistance
- ☐ Clothing (not job related)
- ☐ Public assistance/welfare
- ☐ Food Assistance
- ☐ Obtain driver's license/state ID/birth certificate/other identifying documents
- ☐ Other social services/emergency needs (specify)

☐ **Healthy Marriage and Relationship Education Services**

☐ **Other Service (specify)**

☐ **Meeting with Facilitator**

☐ **Reminder contact (call, email, text)**

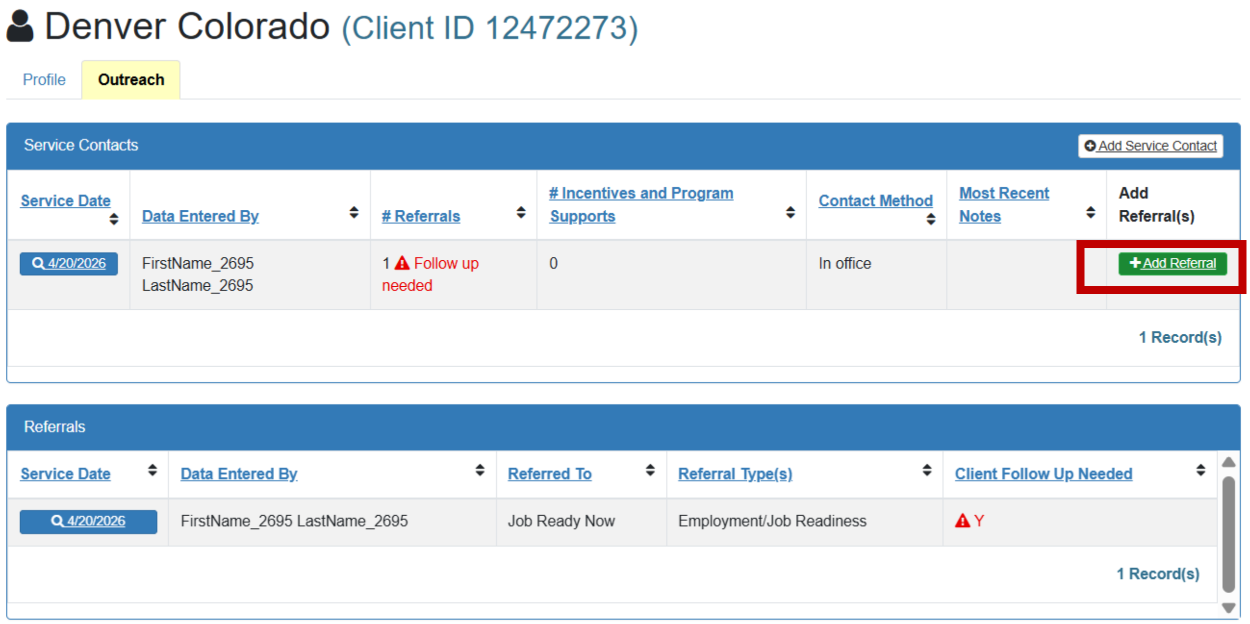
☐ **Youth services (specify)**

Service Notes

Add Note

Save Cancel

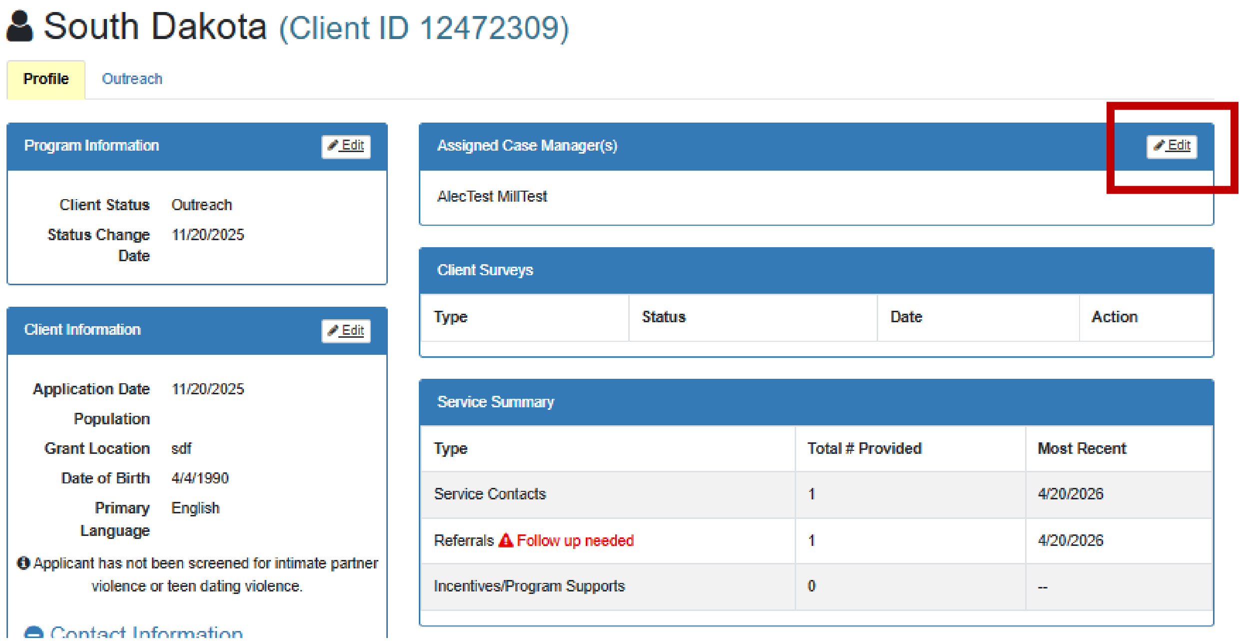
Grant recipient staff can also add any referrals provided during the Outreach period by selecting "+Add Referral" from the applicable service contact. See Module VII.B.2 for information about how to record referrals.



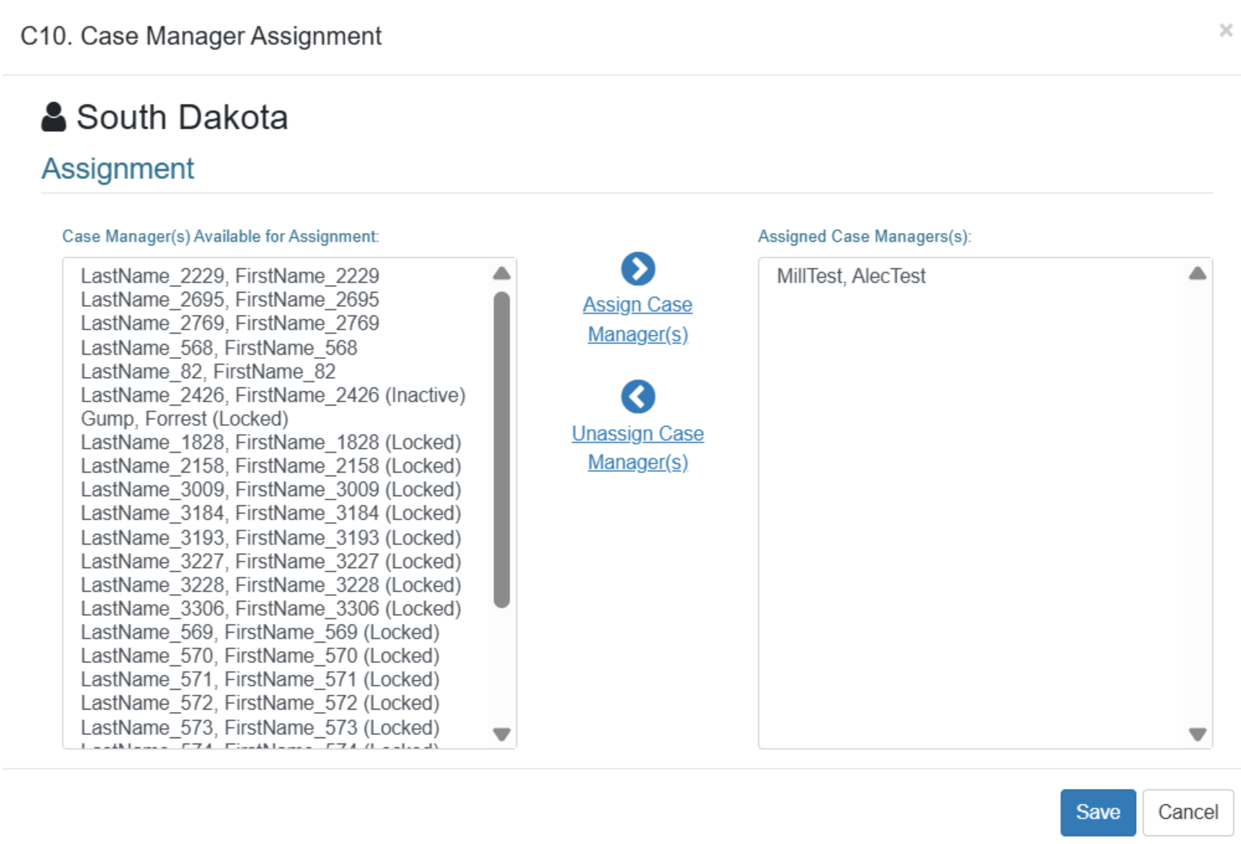
Program staff can review the number of and most recent service contacts and referrals provided to applicants prior to enrollment (including referrals that require follow up) in the Service Summary table on the Client Profile. Grant staff can also review Service Notes in Service Contacts for information about conducting further client outreach. For example, staff can record details about a prospective client's children, questions and concerns applicants have raised about the program, and information about their relationship status.

Note: Incentives and workshop participation cannot be recorded until a client is enrolled.

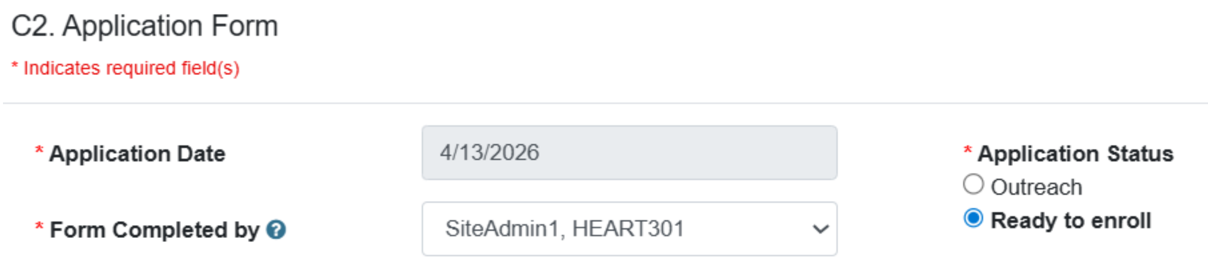
Users can also assign a case manager to a client in the Outreach status by clicking Edit under Assigned Case Managers in the Profile to open screen C10. Case Manager Assignment.



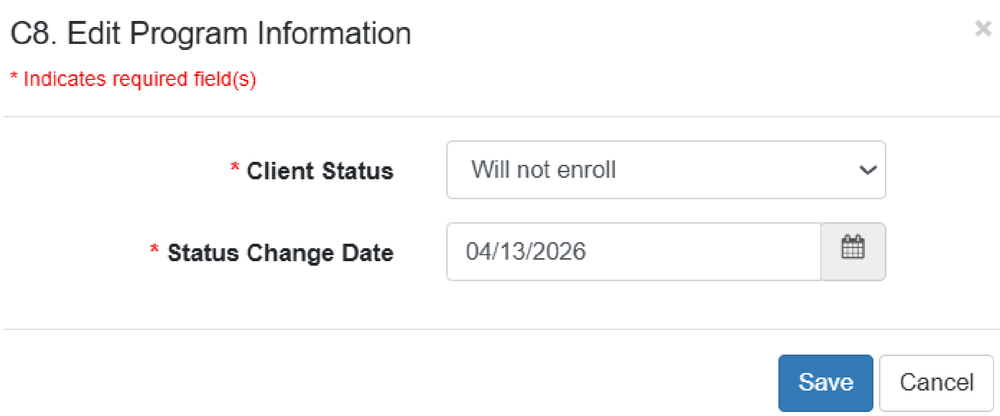
On screen C10, select one or more case managers listed under Case Manager(s) Available for Assignment. Click the Assign Case Manager(s) arrow icon to move the selected individuals to Assigned Case Manager(s) and click Save.



Once a client is ready to enroll, update their application status on their Application Form from "Outreach" to "Ready to enroll." This can be edited by navigating to the client's profile and selecting "Edit" in the Client Information box. See Module V.B for information on completing the Application Form to enroll clients. Once a client's Application Status has been saved as Ready to enroll, the Outreach tab can no longer be edited.



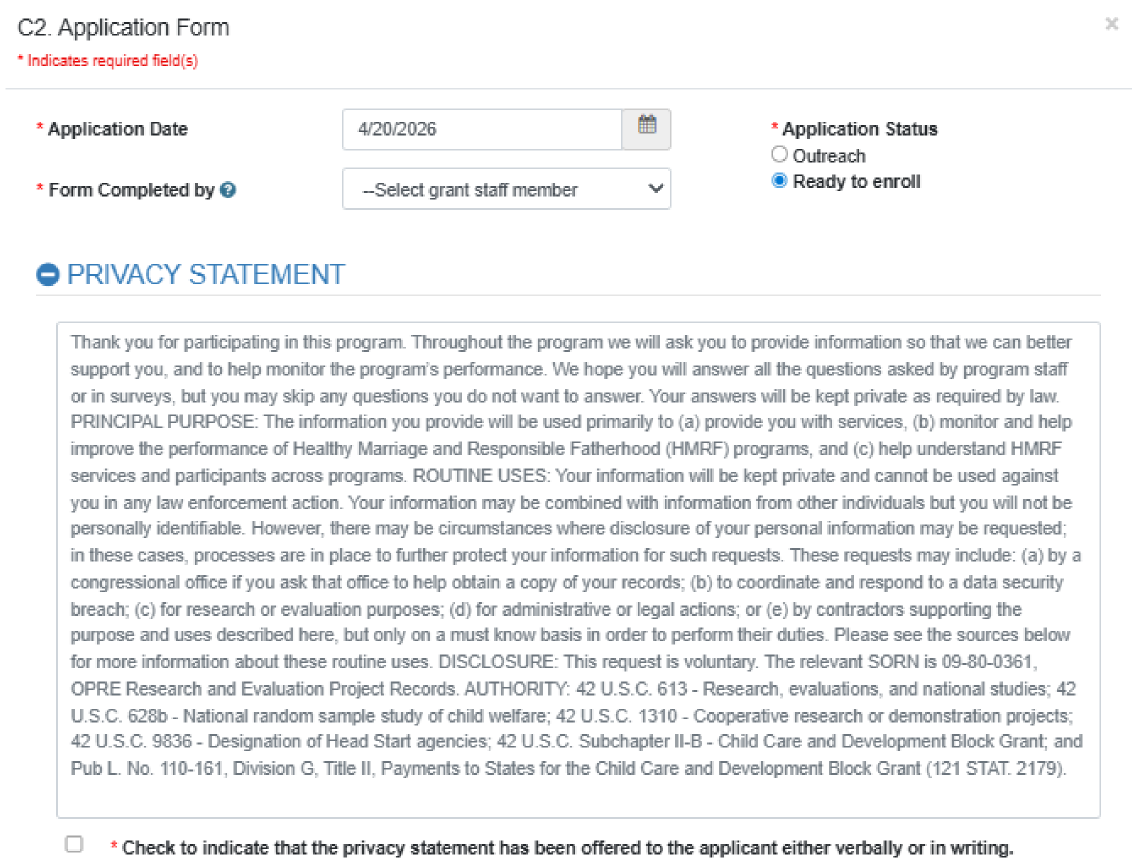
If a client decides not to enroll, open their Client Profile, select 'Edit' in the Program Information section, and update Client Status to "Will not enroll"



B. Enroll new clients (screens C1 and C2)

If applicants are ready to enroll immediately, without a period of outreach and recruitment, grant staff will need to create a new record. Search for the applicant's name on the All Clients page (C1), as described in Module V.A above, to make sure the applicant does not already have a record in the nFORM. Once you have confirmed the applicant does not already have a record in nFORM, select the +Add Client button on the All Clients page (C1) in the Clients tab to open the Application Form (C2).

Start filling out the Application Form (C2) for the applicant, as described in Module V.A. However, instead of Outreach, select the Ready to enroll application status.



C2. Application Form

* Indicates required field(s)

* Application Date 4/20/2026

* Form Completed by --Select grant staff member

* Application Status
Outreach
Ready to enroll

PRIVACY STATEMENT

Thank you for participating in this program. Throughout the program we will ask you to provide information so that we can better support you, and to help monitor the program's performance. We hope you will answer all the questions asked by program staff or in surveys, but you may skip any questions you do not want to answer. Your answers will be kept private as required by law. PRINCIPAL PURPOSE: The information you provide will be used primarily to (a) provide you with services, (b) monitor and help improve the performance of Healthy Marriage and Responsible Fatherhood (HMRF) programs, and (c) help understand HMRF services and participants across programs. ROUTINE USES: Your information will be kept private and cannot be used against you in any law enforcement action. Your information may be combined with information from other individuals but you will not be personally identifiable. However, there may be circumstances where disclosure of your personal information may be requested; in these cases, processes are in place to further protect your information for such requests. These requests may include: (a) by a congressional office if you ask that office to help obtain a copy of your records; (b) to coordinate and respond to a data security breach; (c) for research or evaluation purposes; (d) for administrative or legal actions; or (e) by contractors supporting the purpose and uses described here, but only on a must know basis in order to perform their duties. Please see the sources below for more information about these routine uses. DISCLOSURE: This request is voluntary. The relevant SORN is 09-80-0361, OPRE Research and Evaluation Project Records. AUTHORITY: 42 U.S.C. 613 - Research, evaluations, and national studies; 42 U.S.C. 628b - National random sample study of child welfare; 42 U.S.C. 1310 - Cooperative research or demonstration projects; 42 U.S.C. 9836 - Designation of Head Start agencies; 42 U.S.C. Subchapter II-B - Child Care and Development Block Grant; and Pub L. No. 110-161, Division G, Title II, Payments to States for the Child Care and Development Block Grant (121 STAT. 2179).

* Check to indicate that the privacy statement has been offered to the applicant either verbally or in writing.

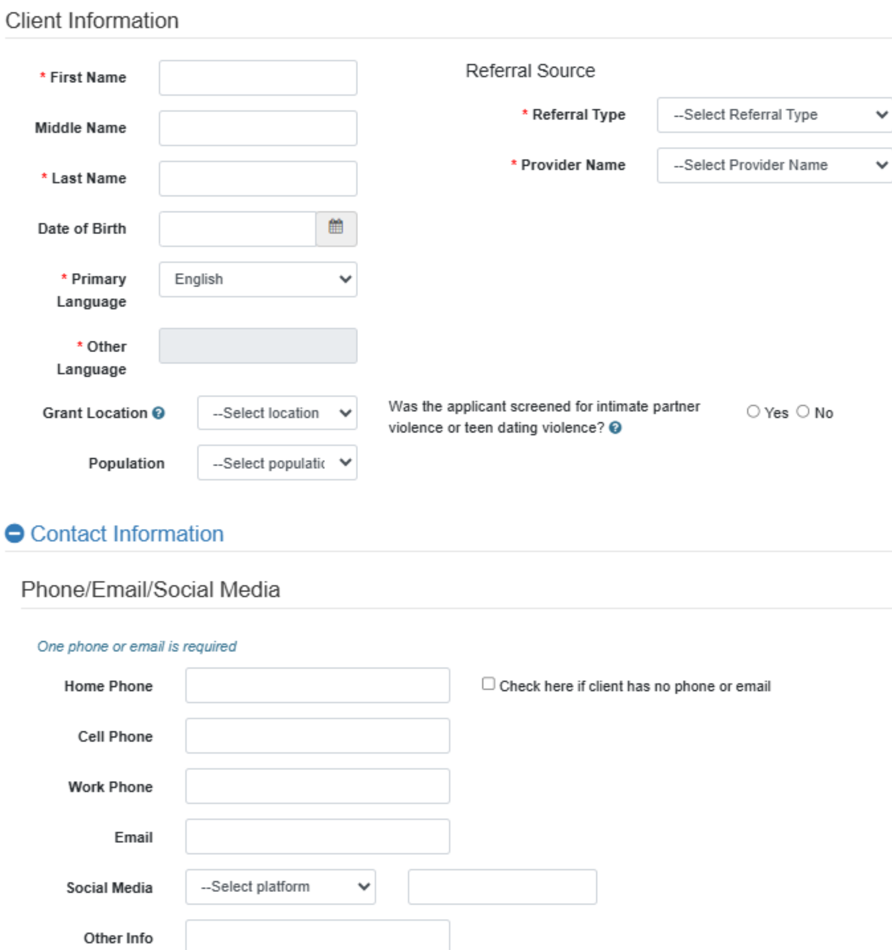
Present the Privacy Act Statement verbally or in writing, and check the box indicating the applicant has been offered the privacy statement in order to save the form.

Note: Grant staff are required to provide the Privacy Act Statement to applicants who are ready to enroll even if the applicant was provided the statement during outreach.

Record the following information for applicants who are in the Ready to enroll stage:

- First, middle, and last name (only first and last name are required)
- Date of birth (required, but if applicant refuses enter the birth month and year, or birth year)
- Referral type (required)
- Provider name (required for any referral type other than Self-referral)
- Primary language (required)
- Other language (if “Other” is chosen for Primary language)
- Grant location (if applicable)
- Population (required, based on grant type and targets approved by ACF)

- Intimate partner violence or teen dating violence screening and outcome (optional fields for whether a screening was conducted, and if yes then outcome)
- Home, cell, and work phone numbers, and email (at least one phone number or email is required)
- Social media information (optional; includes Facebook/Messenger, Instagram, LinkedIn, or WhatsApp)
- Other contact information (optional, such as to record applicant's preferred contact method)
- Local evaluation status (if grant recipient is conducting a local evaluation)
- Address(es) (primary address required)
- Additional contacts (optional)



As described in Module V.A, grant staff must select the type of agency or organization that referred the applicant to the program, or "self-referral" if the applicant chose to enroll on their own.

Select a client population from the drop-down menu based on your grant type and the target population(s) approved by your FPS. It is important to select the correct population so that you can monitor clients' progress towards your grant's ACF-approved enrollment and participation targets and to ensure clients are administered the correct entrance and exit surveys. Contact your FPS with any questions about your target population(s).

- For HEART grant recipients the client population options are Adult Couple and Adult Individual. All HEART clients take the HM adult entrance and exit surveys.
- For READY4Life grant recipients, the only client population option is Youth. All READY4Life clients take the HM youth entrance and exit surveys.
- For FORGE Fatherhood grant recipients the client population options are Community Father and Reentering Father. FORGE Fatherhood clients take the RF community fathers or RF reentering fathers entrance and exit surveys based on their assigned population.

HEART programs serving Adult Couples follow the enrollment steps described in this section for each partner of a couple, including identifying both partners as participating in the local evaluation, if applicable. Then, staff must also link the partners together as a couple unit in nFORM. See Module V.F for more information on entering couples into nFORM.

A client's population can only be modified before the client completes the entrance survey, which ensures that a client completes an exit survey for the same population. A client's population should not be changed while the client is taking a survey. HEART or FORGE grant recipients that serve more than one client population are encouraged to create a written protocol for staff to follow to determine the correct client population that should be recorded for applicants during intake. For example, HEART grant recipients that serve both individuals and couples should have clear procedures in place to determine during intake whether individuals may be interested in and eligible to receive services with a partner.

Grant recipients conducting their own local evaluation must check the applicable box in the middle of the Application Form if the applicant will be part of the program's local evaluation. This box should be left unchecked if the client is not participating in a local evaluation. Checking the local evaluation box will enable a service assignment (for example, whether a client will be in a treatment or control group) to be designated for the client on their profile page after the client completes the entrance survey. It is important for staff to be trained on whether or not the box should be checked, particularly if grant recipient staff will be serving clients who will participate in a local evaluation as well as clients who will not.

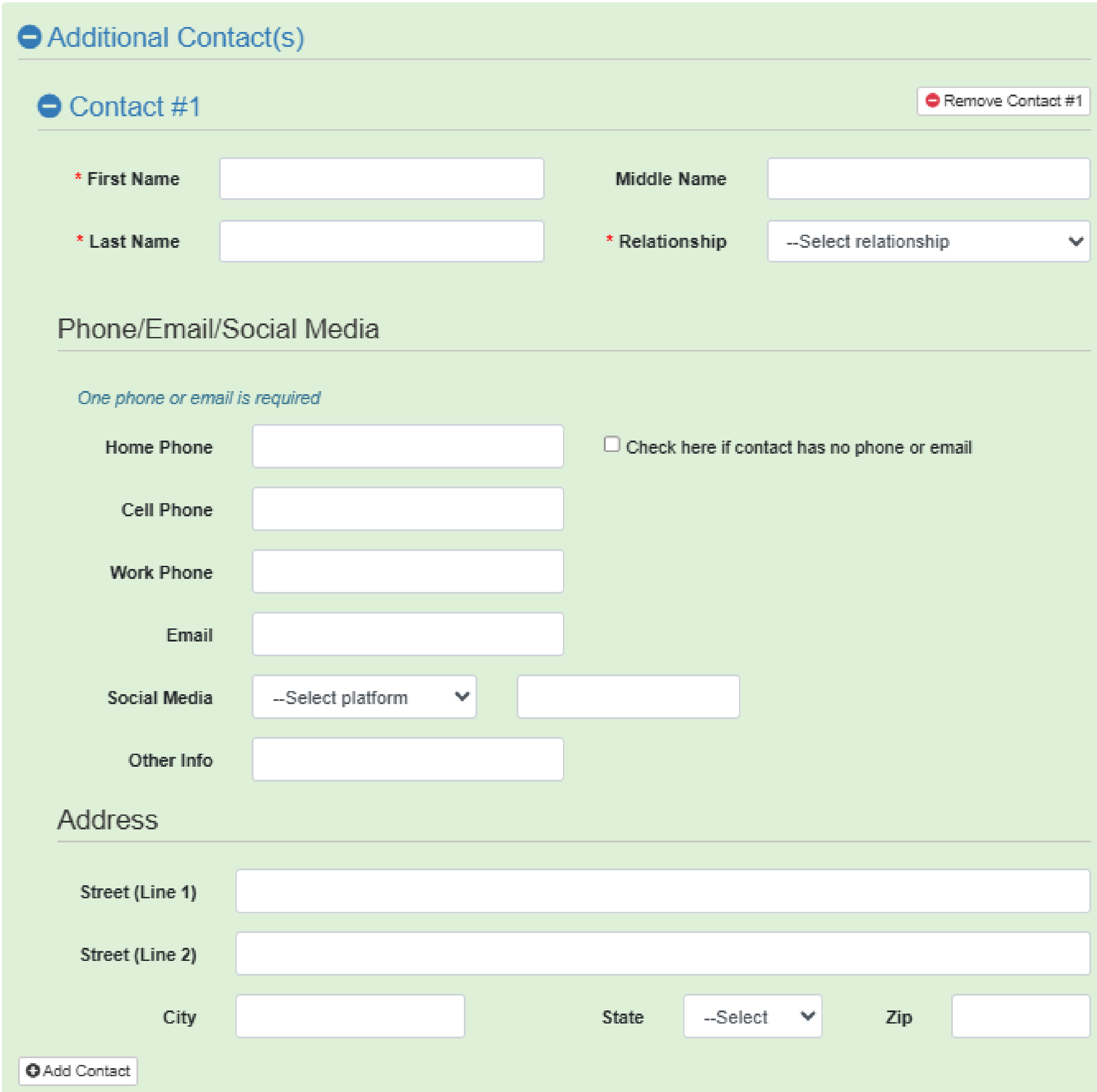
If a mistake is made in whether the local evaluation box is checked, the site administrator can edit the client's Application Form and correct the mistake. Select the Edit button in the top right corner of the Client Information box to open the Application Form screen (C2). Click Edit at the bottom of the form. In the middle of the form, check the box next to "Check here if client is in a local evaluation" and click Save at the bottom on the form. The client will then be part of the local evaluation and the client's service assignment can then be saved on their profile. If a client was mistakenly indicated as being in a local evaluation, site administrators repeat the same process to uncheck the box that signifies the client is part of the local evaluation.

Grant recipients must enter all available client contact information into nFORM. In the case that grant recipients are using another system to record clients' contact information, grant recipients must still enter a minimum of one set of contact information in nFORM, defined as one primary physical address and either one phone number or one email address. Grant recipients can enter additional primary or secondary addresses by selecting the Add Address button.

If the client does not have a phone number or email address, check the box that indicates this contact information is unavailable. In these situations, it is very important to gather information about additional contacts so that the client can be reached, if needed.

While additional contacts are not required, grant recipients are encouraged to record information for two to three people who will know how to reach the client. Additional contacts can help you reach clients for services, workshops, and data collection (for performance measures and a local evaluation, if applicable). To record additional contacts for the client click the +Add Contact button to open the data entry fields. Record the following information about each additional contact:

- First, middle, and last name
- Relationship to the client
- Home, cell, and work phone numbers
- Email
- Social media information (Facebook/Messenger, Instagram, LinkedIn, or WhatsApp)
- Other info (include information about a contact’s preferred contact method or other relevant information)
- Address



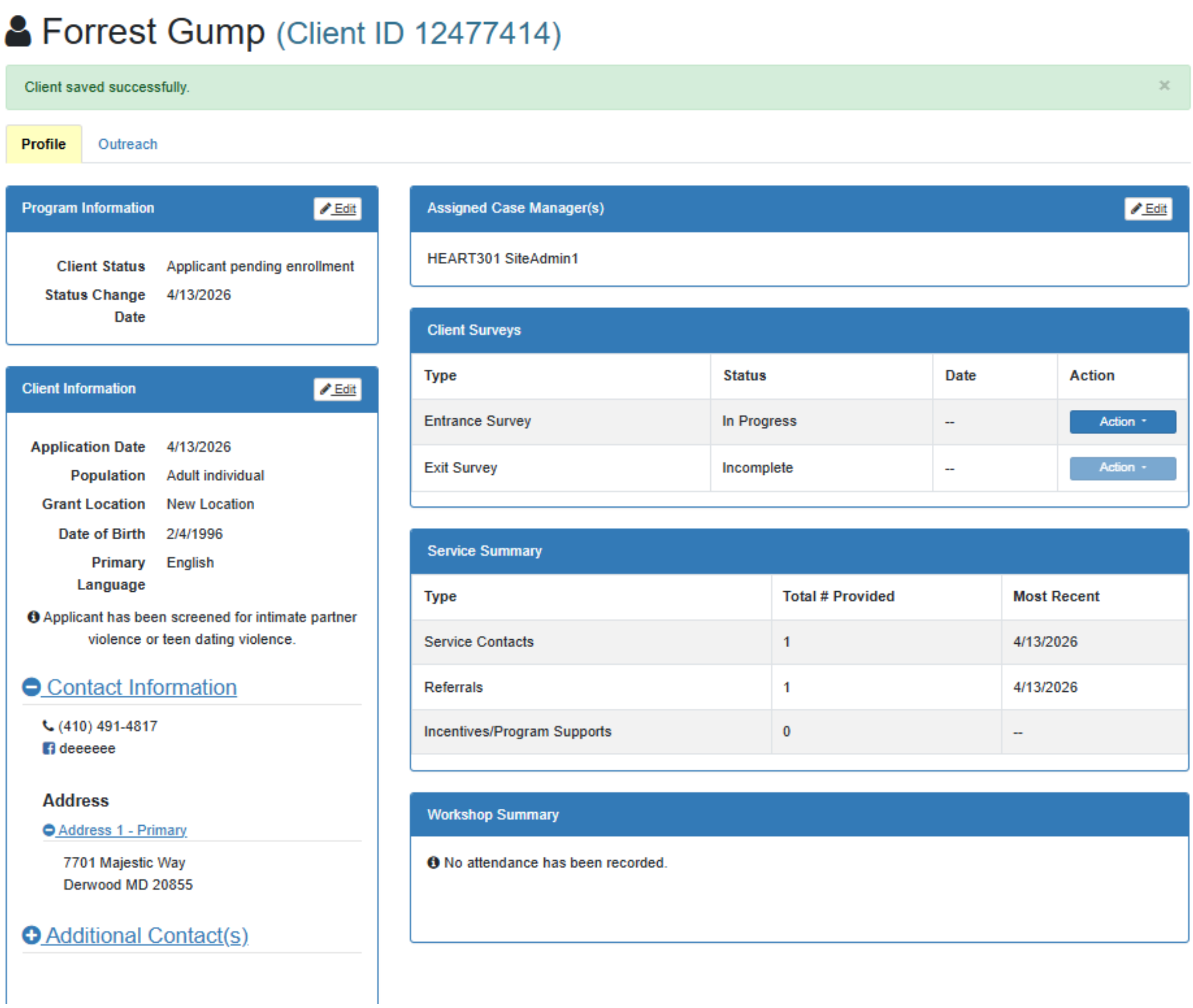
Select Save to create or update a client record in nFORM for the applicant; the client record will be automatically assigned a unique client ID number. After the completed Application Form is saved, grant recipient staff will be able to view the information entered on the form, with the exception of the outcome of intimate partner violence screening. For the protection of clients, this screening outcome will not be viewable after it is entered and saved.

C. Duplicate detection check and Client Profile page (screen C3)

After hitting Save on the Application Form, nFORM will automatically run a duplicate client record check for the new client record. This is a second layer of quality assurace after staff manually search for exisiting records by the applicant's name and nicknames. The duplicate check will identify any existing client records that match the new record on first and last name, and, for Ready to enroll applicants, date of birth. As described at the beginning of this module, it is important to first conduct a manual check to determine if the client is in nFORM because the automatic check will not identify nicknames and alternative versions of a name (e.g., Bill for William).

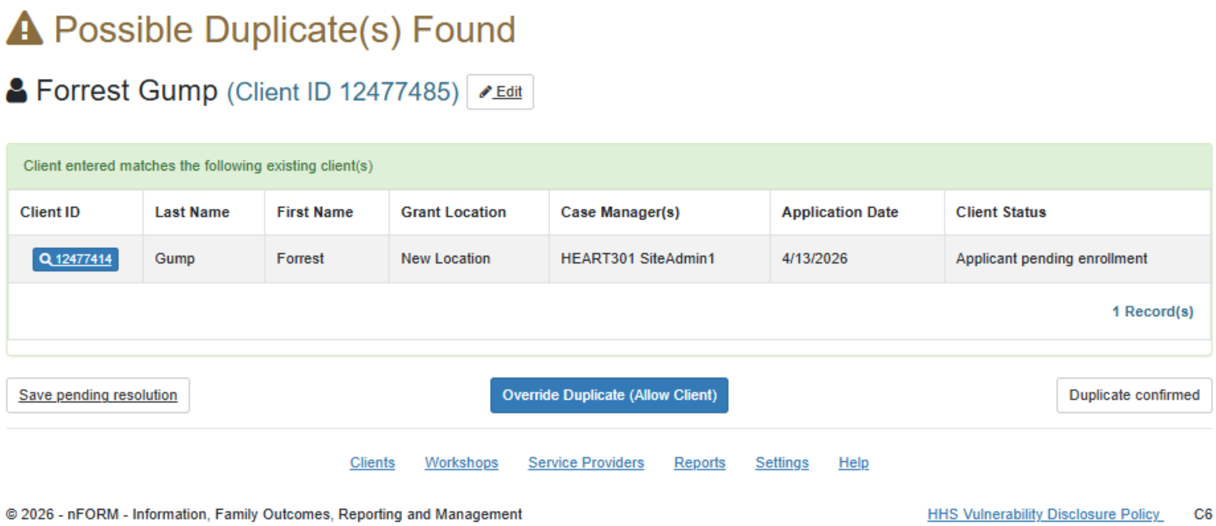
If a possible duplicate client entry is found, resolve the duplicate entry following the process described in Module V.D of this user manual. If no duplicate client entry is found, the new client's profile screen will automatically open (C3).

The top of the client profile displays the client's first and last name and the client's ID number. Information entered in the Application Form will display in the Client Information section of the Profile screen. The client information can be updated by case managers and site administrators by clicking the Edit button.



D. Identify and resolve duplicate client records (screen C6)

When a new client record matches an existing record, the nFORM user is taken to the Possible Duplicate(s) Found screen (C6) which lists potential duplicate matches. Additional information—service assignment, program grant location, case manager(s), application date, and client status—is displayed for the existing clients to help grant recipient staff determine whether there is a true duplicate. To view more details about existing clients select the client ID button. Information on existing clients cannot be edited from this screen.



There are three options for addressing duplicate client records:

- Users with enrollment permission can edit the client record that was just created if it has inaccurate information (for example, the wrong name or date of birth).
- Site administrators can confirm a record as a duplicate if the information in the client record is correct. The duplicate record is flagged as a duplicate entry; this is a quality control feature so that client records are not mistakenly deleted from the system. Records that are confirmed as duplicates cannot have any service information recorded.
- Site administrators can use the override function to allow two client records with identical first name, last name, and date of birth to remain in nFORM. Site administrators should confirm that the two records are two distinct individuals before overriding a possible duplicate.

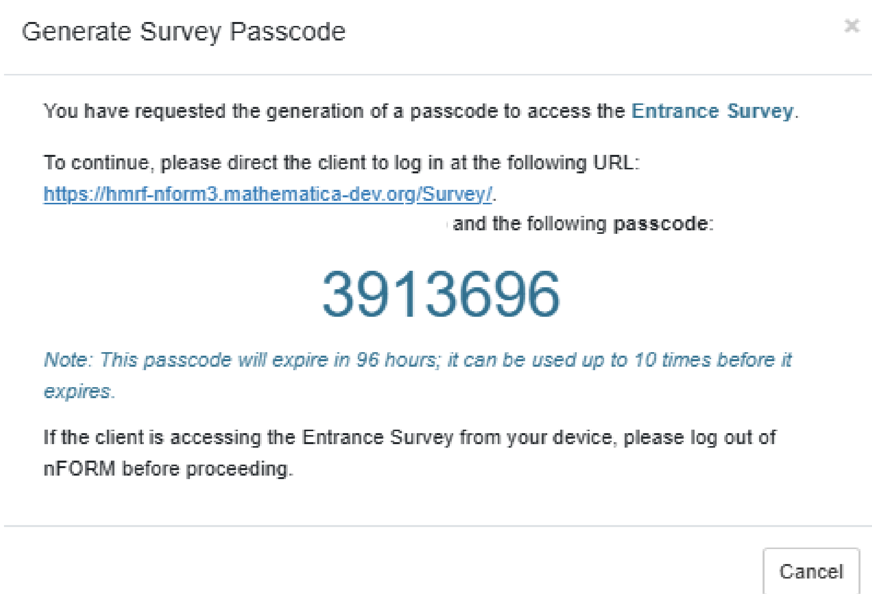
E. Administer entrance survey (screen C3)

Once an application form with a Ready to enroll status is completed and saved, the applicant's status will automatically update to "Applicant pending enrollment". This status will display in the Program Information section of the client's Profile page. Enrollment is completed after the client responds to the entrance survey, and for clients who are part of local evaluations, after the client's service assignment is recorded in their profile. The client's nFORM-generated enrollment date is the earliest date that a client can be registered for and recorded as attending workshops, and the earliest date for which incentives can be recorded. nFORM includes data validation checks so that any participation in workshops or incentives that occurs before the nFORM enrollment date cannot be recorded in nFORM.

To administer the web-based entrance survey, click the Action button on the Client Surveys table in the middle of the Profile page (C3), and select the Passcode option. This will open the Generate Survey Passcode screen, which displays the URL for the survey, the client's ID number, and a passcode that is usable for the next 96 hours. The passcode can be reused by the client up to 10 times within the 96 hour timeframe from when it was first generated. A message also displays that notifies the user of when the passcode will expire and how many times the passcode has been used. Please note that passcodes will expire after 96 hours or after 10 uses, whichever comes first. Once a survey is submitted, the passcode cannot be reused.

The URL for all client surveys is: https://nform.acf.hhs.gov/nFORM/Survey.

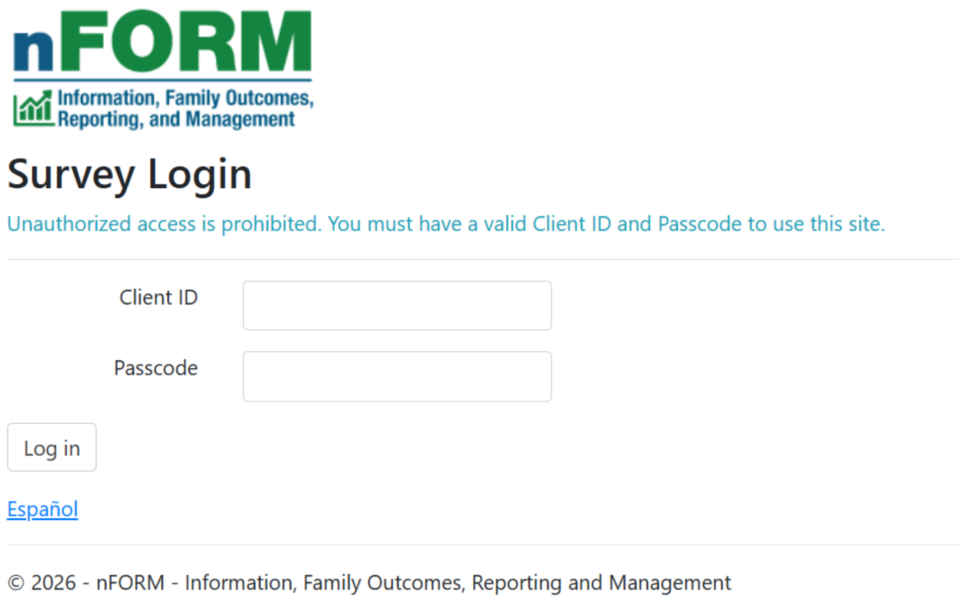
Grant recipient staff should bookmark the survey URL in advance on all devices that clients will use to respond to the entrance and exit surveys. Once the passcode is entered, the survey will open. Clients can take as long as they need to respond to the survey, but the survey will automatically log out after 30 minutes of inactivity as a security precaution.



Clients should complete the surveys on separate devices from the devices used by grant staff, so that clients can only access the surveys and not other parts of nFORM. The devices should meet the minimum system requirements described in Module I.A.

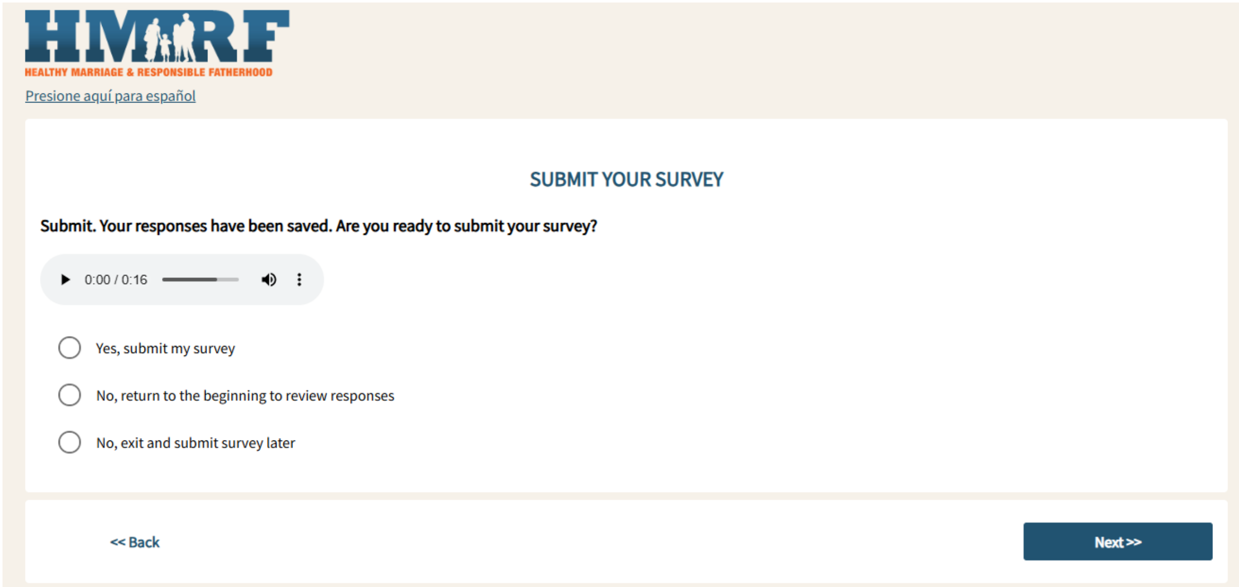
Open the survey URL for the client on the device the client will use to respond to the survey. Insert the client's ID number and passcode into the relevant fields on the Survey Login page, or provide this information to the client to enter. The client will then be asked to confirm his or her name before beginning the survey. For clients who will be taking the survey in Spanish, select the Español link on the Survey Login page before clicking "Log in" so that the client confirmation page displays in Spanish for the client.

This link will also display the appropriate ACASI audio of the survey, either English or Spanish. The audio portion will not play automatically, so clients must click the play button to hear it. Please note that the ACASI audio functionality is not compatible with screen reading technology such as JAWS. If clients are not able to respond to web surveys visually or using ACASI's audio assistance, grant recipient staff can ask clients the questions and input their responses.



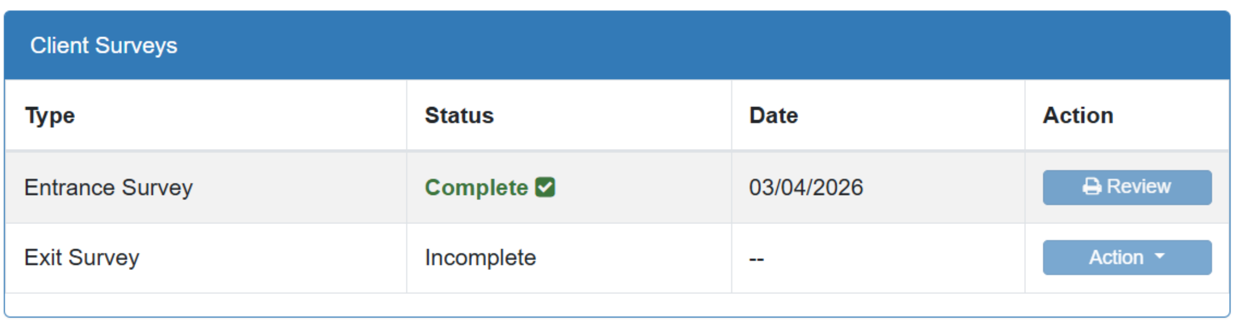
Once the client’s name is confirmed, the client will answer the questions on each screen of the entrance survey, clicking the Next button to advance to the next question or the Back button to return to earlier questions.

After answering each question, the client will submit the completed entrance survey on the final screen. For more information on the survey process, see Module VII.



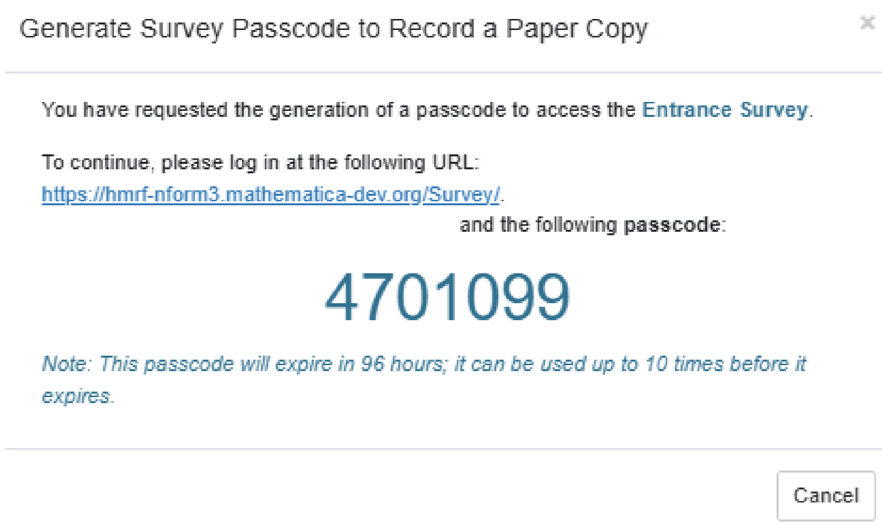
Encourage clients to answer all survey questions, though they can skip any questions they do not wish to answer. If an important question is left blank, nFORM will prompt the client to respond. For example, nFORM may prompt the client with "This question is very important. Please select an answer." Some questions are particularly important because their responses route clients to other questions in the survey. If the client still chooses to leave the question blank after the prompt, the client should click the Next button a second time to advance to the next question.

After the client submits a web survey, the status of the entrance survey on the Client Survey table will change to Complete.

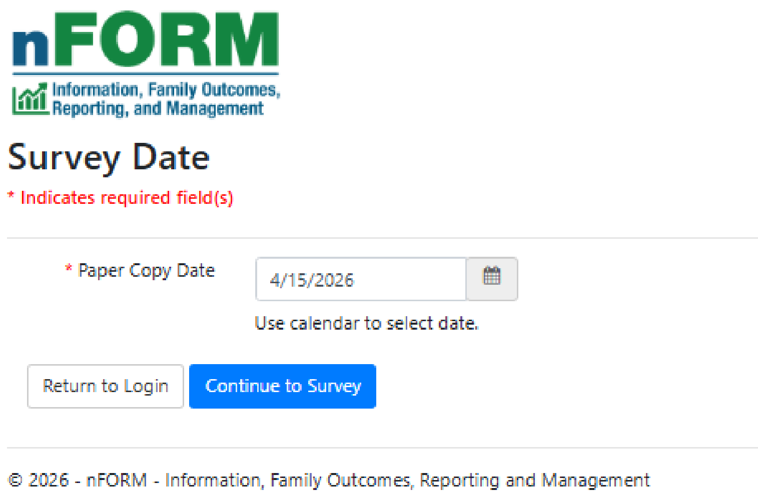

Client Surveys

Type	Status	Date	Action
Entrance Survey	Complete	03/04/2026	Review
Exit Survey	Incomplete	--	Action

Entering responses from paper surveys into nFORM. When grant recipients administer paper surveys, staff will need to data enter a client's paper survey responses into nFORM. To do this, click the "Action" button next to the entrance survey in the Client Surveys box on the client's profile (C3), but select "Paper Copy" rather than "Passcode." The Generate Survey Passcode screen will launch but will reflect the fact that you are entering responses from a paper survey.



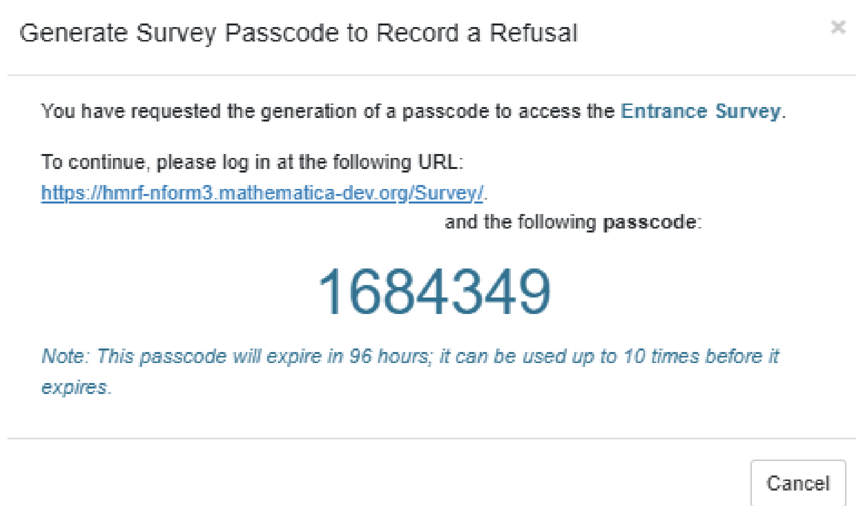
Grant staff will be prompted to select the date on which the client completed the paper survey from the date picker on the screen. This will allow the client's enrollment date to reflect the actual date of survey completion, rather than the date of data entry. Surveys may be backdated up to 4 days from the data entry date.

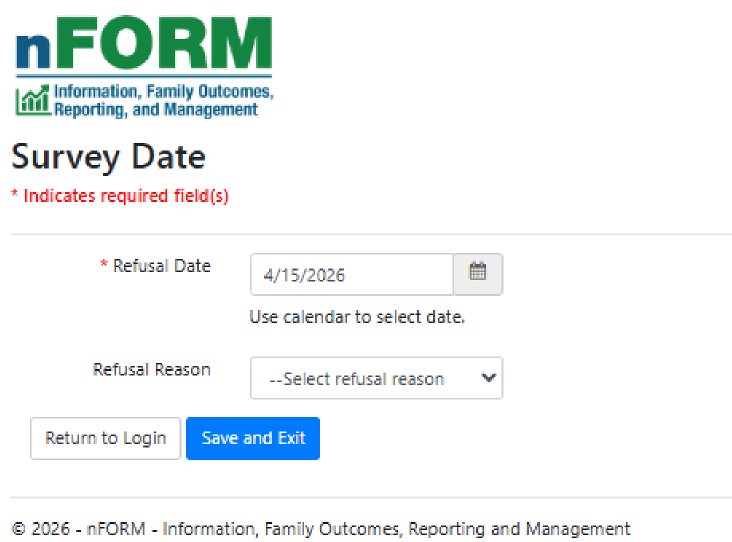


Then, grant recipient staff can navigate through the questions and record clients' answers. After grant recipient staff submit the survey, its status will display as "Paper Complete" in the Client Surveys box on screen C3. Click the Review button to see the client's responses to demographic questions on the entrance survey.

Entering entrance survey refusals. Clients are not considered active in nFORM until they have either completed or refused the Entrance Survey. If a client initially refuses to take the Entrance Survey but is interested in continuing with the program, grant recipient staff should encourage the client multiple times to complete the survey. Ask the client to describe their reservations about survey completion and respond accordingly – for example, emphasizing that their information will be kept private or that they can skip any question they don't want to answer. In addition, let clients know that they are contributing to research that will help improve the program for others going forward.

If a client still refuses to take the Entrance Survey, you may status the survey as "Refused" by navigating to the "Action" button next to the survey and selecting "Refuse Survey." This will generate a passcode to enter into the survey, as with regular administration. However, after you confirm the name of the client refusing the survey, you will see a screen on which to enter the refusal date and refusal reason and submit the refusal. Refusals may be backdated up to 4 days from the data entry date.





The client's status for the entrance survey will then display "Refusal" in the Client Surveys box on screen C3.

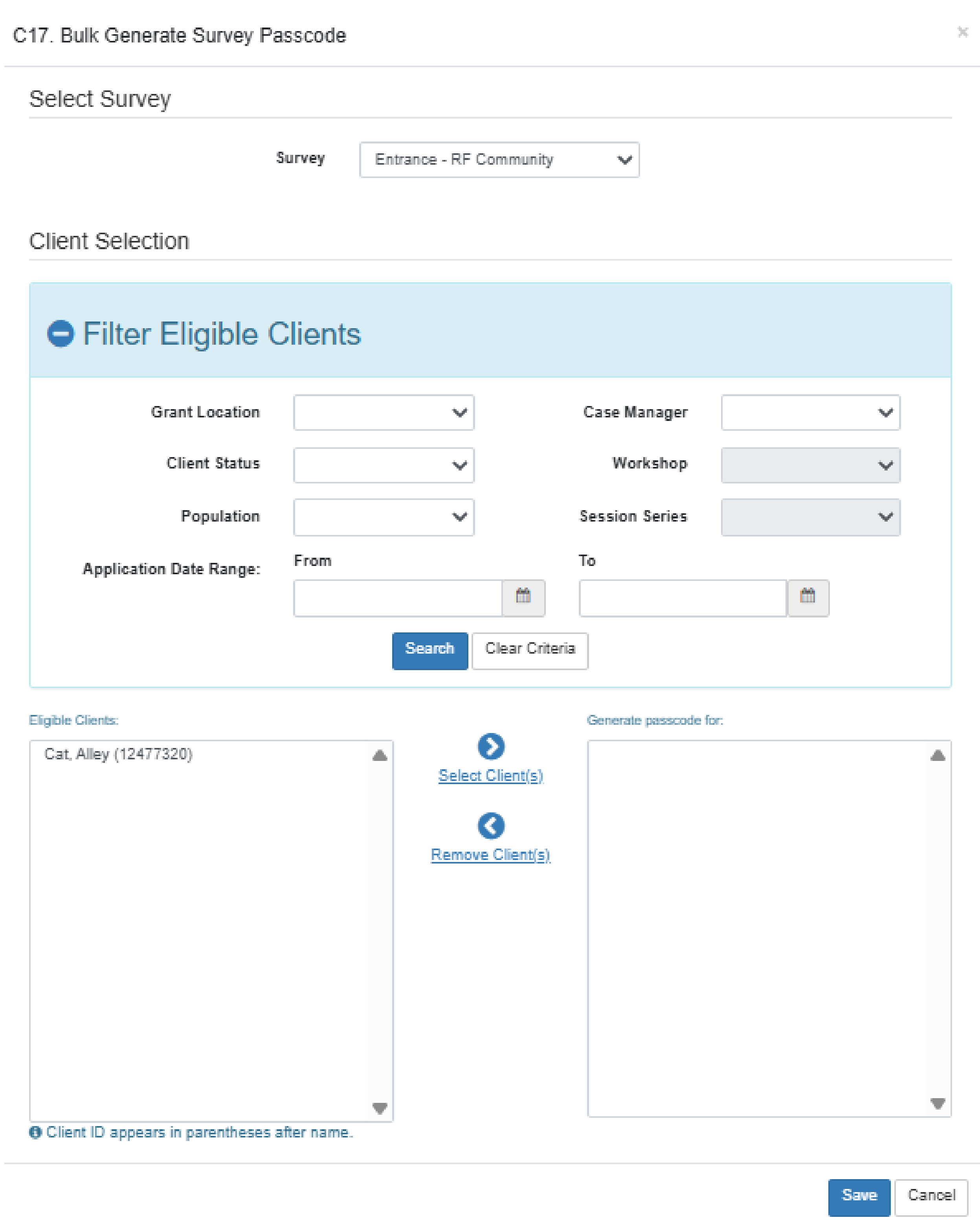
V.E.1. Generating passcodes for the entrance survey in bulk

Grant recipients, especially those that enroll clients as a cohort, may administer the entrance survey to multiple clients at the same time. In these situations, grant staff can generate passcodes in bulk rather than individually.

On the Clients tab, select the Bulk Update option and the Passcode Generation option. On the Bulk Generate Survey Passcode screen (C17), select the entrance survey. From there, grant recipients can search for clients based on the following criteria:

- Grant location
- Client status
- Population
- Case manager
- Workshop and session series
- Application date
- Enrollment date

Clients who fit the specified criteria will be listed in the Eligible Clients box on screen C17. Grant staff can select one or more clients from the Eligible Clients box and click the Select Client(s) arrow to move them to the Generate passcode for box. Upon clicking Save, a PDF entitled “SurveyLoginSheet” will download. The PDF will list each client’s name, location, passcode generation date, client ID, and passcode. Like a passcode generated individually on the Client Profile (C3), these passcodes will be valid for 96 hours and can be used up to 10 times within that timeframe, until the survey is submitted. The PDF will also indicate when the passcodes were generated and a reminder that the passcode expires in four days.



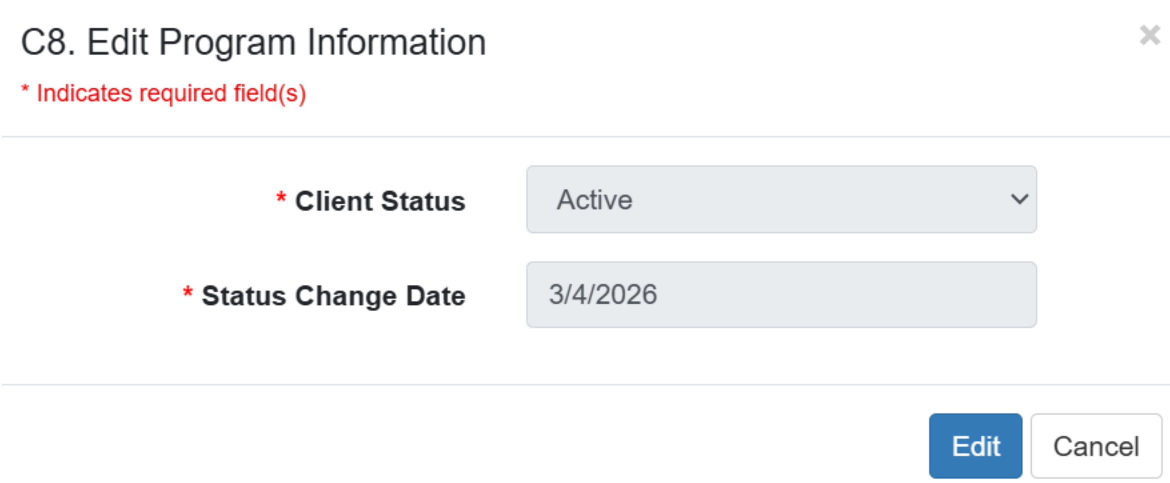
V.E.2. Recording service assignments for local evaluations

After the entrance survey is complete, the client's status on the Profile page will change to Active for clients who are not part of a local evaluation. If a client is part of a local evaluation, the client's service assignment (Treatment, Control (With Services), Control (NO Services Provided), Control Waitlist (With Services), or Control Waitlist (Without Services) needs to be selected in the Program Information box on the Profile screen (see Module III.C for how to create service assignments)). Once this is done, the client's status will change to Active.

To do this, select the Edit button in the top right corner of the Program Information box to open the Edit Program Information screen (C8). Then select the appropriate Service Assignment using the drop-down menu. If the entrance survey was either completed on paper or refused, staff members must also select a value for the "Enrollment Date" field from one of two options: the date on which the survey was entered/refused, or the current date. If a mistake is made in selecting the client's Service Assignment, the site administrator can follow this same process to correct the mistake. If a client was mistakenly identified as being in the local evaluation or the client was not identified as part of the local evaluation, but should be, a site administrator can make a correction to the client's application form as described in Module V.A above.

Note: When editing a client's service assignment, please only make changes to the service assignment. Clients assigned to a service group should be clients whose statuses are Active, so do not change the client status at the same time that you edit the service assignment. If you do need to edit a client's status, please do so after you select their service assignment.

Some grant recipients may be conducting local evaluations in which clients can be assigned to a waitlist condition; they may be assigned to a waitlist control group with either partial services or no services. If these clients are later able to receive services, their service assignment can be changed by the site administrator from a control to a treatment assignment on the Edit Program Information screen (C8).



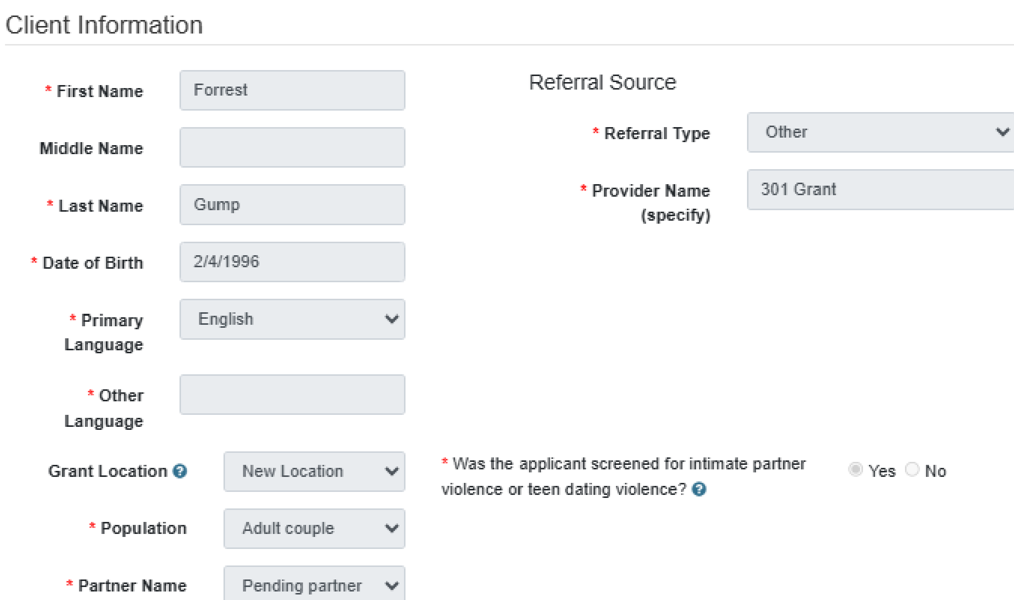
When a client's case status changes to Active the other client management functions in nFORM for the enrolled client are enabled. ACF's intended standard enrollment and data collection process is for HMRF grant recipients to administer the entrance survey in nFORM before the first workshop. This standard process allows grant recipients to register clients for workshops in advance of their first workshop session. nFORM includes important date checks so that clients cannot be marked as attending any workshop session occurrence that precedes their enrollment date. Grant recipients must plan their enrollment and data collection processes accordingly.

F. Enroll new clients for couple services (screens C1 and C2)

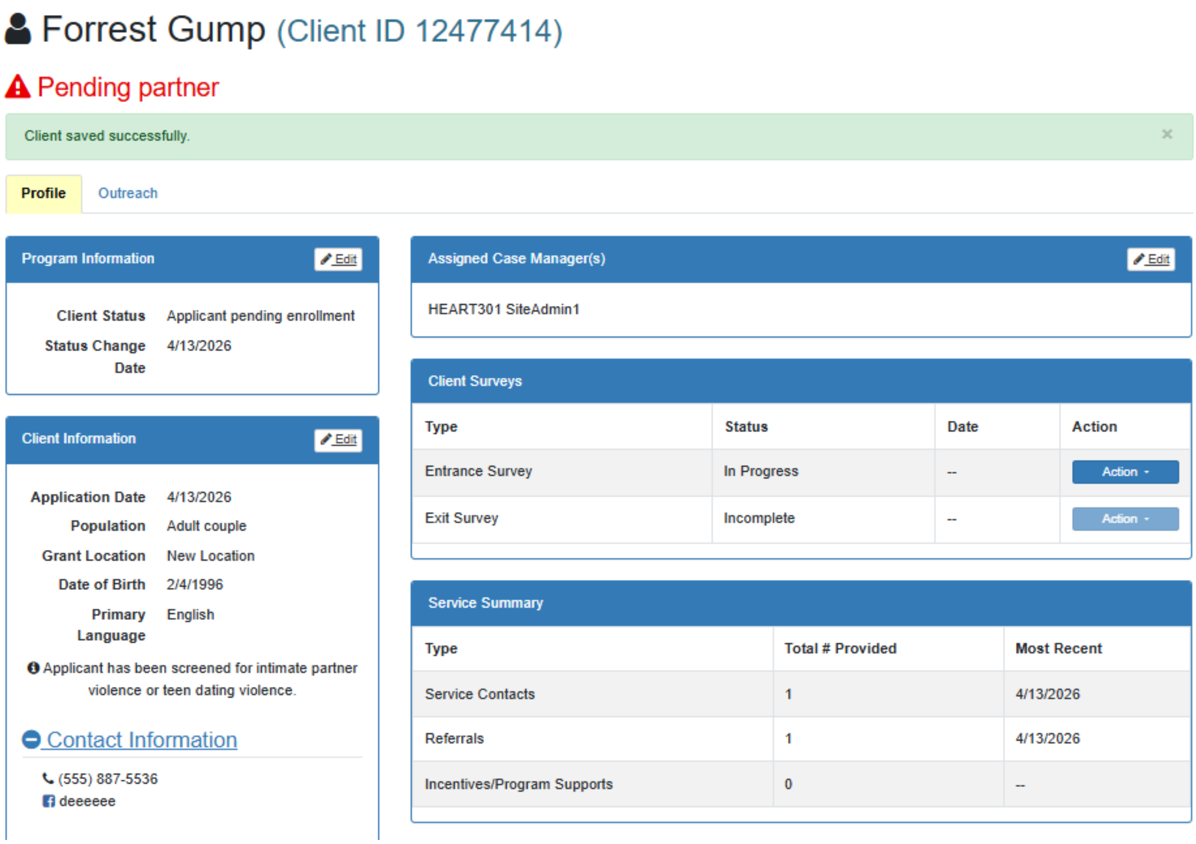
For HEART grants that provide services to couples, each partner will need to be entered and linked together in nFORM. The process is the same as enrolling individual clients into the system with only one additional step. Grant recipient staff follow the same enrollment steps described above for each partner of a couple; however, staff must also link the partners together as a couple unit in nFORM.

In this manual, partner 1 refers to the first member of a couple for whom an Application Form is completed, and partner 2 refers to the second member of a couple for whom an Application Form is completed.

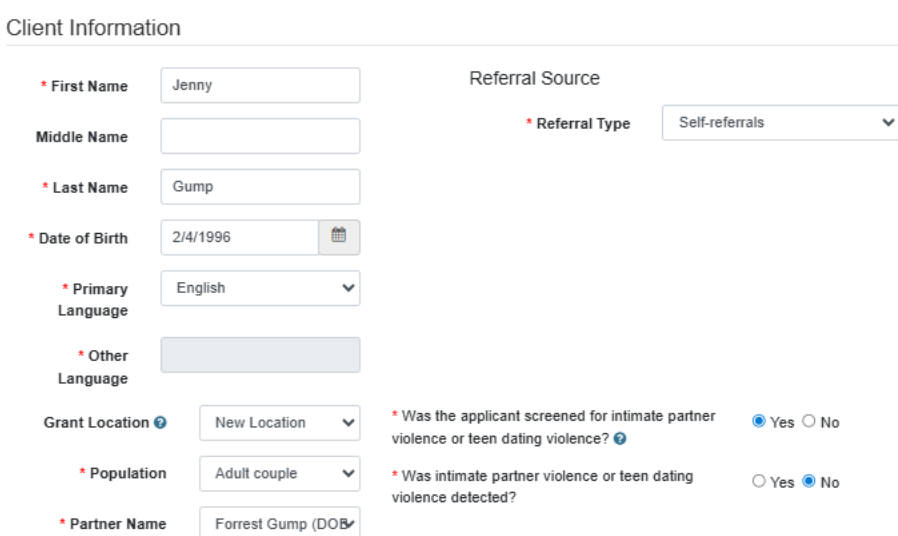
First, complete the steps outlined above to create a client record for partner 1. Make sure that you have selected a population type of Adult Couple. When this population is selected, the Partner Name dropdown menu will appear. Select Pending Partner from the dropdown menu to indicate that a record for partner 2 still needs to be created.



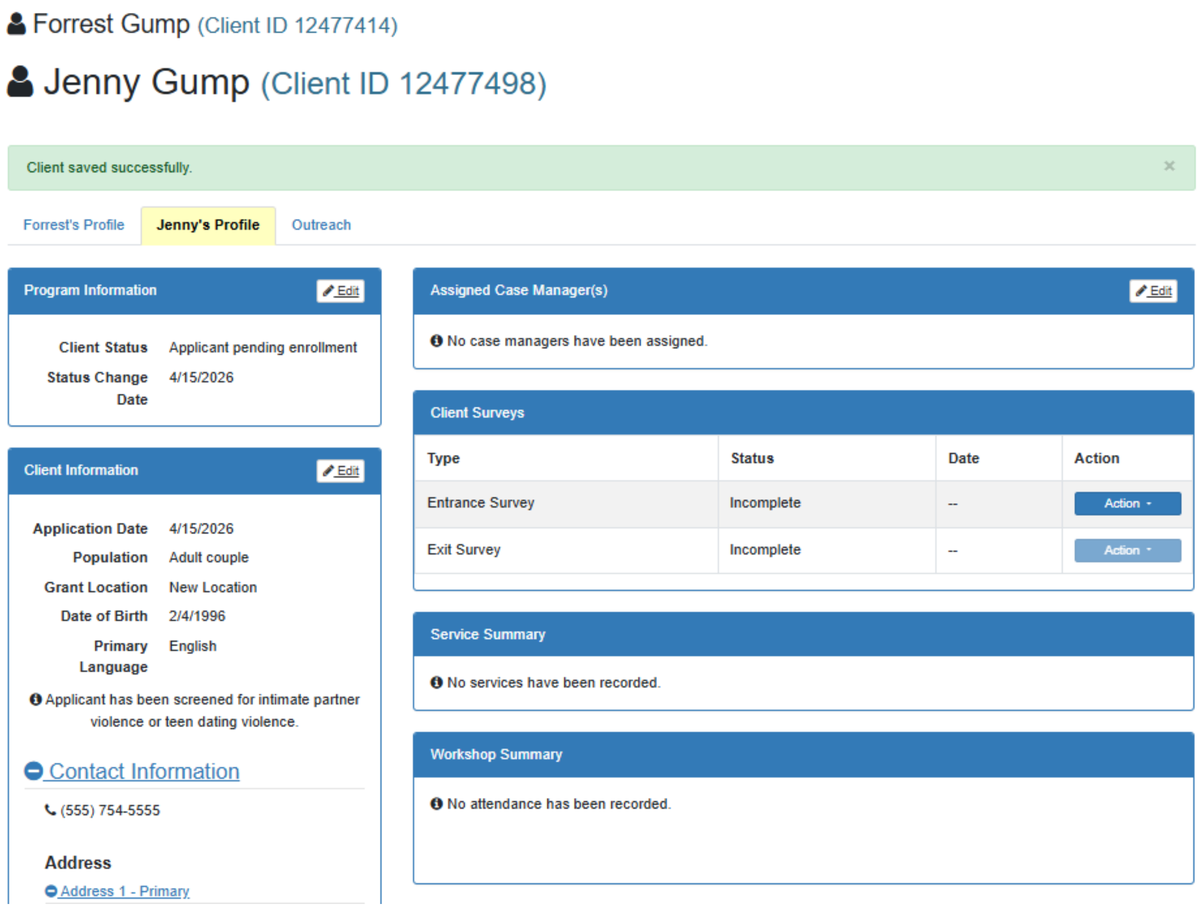
After creating partner 1's client record under the "Ready to enroll" Application Status, and if no possible duplicate record is found, partner 1's profile page will open. The top of the client profile displays partner 1's first and last name and client ID number, and a Pending Partner warning message will appear in red.



Complete a new Application Form to add partner 2. Select the Adult Couple population on partner 2's Application Form to make the Partner Name dropdown menu appear. All clients added to nFORM with Pending Partner selected in the Partner Name field will then appear in the Partner Name dropdown list so that they can be selected as an applicant's partner. Select partner 1's name to link partner 1 and partner 2 as a couple in nFORM.



After partner 2 is added, and if no possible duplicate record is found, partner 2's profile page will automatically open. Both partners' first and last names and client ID numbers are displayed at the top of the client profile. The lower client ID number will always appear first. Below the partners' names are tabs that open profile screens for each partner. Each partner's tab displays information from their Application Form and can be updated by grant recipient staff by clicking the Edit button.



If a tab does not appear for partner 1 on the couple's profile screen (C3), partner 1's name was not selected on partner 2's Application Form to link them as a couple. Click the Edit button in the Client Information section of the Profile Screen to open partner 2's Application Form. Then click the Edit button on the bottom of the Application Form. Confirm that the appropriate population has been selected (Adult Couple or Community Couple) and select partner 1's name from the Partner Name dropdown list. Select Save; after a successful duplicate client check, you will be directed to the couple's profile screen (C3). Confirm that separate tabs appear for partner 1 and partner 2.

If a couple is participating in a local evaluation, grant recipient staff should ensure that both partners in the couple have the same service assignment. Once service assignments are selected and saved, they cannot be changed by grant recipient staff. A red warning message will appear at the top of the Profile page when couples are enrolled as part of a local evaluation, but the partners have different service assignments. In addition, the couple's service and workshop participation will not be fully counted on the PPR. As noted earlier, if a mistake is made in selecting a client's Service Assignment, or if a waitlist control client becomes eligible to receive treatment services, a site administrator can change the assignment by selecting Edit on the Program Information section of the Profile Screen. If the client was mistakenly identified as part of the local evaluation or mistakenly not identified as part of the local evaluation, a site administrator must edit the local evaluation check box in the client's Application Form (screen C2).

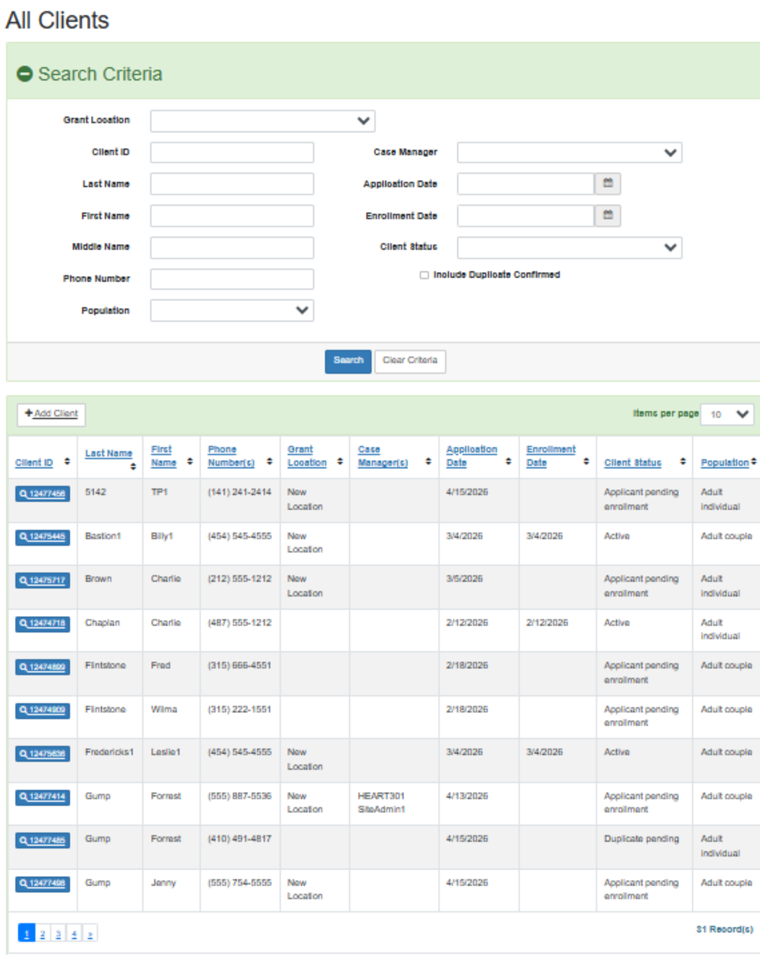
Couples do not need to be enrolled simultaneously. As soon as one partner becomes Active, the other tabs in the client profile are available and service information can be recorded. It is important, however, to complete enrollment in a timely manner for both partners so that they are Active in nFORM and can be registered for workshops.

G. View all clients (screen C1)

All users can search for a client served by their grant within nFORM by clicking the All Clients link under the Clients tab. After entering search criteria in one or more fields, click the Search button; the results will populate on the bottom of the screen. If multiple criteria are entered, the search returns only those clients who match all the search criteria. Clicking Search without entering any search criteria returns all client records for the grant recipient.

Search criteria include the following fields:

- Grant location
- Client ID
- Client last, first, and middle names
- Client phone number
- Client population
- Case manager assigned to the client
- Application date
- Enrollment date
- Client status
  - "Include Duplicate Confirmed" checkbox (by default, this client status is excluded from searches)
- Service assignment (only grant recipients with their own local evaluations)

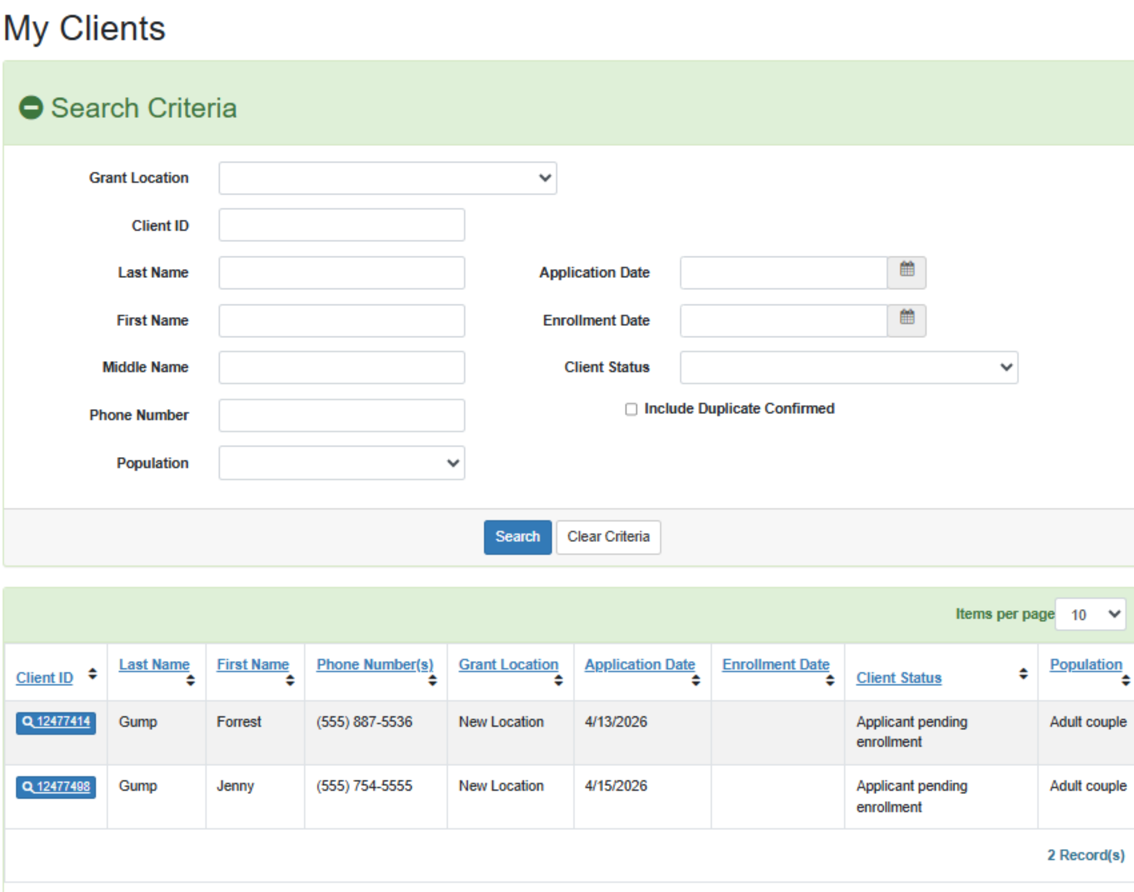


Client ID	Last Name	First Name	Phone Number(s)	Grant Location	Case Manager(s)	Application Date	Enrollment Date	Client Status	Population
12477456	5142	TP1	(141) 241-2414	New Location		4/15/2026		Applicant pending enrollment	Adult individual
12475445	Bastion1	Billy1	(454) 545-4555	New Location		3/4/2026	3/4/2026	Active	Adult couple
12475717	Brown	Charlie	(212) 555-1212	New Location		3/5/2026		Applicant pending enrollment	Adult individual
12474718	Chaplan	Charlie	(487) 555-1212			2/12/2026	2/12/2026	Active	Adult individual
12474899	Flintstone	Fred	(315) 666-4551			2/18/2026		Applicant pending enrollment	Adult couple
12474909	Flintstone	Wilma	(315) 222-1551			2/18/2026		Applicant pending enrollment	Adult couple
12475638	Fredericks1	Leslie1	(454) 545-4555	New Location		3/4/2026	3/4/2026	Active	Adult couple
12477414	Gump	Forrest	(555) 887-5536	New Location	HEART301 SiteAdmin1	4/13/2026		Applicant pending enrollment	Adult couple
12477485	Gump	Forrest	(410) 491-4817			4/15/2026		Duplicate pending	Adult individual
12477498	Gump	Jenny	(555) 754-5555	New Location		4/15/2026		Applicant pending enrollment	Adult couple

Authorized users may view an individual client's Profile (C3) by clicking on the Client ID button for that client. Clicking on the Client ID for a client with Duplicate Pending status opens the Duplicate Pending screen (C6).

H. View clients by case manager/assigned program staff (screen C9)

Grant recipient staff who manage a case load may view the list of clients assigned to them by clicking the My Clients (C9) link under the Clients tab. This screen allows grant recipient staff to easily find their own clients to perform specific case management tasks, such as administering the client surveys; adding service contacts, referrals, and incentives; and recording individual make-up sessions. Case manager and site administrator users can also perform these functions in nFORM even if they are not assigned to specific clients. The My Clients (C9) screen offers the ability to search for clients using the same criteria as on the All Clients (C1) screen described in Module V.G.



My Clients

Search Criteria

Grant Location

Client ID

Last Name

First Name

Middle Name

Phone Number

Population

Application Date

Enrollment Date

Client Status

Include Duplicate Confirmed

Search | Clear Criteria

Items per page 10

Client ID	Last Name	First Name	Phone Number(s)	Grant Location	Application Date	Enrollment Date	Client Status	Population
12477414	Gump	Forrest	(555) 887-5536	New Location	4/13/2026		Applicant pending enrollment	Adult couple
12477498	Gump	Jenny	(555) 754-5555	New Location	4/15/2026		Applicant pending enrollment	Adult couple

2 Record(s)

VI. Managing Workshops and Sessions

A. Overview of workshops and sessions (screens W1 to W10)

The Workshops tab is where site administrator, case manager, and general users create and manage workshops, session series, and session occurrences, and where grant recipient staff find information on the workshops offered by their grant program.

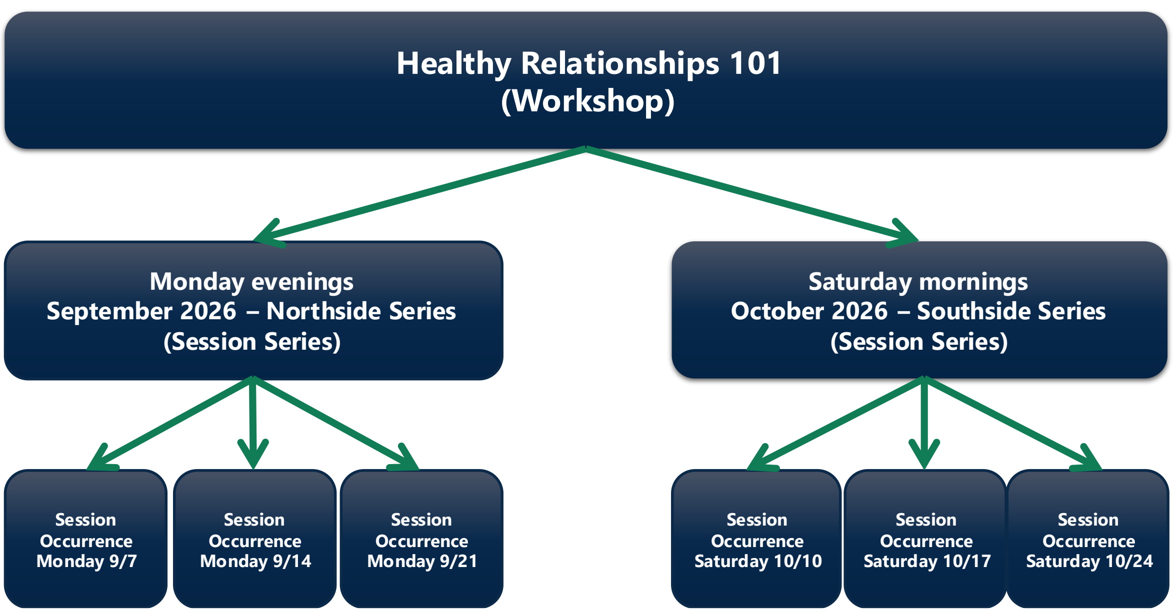
Managing workshops and sessions is functionality available to all site administrators. Case manager and general users have access to only specific functionality for managing workshops and sessions.

Grant recipient staff complete the following tasks on the workshop tab:

- Create workshops and session series
- Cancel/reinstate session series and occurrences
- Reschedule session occurrences
- Register clients for sessions
- Generate client rosters and track attendance

The healthy marriage or responsible fatherhood programming that grant recipients provide clients is recorded in nFORM following the workshop, session series, and session occurrence hierarchy illustrated here:

Figure VI.1. Hierarchy of workshops, session series, and session occurrences in nFORM



- A **workshop** is a curriculum or set of classes offered by the grant recipient based on the curriculum developer's specifications for group-based or individual programming. Grant recipients may offer multiple workshops for their clients (for example, a workshop for fathers in the community and a workshop for reentering fathers). All grant recipients must offer primary workshops and grant recipients may or may not offer optional workshops (both explained in more detail below).
- A **session series** is the offering of that workshop to each new cohort or group of clients to which the grant recipient plans to offer services and/or a curriculum together. Grant recipients may offer the same workshop in multiple session series such as a daytime session series, an evening session series, and a weekend session series to accommodate different client schedules. Grant recipients offering the same workshop but in different languages should set up separate series for the two offerings, for example, setting up a Spanish series and an English series. Grant recipients should give each session series a unique and easily recognizable name, but should be sure to never include client PII like names in the name of session series.
- **Session occurrences** are the individual classes within a session series; for example, a weekend session series of a given workshop may occur on 10 consecutive Saturdays beginning in June.

Setting up workshops, session series, and session occurrences following this hierarchy is necessary for accurate reporting of workshop participation in the quarterly reports.

Depending on their user permissions, grant recipient staff will complete various tasks related to workshops, session series, and session occurrences under the applicable pages within the Workshops tab.

B. Workshops

A workshop must be created before session series or occurrences can be scheduled. Only site administrators can create workshops.

Under the Workshops tab, select the Workshops page (W1) to view all of the workshops offered by your grant recipient. The table displays the workshop name, population served, whether registration is required for clients, enrollment category, workshop type, and the total hours in the workshop.

Workshops

+ Add Workshop — Items per page 10

Workshop Name	Population	Registration Required	Enrollment	Type	Total Hours
24/7 Dad	Community father	Yes	Cohort	Primary	24
Financial Literacy 101	Community father	No	Open	Optional	6
Nurturing Fathers	Reentering father	Yes	Open	Primary	32

3 Record(s)

Add Workshops. Site administrators add new workshops by first selecting the +Add Workshop button on the Workshops page (W1) to open the Add/Edit Workshop screen (W2).

In the top portion of the Add/Edit Workshop screen (W2), the Program field will pre-fill with the applicable program type for your grant recipient (that is, HEART, READY4Life, or FORGE Fatherhood). The site administrator should select the primary population to be served by the workshop and enter the name of the workshop and a brief description of it, whether registration is required for workshop attendance, the workshop's enrollment category, and the total length of the workshop in hours. Grant recipient staff should also select the relevant activities and, for HEART and READY4Life grant recipients, elements of the workshop. Finally, grant recipient staff should select the workshop type and structure and enter one or more curricula or other group service for the workshop.

Site administrators should select Yes for Registration Required if clients must be registered in advance of attending the workshop. Clients can then be registered by name for the workshop, so they appear as an expected attendee on the rosters for individual workshop sessions. If the client misses a session occurrence, and registration is required, nFORM will display the absence in the client's profile. Requiring registration does not preclude clients from participating in a workshop session on a drop-in basis as long as their nFORM enrollment date (the date their status becomes Active) is on or before the date of the session occurrence. Site administrators should select No for Registration Required if client registration is not mandatory. Attendance for workshops that do not require registration will be recorded as drop-in attendance.

Note that the workshop's Registration Required field cannot be changed after a selection is made and saved.

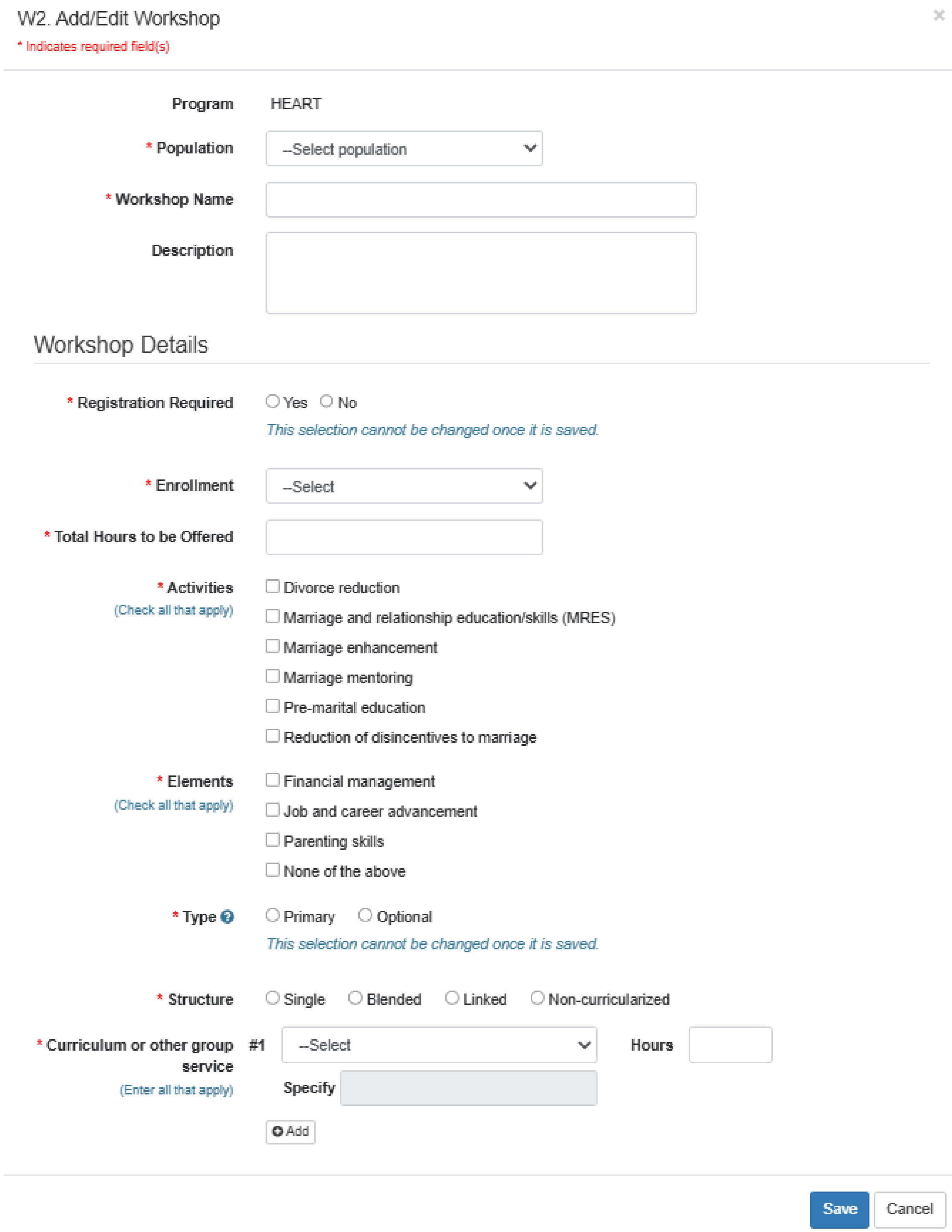
Site administrators should select Open for Enrollment Type if clients can enroll in the workshop at whatever time they enroll in the program. Select Cohort for the Enrollment Type if clients enroll in the workshop at the same time as a group and progress through the workshop together. Site administrators should select Other if clients enroll in workshops in some other fashion.

Then, grant recipient staff should select whether the workshop is Primary or Optional. Select Primary if the workshop is part of the essential group-based services that all clients within a population are expected to attend. Select Optional if the workshop is one that clients can attend, but are not expected to attend as part of the grant recipient's essential group-based services.

Grant recipients also designate structures for these workshops based on the curricula they offer. Workshops with a Single structure are composed of one curriculum. Workshops with a Linked structure are composed of two or more curricula that are offered as distinct components. Workshops with a Blended structure are also composed of two or more curricula, but in this case, the curricula are offered in a way in which the curricula cannot be disentangled. Grant recipient staff will then select one or more curriculum or group service offered through the workshop, all of which are listed in the drop-down menu at the bottom of the screen, and the hours of that curriculum.

After completing all required information, select Save to add the new workshop to nFORM. You will be automatically taken back to the Workshops page (W1) and the newly created workshop will appear in the Workshops table.

Workshop setup for HEART and READY4Life grant recipients



W2. Add/Edit Workshop

* Indicates required field(s)

Program: HEART

* Population: --Select population

* Workshop Name:

Description:

Workshop Details

* Registration Required: ○ Yes ○ No

This selection cannot be changed once it is saved.

* Enrollment: --Select

* Total Hours to be Offered:

* Activities (Check all that apply)

- ☐ Divorce reduction
- ☐ Marriage and relationship education/skills (MRES)
- ☐ Marriage enhancement
- ☐ Marriage mentoring
- ☐ Pre-marital education
- ☐ Reduction of disincentives to marriage

* Elements (Check all that apply)

- ☐ Financial management
- ☐ Job and career advancement
- ☐ Parenting skills
- ☐ None of the above

* Type: ○ Primary ○ Optional

This selection cannot be changed once it is saved.

* Structure: ○ Single ○ Blended ○ Linked ○ Non-curricularized

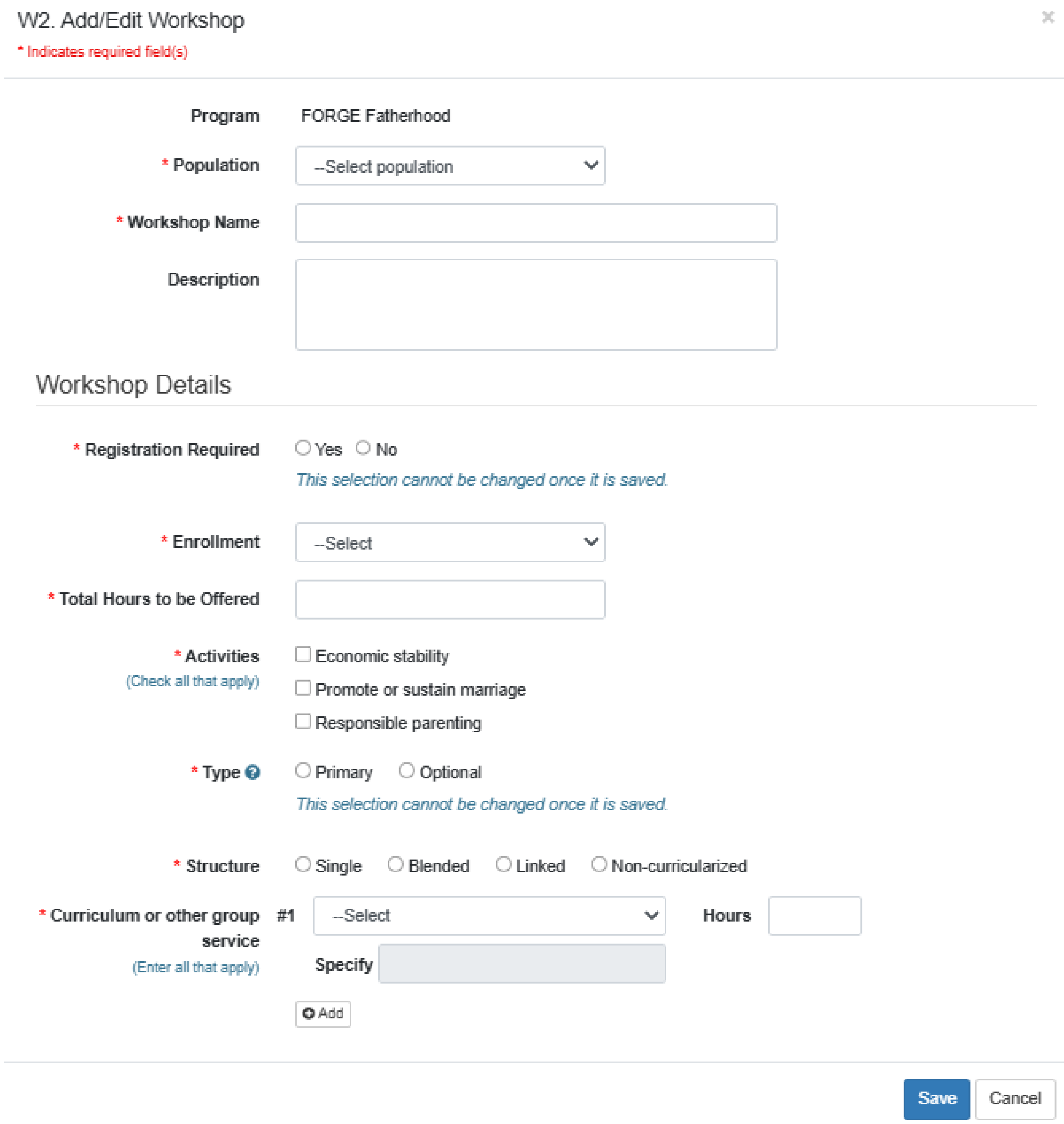
* Curriculum or other group service (Enter all that apply): #1 --Select Hours

Specify

Add

Save Cancel

Workshop setup for FORGE Fatherhood grant recipients

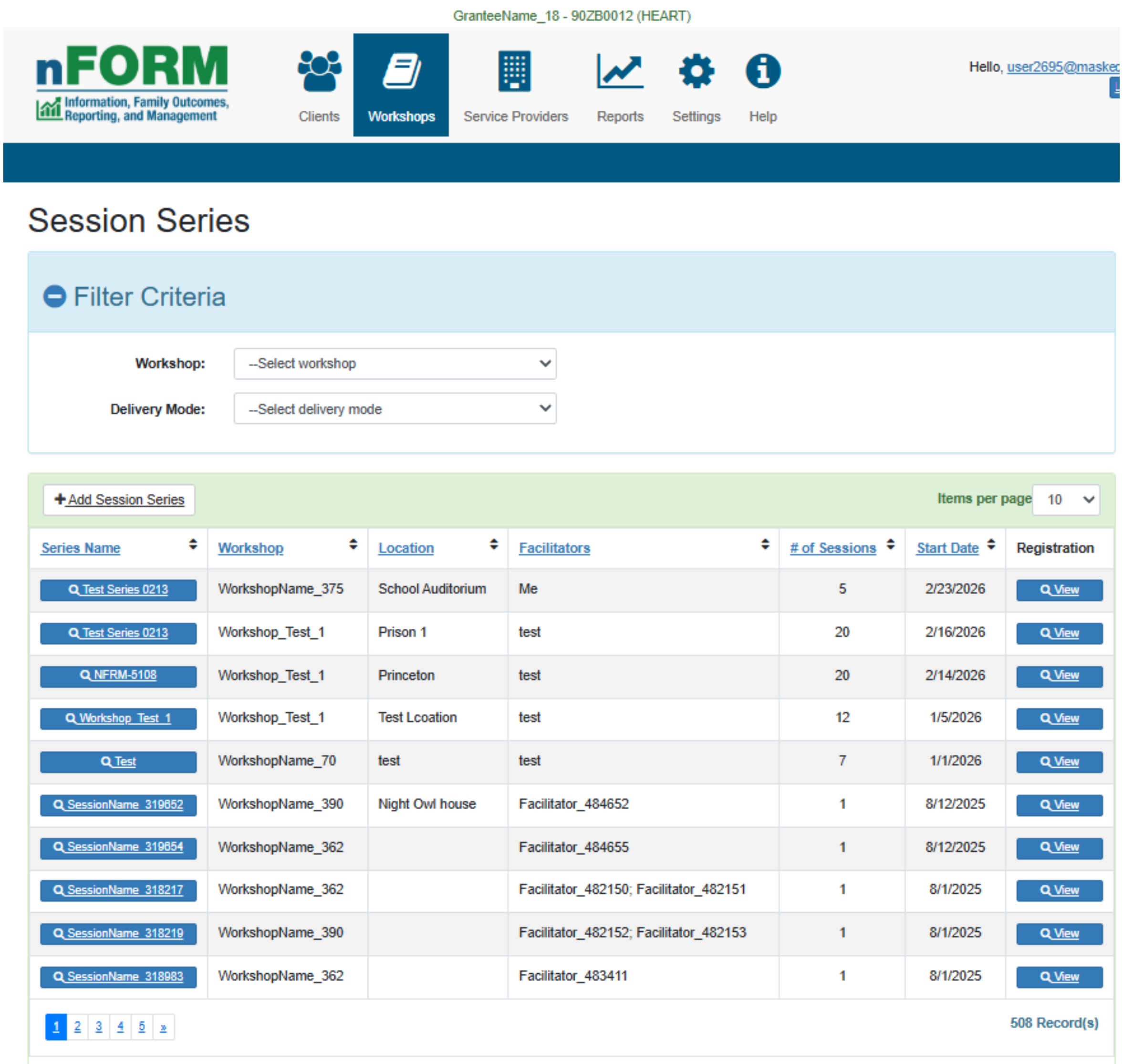


Edit and Delete Workshops. Site administrators can edit information about specific workshops by clicking on the Workshop Name button on the Workshops page (W1). The Add/Edit Workshop screen (W2) for the selected workshop will open in a view-only format. Select the Edit button at the bottom of this screen to enable editing of the population, workshop name, description, total hours to be offered, activities, and elements (HEART and FORGE Fatherhood grant recipients only) fields for the workshop. Note that you cannot change whether a workshop requires registration after it is initially entered and saved. After editing the relevant fields, select the Save button to save the edits for the workshop. You will automatically be taken back to the Workshops page (W1) and the revised workshop information will appear in the Workshops table.

If a workshop has been created in error, site administrators can delete the workshop by selecting the Delete Workshop button on the lower left corner of the Add/Edit Workshop screen (W2), after this screen has been enabled for editing. **Workshops should not be deleted for any other reason than being created in error because deleting a workshop will remove all session series created for it and ALL recorded attendance by clients.** After clicking the Delete Workshop button, a warning message will appear asking the site administrator to confirm that the workshop should be deleted. If you confirm the deletion, you will automatically be taken back to the Workshops page (W1) and the deleted workshop will no longer appear in the Workshops table.

C. Session series

Under the Workshops tab, select the Session Series page (W4) to view all of the session series for your grant recipient. A table shows the series name, the workshop the series is a part of, the location where the session series is held, the facilitator(s), the number of session occurrences in the series, the start date of the series, and a button for managing registration for the session series.



Series Name	Workshop	Location	Facilitators	# of Sessions	Start Date	Registration
Test Series 0213	WorkshopName_375	School Auditorium	Me	5	2/23/2026	View
Test Series 0213	Workshop_Test_1	Prison 1	test	20	2/16/2026	View
NFRM-5108	Workshop_Test_1	Princeton	test	20	2/14/2026	View
Workshop_Test_1	Workshop_Test_1	Test Lcoation	test	12	1/5/2026	View
Test	WorkshopName_70	test	test	7	1/1/2026	View
SessionName_319652	WorkshopName_390	Night Owl house	Facilitator_484652	1	8/12/2025	View
SessionName_319654	WorkshopName_362		Facilitator_484655	1	8/12/2025	View
SessionName_318217	WorkshopName_362		Facilitator_482150; Facilitator_482151	1	8/1/2025	View
SessionName_318219	WorkshopName_390		Facilitator_482152; Facilitator_482153	1	8/1/2025	View
SessionName_318983	WorkshopName_362		Facilitator_483411	1	8/1/2025	View

The workshop dropdown filter allows grant recipient staff to restrict the session series table to show only the series for the selected workshop. The delivery mode filter allows grant recipient staff to restrict the session series table to show only the series for the selected delivery mode. The arrow buttons in the header of each column can be used to sort the session series, for example, by location. These features allow grant recipient staff to quickly find specific session series and to manage client registration.

VI.C.1. Adding a new session series (screens W4 and W5)

Grant recipient staff with session series permissions can add new session series for workshops by first selecting the +Add Session Series button on the Session Series page (W4) to open the Add/Edit Session Series screen (W5). In the top portion of this screen, select the workshop for which a session series will be added. The registration requirements, total hours to be offered, enrollment category, workshop type and structure, curriculum and workshop description will automatically fill-in for the selected workshop. Note that this information about the workshop is only editable by site administrators from screen W2.

Complete the Session Series Details portion of the Add/Edit Session Series screen (W5). Provide a name for the session series that describes the curriculum as well as the timing, for example, ABC curriculum June 2027 evenings. However, never include client PII like names in the name of session series. Select the agency that will provide the session series from the dropdown menu. Insert the maximum number of clients who can attend each session occurrence or, if there is no limit to the number of clients who can attend, check the No Limit check box. The maximum number of clients entered in this screen will limit the number of clients who can be registered for that session series. Select the delivery mode and primary setting for the series, and enter information about the location where the sessions will be provided, including the name, address, and telephone number of the location.

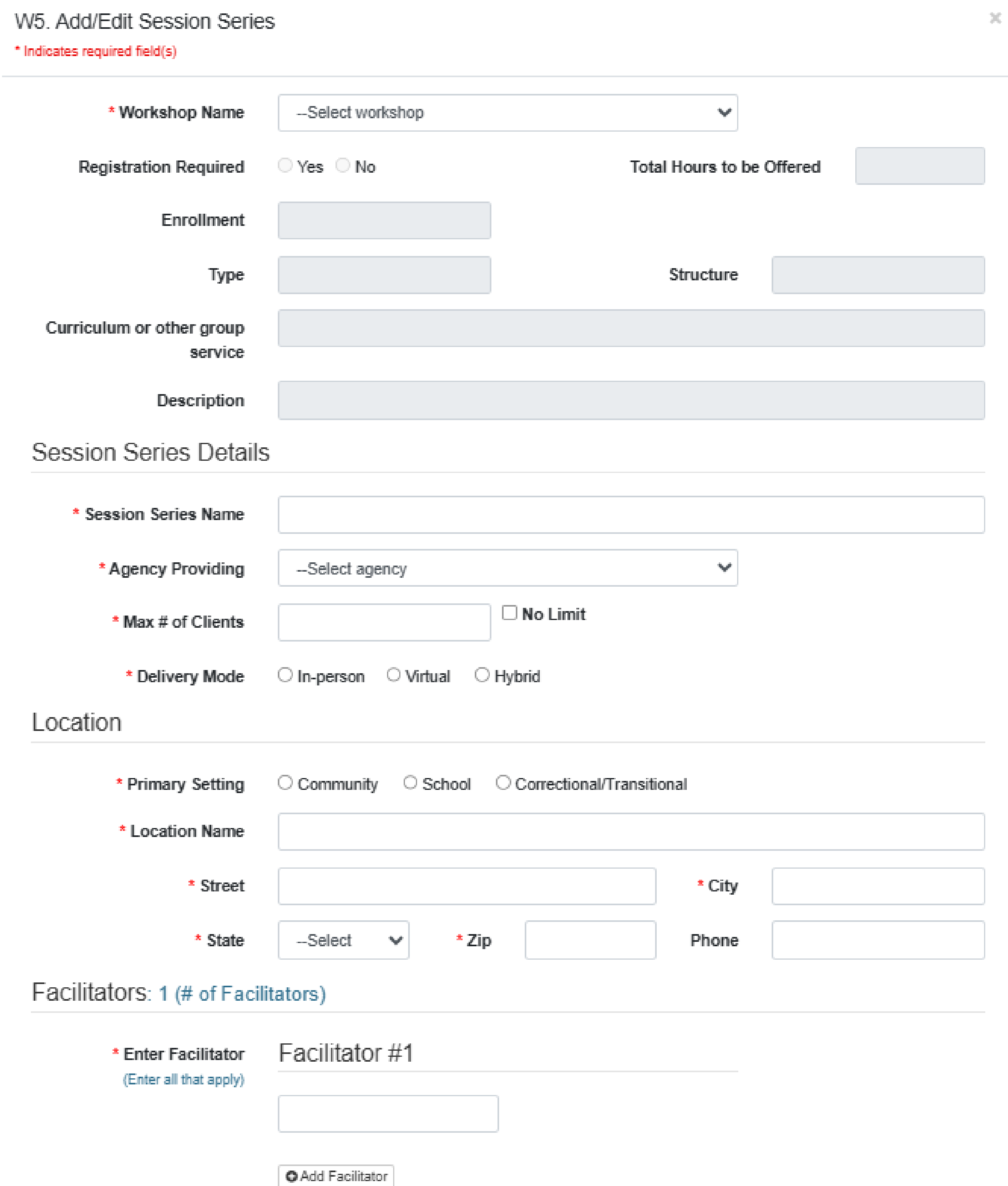
In the Facilitators section, grant recipient staff can enter the names of up to 15 facilitators of the session series. At least one facilitator name must be entered.

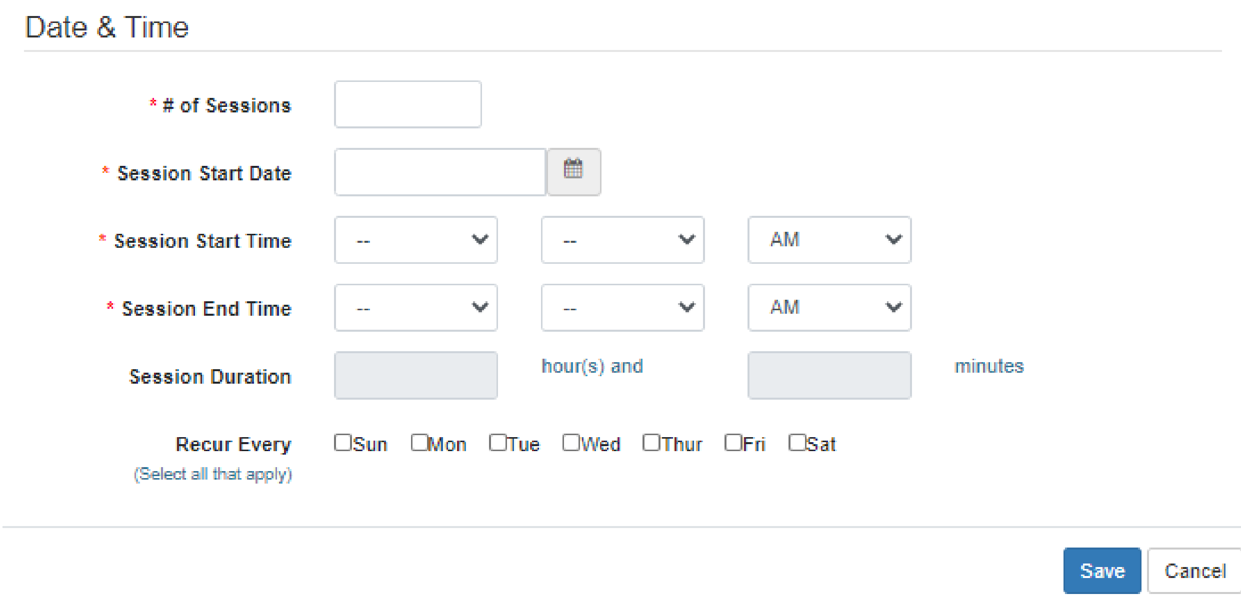
In the bottom portion of the screen add information about the date and time of the session occurrences in the series. First, enter the total number of session occurrences to be included in the series. If the number of session occurrences in the series is greater than one, the Recur Every field will appear at the bottom of the screen; select the day(s) of the week on which the session occurrences will be held.

Next, enter the date of the first session occurrence by using the calendar feature to select the date or by entering the date in MM/DD/YYYY format. Use the dropdown menus to select the start time of the session occurrences.

Enter one start and end time for all sessions in the series and double-check that the duration, auto-filled based on start and end time, is accurate based on the Total Hours to be Offered for the workshop as entered on screen W2 and the number of session occurrences in the series as entered on screen W5. A warning message will appear if the number of session occurrences multiplied by the duration of each session is 20% more than the Total Hours to be Offered, but the series can still be saved. If the number of session occurrences multiplied by the duration of each session is less than the Total Hours to be Offered, the series cannot be saved until this discrepancy is fixed.

Use the Edit Occurrence Details processes described below in Modules VI.D.1 and VI.D.4 to create session series with session occurrences that do not recur on the same days each week. First, create the desired number of session occurrences and have them recur on a weekly basis. Then follow the instructions in those sections to change the dates of individual session occurrences to the desired dates. Use the same Edit Occurrence Details processes to edit the start and end times of occurrences when times or durations differ across the sessions in a series.


W5. Add/Edit Session Series
* Indicates required field(s)
* Workshop Name
--Select workshop
Registration Required
Yes
No
Total Hours to be Offered
Enrollment
Type
Structure
Curriculum or other group service
Description
Session Series Details
* Session Series Name
* Agency Providing
--Select agency
* Max # of Clients
No Limit
* Delivery Mode
In-person
Virtual
Hybrid
Location
* Primary Setting
Community
School
Correctional/Transitional
* Location Name
* Street
* City
* State
--Select
* Zip
Phone
Facilitators: 1 (# of Facilitators)
* Enter Facilitator
(Enter all that apply)
Facilitator #1
Add Facilitator



Select the Save button to add the new session series to nFORM. You will automatically be taken back to the Session Series page (W4) and the newly created session series will appear in the Session Series table.

VI.C.2. Editing, canceling, and deleting session series (screens W4 and W5)

To edit information about session series, site administrators select the applicable Series Name button on the Session Series page (W4) under the Workshops tab. The Add/Edit Session Series screen (W5) for the selected session series will open in a view-only format. Select the Edit button at the bottom of the screen to enable editing of the session series details, location, facilitators, and date and time sections of the screen. Select the Save button to save any edits made for the session series. You will automatically be taken back to the Session Series page (W4) and the edited session series information will appear in the Session Series table.

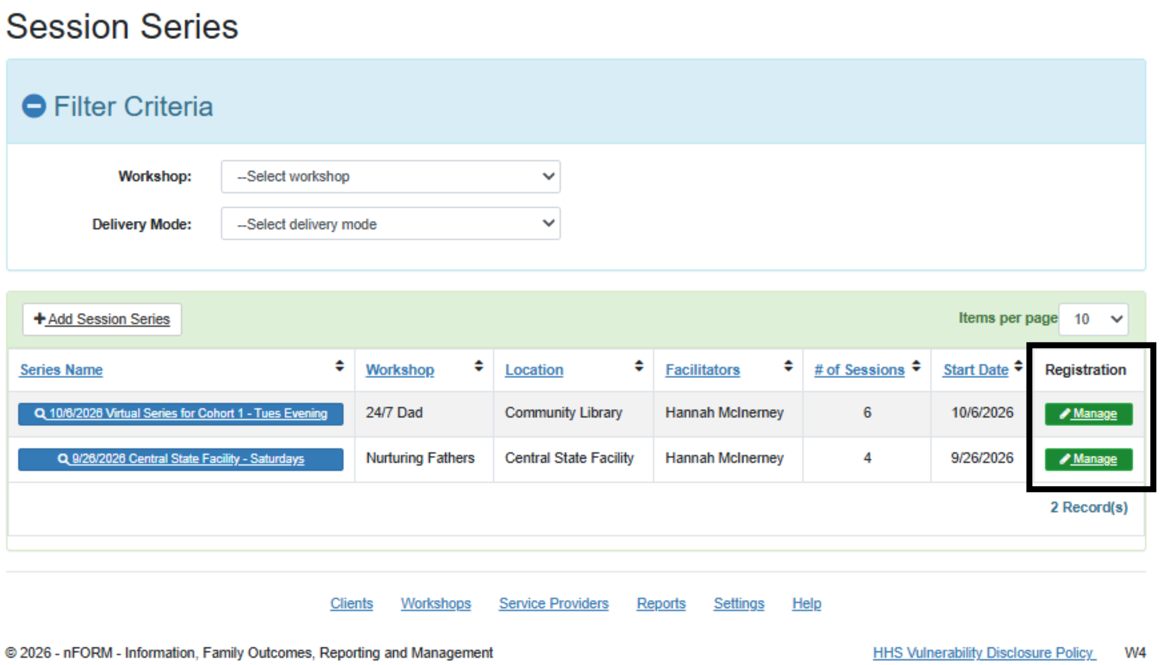
Select the Cancel Upcoming Session(s) button on the Add/Edit Session Series screen to cancel all future session occurrences for the series. You will be asked to confirm the cancellation; if you confirm the cancellation, you will automatically be taken back to the Session Series page (W4). The session series for which you cancelled the upcoming sessions will still appear on the Sessions Series table, but clients can no longer be registered for the session series and attendance cannot be recorded for the sessions that were canceled. The Registration/Manage button will change to a Registration/View button, which opens a view-only version of the Manage Client Registration screen (W8) for the session series. The Manage Client Registration screen (W8) is described in the following section of this manual.

To delete a session series, site administrators may select the Delete Session Series button after selecting the Edit button at the bottom of the Add/Edit Session Series screen (W5). After clicking the button, a warning message will appear asking the site administrator to confirm the session series deletion. After confirming the deletion, the site administrator will automatically be taken back to the Session Series page (W4); the deleted session series will no longer appear in the Session Series table. As noted above, **workshops should not be deleted unless they were added to nFORM in error because deleting a workshop will remove the workshop including all session series created for it and ALL**

recorded attendance. Similarly, session series should not be deleted unless they were created in error because deleting a session series will remove the sessions and ALL recorded attendance for that series.

VI.C.3. Registering clients for session series (screens W4 and W8)

All nFORM users can register clients to attend sessions of workshops that require registration. First, on the Session Series table on the Session Series page (W4), select the Manage button for the session series for which you want to register clients; this will open the Manage Client Registration screen (W8).



The top of the Manage Client Registration screen (W8) displays the name and details of the workshop, the session series name, and details about the series including date, time, location, delivery mode and primary setting.

The Filter Eligible Clients section displays drop-down menus that allow nFORM users to filter clients by grant location, client ID, first and last name, case manager, client status, population, service assignment (for local evaluations only), and enrollment date range. If entering multiple criteria and select Search, only those clients who match all criteria will appear. The Clear Criteria button clears all prior filter selections.

Below the Filter Eligible Clients section, the Eligible Clients box displays the names and client IDs of clients who can be registered for the workshop, filtered based on the criteria entered. If no criteria are entered, the Eligible Clients box will display the names and client IDs of all eligible clients.

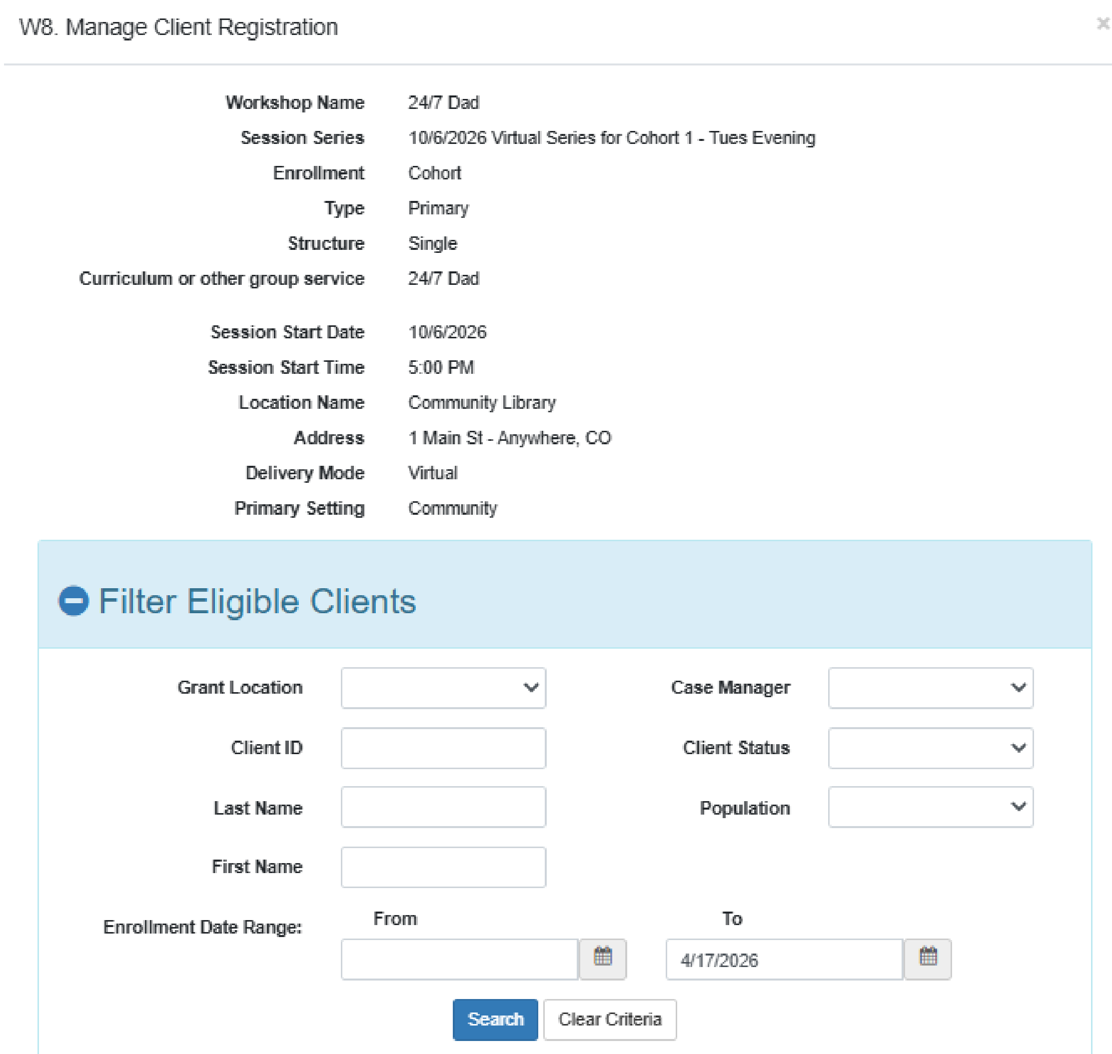
Clients who are eligible to be registered for a session series include clients who are participating in the program, that is, clients with any Client Status other than Outreach, Applicant Pending Enrollment, Will Not Enroll, Duplicate Pending, Duplicate Confirmed, or Consent Revoked. The client ID can be used to distinguish between different clients with the same or similar name. Clients with a status of Applicant

Pending Enrollment must complete the entrance survey and have their service assignment recorded (if applicable) to change to Active, before they can be registered for workshop series. Clients who become Active in nFORM after the start date of a workshop session series will appear in the Eligible Clients box for subsequent session occurrences in that session series.

There is no way to register clients or record their attendance in nFORM for session occurrences that precede their nFORM enrollment date (the date on which their status in nFORM changes to Active from Applicant Pending Enrollment). Clients who are registered for a session series on the same day of a session in that series will not appear on the series' registration list until the next session occurrence; these clients are not considered to be registered in advance of a session if the registration date and session date are the same. (This is further described in Module VI.D.4 below.) However, staff can record these clients as drop-ins, and they will appear as registered in advance for subsequent sessions.

Grant recipients must plan their enrollment and data collection procedures accordingly to ensure accurate recording of service and participation data.

In addition, clients participating in a local evaluation must have a treatment, control (with services), waitlist control (with services) assignment; clients with a control (no services provided) or waitlist control (no services provided) assignment will not be displayed in the list of clients who can be registered for a workshop session series.



W8. Manage Client Registration

Workshop Name	24/7 Dad
Session Series	10/6/2026 Virtual Series for Cohort 1 - Tues Evening
Enrollment	Cohort
Type	Primary
Structure	Single
Curriculum or other group service	24/7 Dad
Session Start Date	10/6/2026
Session Start Time	5:00 PM
Location Name	Community Library
Address	1 Main St - Anywhere, CO
Delivery Mode	Virtual
Primary Setting	Community

Filter Eligible Clients

Grant Location

Case Manager

Client ID

Client Status

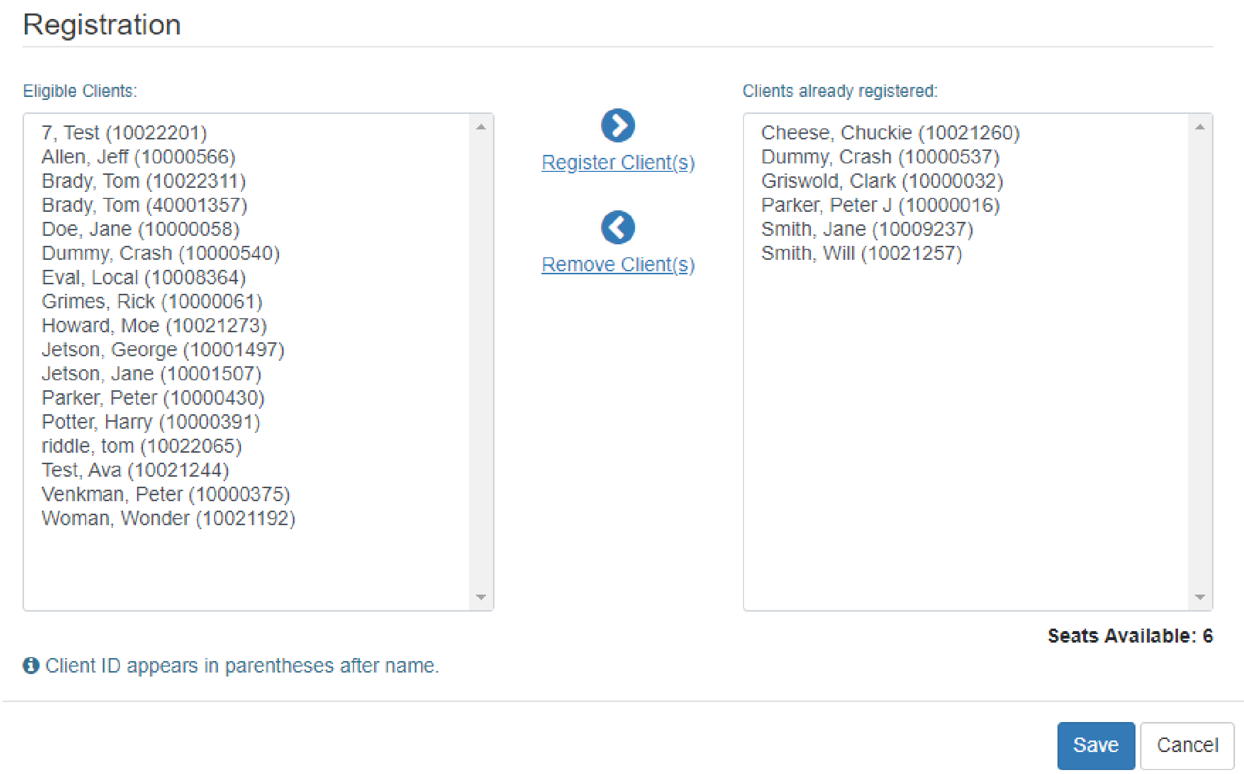
Last Name

Population

First Name

Enrollment Date Range: From To 4/17/2026

Search Clear Criteria

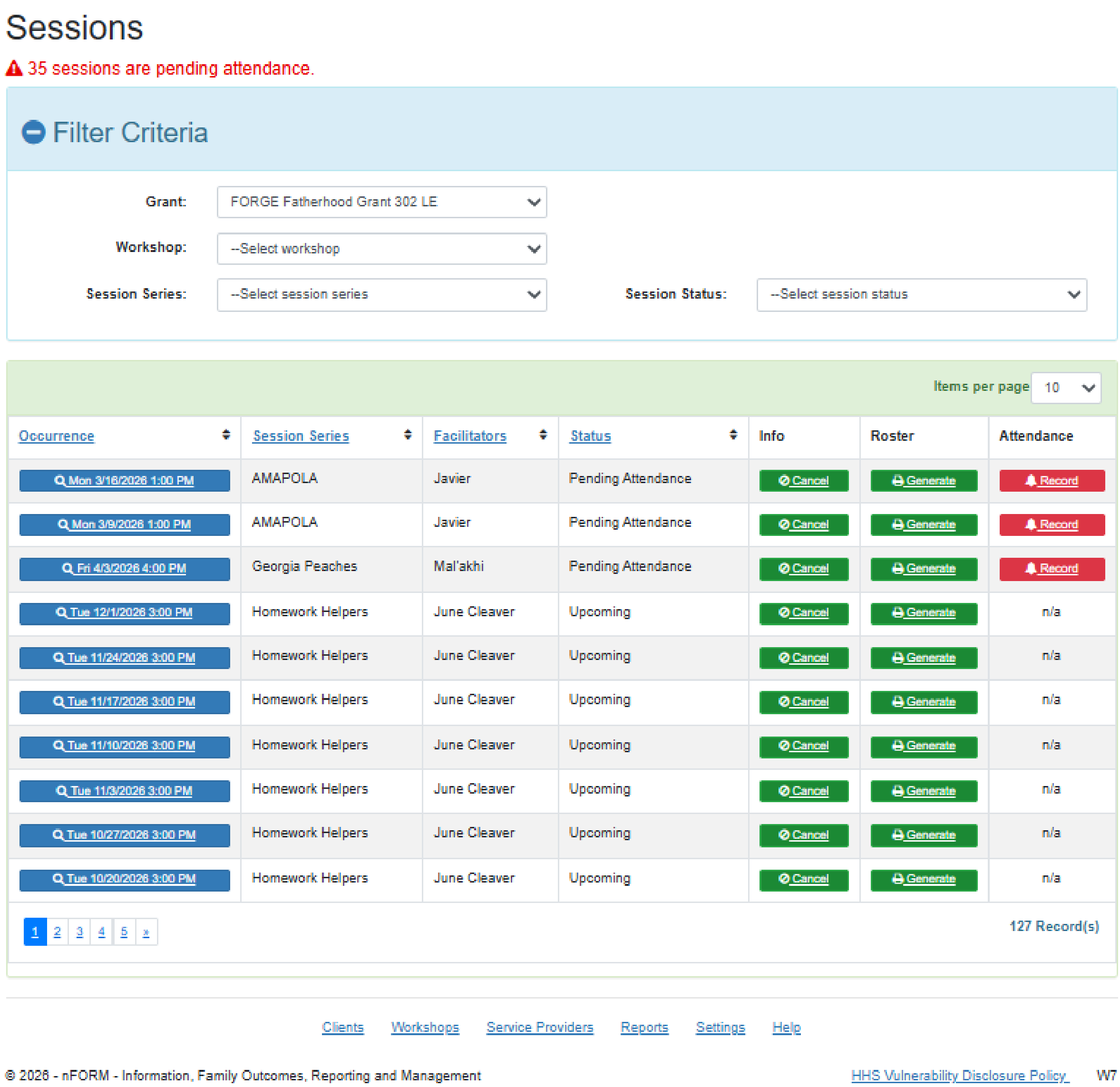


Use your cursor to select the names of the clients who you want to register for the session series, then hit the Register Clients button. This will transfer the client names to the right-hand box to show that they are registered for the session series. The Seats Available indicator in the lower right corner of the screen displays the number of clients who can still be registered for the session series. Select Save when you have finished registering clients for the session series; you will automatically be taken back to the Session Series page (W4).

You can remove clients from the list of registered clients by selecting their name(s) in the right-hand box on the Manage Client Registration screen (W8) and selecting the Remove Client(s) button to move them back to the list of unregistered clients in the left-hand box. Changes to the list of registered clients must be made before the session series has ended. Clients who are removed from the advance registration list will no longer appear on the client roster or appear on screen W9 as advanced registered. In addition, clients who are registered, deregistered, and then reregistered will only appear as registered for a series for the session following the most recent date they were registered for a series.

D. Sessions (screens W7, W9, and W10)

Under the Workshops tab, select the Sessions screen (W7) to view all of the sessions for your grant recipient. The top of the screen will display red text showing the number of sessions that are pending attendance. Below that, the screen has filters that allow you to narrow the list of sessions to specific workshops or session series. The Sessions table displays the session occurrence date, session series name, facilitators, and status of the session. You can sort the sessions in ascending or descending order by any of these fields using the arrow button in the column header.

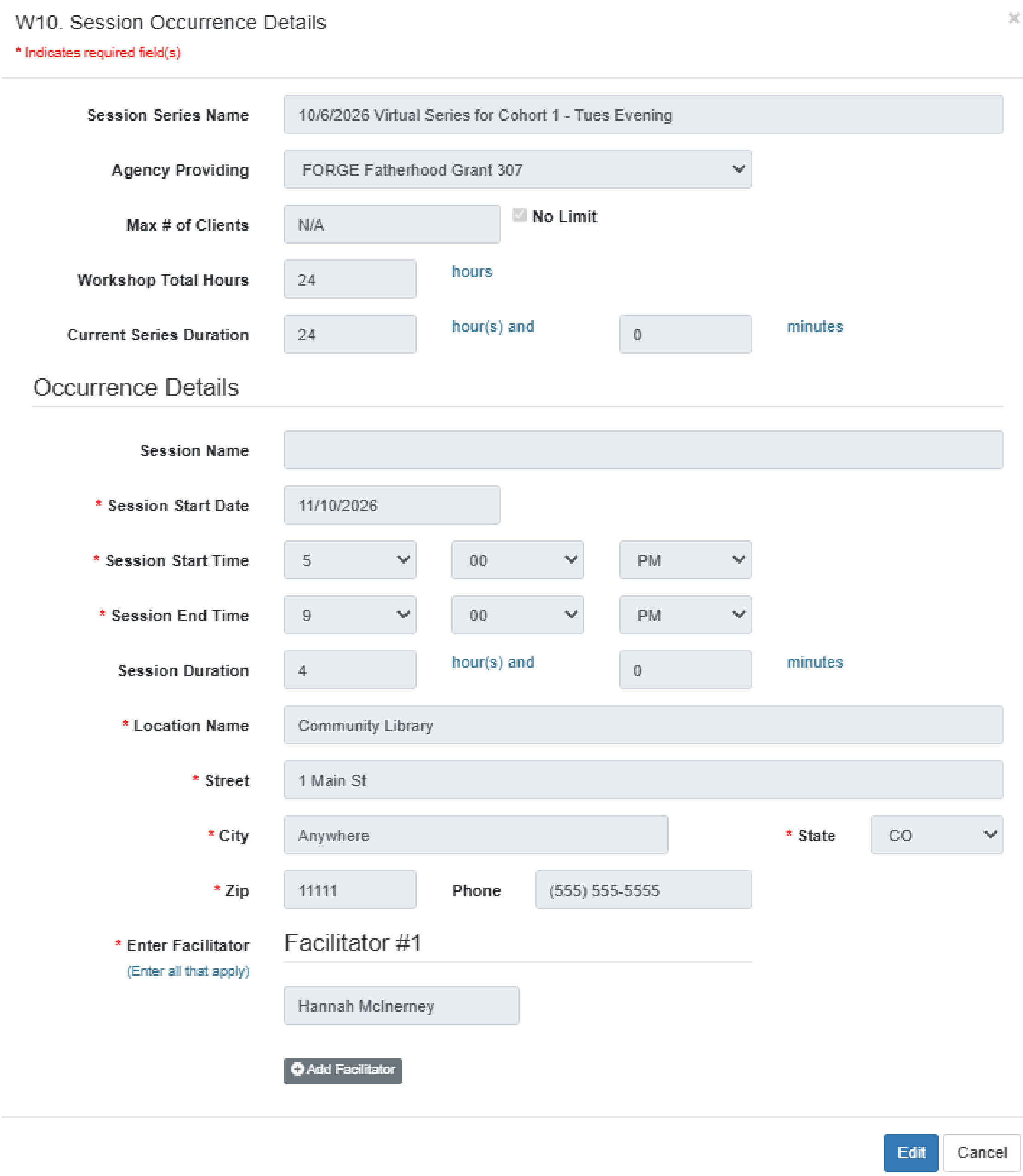


VI.D.1. Editing session occurrence details before or on the session date (W10)

Select the applicable Session Occurrence button on the Sessions table to view the Session Occurrence Details screen (W10). This screen has detailed information about the session occurrence. If the current date is before or on the session date, grant recipient staff can edit details of the session, like its location or facilitators. Grant recipients can also add names to individual sessions, although this detail is optional. Grant recipient staff can also reflect rescheduled sessions on this screen by entering the new date and time for the rescheduled session occurrence; select Save and the session occurrence will display in the Sessions table with the new session date and time. This feature is useful if, for example, the scheduled session falls on a holiday and must be rescheduled.

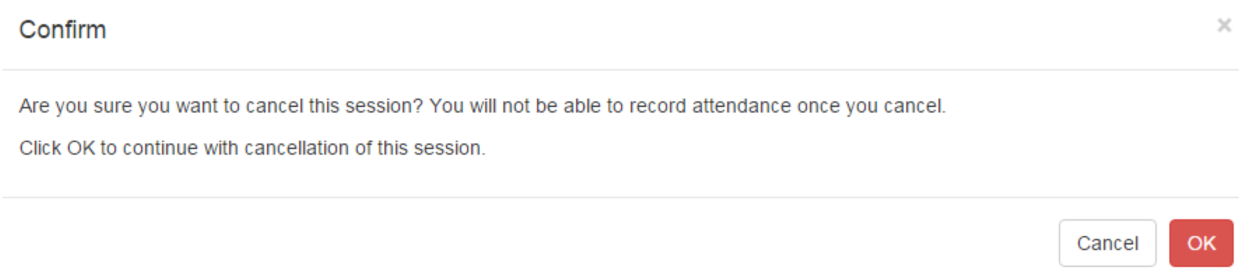
Grant recipients may also use this Edit feature to change session start or end times if their intent is to hold workshop session occurrences of varied lengths. nFORM automatically generates workshop sessions of equal durations. However, users can adjust the duration of each session by adjusting its start and end time. A warning message will pop up that indicates the combined hours across the sessions in the series do not match the total hours specified for the workshop. This will occur if a change to the session duration results in the series duration being either less than the Total Workshop Hours to be offered or exceeds the Total Workshop Hours to be offered by more than 20%. The changes can still be saved.

Session occurrence details can only be edited on this screen before or on the scheduled date of the session occurrence. If the original date of the session occurrence has passed, but the session was held on a different date and/or time, then the actual details of when the session was held should be recorded as described below in Module VI.D.4 when recording attendance for the session occurrence.

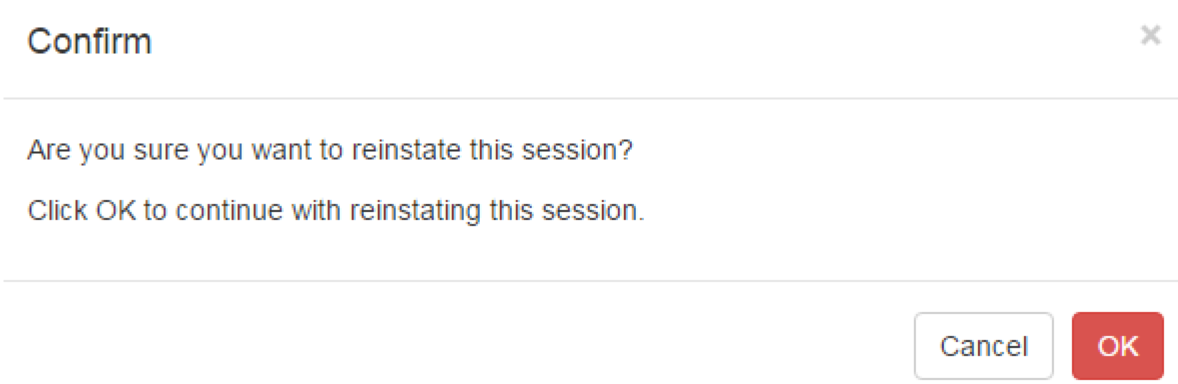


VI.D.2. Canceling and reinstating session occurrences (screen W7)

nFORM users may cancel individual sessions in the Sessions table on the Sessions screen (W7). To cancel an individual session, click the Cancel button under the Info column in the row of the session you want to cancel. You will be asked to confirm the cancellation of the session.



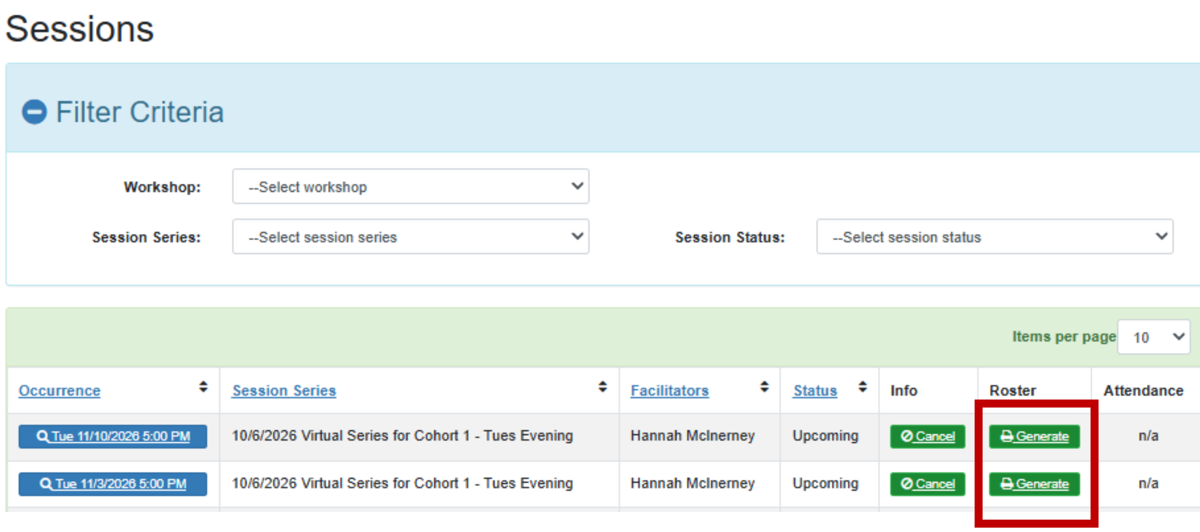
The Info column will now show a Reinstate button in the row of the session occurrence that was cancelled. Clicking the Reinstate button allows you to reverse the cancellation of a session occurrence. You will be asked to confirm the reinstatement of a cancelled session occurrence. The Cancel button will reappear for a reinstated session occurrence.



Note: Session duration associated with Cancelled sessions is not counted (included) when calculating series duration.

VI.D.3. Generating a roster of registered clients (screen W7)

All nFORM users may select the Generate button under the Roster column on the Sessions screen (W7) to generate a PDF list of the registered clients for a specific session occurrence. For sessions where registration is not required, the roster will include blank lines for recording attendance at the session, rather than any pre-printed names. Open the PDF file to view your generated client roster. You also have the option to save the roster to your computer or print it to record attendance. A roster can be generated for any session occurrence.



Example of PDF roster file

nFORM
Information, Family Outcomes, Reporting, and Management

24/7 Dad
Session Series: 10/6/2026 Virtual Series for Cohort 1 - Tues Evening
Session Name:
Session Date: 10/6/2026 Session Start Time: 5:00 PM
Delivery Mode: Virtual Primary Setting: Community

Please complete the following session information:

Location Name: ______________________

Session Start Time: ______________________

Session End Time: ______________________

Facilitator(s) for this session

Attendance Roster

Registered Attendee(s): ***SIGN NAME***

LN1, TP1 ______________________

LN2, TP2 ______________________

Additional Attendee(s):

PRINT NAME ***SIGN NAME***

VI.D.4. Tracking session attendance (screens W7 and W9)

On the day a session takes place, the Status column on the Sessions screen (W7) will begin to display Pending Attendance. In order to remind grant recipient staff to record attendance as soon as possible, a message will appear at the top of the screen in red if one or more sessions are Pending Attendance. This count aggregates across all workshops and will decrease once attendance is recorded. Use this message as a check to make sure that attendance information is entered in a timely manner.

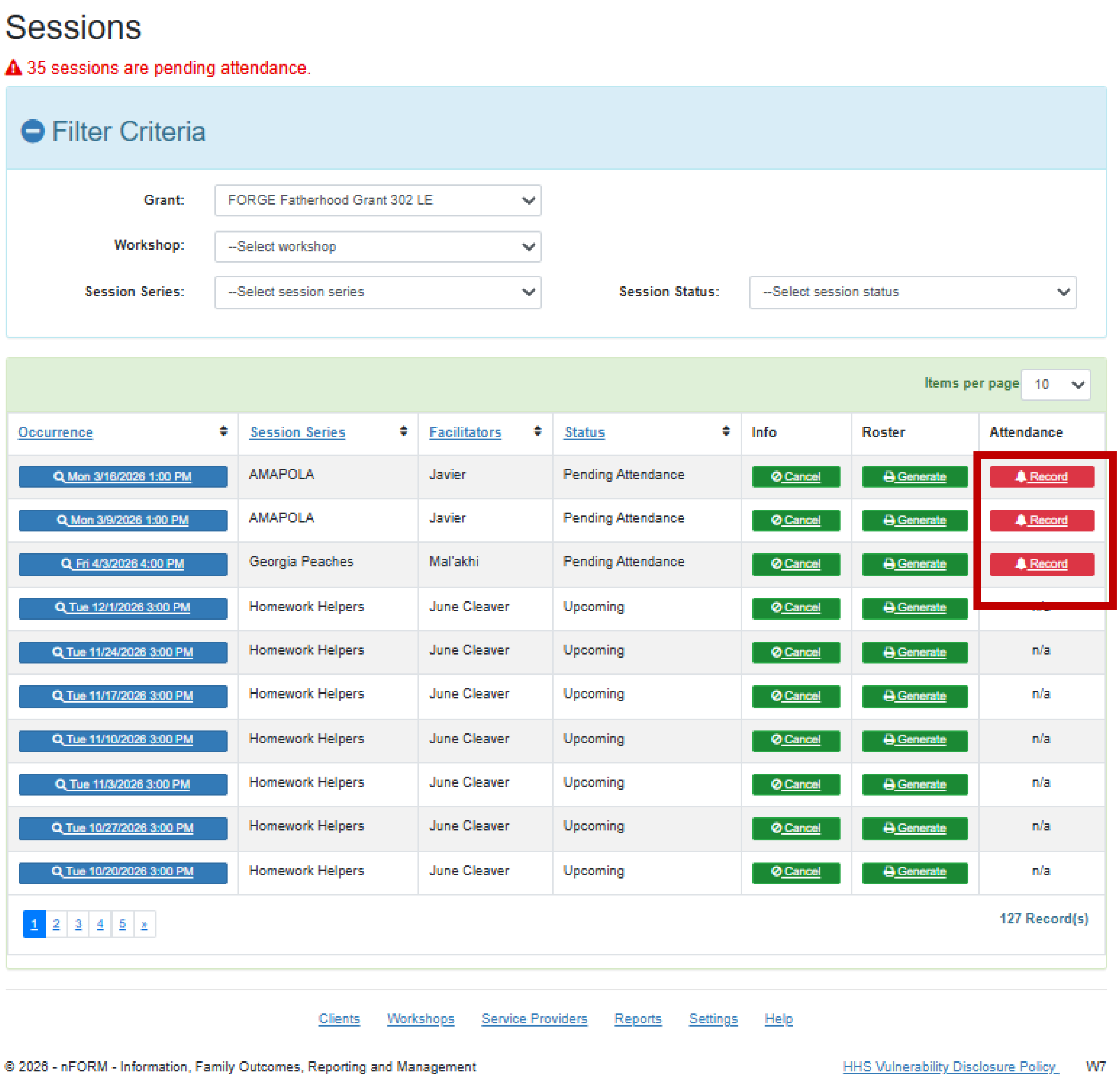
nFORM users may record attendance for a session occurrence by selecting the Record button that appears in red under the Attendance column for the applicable session occurrence on the Sessions screen (W7).

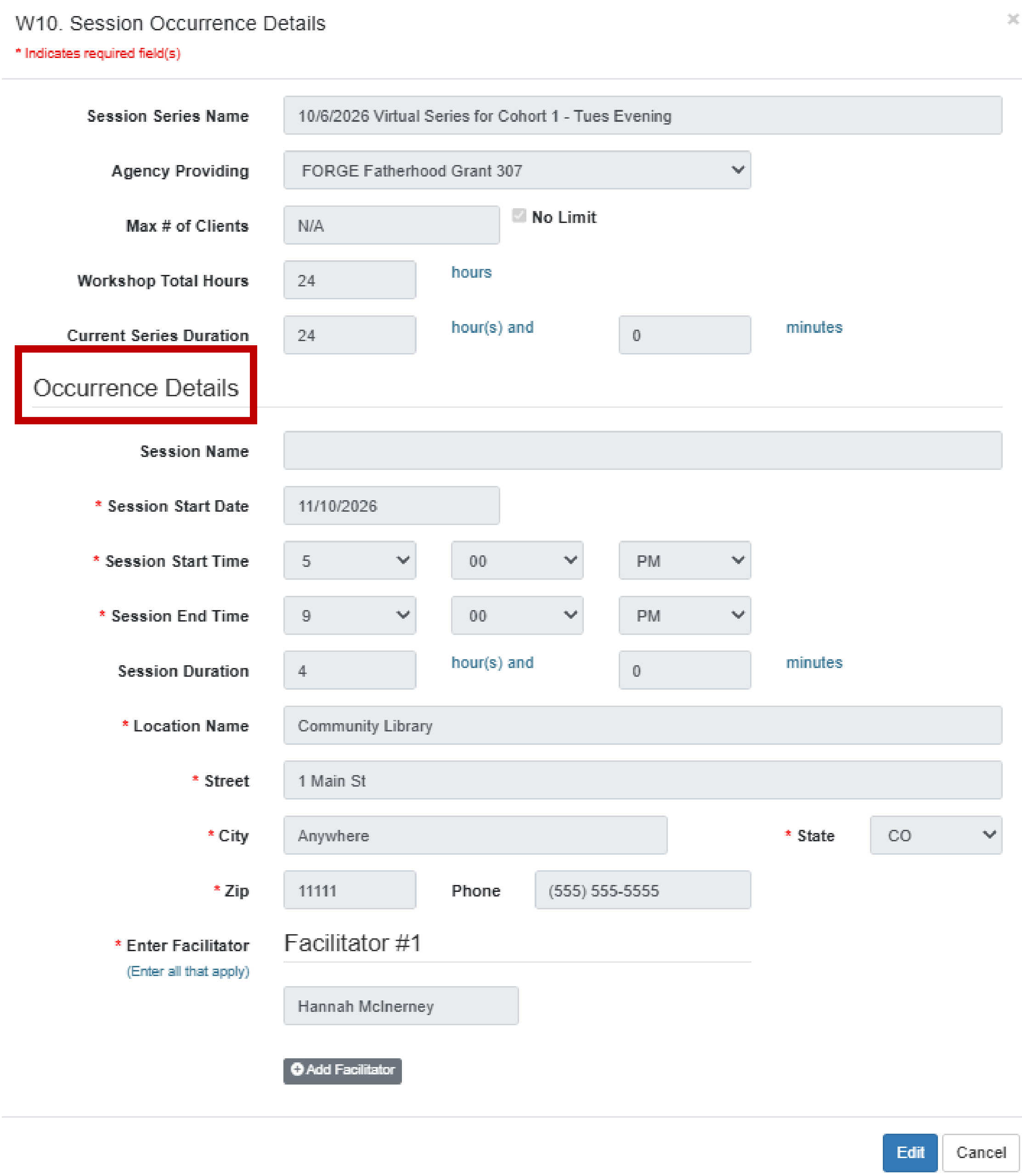
This opens the Track Session Attendance screen (W9). The top portion of this screen displays the workshop and session series names. The Occurrence Details section of the screen displays the date, time, duration, location, and facilitators of the session occurrence.

Occurrence details can be edited if the current date is after the session date by selecting the Edit button in this section of the screen. Click the Edit button to record a new session date, session start time, session end time, location, or facilitators if those differ from what was originally scheduled when creating the session series. This feature is useful if, for example, there were substitute facilitators for a scheduled session, or a session had to be rescheduled at the last minute due to weather conditions or facilitator illness.

Grant recipients may also use this Edit feature if their intent is to hold workshop session occurrences of varied lengths, since nFORM automatically generates workshop sessions of equal durations. Grant recipient staff can edit session durations in advance by adjusting the session start and end time on screen W10 before or on the date of the session, as described at the beginning of this section. If the session date has passed, these details can be edited on screen W9. As on screen W10, a warning message indicating the combined hours across the sessions in the series do not match the total hours specified for the workshop will pop up, if edits to a session's start and end time results in the series duration being either less than the Total Workshop Hours to be offered or exceeds the Total Workshop Hours to be offered by more than 20%. In this instance, the changes can still be saved.

Grant recipient staff can also edit occurrence details to name individual sessions, although this detail is optional. Finally, grant recipients can add notes about each session on this page.


Sessions
35 sessions are pending attendance.
Filter Criteria
Grant: FORGE Fatherhood Grant 302 LE
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
Mon 3/16/2026 1:00 PM | AMAPOLA | Javier | Pending Attendance | Cancel | Generate | Record
Mon 3/9/2026 1:00 PM | AMAPOLA | Javier | Pending Attendance | Cancel | Generate | Record
Fri 4/3/2026 4:00 PM | Georgia Peaches | Mal'akhi | Pending Attendance | Cancel | Generate | Record
Tue 12/1/2026 3:00 PM | Homework Helpers | June Cleaver | Upcoming | Cancel | Generate
Tue 11/24/2026 3:00 PM | Homework Helpers | June Cleaver | Upcoming | Cancel | Generate | n/a
Tue 11/17/2026 3:00 PM | Homework Helpers | June Cleaver | Upcoming | Cancel | Generate | n/a
Tue 11/10/2026 3:00 PM | Homework Helpers | June Cleaver | Upcoming | Cancel | Generate | n/a
Tue 11/3/2026 3:00 PM | Homework Helpers | June Cleaver | Upcoming | Cancel | Generate | n/a
Tue 10/27/2026 3:00 PM | Homework Helpers | June Cleaver | Upcoming | Cancel | Generate | n/a
Tue 10/20/2026 3:00 PM | Homework Helpers | June Cleaver | Upcoming | Cancel | Generate | n/a
1 2 3 4 5 »
127 Record(s)
Clients Workshops Service Providers Reports Settings Help
© 2026 - nFORM - Information, Family Outcomes, Reporting and Management
HHS Vulnerability Disclosure Policy
W7



If no clients attended the session occurrence, select the applicable checkbox at the top of the Attendance section of the Track Session Attendance screen (W9). This will complete the process of recording attendance for these situations.

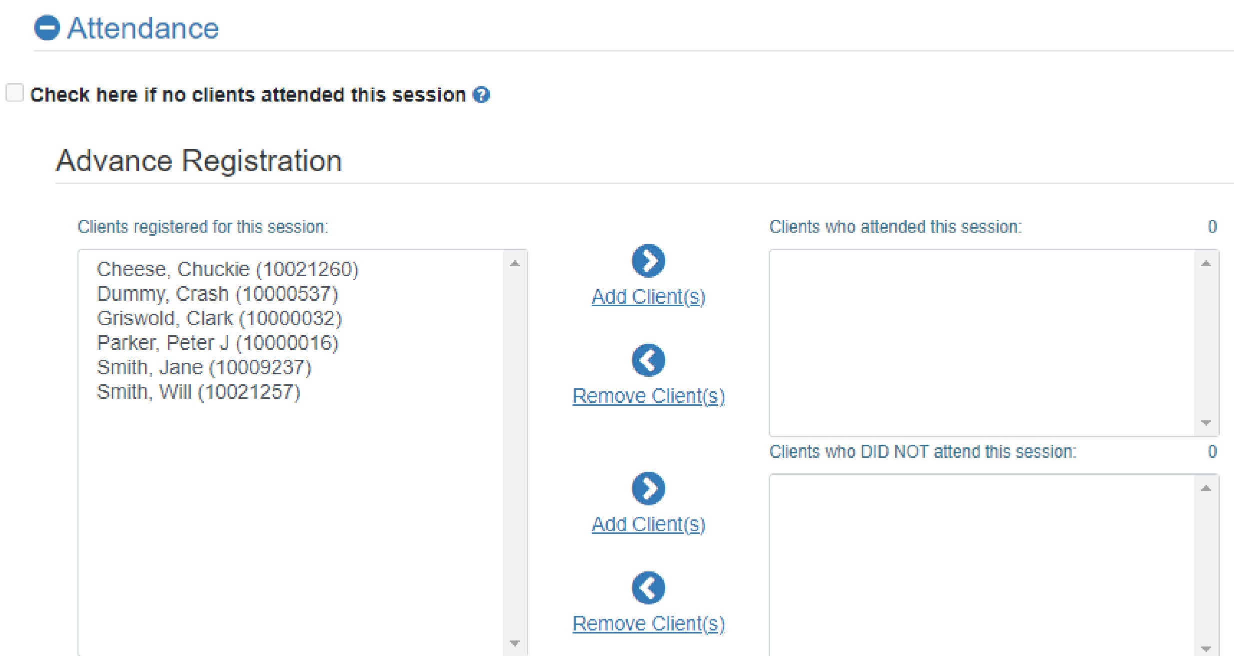
If one or more clients attended a session occurrence, grant recipient staff should record attendance for registered clients under the Advance Registration subsection of the Attendance section of the screen. Select the names of the registered clients who attended in the left box and use the top Add Clients button to move these clients to the box on the right-hand side for clients who attended the session. As you move clients to this box, the attendance counter above will increase to reflect the number of clients in the box.

Use this as a data quality check to make sure the number recorded as attending matches the number from the sign in sheet.

The registered clients who attended the session will now appear in the top box on the right. Similarly, select the names of the registered clients in the left-hand box who did not attend the session and use the lower Add Clients button to move their names to the box of clients who DID NOT attend the session. The registered clients who did not attend the session will then appear in the appropriate box on the right to record their absence, and the number of clients in the attendance counter above the appropriate box will increase accordingly.

Grant recipient staff can reverse the process by using the Remove Client(s) buttons, which will also decrease the attendance counter.

Note: Clients who were registered on the same day as the session will not appear in the Advance Registration box for that session, as this is not considered Advance Registration. However, these clients *will* appear under the Drop-Ins section – described below – for that session, and they will appear in the Advance Registration box for subsequent sessions.

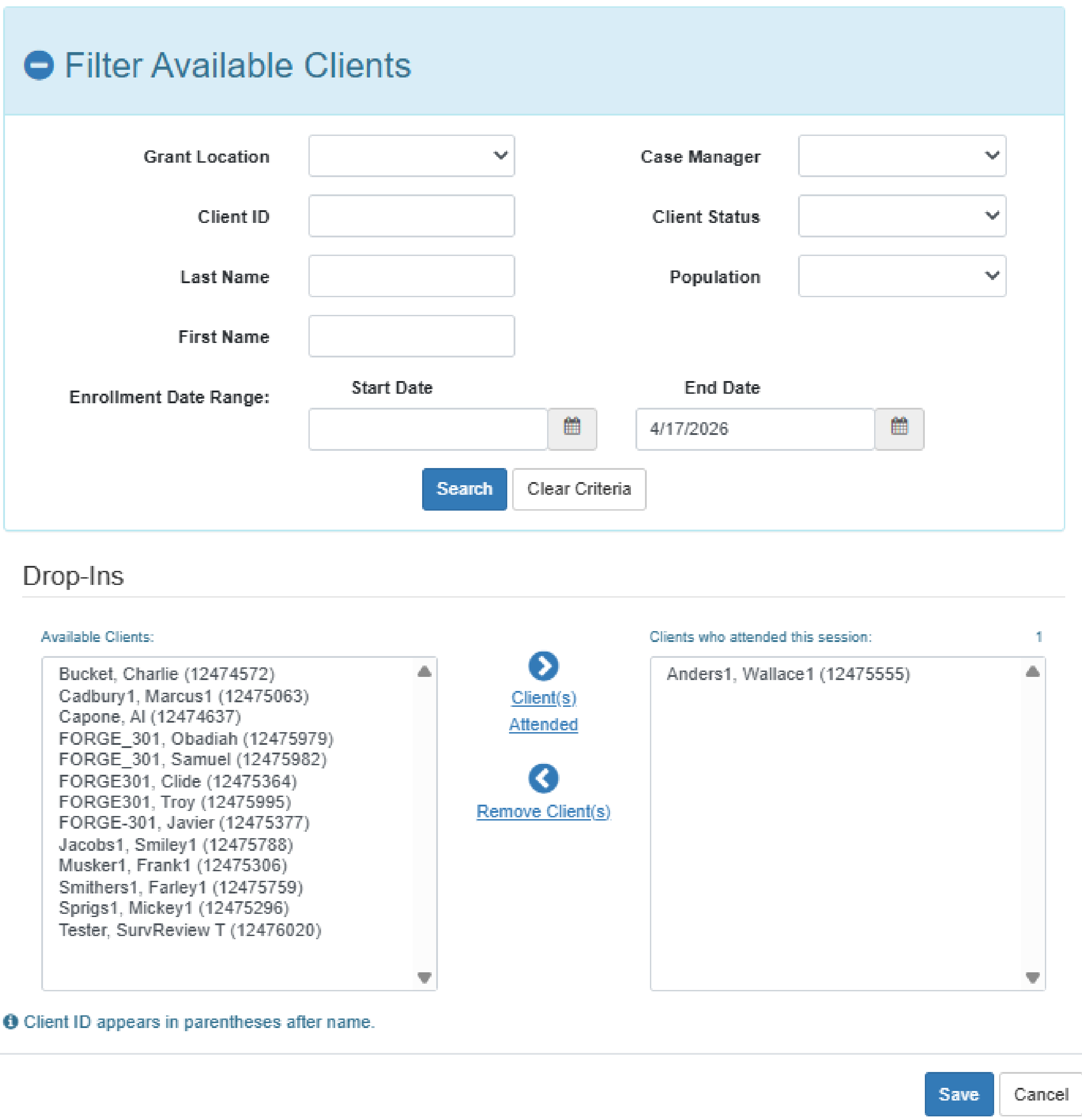


The attendance screen is not considered complete until all registered clients are moved into either the attended or did not attend boxes. The red Record button on the session occurrence screen will not change to View/Edit until all registered clients have been moved from the left-hand box into one of the right-hand boxes.

Clients who were not registered for a session but who were eligible to be registered for a session will appear in the Available Clients box on the left side of the Drop-Ins subsection of the Track Session Attendance screen (W9). Clients are considered eligible for a session if their enrollment date is the same date as a session occurrence or prior and do not have a client status of Outreach, Applicant Pending Enrollment, Will Not Enroll, Duplicate Pending, Duplicate Confirmed, or Consent Revoked.

While all eligible clients will initially appear in the Available Clients box, grant recipient staff have the ability to filter this list by grant location, client ID, client name, assigned case manager, client status, population, service assignment (for local evaluations only), and enrollment date range.

Recording attendance for drop-ins is similar to the process for registered clients. Select the names of the clients who dropped-in to the session in the box on the left and use the Add Client(s) button to move the clients to the box on the right-hand side to indicate clients who attended this session. These clients will be recorded as attending as drop-ins for the session.



Please ensure attendance has been recorded for all session occurrences as quickly as possible after each session occurs.

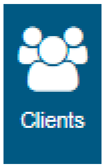
As noted in Module V, nFORM includes an important date check so that clients cannot be marked as attending a workshop session occurrence that precedes their enrollment date. If a client's nFORM enrollment date is after the initial session occurrence(s) of a workshop series, they can still be registered for that workshop series but they cannot be marked as preregistered/attending, dropping in to, or making up the session occurrences that precede their enrollment date.

Grant recipients with rolling session series, where clients can attend any session occurrences across series within the same workshop curriculum, can be marked as drop-ins to these session occurrences. As long as the session series are created within the same workshop in nFORM, their attendance will be counted on the quarterly reports as if they attended sessions within the same series.

Select Save when you finish recording attendance for the session occurrence. You will then be taken back to the Sessions screen (W7).

Grant recipients can use nFORM's reporting features—the query tool, operational reports, and data export—to analyze workshop attendance. For example, the Series Session Attendance operational report shows the attendance for individual clients by selected workshop and series, and the data export allows for analyzing session attendance by individual clients. See Module VIII for more details.

VII. Managing Enrolled Clients



nFORM case management functions are found under the Clients tab.

Case management functionality is available to all site administrators and all case managers. Limited functionality is available to general users with enrollment permissions.

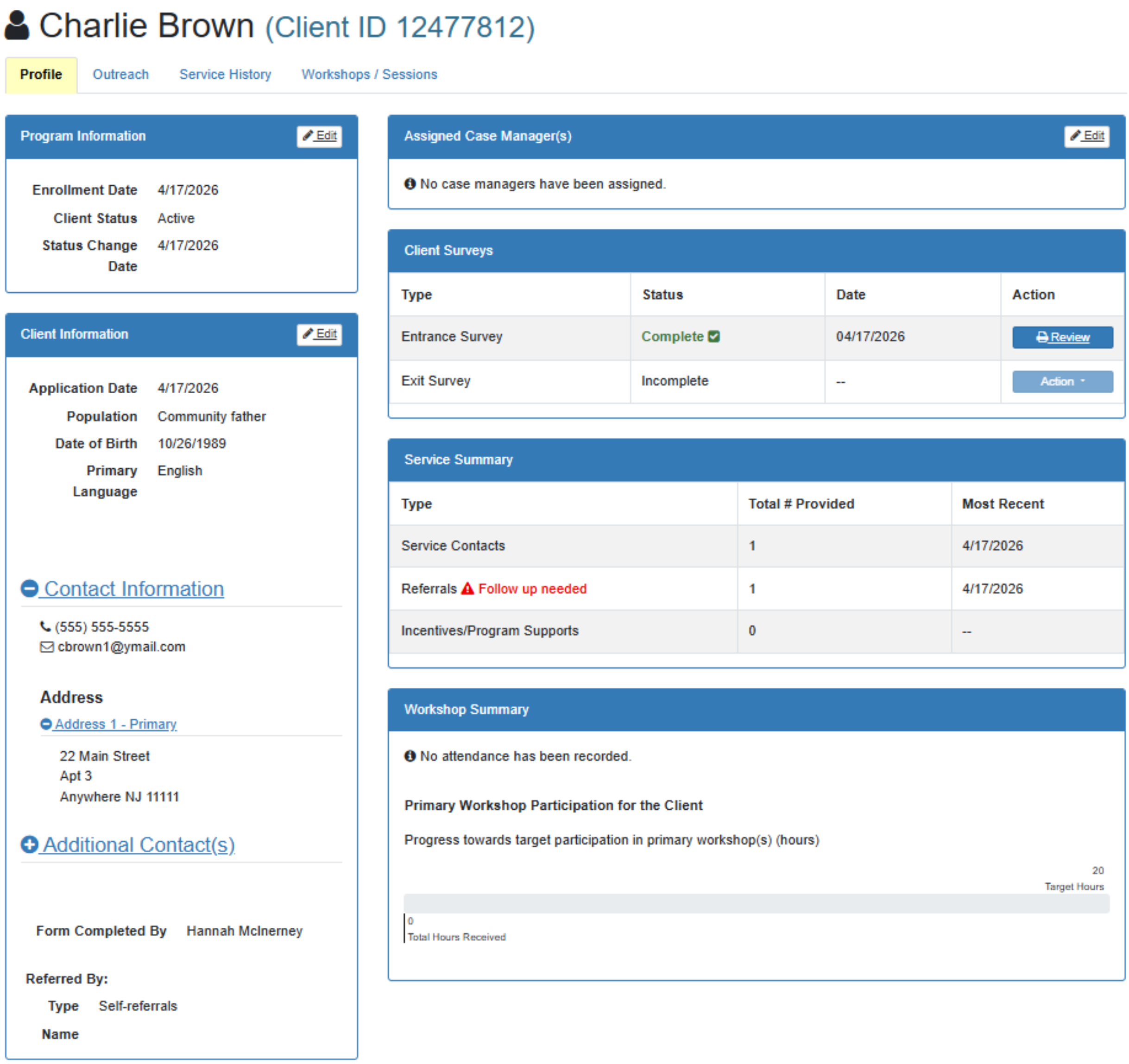
In addition to the client enrollment functions described in Module V, nFORM users complete the following functions through the Clients tab:

- Edit client information including client status
- Assign case managers
- Administer client surveys
- Record and view service contacts with clients
- Record and view referrals made to clients
- Record and view incentives provided to clients
- Remove client's registration from current and upcoming workshops
- Review client's session attendance
- Record individual make-up sessions for missed workshops

All of these functions are performed by opening a client's record through the All Clients screen (C1) or My Clients screen (C9) and navigating to the client's Profile, Service History, or Workshops/Sessions screens (C3, C4, and C5). The Bulk Update screen (C14) allows for editing multiple clients' statuses and case manager assignments at one time. The following sections describe how to complete case management functions for individual clients and in bulk (if applicable); the last section of this module describes how these functions differ for clients enrolled as couples.

A. Client profile (screen C3)

Click on the applicable Client ID number on the All Clients (C1) or My Clients (C9) client listings to open the client's Profile page. The Profile page summarizes the client's outreach and enrollment in the program, contact information, assigned caseworkers, client survey status, service contacts, referrals, incentives, and workshop attendance.



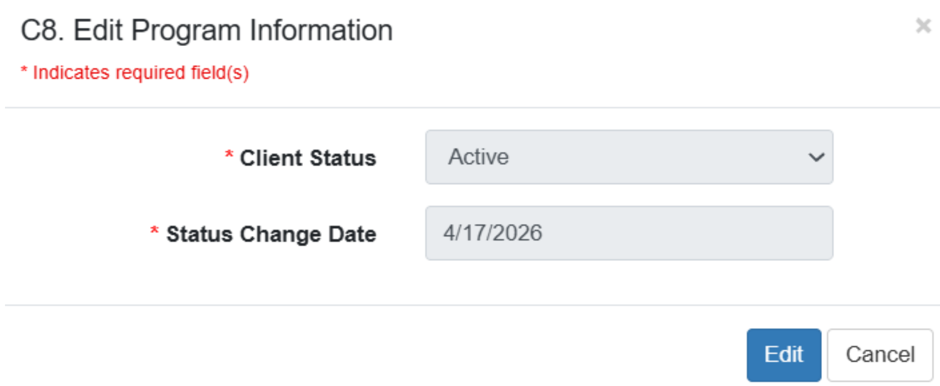
VII.A.1. Editing client information (screens C2 and C3)

The Client Information box on the Profile screen (C3) shows the information that was recorded on the client's Application Form (C2) during outreach and enrollment. Grant recipient staff with enrollment permissions can edit the client's information by selecting the Edit button on the Program Information box to open the Application Form (C2). Clicking Edit at the bottom of the Application Form enables most of the information on the form to be edited. For example, if the grant recipient is conducting a local evaluation and a mistake is made in designating whether a client is participating in the evaluation, site administrators will correct the local evaluation checkbox by editing the Application Form. **However, the Application Date cannot be changed after saving the Application Form. A client's Population may be changed until the client completes their entrance survey.** Click Save after editing the client's information; another duplicate detection process will automatically begin after edits to the Application Form are saved.

VII.A.2. Editing client status individually (screens C3 and C8)

The Program Information box on the client's Profile page shows the client's status and the effective date of the current status. If the client has completed the enrollment process by completing the Application Form and the entrance survey (and a Service Assignment has been made if the client is participating in a local evaluation), then the client's enrollment date will also display in this box. The enrollment date is the date on which the client completes the entrance survey.

Grant recipient staff with enrollment permissions can edit the client's status by selecting the Edit button on the Program Information box to open the Edit Program Information page (C8).



If the client is participating in a local evaluation, their Service Assignment is selected after they complete the entrance survey. This process is described in Module V.D.2. If the client is initially assigned to a control waitlist group (with either partial services or no services), but is later selected to receive treatment services, the site administrator can reassign the client by editing the Service Assignment on the Edit Program Information page (C8).

To change the Client Status, select the Edit button and then the applicable client status option from the Client Status dropdown menu. Options on this drop-down menu include: Active, Completed/graduated, Consent revoked, Deceased, Drop out, Duplicate confirmed, Incarcerated, Moved out of area, Non-responsive, Primary complete/Optional active, Removed from program, and Temporary hold. Table VII.1 provides brief descriptions of each status code. Additionally, grant recipients should review ACF's guidance on end-of-program client status and implications for program completion, exit surveys, and PPR reporting.

After selecting the appropriate Status Code for the client, choose the associated Status Change Date. The Status Change Date is automatically set to show the current date. Grant recipient staff can use the calendar feature or enter a different date in the MM/DD/YYYY format. Status change dates must be between the Application Date and current date. Click the Save button to save the new client status. Use the Client Status operational report described in Module VIII.B to monitor client status across all of the grant recipient's clients.

Table VII.1. nFORM client status codes

Status code	Definition
Outreach	nFORM automatically sets this status after the grant recipient staff saves the Application Form with an Application Status of "Outreach".
Will Not Enroll	Client has decided to not enroll or grant staff have determined that the client is not eligible to enroll. Grant recipients can update a client's status to "Will Not Enroll" when they have a current status of either "Outreach" or "Applicant pending enrollment".
Applicant pending enrollment	nFORM automatically sets this status after the grant recipient staff completes the Application Form with an Application Status of "Ready to Enroll".
Active	nFORM automatically sets this status after the client completes the entrance survey, and, if the client is in a local evaluation, after a service assignment is selected. At this point the client has completed enrollment in the grant recipient's program.
Duplicate pending	nFORM automatically sets this status; it cannot be selected by grant recipient staff. When the Application Form is saved, nFORM automatically runs a duplicate check against existing client records (as described in Module V). If a match is found, the client status is set to Duplicate pending. The client status will automatically change to Applicant pending enrollment if the duplicate is overridden by the grant recipient site administrator.
Duplicate confirmed	Site administrators and case managers can confirm a record as a duplicate on the Possible Duplicate(s) Found screen. Only site administrators can edit the status of clients with a status of Duplicate confirmed. Individual services, referrals, and incentives, and participation in workshops cannot be recorded in nFORM for records with this status.
Completed/graduated	Client has completed all required or recommended services. Program completion—which services are recommended/required and the level of participation that is expected before a client is considered to have completed or graduated—is defined per a grant recipient's approved grant application and any modifications approved by OFA through non-competing continuations. For example, a program may define completion as when a client has attended 100 percent of the workshop sessions and participated in 2 meetings with a case manager. Clients who have completed/graduated may still be eligible for other services in a program.
Consent revoked	Grant recipients may be required to obtain informed consent from enrollees either as part of or outside of a local evaluation. These grant recipients should use the "Consent revoked" status code when: **1.** A client revokes their consent to participate in the grant recipient's local evaluation and the client will not continue participating in the program. **2.** A client is not participating in a local evaluation but revokes their consent to have their data collected and used by the grant recipient. If a client revokes consent to participate in a grant recipient's local evaluation but will continue participating in programming, uncheck the local evaluation checkbox in the client's profile (screen C2). This removes the client from the local evaluation and allows additional service and survey data to be collected. Grant recipients that do not request informed consent from clients should not use this code. If a client stops participating and is unresponsive to outreach, use the "Non-responsive" status code. If a client communicates to grant recipient staff that they no longer want to participate in programming, use "Drop out".
Deceased	Client passed away.

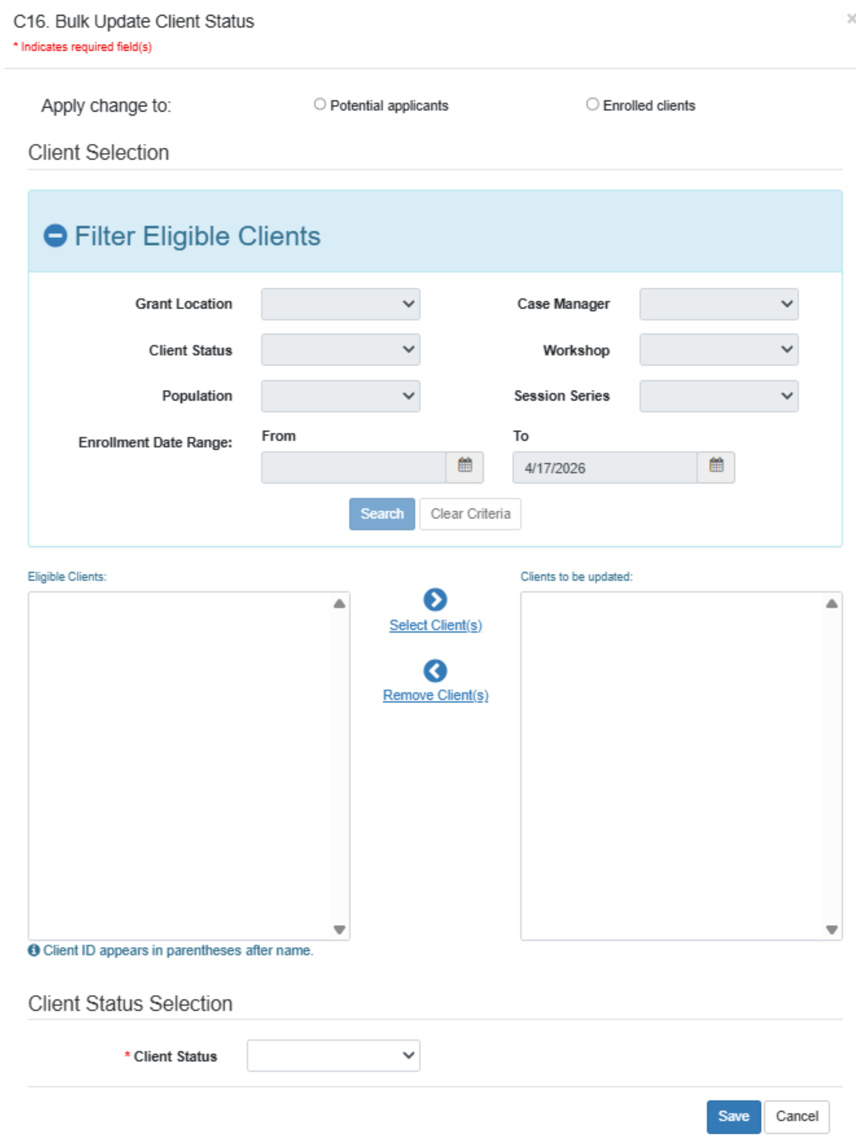
Status code	Definition
Drop out	Client has indicated that they are no longer interested in services or will not/cannot attend. At the program's discretion, staff may also classify a client as a drop out if s/he has not attended services for a certain amount of time as designated by the program (such as six months). This status could be used for clients who attended and then stopped as well as those who never attended services.
Incarcerated	Client is unable to participate in programming because they are in prison or jail.
Moved out of area	Client has moved out of service area or the grant recipient’s service area has changed.
Non-responsive	Client is not regularly attending services and does not respond to outreach efforts, as defined by the grant recipient.
Primary complete/optional active	Client has reached primary workshop participation target for his/her population but is still participating in optional programming provided by grant recipient.
Removed from program	Grant recipient has determined that client cannot or should not attend the program, for example, because of illness preventing further participation, inappropriate behavior, violation of policy, or safety concerns for staff or other clients.
Temporary hold	Client is not currently participating in services but may return, for example, because of a temporary change in work schedule or illness. This may include clients who are responsive to outreach but not attending services.

VII.A.3. Editing client status in bulk (screen C16)

The Bulk Update screen (C14), located next to the All Clients (C1) and My Clients (C9) screen buttons, includes a Change Client Status button that allows nFORM users to change the Client Status for multiple clients at the same time. First, grant staff must select the subset of clients to which the status change is to be applied. At the top of the menu select whether the change will be applied to potential applicants or enrolled clients. Then use the Filter Eligible Clients section at the top of the screen to find clients; if filtering by potential applicants, options include grant location, their current client status, population, case manager assignment, and application date range. Filter enrolled clients by grant location, client status, case manager assignment, workshop and session series they attended, and enrollment date range. Note that if entering multiple criteria, only those clients who match all criteria will appear. The Clear Criteria button clears all prior filter selections.

The Eligible Clients box below displays the names and client IDs of the clients whose statuses can be changed, filtered based on the criteria entered. If no criteria are entered, the Eligible Clients box will display the names and client IDs of all eligible potential applicants or enrolled clients. After selecting the names of those clients whose statuses will be changed, click the Select Clients button to move their names to the Clients to be updated box.

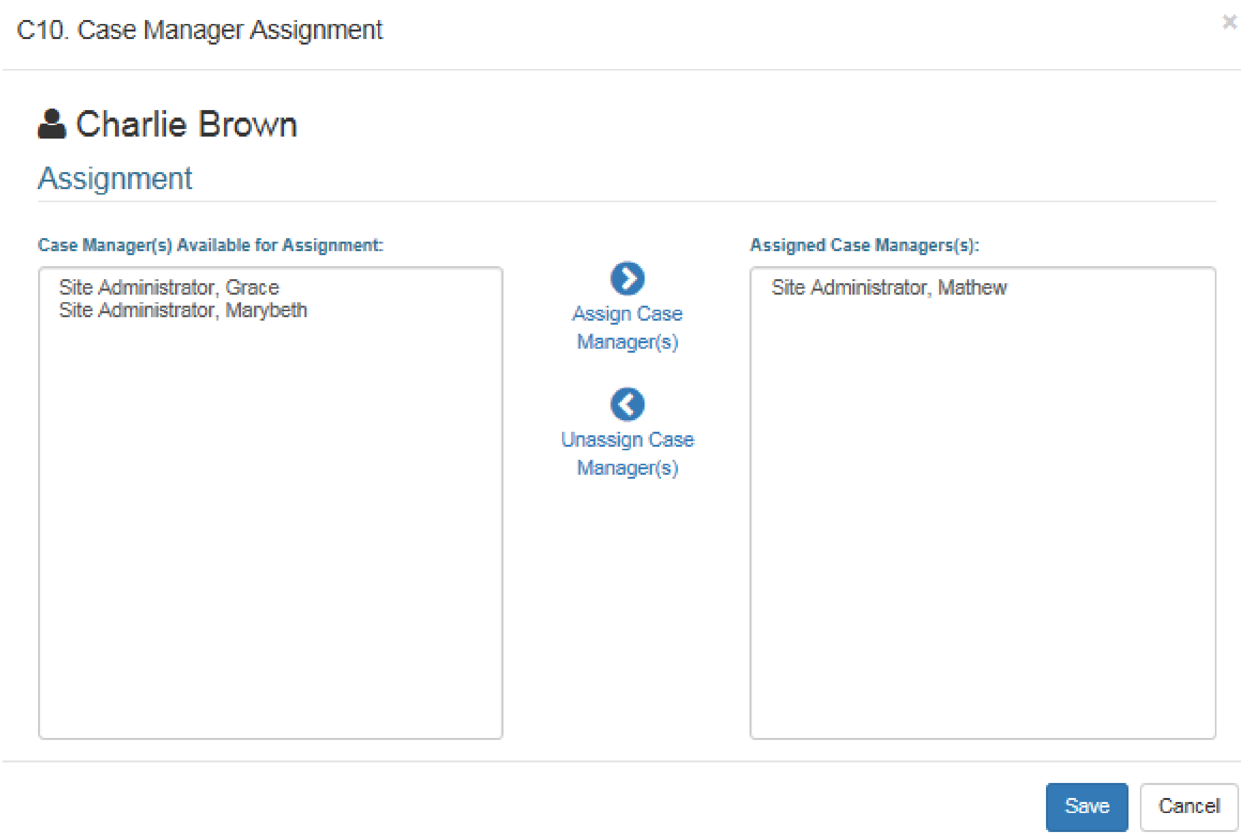
When all desired Eligible Clients have been selected, choose the new client status from the Client Status drop-down menu. Table VII.1. below provides descriptions of each status code.



VII.A.4. Assigning case managers individually (screens C3 and C10)

Site administrators and case managers who are assigned to a potential applicant or enrolled client are listed in the Assigned Case Manager(s) box on the Profile screen (C3). Grant recipient site administrators assign case managers in nFORM by clicking the Edit button in the Assigned Case Manager(s) box to open the Case Manager Assignment (C10) screen. The ability to assign case managers is limited to site administrators and case managers to whom a site administrator has granted the user account permission to manage case manager assignment.

Highlight the applicable case manager(s) from the list of caseworkers available for assignment in the box on the left side of the Case Manager Assignment screen (C10). Click on the Assign Case Manager(s) arrow to move the selected case manager(s) from the Case Manager(s) Available for Assignment box on the left to the Assigned Case Manager(s) box on the right.



You can also unassign a case manager by selecting the case manager's name in the Assigned Case Manager(s) box on the right and clicking the Unassign Case Manager(s) button to move the case manager's name to the Case Manager(s) Available for Assignment box on the left.

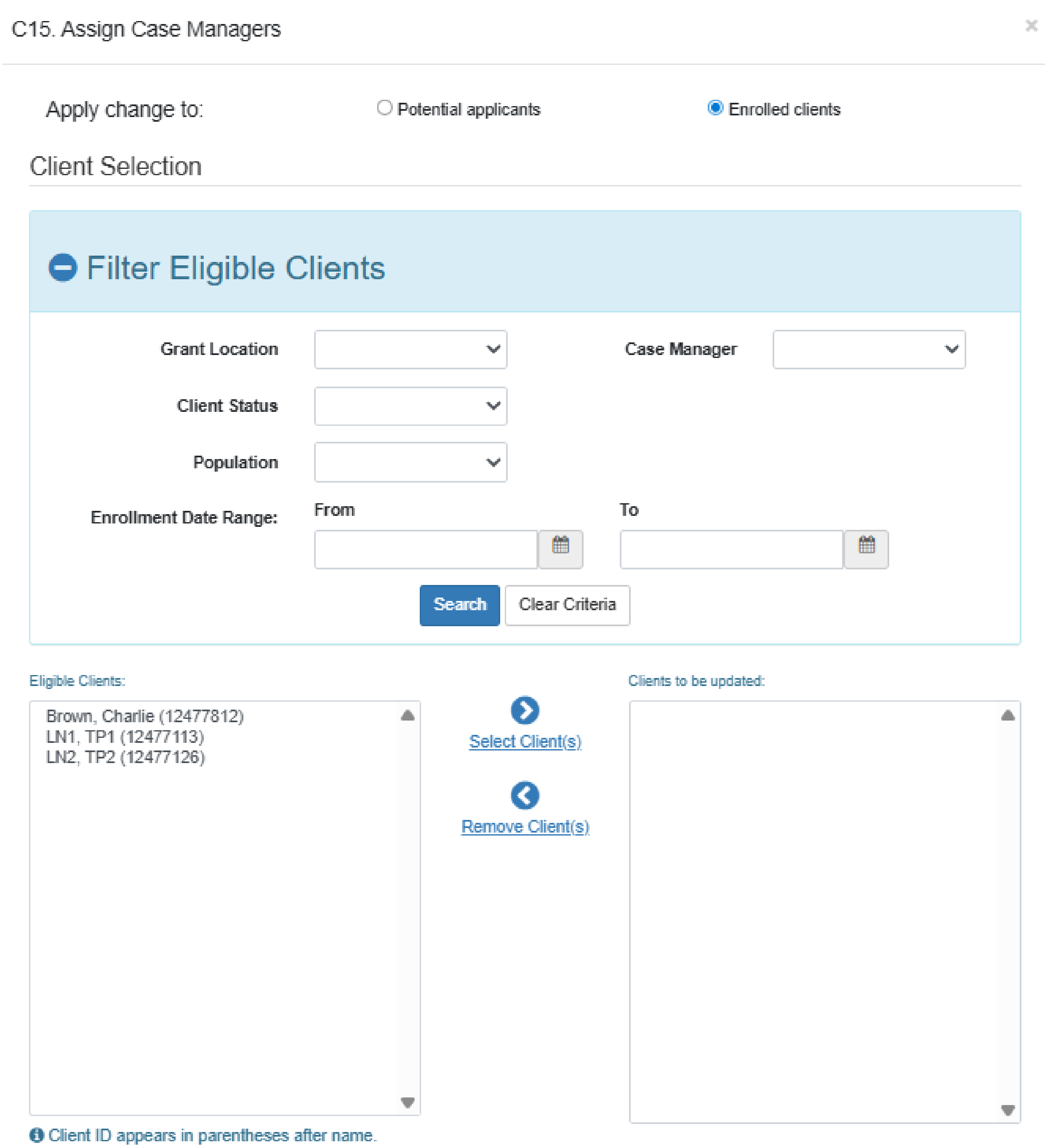
Select Save and the assigned case manager(s) will appear in the Assigned Case Manager(s) box on the Client Profile screen (C3). In addition, the client will appear in the My Clients list of the assigned case manager(s).

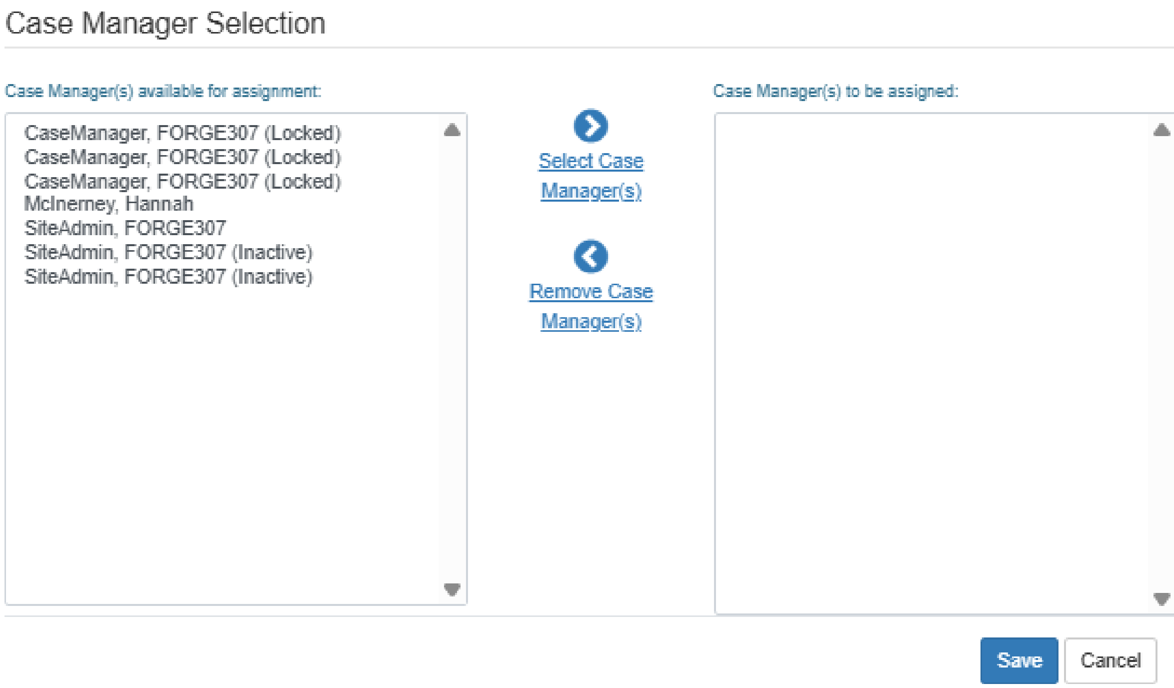
VII.A.5. Assigning and unassigning case managers in bulk (screens C14, C15, and C20)

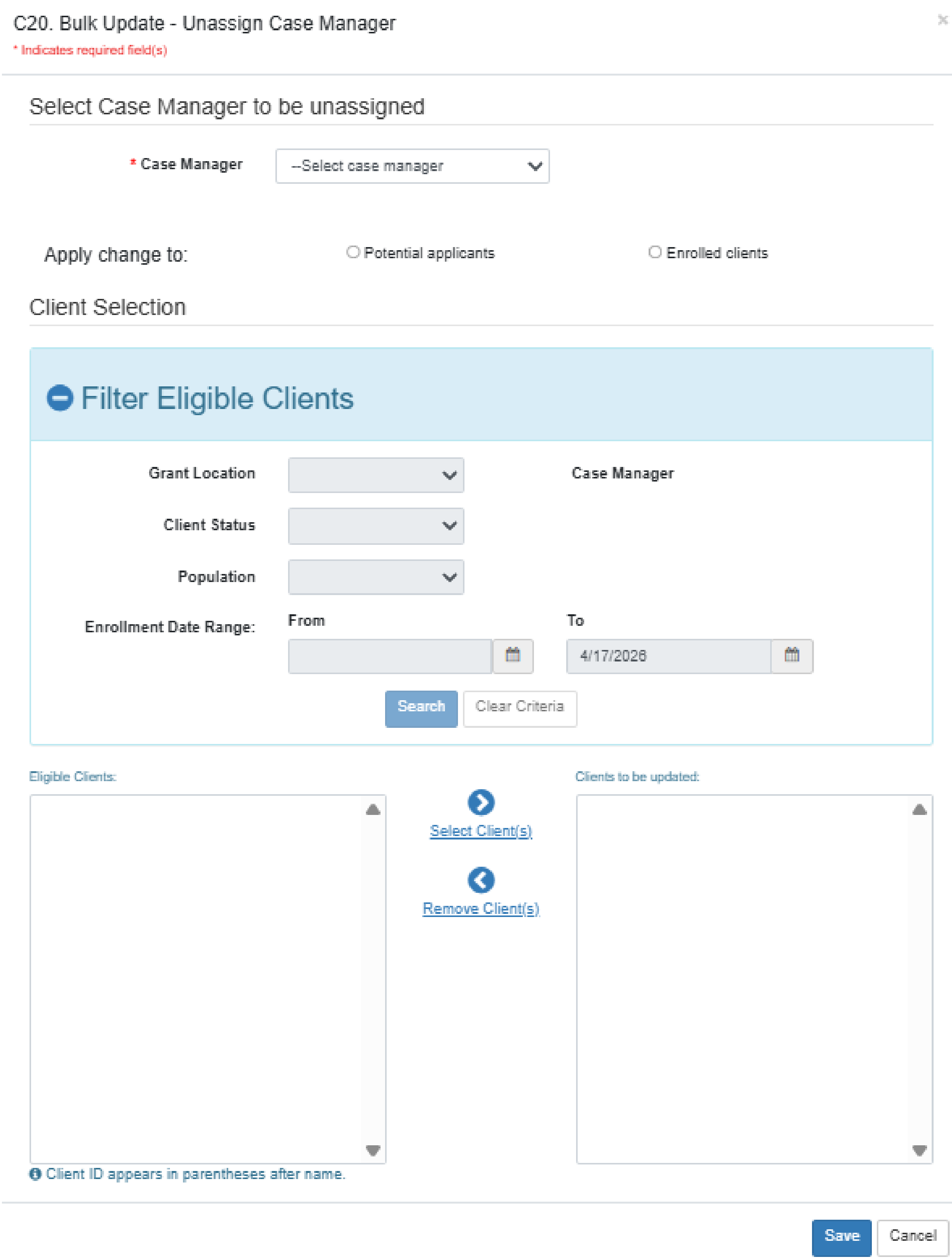
Site administrators can assign one or more case managers to multiple clients at one time. From the Bulk Update screen (C14), select the Assign Case Managers button to open the bulk Assign Case Managers screen (C15). First, grant staff must select the subset of clients to which the status change is to be applied. At the top of the menu select whether the change will be applied to potential applicants or enrolled clients. Then use the Filter Eligible Clients section at the top of the screen to find clients; if filtering by potential applicants, options include grant location, their current client status, population, case manager assignment, and application date range. Filter by grant location, client status, case manager assignment, workshop and session series they attended, and application date range (potential applicants only) or enrollment date range (for enrolled clients only). The Eligible Clients box below displays the names and client IDs of the clients who can be assigned Case Manager(s), filtered based on the criteria entered. If no criteria are entered, the Eligible Clients box will display the names and client IDs of all eligible clients.

To bulk assign Case Manager(s), select the clients to be updated from the Eligible Clients box by clicking the Select Client(s) button to move them to the Clients to be updated box. Then, select the Case Manager(s) to assign to those clients from the Case Manager(s) available for assignment box and click the Select Case Manager(s) button to move them to the Case Managers to be assigned box. Click save to assign the case managers to the selected clients.

Site administrators can also unassign a case manager from multiple clients at one time. From the Bulk Update screen (C14), select the Unassign Case Managers button to open the bulk Unassign Case Manager screen (C20). After selecting a case manager at the top of the screen and whether the change will be applied to potential applicants or enrolled clients, the Eligible Clients box will fill with all clients assigned to that case manager. That list of clients can be further filtered by searching on grant location (if applicable), client status, population, and either application date range for potential applicants or enrollment date range for enrolled clients. Move clients from the Eligible Clients box to the Clients to be updated box using the Select Client(s) arrow and click Save to bulk unassign the specific case manager from all selected clients.


C15. Assign Case Managers
Apply change to:
Potential applicants
Enrolled clients
Client Selection
Filter Eligible Clients
Grant Location
Case Manager
Client Status
Population
Enrollment Date Range:
From
To
Search
Clear Criteria
Eligible Clients:
Brown, Charlie (12477812)
LN1, TP1 (12477113)
LN2, TP2 (12477126)
Select Client(s)
Remove Client(s)
Clients to be updated:
Client ID appears in parentheses after name.


Case Manager Selection
Case Manager(s) available for assignment:
CaseManager, FORGE307 (Locked)
CaseManager, FORGE307 (Locked)
CaseManager, FORGE307 (Locked)
McInerney, Hannah
SiteAdmin, FORGE307
SiteAdmin, FORGE307 (Inactive)
SiteAdmin, FORGE307 (Inactive)
Select Case Manager(s)
Remove Case Manager(s)
Case Manager(s) to be assigned:
Save
Cancel


C20. Bulk Update - Unassign Case Manager
* Indicates required field(s)
Select Case Manager to be unassigned
* Case Manager
--Select case manager
Apply change to:
Potential applicants
Enrolled clients
Client Selection
Filter Eligible Clients
Grant Location
Case Manager
Client Status
Population
Enrollment Date Range:
From
To
4/17/2026
Search
Clear Criteria
Eligible Clients:
Clients to be updated:
Select Client(s)
Remove Client(s)
Client ID appears in parentheses after name.
Save
Cancel

VII.A.6. Administering client surveys individually (screen C3)

As described in Module V, the Client Surveys box on the Profile page (C3) shows the status of the entrance and exit surveys; grant staff access web surveys for clients from this box. Clients will respond to the entrance survey at intake (as described in Module V.E) and the exit survey at the client's last workshop session, or 14 days after the entrance survey if the program of services is shorter than that.

If a client attends multiple workshops, they should take the exit survey at the last session of the last workshop. To administer the exit survey to clients, or to enter paper survey responses or refusals, follow the same survey administration steps described in Module V.E, but start by selecting the "Action" button for the exit survey instead of for the entrance survey in the Client Surveys box. The Action button for the exit survey is only functional 14 days after the entrance survey is completed.

Client Surveys

Type	Status	Date	Action
Entrance Survey	Complete	04/17/2026	Review
Exit Survey	Incomplete	--	Action

Grant recipients should use the Survey Completion operational report described in Module VIII.B to monitor administration of the client surveys. The operational report will show the status of each client's surveys: Incomplete, In progress, Complete, Paper Complete, or Refusal.

If the client initially refuses to take the Exit Survey, you should similarly encourage the client to complete the survey. Once a client has been designated as no longer in the program (e.g. "drop out," "moved out of the area") **grant recipients should still pursue the client to complete the Exit Survey,** even if the client did not finish all programming. If the client still refuses after staff engage in refusal conversion attempts, the Exit Survey status can be set to "Refused". If the client cannot be reached to complete or refuse the Exit Survey, you should leave the Exit Survey as incomplete.

VII.A.7. Administering client surveys in bulk (screens C14 and C17)

As described in Module V.E.1, if grant staff plan to administer surveys to multiple clients at the same or similar times, they can generate survey passcodes in bulk rather than individually. For example, grant staff may administer the exit survey during the last workshop session to all clients in the cohort.

On the Clients tab, select the Bulk Update option and the Passcode Generation option. On the Bulk Generate Survey Passcode screen (C17), select the appropriate survey. Search for clients based on:

- Grant location
- Client status
- Population

- Case manager
- Workshop and session series (exit survey only)
- Application date (entrance survey only)
- Enrollment date (exit survey only)

Clients that fit the specified criteria will be listed in the Eligible Clients box on screen C17. Grant staff can select one or more clients from the Eligible Clients box and click the Select Client(s) arrow to move them to the Generate passcode for box. After clicking Save, a PDF entitled “SurveyLoginSheet” will download. The PDF will list each client’s name, location, passcode generation date, client ID, and passcode. Like a survey passcode generated individually on the Client Profile (C3), these passcodes will be valid for 96 hours and can be used up to 10 times within that timeframe, until the survey is submitted. The PDF will also indicate when the passcodes were generated and a reminder that the passcode expires in four days.

VII.A.8. Viewing client’s service summary (screen C3)

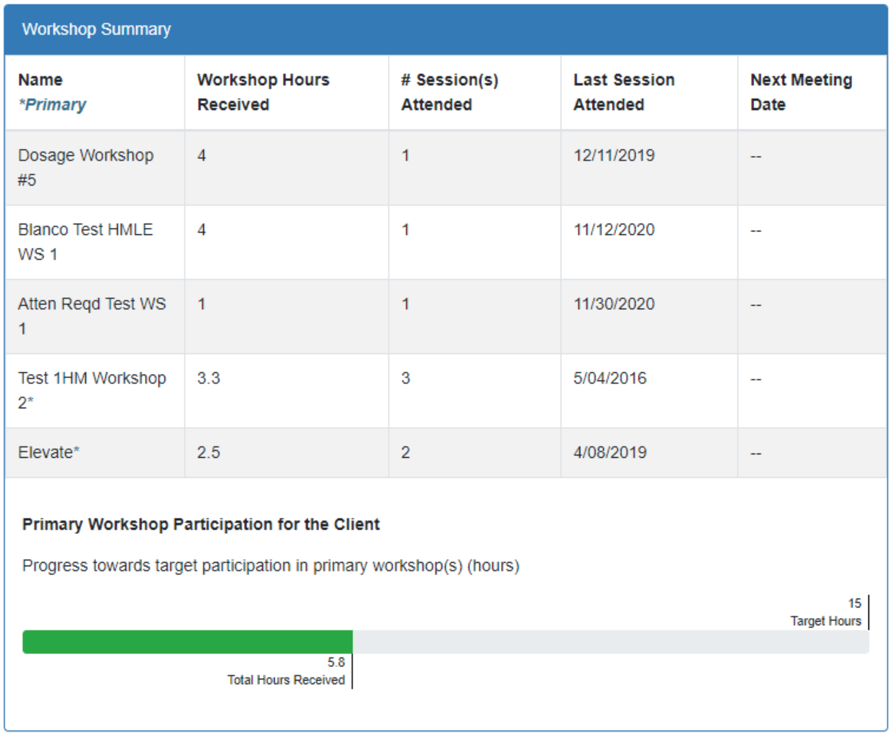
The Service Summary box on the client’s Profile page shows the number of service contacts, referrals, and incentives provided to the client and the most recent date each was provided. This box provides grant recipient staff with a snapshot of the client’s service history and will alert case managers when a follow-up is needed about a referral. When any follow-up is needed, a red alert will appear in the referrals row of the Service Summary box. This red alert should prompt grant recipient staff to review the client’s Service History page so they can follow-up as needed. A red alert will also display in the Incentives/Program Supports row when Incentives exceed the maximum allowed.

Service Summary

Type	Total # Provided	Most Recent
Service Contacts	3	4/17/2026
Referrals Follow up needed	2	4/17/2026
Incentives/Program Supports	1	4/17/2026

VII.A.9. Viewing client’s workshop summary (screen C3)

The Workshop Summary box on the client’s Profile page lists the workshops that the client is enrolled in, the number of workshop hours received by the client, the number of workshop sessions that the client has attended, the date of the last workshop session attended, and the date of each workshop’s next session. Beneath the Summary box, the primary workshop participation meter displays the client’s progress toward participation in the target number of primary workshop participation hours specified for the client’s population type.



Workshop Summary

Name *Primary	Workshop Hours Received	# Session(s) Attended	Last Session Attended	Next Meeting Date
Dosage Workshop #5	4	1	12/11/2019	--
Blanco Test HMLE WS 1	4	1	11/12/2020	--
Atten Reqd Test WS 1	1	1	11/30/2020	--
Test 1HM Workshop 2*	3.3	3	5/04/2016	--
Elevate*	2.5	2	4/08/2019	--

More detailed information can be found under the client's Workshops/Sessions page.

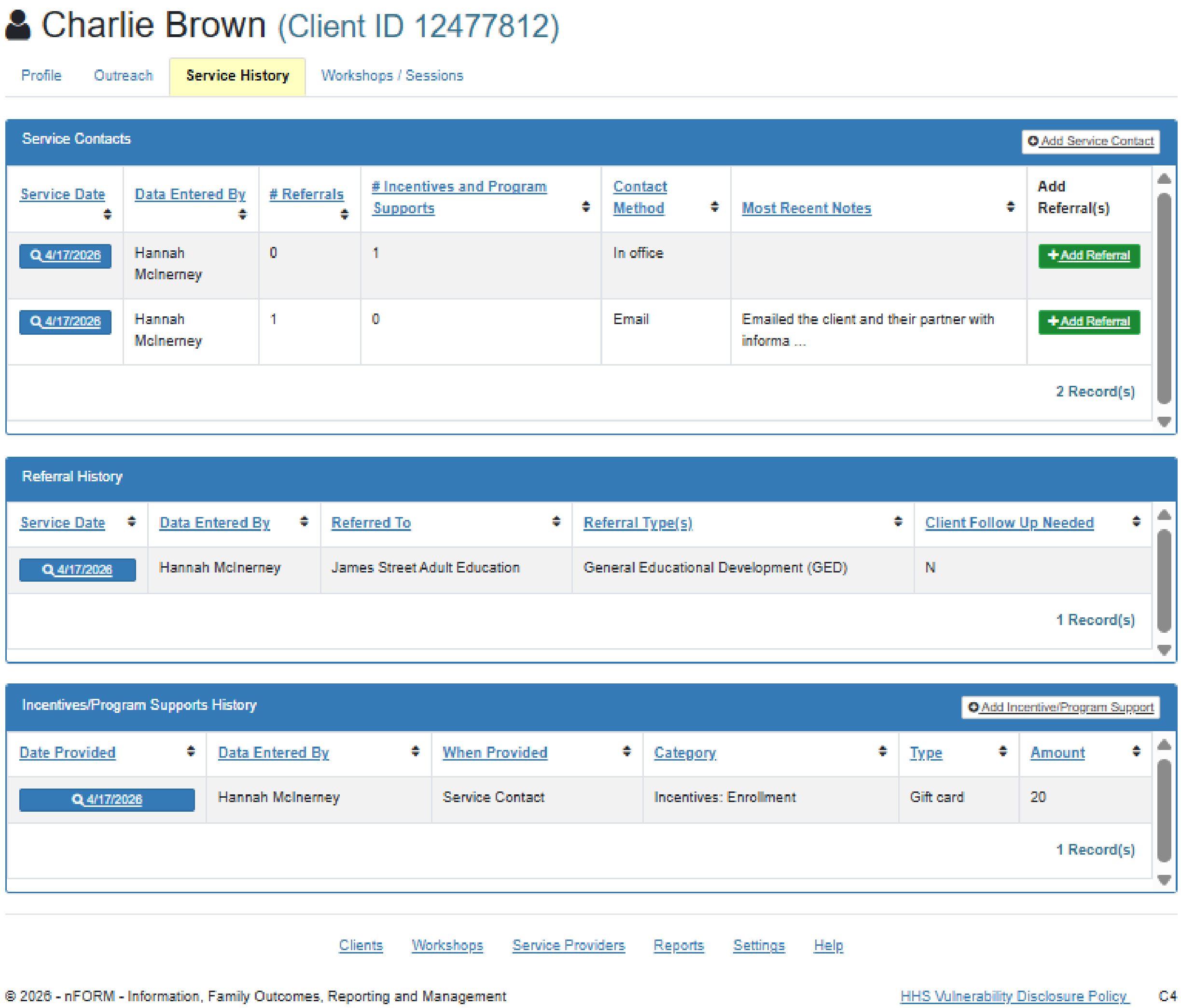
B. Service history (screen C4)

The client's Service History page (C4) provides a complete history of the (1) post-enrollment ISCs with the client, (2) post-enrollment referrals made for the client, and (3) incentives/program supports provided to the client. Summaries of each appear in three tables on the page.

As a reminder, a client's enrollment date is automatically set by nFORM once the entrance survey is completed in nFORM and, if applicable, the client's Service Assignment is selected. While individual service contacts and referrals can be recorded for a client during outreach and recruitment, the client's nFORM enrollment date is the earliest date that a client is eligible to attend workshops and receive incentives/program supports.

For grant recipients conducting their own local evaluations, the Service History page does not appear for clients who are assigned to the control (no services provided) or control waitlist (no services provided) service assignment categories.

Example of the Service History tab of an enrolled client's profile



Record service contacts. Site administrators and case managers record information about service contacts provided after enrollment, such as case management sessions and reminder contacts, by clicking the +Add Service Contact button located in the Service Contacts table on the Service History tab (C4). This opens the Add/Edit Service Contact form (C7). On the top of the form, fill in information about the service contact including:

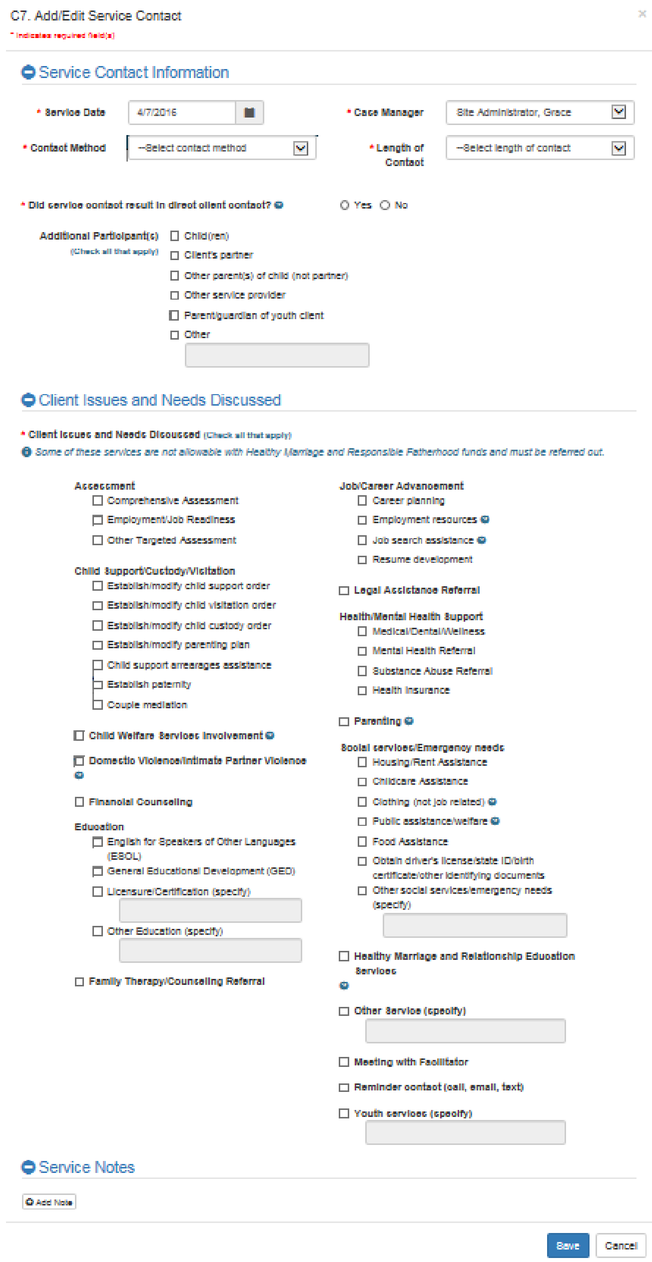
- Service date
- Case manager providing the service consultation
- Contact method
- Length of the contact
- Whether the contact resulted in direct client contact
- Any additional participants at the service contact other than the client

Contact methods include home visits; email; meeting in the community, high school, or office; mail; phone call; and text message. An "other" option is also available if the client was contacted in some other way. If the type of contact is email, text message, or mail, record an estimate of the length of time to prepare the contact and any back and forth with the client in that mode.

Use the "Additional Participant(s)" checkboxes to indicate who, in addition to the individual client, received the service. Because service contacts are recorded under individual client profiles, when both partners of a couple participate in the same service contact, be sure to check "Client's partner" when entering service contact information. The operational reports and data export will have one record for this service contact, which includes the couple ID number.

In the middle portion of the form, select the category or categories that best describe the types of issues and needs discussed during the service contact with the client. If none of the existing categories are applicable, select the "other" category and write in a brief description of the issue or need that was discussed. If the service contact was simply a reminder contact, select "Reminder contact" as the category.

In the bottom of the form, click the +Add Note button to add case notes to the service contact. Throughout nFORM, 5,000 characters of text can be entered into each case notes field. Case managers should save their notes periodically by clicking anywhere in the form to avoid losing their work as nFORM will time out after 15 minutes of inactivity. Please note that typing is not considered activity and clicking on the form is the only way to safely extend your session in the notes field. After all information about the service contact is recorded, click Save and the service contact will appear on the Service Contacts table on the client's Service History tab (C4). Case notes cannot be edited after they are saved. Any additions or changes should be documented in another note. Case notes also cannot be exported from nFORM because they may contain clients' personally identifiable information.



You can edit information about a service contact provided either before or after enrollment by selecting the service contact date on the Service Contacts table on either the Service History or Outreach tab and clicking the Edit button at the bottom of the form. However, once a client is enrolled, service contacts can no longer be recorded on the Outreach tab of their profile.

nFORM automatically identifies recorded ISCs that are considered substantive. ACF requires FORGE Fatherhood grant recipients to provide each client with at least 8 substantive ISCs, which are defined as:

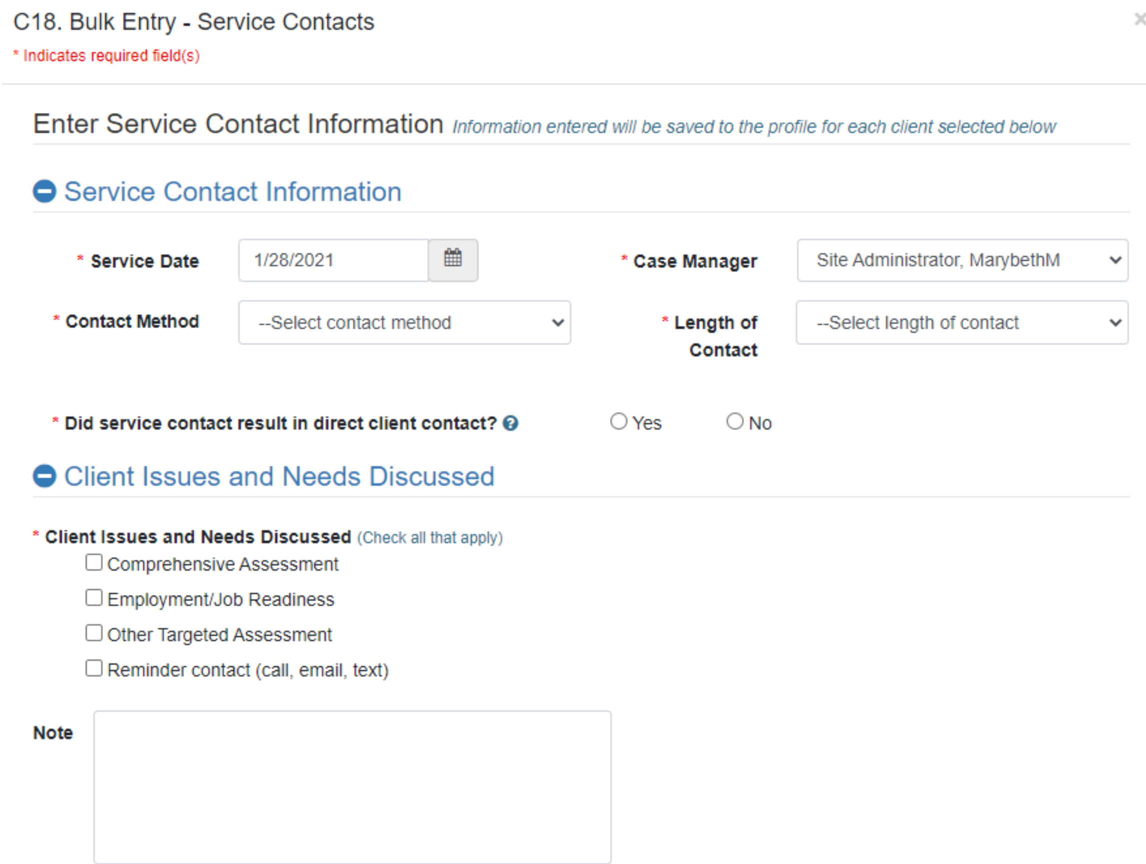
1. Lasting 15 minutes or longer;
2. Involving direct contact with the client (for example, in-person or by telephone);
3. Covering client issues and needs beyond just reminder contacts, and

Using these criteria, nFORM data tools automatically report on the number of substantive ISCs provided to clients (see Module VIII.B for more information on the Individual Service Contact operational report) including those provided both before and after a client's enrollment. nFORM also identifies informational and reminder-only service contacts provided both pre- and post-enrollment; reminder-only contacts are those where only a reminder contact occurred without any other client issues and needs recorded as part of the service contact.

Currently, ACF does not have a minimum requirement for the number of substantive ISCs HEART and READY4Life grant recipients should provide to clients, but all grant recipients that offer case management as part of their program design can monitor substantive ISC receipt in the PPR, Individual Service Contact operational report, and data export.

VII.B.1. Adding service contacts in bulk

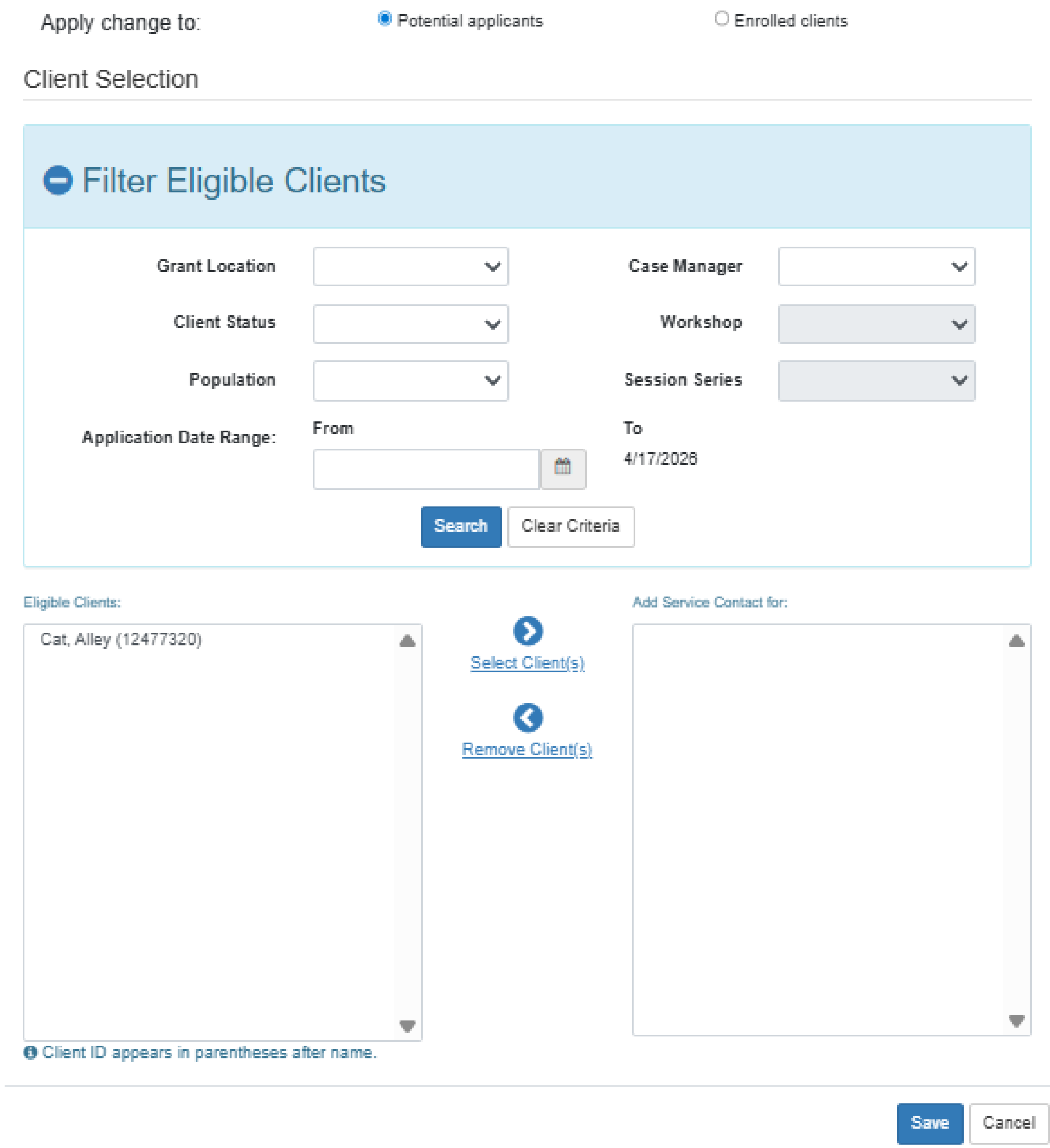
Grant recipient staff have the ability to add certain types of service contacts in bulk. From the Clients tab, select Bulk Update and Service Contacts to open the Bulk Entry – Service Contacts screen (C18). Staff should enter the date of the service they are bulk entering, the contact method, the case manager who contacted the clients, and the length of the contact, and indicate if the service contact resulted in direct client contact. Then, staff should select from the four types of client issues and needs discussed – comprehensive assessment, employment/job readiness, other targeted assessment, and reminder contact – that can be completed for multiple clients at one time. Staff must choose whether the bulk service contacts are applied to either potential applicants or enrolled clients.



Then, staff can search for potential applicants or enrolled clients based on the following criteria:

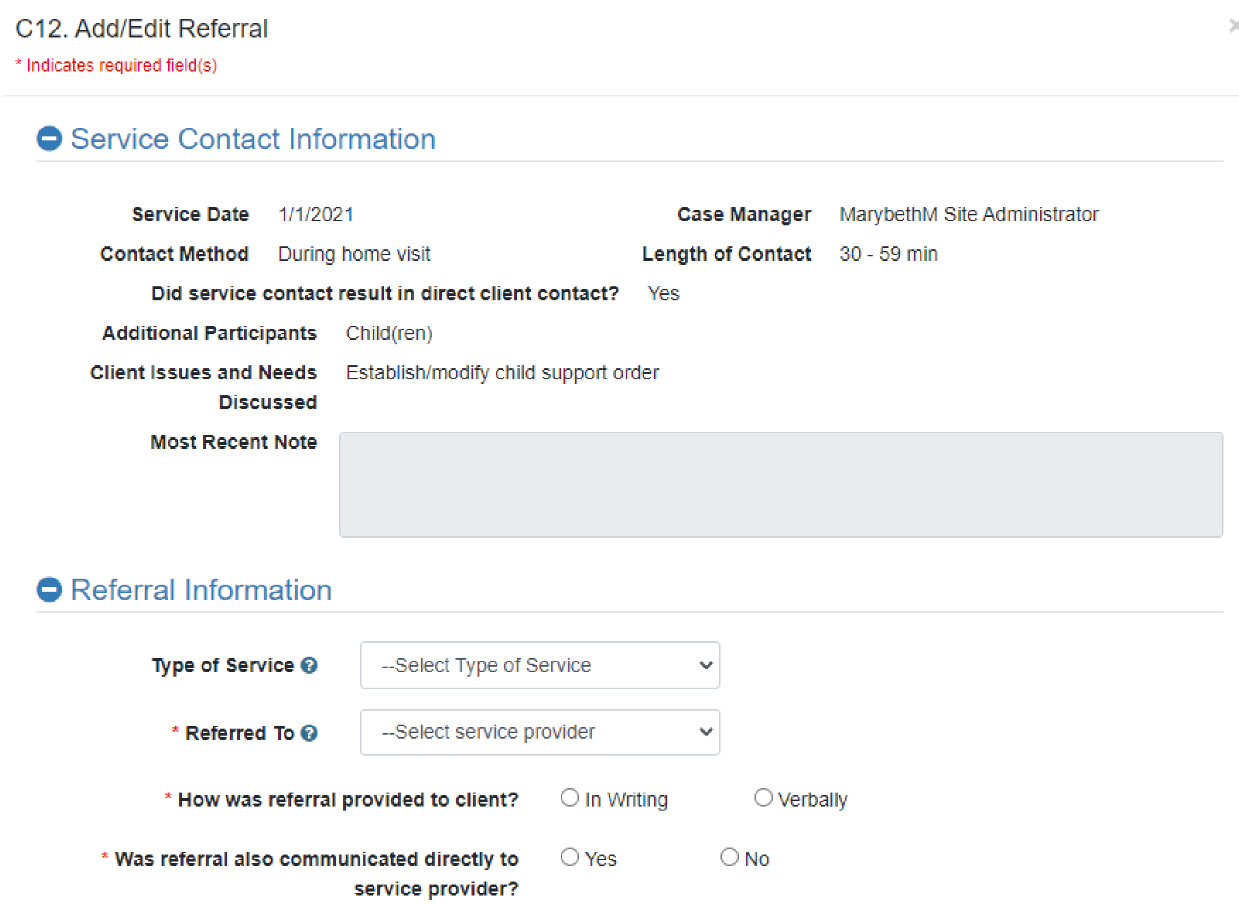
- Grant location
- Client status
- Population
- Case manager
- Workshop and session series (enrolled clients only)
- Application (for potential clients) or enrollment (for enrolled clients) date range
  - Note that unlike other Filter Eligible Clients sections, the “To” date on screen C18 is not editable in this module. The “To” date pre-fills with the date selected as “Service Date” at the top of the screen because users cannot add a service contact on a certain date for a client who either had an application created or was enrolled after that date.

Potential applicants or clients that fit the specified criteria will be listed in the Eligible Clients box. Grant recipient staff can select one or more applicants or clients from the Eligible Clients box and click the Select Client(s) arrow to move them to the Add Service Contact for box. Upon clicking Save, the service contact will be added to the individual profiles of all potential applicants or clients selected as Clients to be updated.


Apply change to:
Potential applicants
Enrolled clients
Client Selection
Filter Eligible Clients
Grant Location
Case Manager
Client Status
Workshop
Population
Session Series
Application Date Range:
From
To
4/17/2026
Search
Clear Criteria
Eligible Clients:
Cat, Alley (12477320)
Select Client(s)
Remove Client(s)
Add Service Contact for:
Client ID appears in parentheses after name.
Save
Cancel

VII.B.2. Record and follow up on referrals

To record a referral provided during a service contact, site administrators and case managers click the +Add Referral button next to the service contact when the referral was made. This opens the Add/Edit Referral form (C12). The top of the form displays the information recorded about the service contact. In the middle section, grant recipient staff have the option to select a type of service, which will filter the list of providers in the Referred To dropdown to those offering that type of service. The provider names that appear in the dropdown menu are the providers recorded on the Service Provider tab with a Provider Function designation of Service Provider.


C12. Add/Edit Referral

* Indicates required field(s)

Service Contact Information

Service Date	1/1/2021	Case Manager	MarybethM Site Administrator
Contact Method	During home visit	Length of Contact	30 - 59 min

Did service contact result in direct client contact? Yes

Additional Participants: Child(ren)

Client Issues and Needs Discussed: Establish/modify child support order

Most Recent Note

Referral Information

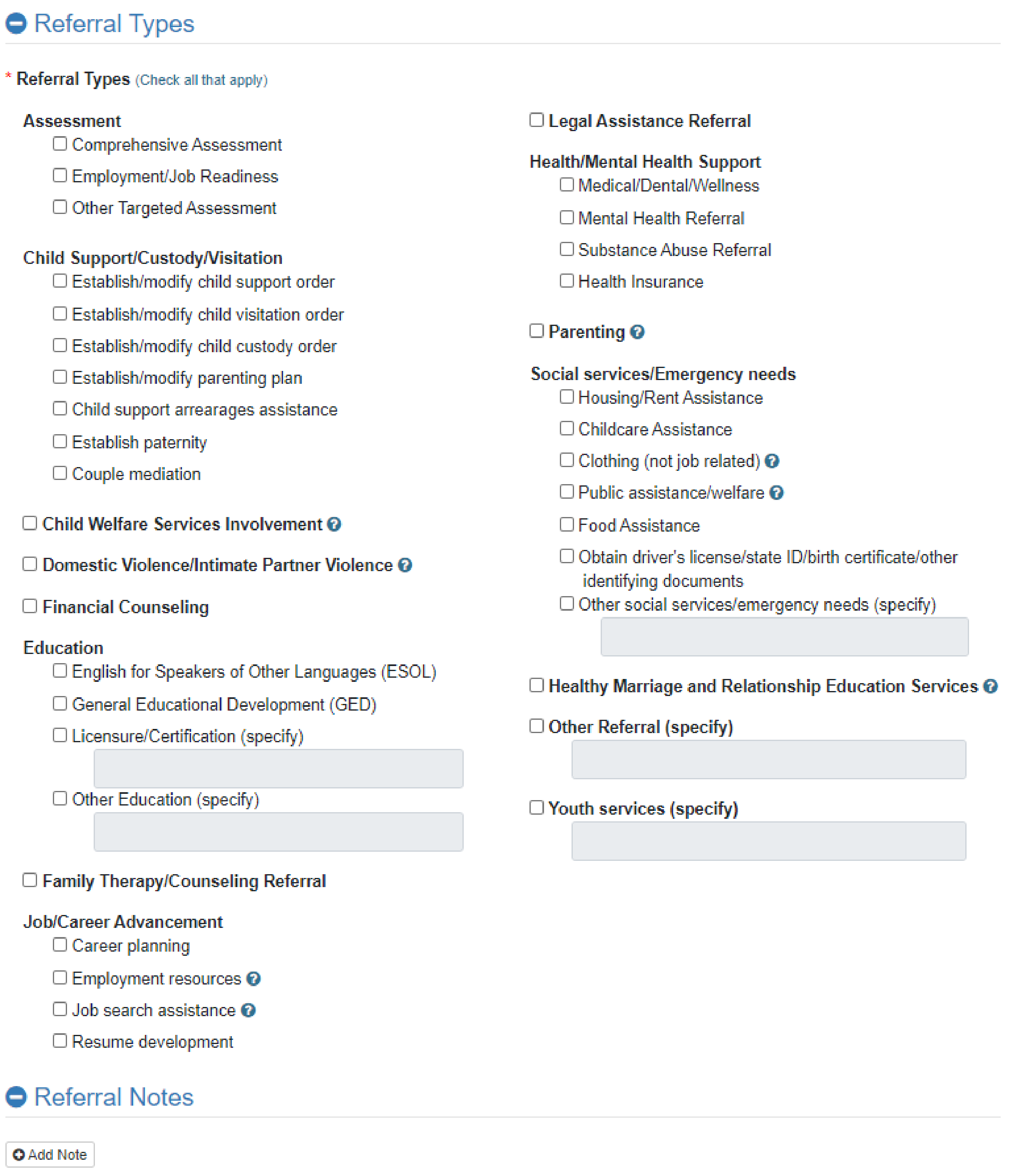
Type of Service: --Select Type of Service

* Referred To: --Select service provider

* How was referral provided to client? In Writing / Verbally

* Was referral also communicated directly to service provider? Yes / No

Next, select whether the referral was provided to the client in writing or verbally, and whether the referral was also communicated directly to the service provider. If the referral is being entered for a member of the HEART adult couple population, you must also select if the referral was for one or both partners.



In the Referral Types section, select the category or categories that best describe the referral.

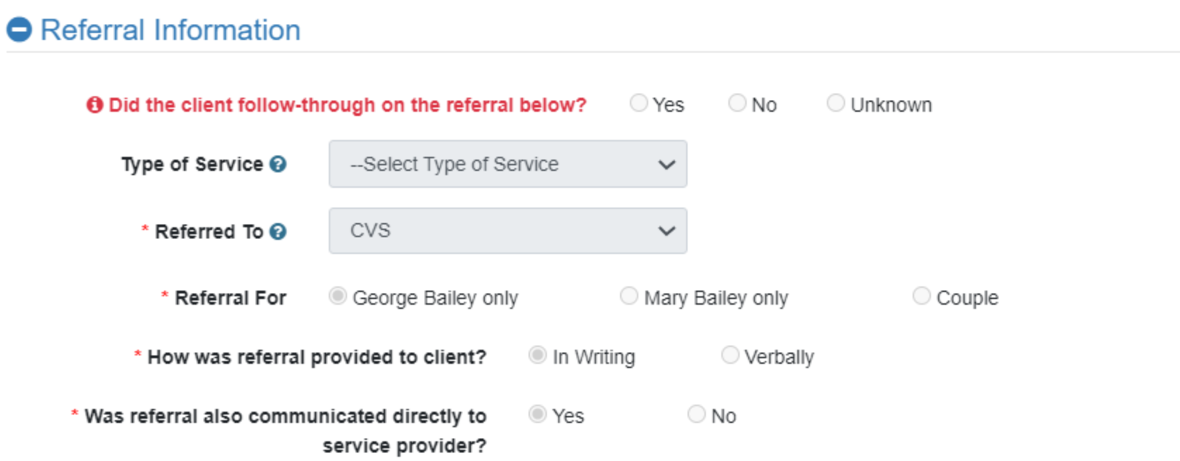
Click the +Add Note button at the bottom of the form to record any notes about the referral. Like ISC notes, notes about referrals cannot be edited after they are saved. Any additions or changes should be documented in another note. Case managers should save their referral notes periodically by clicking the Save button to avoid losing their work, as nFORM will time out after 15 minutes of inactivity. **Please note**

that typing is not considered activity and the Save button is the only way to safely extend your session in the Notes field.

Once all the information about the referral is entered, click the Save button at the bottom of the form. The referral just entered will now appear in the Referral History table on the Service History page (C4).

The Referral History table on the client's Service History page (C4) displays the date that each referral was provided, which nFORM user recorded the referral, where the client was referred, the type of referral, and whether the client followed through on the referral. Case managers will be alerted to check with a client on whether the client pursued a referral by the red alert Follow up needed message on the client's Profile page and in the Service Contacts table on the client's Service History page (C4). A Y in the Follow Up Needed column of the Referral History table will specify which referral requires a follow-up.

A case manager should confirm whether the client pursued the referral, and then access the referral record by clicking on the corresponding service date button in the Referral History table on the Service History page. This will open the Add/Edit Referral (C12) screen. To record the follow-up, click Edit on the bottom of the screen and answer the question in the Referral Information section on whether the client followed through with the referral. Select Unknown if it is not known whether the client followed through with the referral.



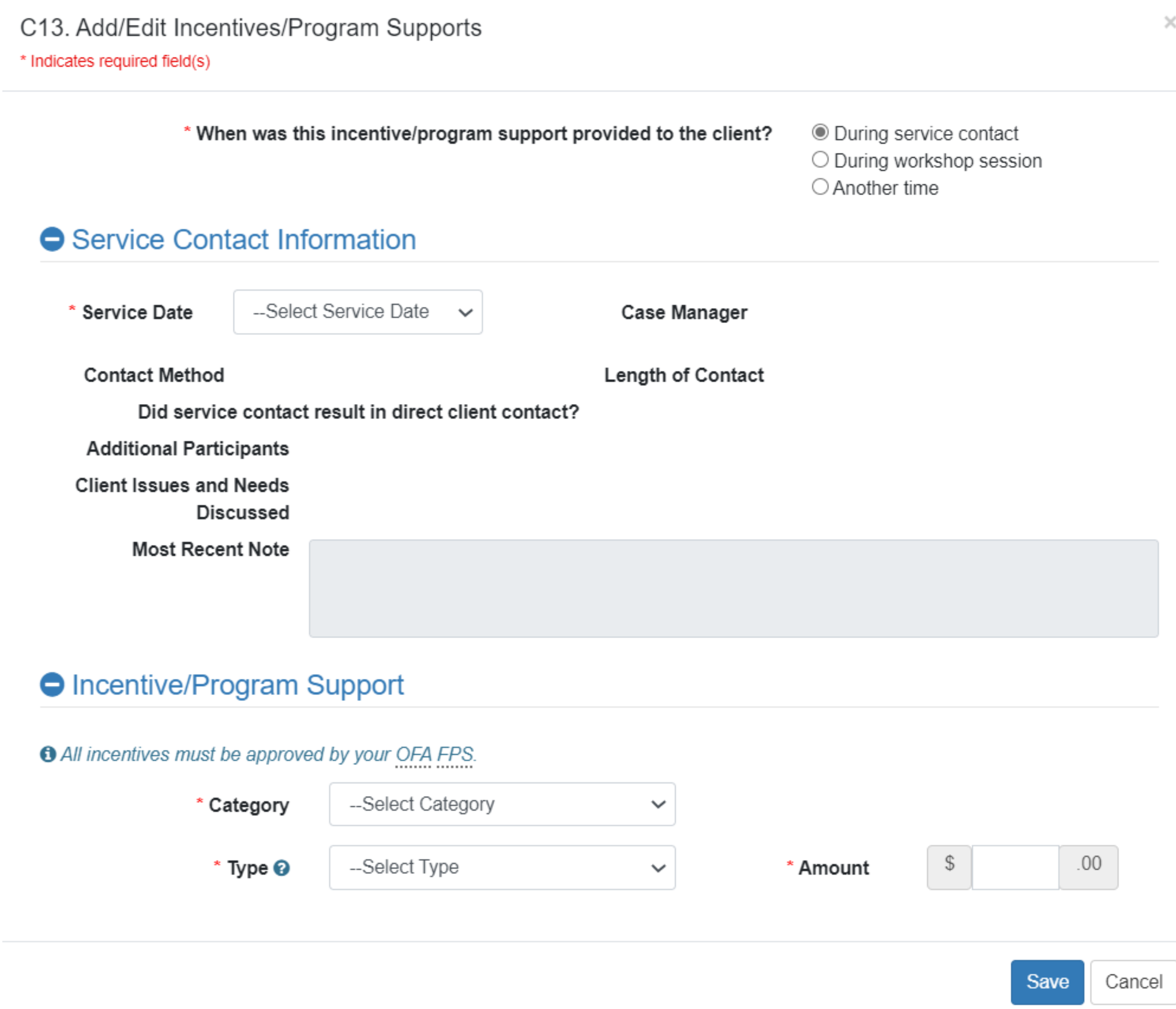
Click Save and the follow-up will be recorded. The flag indicating a follow up is needed will no longer appear on the Referral History table, and N will appear in the Follow Up Needed column of the Referral History table.

You can edit information about a referral provided either before or after enrollment by selecting the referral date on the Referral table on either the Service History or Outreach tab and clicking the Edit button at the bottom of the form.

Note: Once a client is enrolled, referrals can no longer be recorded on the Outreach tab of their profile.

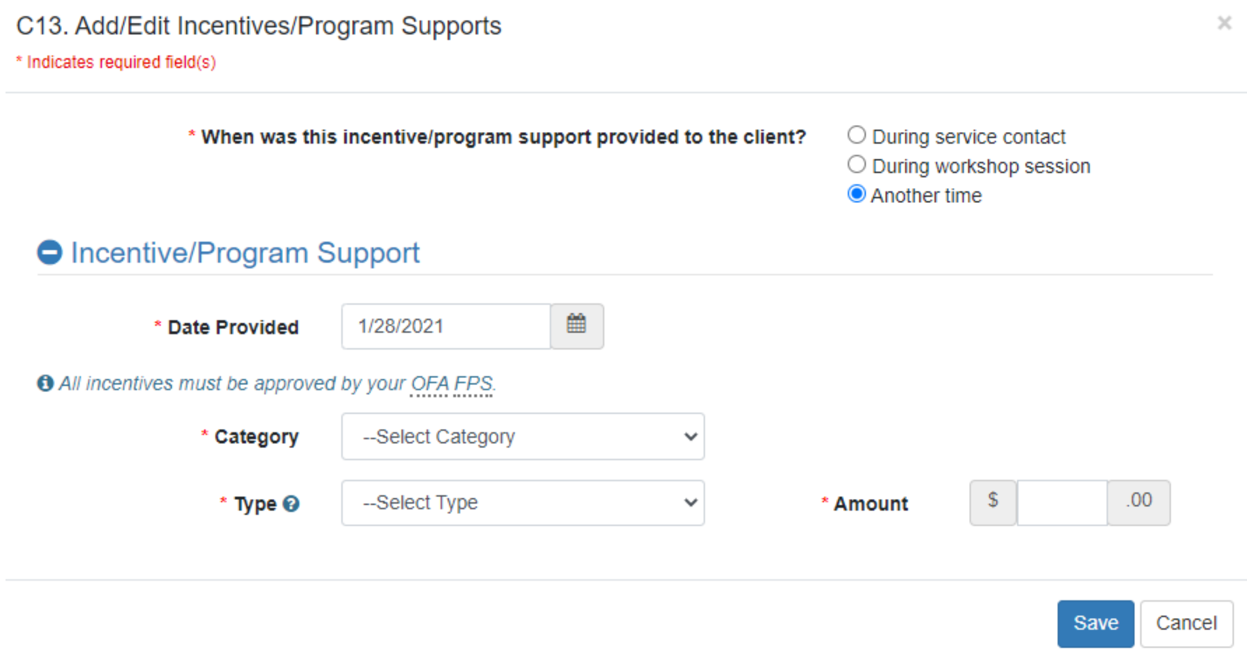
VII.B.3. Add and review incentives/program supports

Site administrator and case manager users record information about incentives and program supports provided to enrolled clients by clicking the +Add Incentive/Program Supports button in the Incentives/Program Supports table on the client's Service History page (C4). This opens the Add/Edit Incentive/Program Support form (C13). First, indicate whether the incentive or program support was provided to the client during a service contact, during a workshop session, or another time.



If you select that the incentive was provided during a service contact, the service contact information field will open. Select the date of the service contact for which the incentive was provided to the client. Information about the selected service contact will display. Review this information to confirm that this was the service contact when the client received the incentive. Next, fill in the information under the Incentive/Program Support section of the modal.

If the incentive/program support is not associated with a service contact, click on the appropriate button to indicate that it was provided during a workshop session or another time. An abbreviated version of screen C13 will open. Specify the date on which the incentive/program support was provided.



For all incentives/program supports, use the dropdown menus on C13 to select the incentive/program support category and type. Enter the amount.

There are three available options for Incentive/Program Support Category for **incentives**:

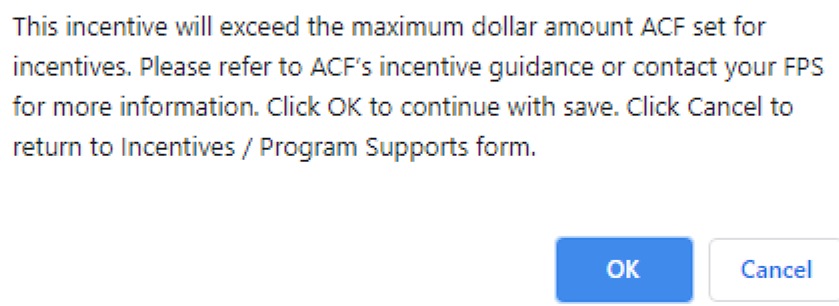
1. Incentives: Enrollment
2. Incentives: Participation/Client Milestone
3. Incentives: Survey Completion

There are five available options for Incentive/Program Support Category for **program supports**:

1. Grant-funded Participation Supports: Transportation
2. Grant-funded Participation Supports: Child care
3. Grant-funded Participation Supports: Other
4. Employment-related Supports: Work supports (e.g. work boots, clothing, tools)
5. Employment-related Supports: Training

In addition, there are three available response options in the Type dropdown: gift card, direct payment to a vendor, and in-kind. Next to the Type field, there is a tool tip reminding grant recipient staff that direct cash payment to a client is not allowable.

The maximum dollar amount of incentives allowed for a single client is $350. If you are entering an incentive that will exceed the maximum for a client, a pop-up message will display.



After entering information about the incentive, click Save and the incentive will appear in the Incentives/Program Supports table on the client's Service History page (C4). You can edit information about incentives and program supports by clicking on the date the incentive or program support was provided on the table and editing the information in the Add/Edit Incentive/Program Support screen (C13).

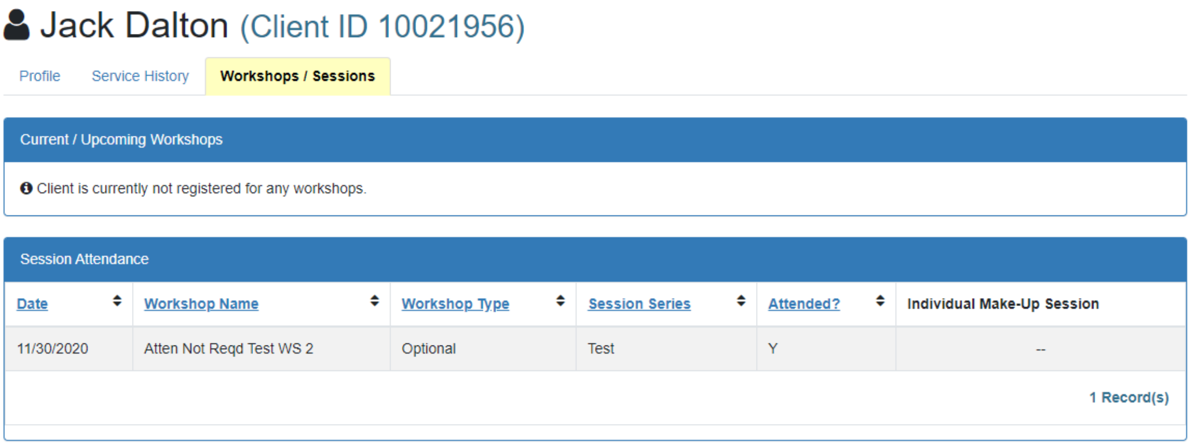
Grant recipient plans for providing incentives and program supports must align with ACF guidance and be approved by your FPS.

C. Workshops/Sessions (screen C5)

The client's Workshops/Sessions page (C5) displays summaries of the client's current and upcoming workshop sessions and the client's session attendance. From this page, nFORM users with permissions can remove a client's registration for an upcoming workshop and can record make-up sessions for workshops that the client has missed. Make-up sessions can be recorded only for workshops with an advance registration requirement; make-up sessions cannot be recorded for workshops that do not require advance registration. Other workshop attendance or changes must be entered in the Workshops tab (see Module VI).

The Current/Upcoming Workshops table on this page displays the date and time of the client's next scheduled workshop as well as the name and type of the workshop and the name of the session series. This provides case managers with a snapshot of a client's scheduled services.

The Session Attendance grid on this page shows the date of the client's sessions, the workshop and session series names, and whether the client attended the workshop. The Attended? column shows a Y if the client attended the session, an N if the client did not attend the session, and Made Up if the client received the content of a missed session individually, such as at an individual meeting with a case manager. It shows a hyphenated line if the workshop did not require registration.

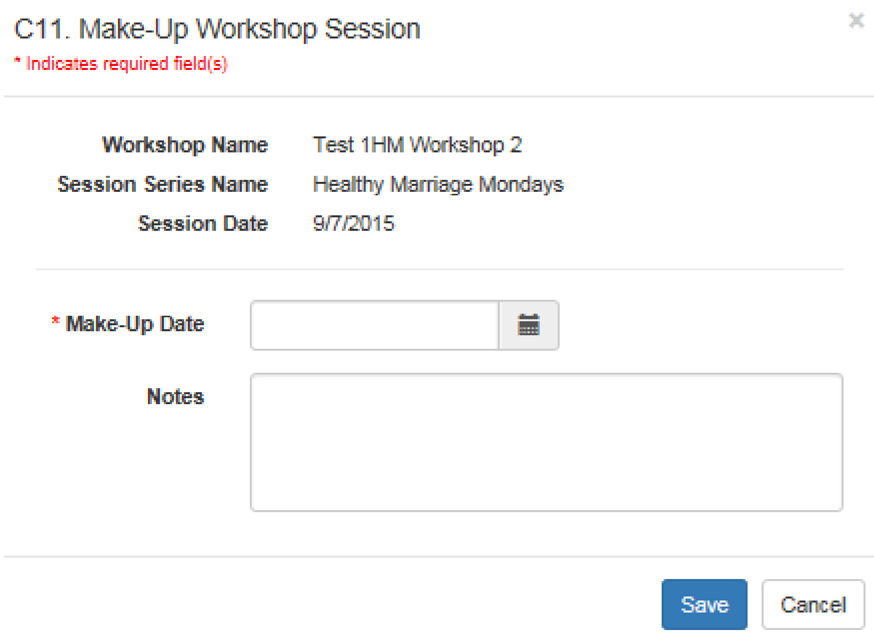


The Workshops/Sessions page (C5) does not display if the client has not completed the entrance survey. For grant recipients conducting their own local evaluation, the Workshops/Sessions page also does not display until the Service Assignment has been selected. The Workshops/Session page will never display for clients assigned to the Control (NO Services Provided) or Control Waitlist (NO Services Provided) Service Assignment category because according to their assignment they should not be receiving program services.

Remove workshop registration. Grant recipient staff can unregister a client for upcoming sessions of a workshop by clicking the Remove button in the Registration column of the Current/Upcoming Workshops table. A prompt will then appear asking for confirmation that the client’s registration should be removed for all upcoming sessions of that workshop. You cannot unregister a client from a single session occurrence. If the nFORM user confirms that the client’s registration should be removed, the Workshops/Sessions page will no longer show those upcoming workshop sessions and the client will no longer appear in the list of registered clients for recording attendance for any occurrence in the session series.

It is important to double check that a client should be unregistered from a series before removing their workshop registration. If a mistake is made, the client can be re-registered for the series; however, they will only show as registered for session occurrences after the new registration date. Clients who are not registered for a series will appear in the drop-in section of the attendance screen for occurrences that are scheduled after their enrollment date.

Record an individual make-up session. nFORM users can record make-up sessions for clients when attendance is recorded as N in the Attended? column of the Session Attendance table. The Record Make-Up button appears for these sessions. To record a make-up session, click the Record Make-Up button to open the Make-Up Workshop Session screen (C11). The top of the screen shows the workshop name, session series name, and date of the session that the client missed. Record the date that the session content was made up and record any relevant notes about the make-up session. Click Save and the attendance will change from N to Made Up in the Session Attendance grid on the client’s Workshops/Sessions page (C5).



Information recorded for a make-up session in the Make-Up Workshop Session screen (C11) can be viewed by clicking the View Make-Up button that appears in the Make-Up Session column of the Session Attendance table. The Make-Up Workshop Session screen opens in read-only format, but can be edited after clicking the Edit button at the bottom of the screen. Grant recipient staff can then revise information about the make-up session or can delete the make-up session. Deleting the make-up session reverts the recorded attendance to N.

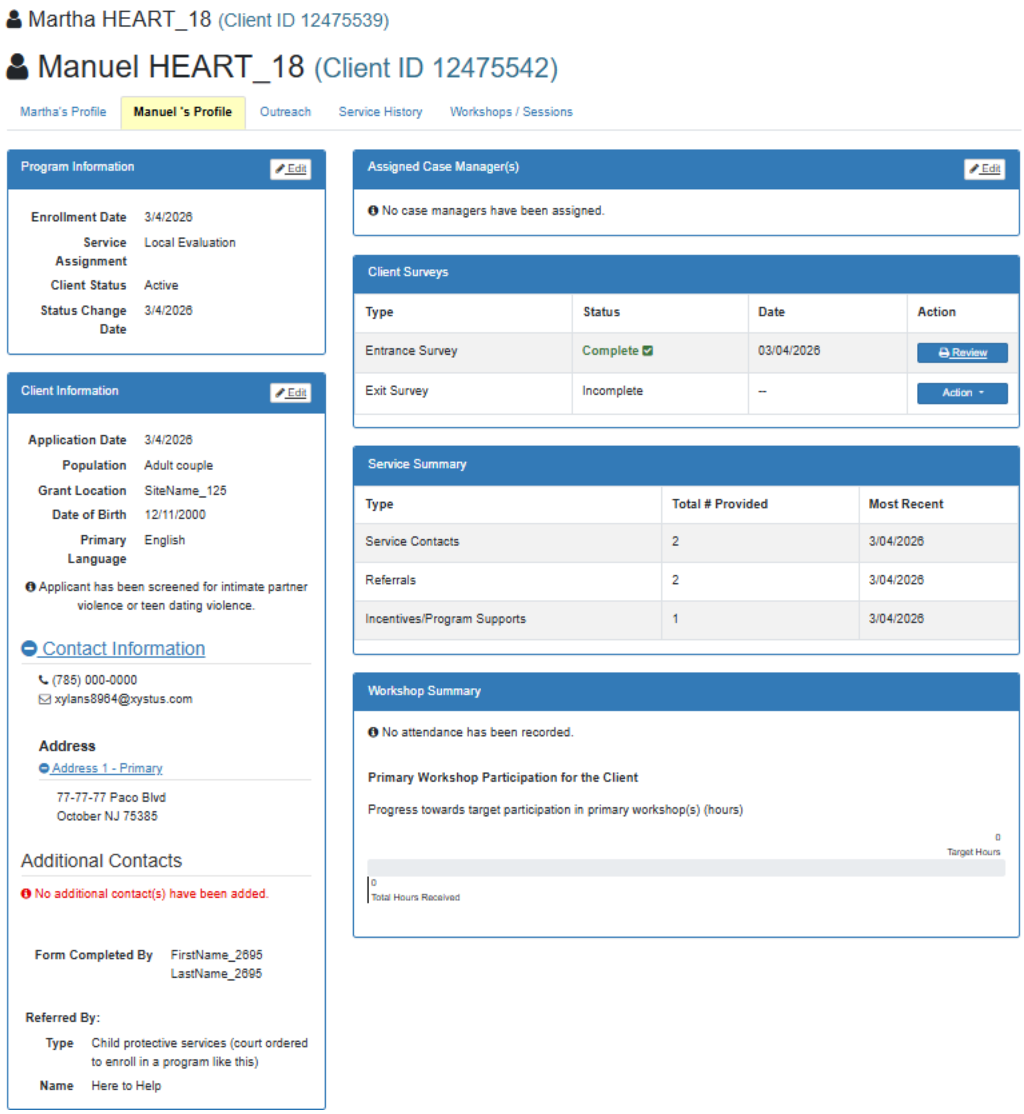
Clients cannot be recorded as dropping into or being registered for Sessions or Make-Up Sessions with dates prior to their enrollment date in nFORM. Rather, clients can drop into corresponding sessions, within the same type of workshop, that have dates that occur after their enrollment date. Contact the nFORM help desk with any questions about recording makeup attendance for workshop sessions that took place prior to a client's enrollment date.

D. Managing enrolled couples

In nFORM, HEART grant recipient staff will generally conduct case management functions for clients enrolled as couples following the same procedures described for individual clients. However, there are some differences in the layout of the Profile, Outreach, Service History, and Workshop/Sessions pages for couple clients. When grant recipient staff open either partner 1 or partner 2's client record they will be directed to a page showing tabs for partner 1's Profile page, partner 2's Profile page, and the couple's combined Outreach page, Service History page, and Workshops/Sessions page.

Please note that two partners enrolled as a couple should not be "uncoupled" in nFORM once one of the partners has completed an entrance survey.

Both partners' names and client ID numbers will be listed at the top of the Profile page in the order of their Client ID numbers. When one partner's Profile page is open, that partner's name appears in larger font and the tab for that partner's Profile page is highlighted in yellow.



The couple's combined Outreach (C21) and Service History (C4) pages are similar to the Outreach and Service History pages of individual clients. However, these pages will include additional columns in the Service Contacts, Referral History, and Incentives/Program Supports tables (Service History page only) to indicate whether the respective activity was for partner 1 only, partner 2 only, or the couple together.

Martha HEART_18 (Client ID 12475539)
Manuel HEART_18 (Client ID 12475542)

Martha's Profile | Manuel 's Profile | **Outreach** | Service History | Workshops / Sessions

Service Contacts

Service Date	Data Entered By	Service contact included	# Referrals	# Incentives and Program Supports	Contact Method	Most Recent Notes	Add Referral(s)
3/4/2026	FirstName_2695 LastName_2695	Couple	1	0	Phone call		

1 Record(s)

Referrals

Service Date	Data Entered By	Referral For	Referred To	Referral Type(s)	Client Follow Up Needed
3/4/2026	FirstName_2695 LastName_2695	Couple	Feeding Us All	Domestic Violence/Intimate Partner Violence; Legal Assistance Referral	N

1 Record(s)

Clients | Workshops | Service Providers | Reports | Settings | Help

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Martha HEART_18 (Client ID 12475539)
Manuel HEART_18 (Client ID 12475542)

Martha's Profile | Manuel 's Profile | Outreach | **Service History** | Workshops / Sessions

Service Contacts — Add Service Contact

Service Date	Data Entered By	Service contact included	# Referrals	# Incentives and Program Supports	Contact Method	Most Recent Notes	Add Referral(s)
4/9/2026	FirstName_2695 LastName_2695	Martha HEART_18	0	0	In community		+ Add Referral
3/4/2026	FirstName_2695 LastName_2695	Couple	1	0	Other Church		+ Add Referral

2 Record(s)

Referral History

Service Date	Data Entered By	Referral For	Referred To	Referral Type(s)	Client Follow Up Needed
3/4/2026	FirstName_2695 LastName_2695	Couple	Keys To Education	Family Therapy/Counseling Referral; Career planning	N

1 Record(s)

Incentives/Program Supports History — Add Incentive/Program Support

Date Provided	Data Entered By	When Provided	Provided To	Category	Type	Amount
3/4/2026	FirstName_2695 LastName_2695	Another Time	Couple	Grant-funded Participation Supports: Child care	Direct payment to a vendor	35

1 Record(s)

Clients | Workshops | Service Providers | Reports | Settings | Help

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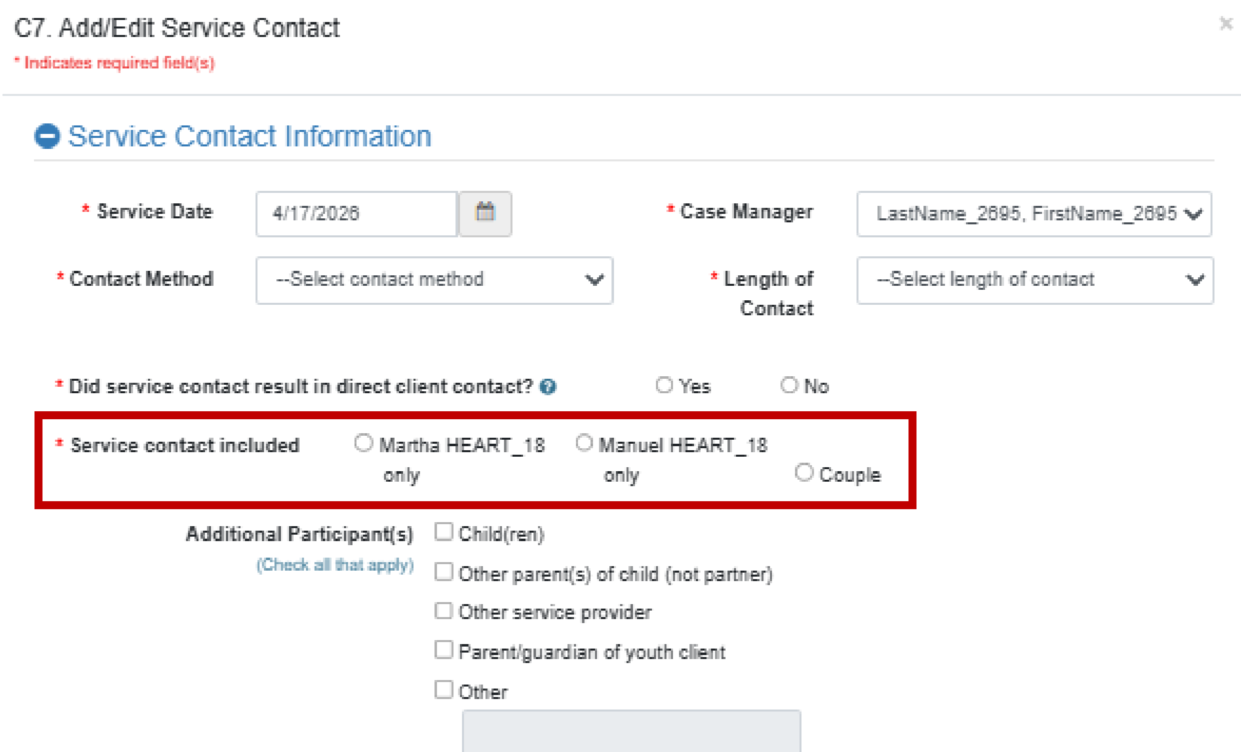
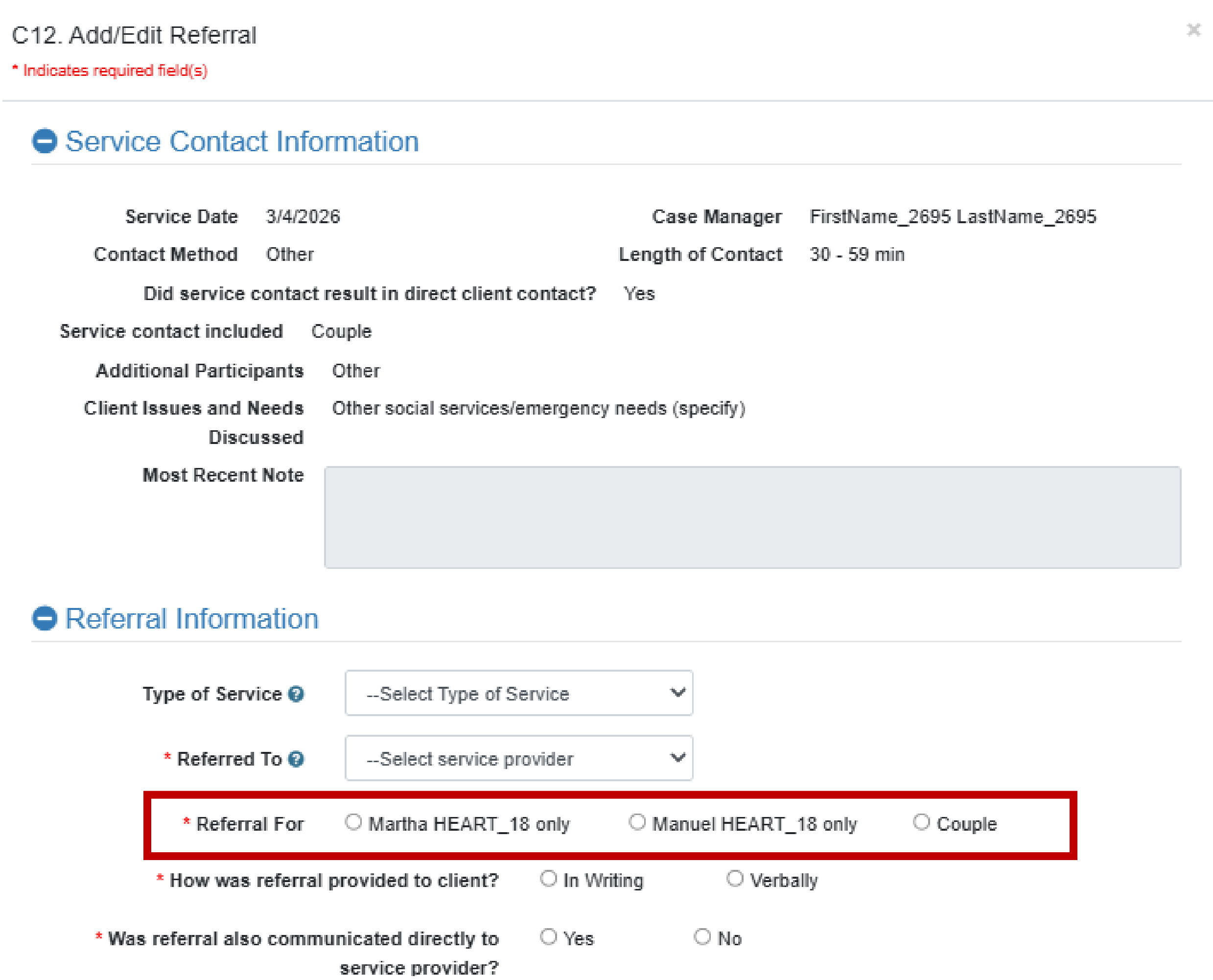
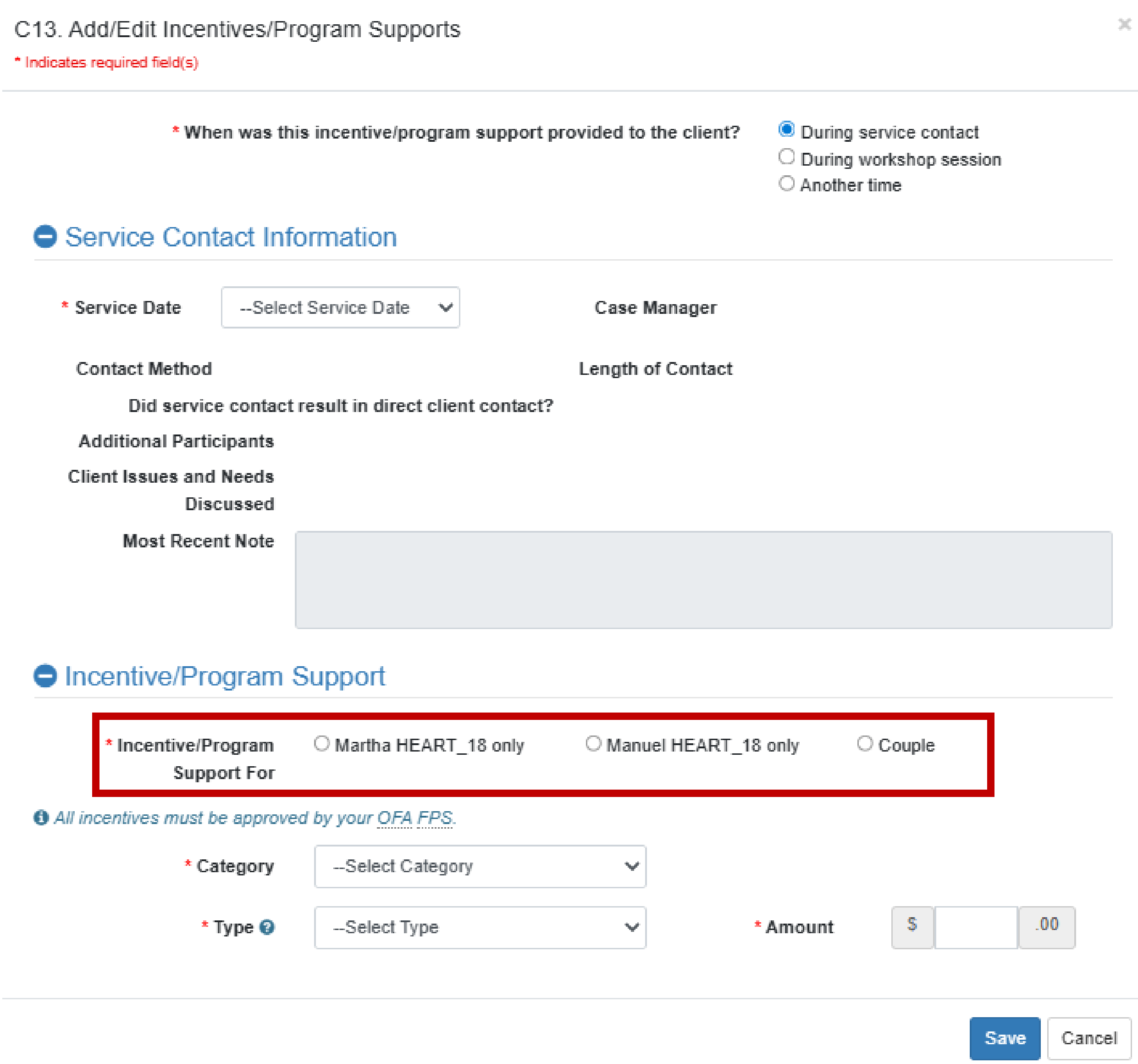
The respective screens to enter information about service contacts, referrals, and incentives/program supports contain extra fields for recording whether the activity was for partner 1 only, partner 2 only, or the couple. All other screen functionality is identical for couple and individual clients.




C12. Add/Edit Referral
* Indicates required field(s)
Service Contact Information
Service Date 3/4/2026
Case Manager FirstName_2695 LastName_2695
Contact Method Other
Length of Contact 30 - 59 min
Did service contact result in direct client contact? Yes
Service contact included Couple
Additional Participants Other
Client Issues and Needs Discussed Other social services/emergency needs (specify)
Most Recent Note
Referral Information
Type of Service
--Select Type of Service
* Referred To
--Select service provider
* Referral For
Martha HEART_18 only
Manuel HEART_18 only
Couple
* How was referral provided to client?
In Writing
Verbally
* Was referral also communicated directly to service provider?
Yes
No



Monitoring ISCs, referrals and incentives provided to couples. ISCs, referrals and incentives that are provided to couples are counted differently depending on whether they apply to one or both partners. See the tables below for more information on how ISCs (table VII.2), referrals (table VII.3), and incentives (table VII.4) provided to couples are reported in nFORM reports[1].

[1] Only substantive ISCs and referrals are reported on the PPR while incentives are not. ISCs, referrals, and incentives are all reported on the query tool.

Table VII.2. Monitoring individual service contacts provided to couples in nFORM

Scenario	Client profile: Service Contacts	PPR (Section C-04.3)	ISC count in summary ISC operational report	ISC count in detailed ISC operational report	Data export (Service Contacts tab)	Query tool
Minnie participates in an ISC. Mickey does not participate in an ISC.	For any type of ISC, 1 row is added to the Service Contacts table displaying "Minnie" as the client who received the service contact.	If substantive, 1 ISC is added in the total and average substantive ISC count.	If substantive or reminder-only,1 ISC is added in the total and applicable category counts for Minnie.	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie.	For any type of ISC, 1 ISC row is added for Minnie.	**Individual Services tab:** For any type of ISC, 1 client is added to the number of clients who had ISCs, and 1 ISC is added to the count of total ISCs. Based on the issue/need discussed during Minnie's ISC, 1 ISC is also added in the Most Common Client Issues and Needs category count(s). **Grant Year Overview tab:** If Minnie was enrolled in the current grant year and the ISC was substantive, 1 ISC is added in the average substantive ISC count.
Minnie and Mickey each participate in an ISC (i.e., they each participate in an individual session).	For any type of ISC, 2 rows are added to the Service Contacts table displaying "Minnie" and "Mickey" as each receiving an ISC.	If substantive, 2 ISCs are added in the total and average substantive ISC count.	If substantive or reminder-only, 2 ISCs are added to the total and applicable category counts, 1 each for Minnie and Mickey.	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie and for Mickey.	For any type of ISC, 1 ISC row is added for Minnie, and 1 ISC row is added for Mickey.	**Individual Services tab:** For any type of ISC, 2 clients are added to the number of clients who had ISCs, and 2 ISCs are added to the count of total ISCs. If applicable, 1 or 2 ISCs are also added in the Most Common Client Issues and Needs category count(s) for Minnie and/or for Mickey, depending on whether either partner's ISC included any of the most common client issues and needs. **Grant Year Overview tab:** If Minnie and Mickey were enrolled in the current grant year and the ISCs were substantive, 2 ISCs are added to the average substantive ISC count.
Minnie and Mickey participate in an ISC as a couple.	For any type of ISC, 1 row is added to the Service Contacts table displaying "Couple"	If substantive, 1 ISC is added in the total and average substantive ISC count.	If substantive or reminder-only, 1 ISC is added to the total and applicable category counts for Minnie and Mickey.	If substantive or reminder-only, 1 ISC is added in the applicable category count for Minnie and for Mickey.	For any type of ISC, 1 ISC row is added for Minnie, and 1 ISC row is	**Individual Services tab:** For any type of ISC, 2 clients are added to the number of clients who had ISCs, and 2 ISCs are added to the count of total ISCs, 1 each for Minnie and for Mickey, as data on this tab are represented at the individual level. If applicable, 2 ISCs are also added in the

Scenario	Client profile: Service Contacts	PPR (Section C-04.3)	ISC count in summary ISC operational report	ISC count in detailed ISC operational report	Data export (Service Contacts tab)	Query tool
	as who received the service contact.				added for Mickey.	Most Common Client Issues and Needs category count(s) for Minnie and for Mickey, depending on whether the ISC included any of the most common client issues and needs. **Grant Year Overview tab:** If Minnie and Mickey were enrolled in the current grant year and the ISC was substantive, 1 ISC is added in the average substantive ISC count.

Note: Service contacts provided to couples prior to enrollment are listed on the Outreach tab and those provided after enrollment are displayed on the Service History tab in the Client profile.

Table VII.3. Monitoring referrals provided to couples in nFORM

Scenario	Client profile: Referral History table	PPR (Section C-06)	Referral count in detailed Caseload Summary operational report	Data export (Referrals tab)	Query tool
Minnie receives a referral. Mickey does not receive a referral.	1 referral is added to the Referral History table displaying "Minnie" as who the referral was provided to.	1 referral is added to the total referral count. If Minnie follows up on the referral, it is included in the total count of follow-ups on referrals.	If the referral needs to be followed up on, 1 referral is included in the "# of referrals requiring follow-up" count for Minnie.	1 referral row is added for Minnie.	**Individual Services tab:** 1 client is added to the number of clients who received referrals. The number of service contacts resulting in referrals would increase by 1 for Minnie, and 1 referral is added to the total referrals count. If applicable, 1 referral is also added in the Most Common Types of Referrals category count(s) for Minnie. **Grant Year Overview tab:** If Minnie's referral needs to be followed up on and she was enrolled in the current grant year, 1 referral is included in the "Number of referrals needing follow-up for current year enrollees" count for Minnie.
Minnie and Mickey each receive a referral (i.e., they each receive an individual referral).	2 rows are added to the Referral History table displaying "Minnie" and "Mickey" as each being provided a referral.	2 referrals are added to the total referral count. If only Minnie follows up on her referral, it is included in the total count of follow-ups on referrals. If only Mickey follows up on his referral, only that one is included in the total count of follow-ups on referrals. If both Minnie and Mickey each follow up on their referral, 2 referrals are added to the total count of follow-ups on referrals.	If Minnie and/or Mickey's referral needs to be followed up on, 1 referral is included in the "# of referrals requiring follow-up" count for Minnie and/or Mickey. If the referrals for Minnie and Mickey both need to be followed up on, 1 referral is included in the "# of referrals requiring follow-up" count for Minnie and 1 referral is included in the "# of referrals requiring follow-up" for Mickey.	1 referral row is added for Minnie, and 1 referral row is added for Mickey.	**Individual Services tab:** 2 clients are added to the number of clients who received referrals. The number of service contacts resulting in referrals would increase by 2, 1 each for Minnie and Mickey, and 2 referrals are added to the total referrals count. If applicable, 1 or 2 referrals are also added in the Most Common Types of Referrals category count(s) for Minnie and/or for Mickey, depending on whether either partner's referral included any of the most common types of referrals. **Grant Year Overview tab:** If Minnie or Mickey's referral needs to be followed up on and they were enrolled in the current grant year, 1 referral is included in the "Number of referrals needing follow-up for current year enrollees" count for Minnie or Mickey. If the referrals for Minnie and Mickey both need to be followed up on, 1 referral is included in the "Number of referrals needing follow-up for current year enrollees"

Scenario	Client profile: Referral History table	PPR (Section C-06)	Referral count in detailed Caseload Summary operational report	Data export (Referrals tab)	Query tool
					count for Minnie and 1 referral is included in the "Number of referrals needing follow-up for current year enrollees" count for Mickey.
Minnie and Mickey receive a referral as a couple.	1 row is added to the Referral history table displaying "Couple" as who the referral was provided to.	1 referral is added to the total referral count. If they follow-up on the referral, it is included in the total count of follow-ups on referrals.	If the referral needs to be followed up on, 1 referral is included in the "# of referrals requiring follow-up" count for Minnie and Mickey.	1 referral row is added for Minnie, and 1 referral row is added for Mickey.	**Individual Services tab:** 2 clients are added to the number of clients who received referrals. The number of service contacts resulting in referrals would increase by 2, 1 each for Minnie and for Mickey, and 2 referrals are added to the total referrals count, as data on this tab are represented at the individual level. If applicable, 2 referrals are also added in the Most Common Types of Referrals category count(s) for Minnie and for Mickey, depending on whether the referral included any of the most common types of referrals. **Grant Year Overview tab:** If Minnie and Mickey's referral needs to be followed up on and they were enrolled in the current grant year, 2 referrals are included in the "Number of referrals needing follow-up for current year enrollees" count for Minnie and Mickey.

Note: Referrals provided to couples prior to enrollment are listed on the Outreach tab and those provided after enrollment are displayed on the Service History tab in the Client profile.

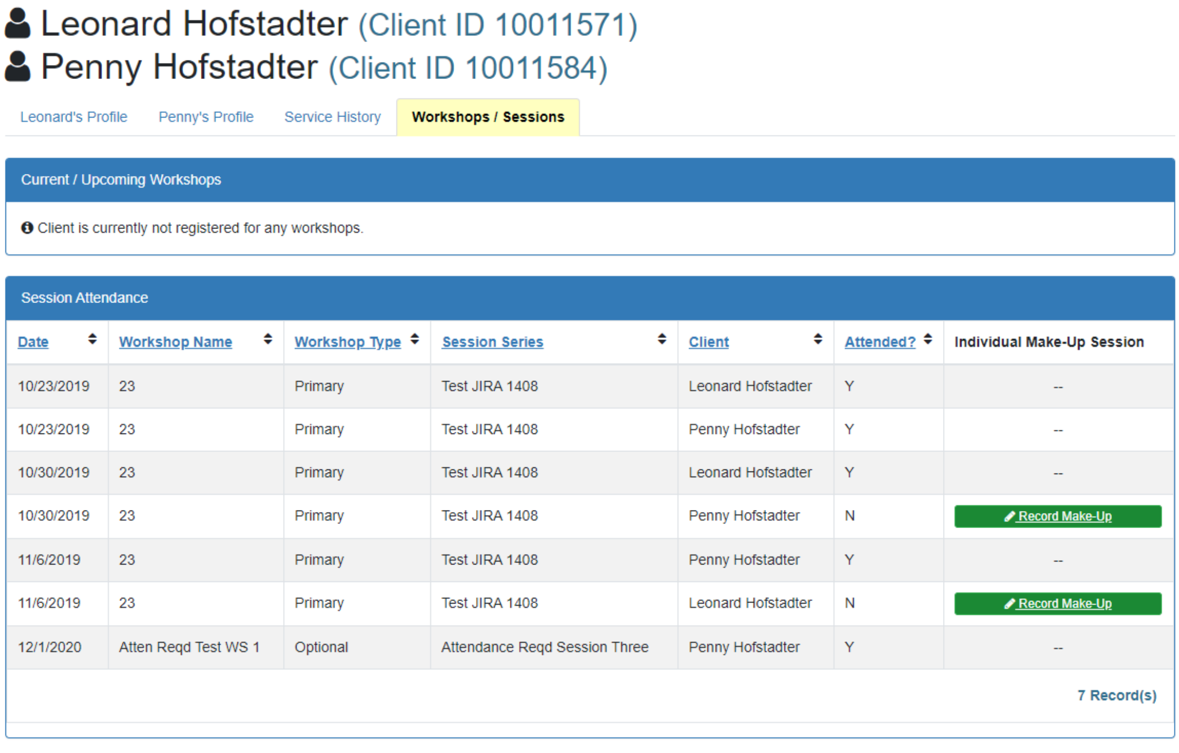
Similar to ISCs and referrals, incentives provided to couples are reported differently depending on whether they are provided to the couple as a unit or to each member of the couple individually. See table VII.4 below for detailed information on how the nFORM reports display client-level information for incentives provided to couples. Note that incentive counts are not reported in the PPR, and an incentive provided to a couple together is reported differently on operational reports than ISCs and referrals provided to a couple together. When using the data export, HEART grant recipients should use the "Incentive-Program Support ID" variable to monitor the number of unique incentives provided and the "Incentive-Program Support Provided to Couple?" variable to identify whether both partners of a couple received an incentive together.

Table VII.4. Measuring incentives provided to couples in nFORM[2]

Scenario	Client profile: Incentives/Program Supports History table	Incentive count in Summary Incentives operational report	Incentive amount in Detailed Incentives operational report	Data export (Incentives-Program Supports tab)	Query tool (Individual Services tab)
Minnie receives an incentive. Mickey does not receive an incentive.	1 row is added to the Incentives/Program Supports table displaying “Minnie” as who received the incentive.	1 incentive is added in the total and applicable category counts for Minnie.	The dollar amount received is reflected in Minnie’s row.	1 incentive row is added for Minnie.	1 client is added to the number of clients who received incentives, and 1 incentive is added to the count of incentives received. The dollar amount of Minnie’s incentive is included in the average incentives amount calculation. 1 incentive is also added to the applicable category count in each bar chart for Minnie.
Minnie and Mickey each receive an individual incentive.	2 rows are added to the Incentives/Program Supports History table displaying “Minnie” and “Mickey” as each receiving an incentive.	2 incentives are added to the total and applicable category counts for Minnie and Mickey.	The dollar amount of each incentive is reflected in Minnie’s row and Mickey’s row.	1 incentive row is added for Minnie, and 1 incentive row is added for Mickey.	2 clients are added to the number of clients who received incentives, and 2 incentives are added to the count of incentives received. The dollar amount of each partner’s incentive is included in the average incentives amount calculation. 2 incentives are also added to the applicable category counts in each bar chart.
Minnie and Mickey receive an incentive as a couple (i.e., the incentive is given to the couple to share).	1 row is added to the Incentives/Program Supports History table displaying “Couple” as who received the incentive.	2 incentives are added to the total and applicable category counts for Minnie and Mickey.	One half of the dollar amount of the incentive is reflected in Minnie’s row and one half in Mickey’s row.	1 incentive row is added for Minnie, and 1 incentive row is added for Mickey.	2 clients are added to the number of clients who received incentives, and 2 incentives are added to the count of incentives received, 1 each for Minnie and for Mickey, as data on this tab are represented at the individual level. 2 incentives are also added to the applicable category count in each bar chart.

[2] If incentives are allocated to a partner in a couples’ population whose status is Applicant pending enrollment, that portion of the incentive will not appear in the Incentives operational report until the client completes enrollment.

The Workshops/Sessions page (C5) also displays an extra column in the Current/Upcoming Workshops and Session Attendance grids to indicate to which member of the couple the row corresponds. All other functionality on this page is the same as for individual clients.


Leonard Hofstadter (Client ID 10011571)
Penny Hofstadter (Client ID 10011584)

Leonard's Profile | Penny's Profile | Service History | Workshops / Sessions

Current / Upcoming Workshops

Client is currently not registered for any workshops.

Session Attendance

Date	Workshop Name	Workshop Type	Session Series	Client	Attended?	Individual Make-Up Session
10/23/2019	23	Primary	Test JIRA 1408	Leonard Hofstadter	Y	--
10/23/2019	23	Primary	Test JIRA 1408	Penny Hofstadter	Y	--
10/30/2019	23	Primary	Test JIRA 1408	Leonard Hofstadter	Y	--
10/30/2019	23	Primary	Test JIRA 1408	Penny Hofstadter	N	Record Make-Up
11/6/2019	23	Primary	Test JIRA 1408	Penny Hofstadter	Y	--
11/6/2019	23	Primary	Test JIRA 1408	Leonard Hofstadter	N	Record Make-Up
12/1/2020	Atten Reqd Test WS 1	Optional	Attendance Reqd Session Three	Penny Hofstadter	Y	--

7 Record(s)

VIII. Reports

Grant recipients can view and analyze the data they collect in nFORM by using the operational reports, data export, and query tool features found under the Reports tab. The Reports tab is also used by site administrators to generate the annual Performance Progress Report (PPR) required by ACF.

Access to nFORM reporting functions depends on the user account types and permissions (see Module IV). Grant recipient site administrators will generate the PPRs and data exports. The types of operational reports that nFORM users can generate depends on their user account type (see Module VIII.B for more information). At each grant recipient, up to three nFORM users (with any type of user account) can be assigned permission to access the query tool.

A. Annual Performance Progress Reports (screen R1)

ACF requires that grant recipients submit a comprehensive PPR each year, due on October 30. The report will include performance measure data for the applicable grant year. For example, the PPR submitted on October 30, 2027 will include performance measure data for grant year 2 (September 30, 2026 – September 29, 2027).

ACF may periodically ask a grant recipient to submit an ad-hoc PPR outside of the annual reporting cycle. If an FPS requests an ad-hoc PPR, grant recipients should follow the same process for completing and submitting the ad-hoc PPR as the annual required report.

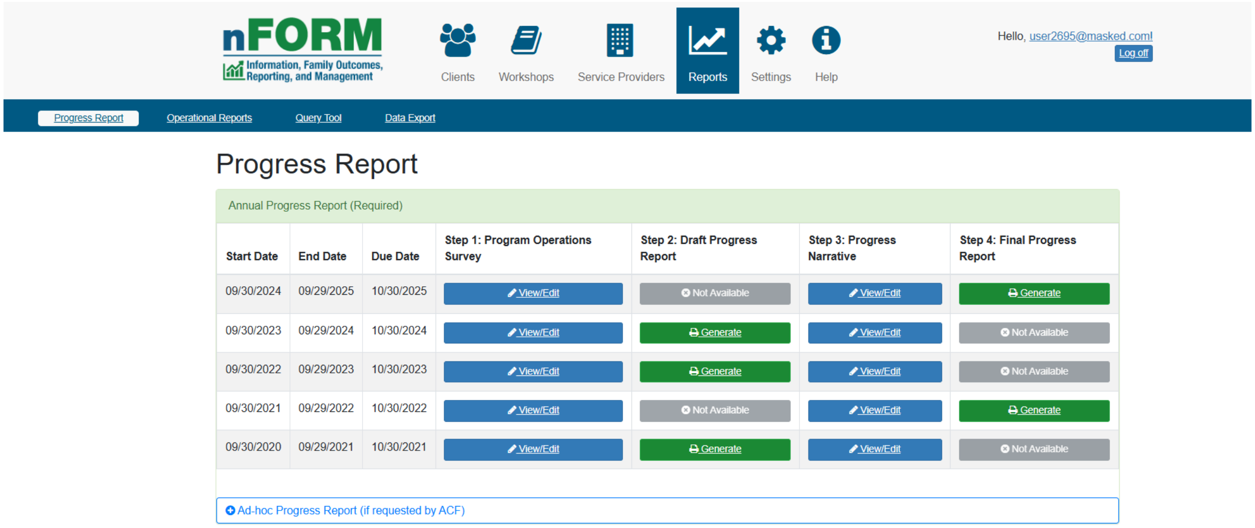
Site administrators should follow the steps below to prepare and generate the required reports. Module VIII.A.4. describes how site administrators submit PPRs to Grant Solutions.

VIII.A.1. Complete program operations survey

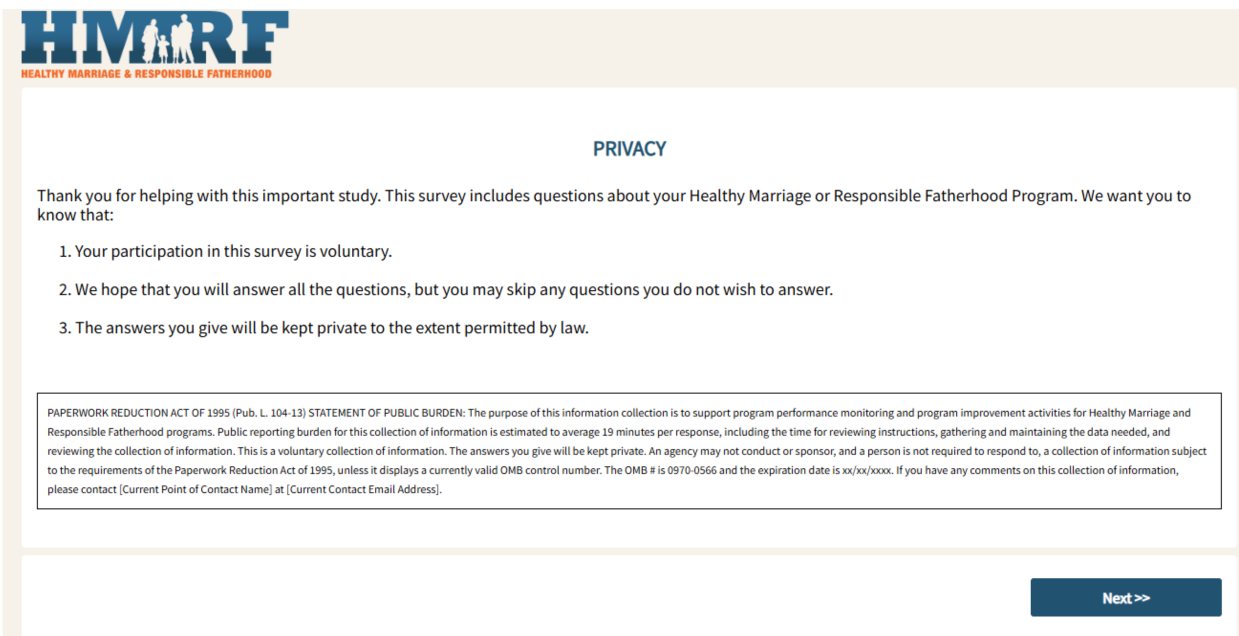
Grant recipients will respond to the program operations survey each year as the first step in completing their PPR. This survey asks grant recipients to provide information in such areas as outreach and recruitment activities, target enrollment, staff levels and training, and implementation challenges. This survey is completed for the grant recipient as a whole, rather than for each grant recipient location.

The program operations survey is a web survey that site administrators may complete on their grant-approved devices. If the program operations survey is completed on a tablet, the tablet should be placed in the landscape or horizontal orientation for best navigation. The program operations survey does not include audio.

The survey is launched from the Progress Report screen (R1) by clicking the Start button in the Step 1: Program Operations Survey column for the applicable reporting period. Reporting periods are designated by the Report Start, Report End, and Due Date in each row.



Within the web survey, click the Next button in the lower right corner of each screen to advance through the questions. You can also click on the Back button to return to prior questions. Answer each question in the survey and click Next on the Submit Your Survey page when finished. Responses to the program operations survey can be edited by clicking the View/Edit button for the applicable reporting period on the Progress Report (R1). This allows grant recipients to correct any mistakes in their program operations survey.



VIII.A.2. Generate PPR data

To generate a draft version of the PPR, click the Generate button under the Step 2: Draft Progress Report column for the applicable reporting period. This will compile all the required numeric performance measures about clients and service delivery, along with program operations survey responses, into a single PDF. For example, based on data entered in the system, nFORM will calculate the number of clients who enrolled in the program and the number who achieved each primary workshop participation benchmark. (The grant recipient's enrollment and primary workshop participation annual targets are programmed into nFORM when approved by ACF.)

Grant recipients should review the numeric information provided in the draft report to inform responses to the Progress Narrative (described in Module VIII.A.3). Site administrators should identify performance measures in the report that may necessitate additional context. For example, grant recipients that do not reach their enrollment target(s) during the grant year can describe outreach and recruitment challenges they may have experienced that impacted enrollment. In the draft and final PPR, responses to the Progress Narrative are embedded in the report so that quantitative and qualitative information on performance measures are displayed together. Report submission instructions are provided in Module VIII.A.4.

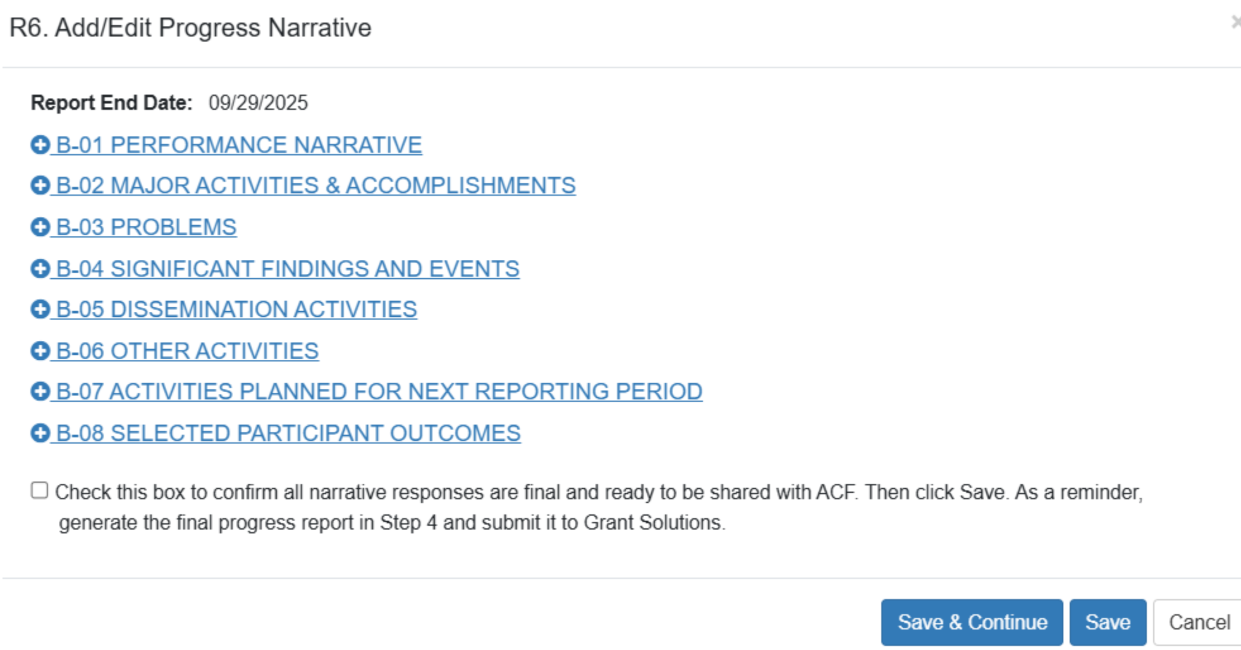
Please note that clients participating in a local evaluation who are assigned to Control (NO services) or Waitlist Control (NO services) groups are not included in PPR calculations. Grant recipients may note any impact this has on enrollment targets in their progress narrative.

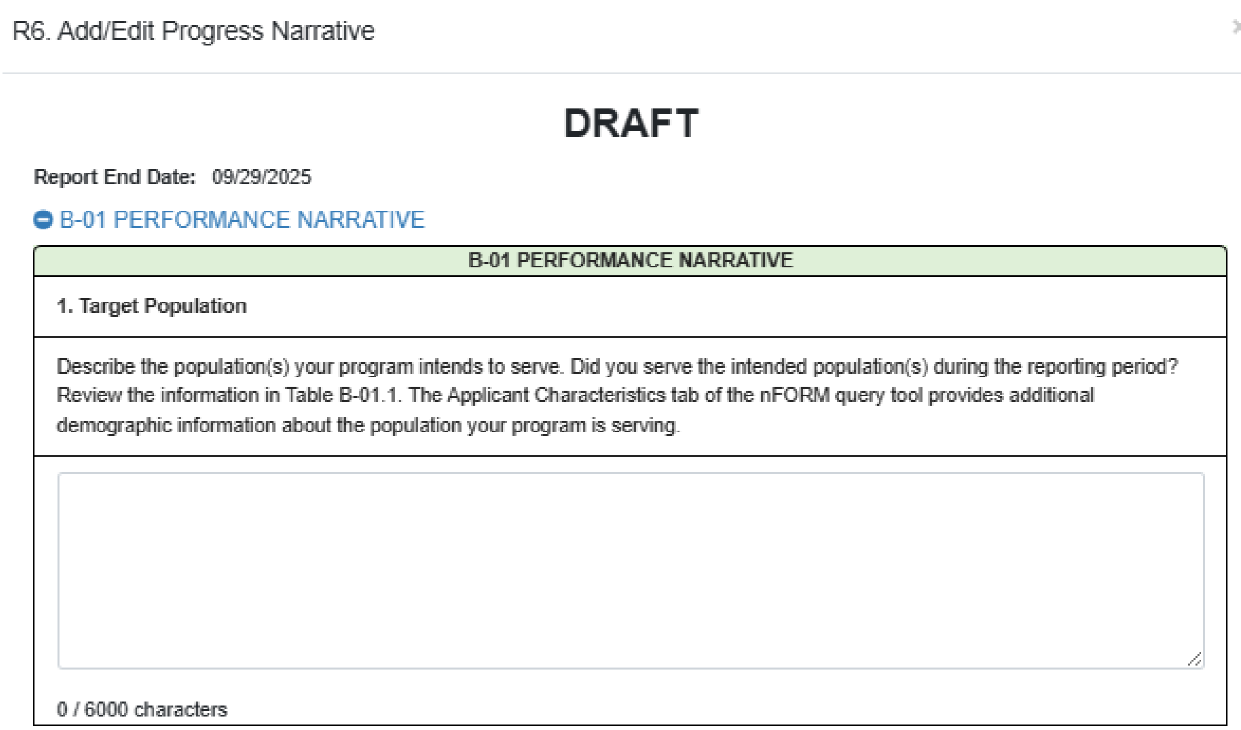
VIII.A.3. Complete progress narrative

Grant recipients are required to provide narrative information about the numeric data in the PPR. The narrative information helps grant recipients and ACF understand the context for the performance measures, what works well in program design and implementation, and where there are challenges. The narrative can be used, for example, to describe any issues grant recipients have in reaching enrollment or primary workshop participation targets. Grant recipients are encouraged to concisely summarize key points in the progress narrative and discuss issues in more detail during discussions with their FPS, rather than restating their numeric data.

To complete the Progress Narrative, click the "Start" button (or "View/Edit" button if the Progress Narrative has previously been opened) under Step 3: Progress Narrative column for the applicable reporting period. Grant recipients will enter responses for questions under each section of the Progress Narrative by clicking the Edit button on the Add/Edit Progress Narrative menu (R6), then clicking the addition symbol to the left to display all of the questions for each section. Note that each response has a 6,000 character limit.

Click either the "Save and continue" button to continue entering information or "Save" to save responses entered so far and exit the screen. Grant recipients that may be prone to service interruptions (for example, weak Internet or Wifi strength) should plan to click "Save and continue" every two minutes to reduce the risk of losing entries.





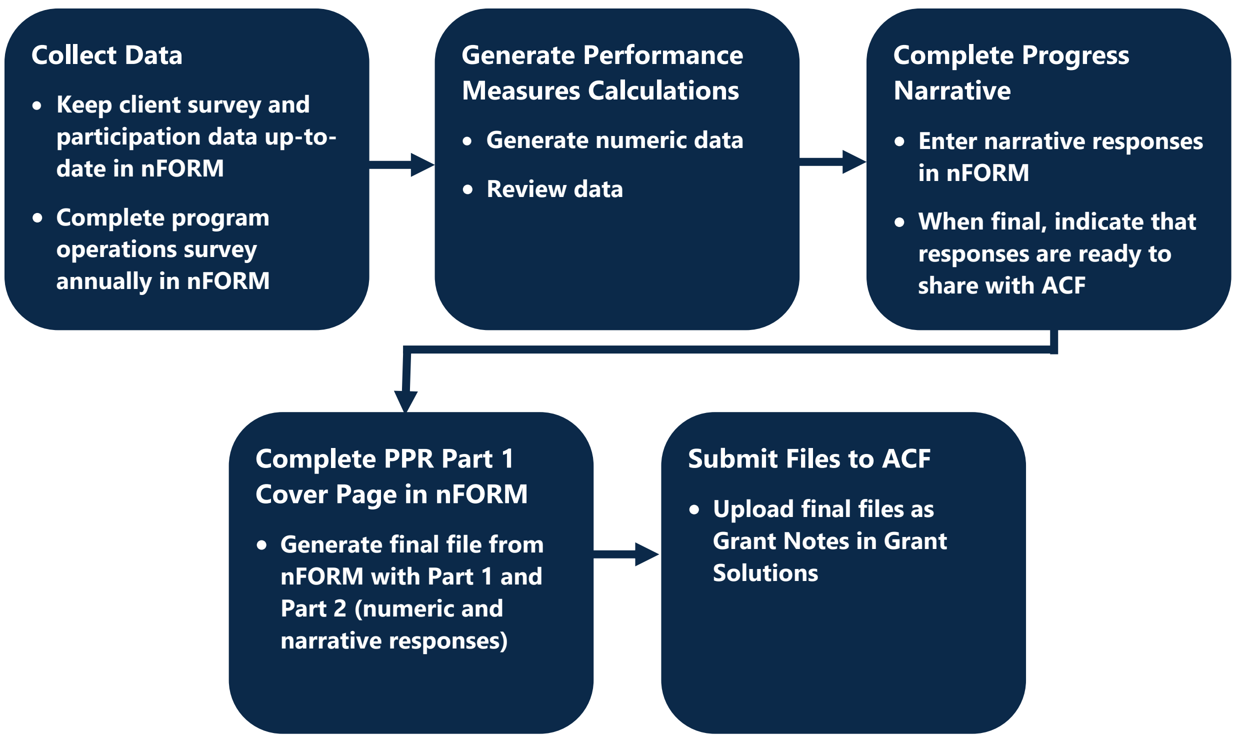
Once grant staff have reviewed and finalized all Progress Narrative responses, grant site administrators will click the checkbox at the bottom of the Add/Edit Progress Narrative screen (R6) confirming that responses are final and ready to be shared with ACF. Responses will appear with the corresponding numeric data in the final PPR.

VIII.A.4. Compile and submit report

Once a PPR is completed as described in Modules VIII.A.1 through VIII.A.3, it must be submitted in Grant Solutions as a Grant Note. The Federal Financial Reports or FFRs (SF-425) are also due in the HHS Payment Management System (PMS)—please refer to your Notice of Award for more information on FFR reporting.

The following flow chart summarizes the process for completing and submitting the PPR to ACF.

Figure VIII.1. Summary of PPR process



B. Operational Reports (screen R2)

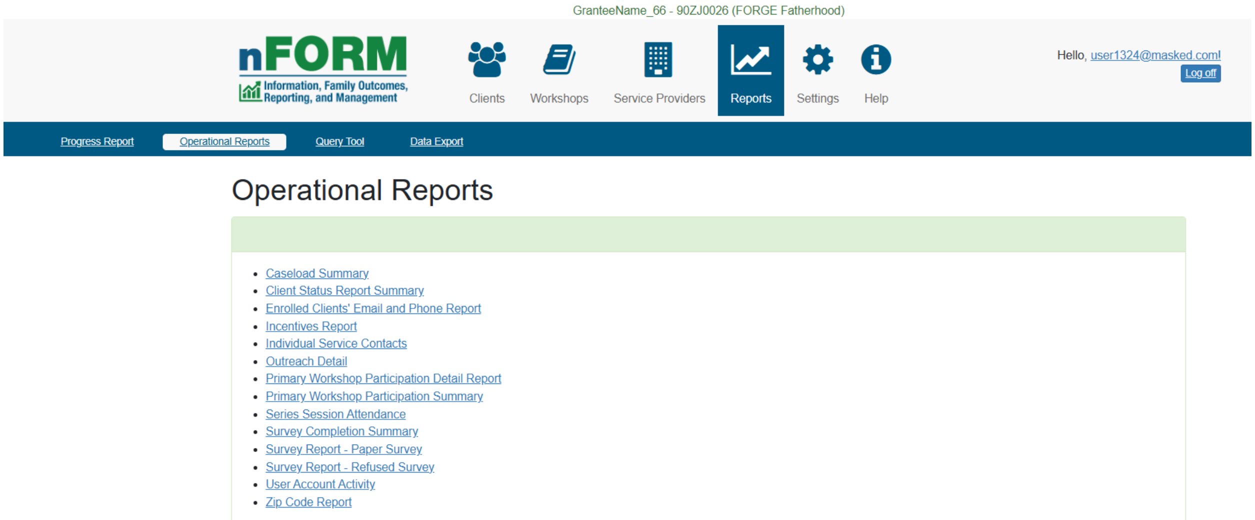
On the Operational Reports screen (R2) in the Reports tab, grant recipient users can access various reports with up-to-date information to help manage the daily operations of their grant and to obtain information for the narrative portion of their PPR. For example, grant staff can run the Survey Completion report to monitor whether enrollment is completed for clients and to identify which clients require a follow-up contact to complete their surveys. These operational reports are described in the following table VIII.2, along with the types of nFORM users who can access each report.

Table VIII.1. nFORM operational reports

Report name	Description	nFORM users with access
Caseload summary/detail	Identifies all staff with case management capability; their active client counts, client assignments, and client activity; and the average caseload across staff with case management capability. Includes couple identifier for applicable clients.	Site administrators and case managers
Client Status report summary/detail	Counts of clients with each status code, and also details clients by location, their current status codes, and enrollment dates. Includes couple identifier for applicable clients.	Site administrators, case managers, and general users with enrollment permission
Incentives report summary/detail	Includes all incentives provided to help grant recipients track incentives per ACF guidelines and FPS-approved incentive plans. Summary counts are provided by grant recipient location and population. The detailed report provides incentive counts and amounts by client. Incentives are reported in total and by category; incentives that exceed the ACF maximum are also identified.	Site administrators and case managers
Individual Service Contacts report summary/detail	Identifies the average number of substantive ISCs and the average number of reminder-only contacts by client population and grant recipient location. The report also lists for each client the date of the client's most recent substantive ISC, the number of substantive ISCs, and the number of reminder-only contacts. (As a reminder, ACF defines substantive ISCs as service contacts that (1) last 15 minutes or longer, (2) result in direct contact with the client, and (3) cover client issues and needs beyond just reminder contacts.)	Site administrators and case managers
Outreach Detail report	Lists client location, population, name, primary language, contact information, and individual services provided including ISCs and referrals for clients who have not yet been enrolled. Can be filtered on application date and whether clients with a status of "Will Not Enroll" are included to help in identifying clients who have not yet enrolled.	Site administrators, case managers, and general users with enrollment permission
Local Evaluation Enrollment summary/detail (where applicable)	Counts of clients in each service assignment category within and across grant recipient locations. The report also details individual clients in each service assignment category. Includes couple identifier for applicable clients.	Site administrators, case managers, and general users with enrollment permission for grant recipients conducting local evaluations
Enrolled Clients' Email and Phone Number report	Lists grant recipient location, population, name, service assignment name for local evaluation clients, primary language, email address, phone numbers, and indicator for permission to text. Can be filtered on enrollment dates, specific client statuses and workshops to help in following up with groups of clients at a time. Report only includes clients who completed enrollment and not those in the outreach/recruitment phase.	Site administrators, case managers, and general users with enrollment permission

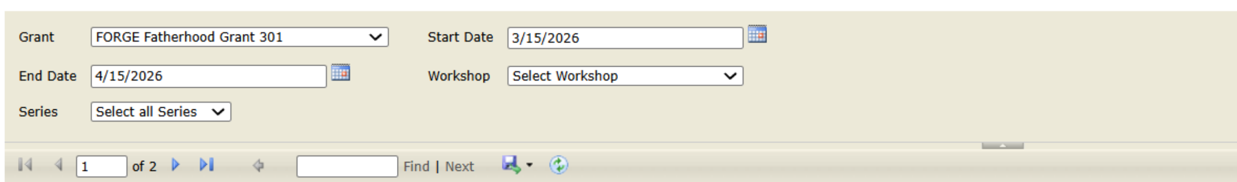
Report name	Description	nFORM users with access
Primary Workshop Participation summary/detail	Counts of clients and their average participation in primary workshop hours compared to target, within and across grant recipient locations. The report also details, by location, clients and their primary workshop participation. Includes participation data for primary workshop sessions where attendance is either fully or partially recorded.	Site administrators, case managers, and general users with enrollment permission
Series Session Attendance	Identifies client attendance by series for selected workshop, series, and time frame. Includes couple identifier for applicable clients.	Site administrators, case managers, and general users with enrollment permission
Survey Completion summary/detail	Counts of clients by population who have completed the entrance survey and whether they have completed the exit survey. The report also details, by location, clients and whether they have completed the exit survey.	Site administrators, case managers, and general users with enrollment permission
Survey report - Paper surveys summary/detail	Identifies counts of surveys completed on paper at aggregate level (by location and population), and at individual client level, to help track data entry when paper surveys must be administered to clients.	Site administrators, case managers, and general users with enrollment permission
Survey report - Refused surveys summary/detail	Identifies counts of refused surveys at aggregate level (by location and population), and at individual client level, to help organize follow-up with clients and identify any trends in refusals that should be addressed.	Site administrators, case managers, and general users with enrollment permission
User Account Activity	Identifies all authorized nFORM users at the grant recipient, their account type and permissions, and usage.	Site administrators
Zip Code report	Lists grant recipient location, population, client zip codes (based on application form data), and total number of clients with each zip code, to help see whether target geographic areas are being reached.	Site administrators, case managers, and general users with enrollment permission

To generate one of the operational reports, click the applicable link on the Operational Reports screen (R2) under the Reports tab. On this screen, nFORM users will see only the operational reports to which they have access.



Where applicable, select report options such as the start and end date of the time period to be reviewed, and then click on View Report to open the selected report in nFORM. Many of the reports have multiple pages to show both summary level data and detailed data at the individual client level; the nFORM couple ID number is also provided where applicable.

Operational reports can be opened in different formats such as a PDF or in Excel, which allows grant recipient staff to sort and filter the information in the reports. Click on the Save icon and select the appropriate format for opening the report, then save the report to your computer (outside of nFORM).



Survey Completion Summary*

Clients Enrolled: 3/15/2026 - 4/15/2026

Grant	Client Population	Number of Clients					
		Entrance Survey			Exit Survey		
		Completed		Refused	Completed		Refused
		English	Spanish		English	Spanish	
FORGE Fatherhood Grant 301	**All**	**7**	**2**	**1**	**2**	**1**	**0**
	Community father	7	1	0	2	0	0
	Reentering father	0	1	1	0	1	0

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

4/15/2026 3:23:43 PM

Page 1 of 2

C. Query Tool (screen Q1)

The query tool helps grant recipients track, monitor, and analyze the data they collect in nFORM for client populations for which they have ACF-approved targets. The query tool refreshes overnight and includes data entered into nFORM through the prior day. (nFORM's other data tools include real-time data, as well as data for any clients served under populations without approved targets, if applicable.)

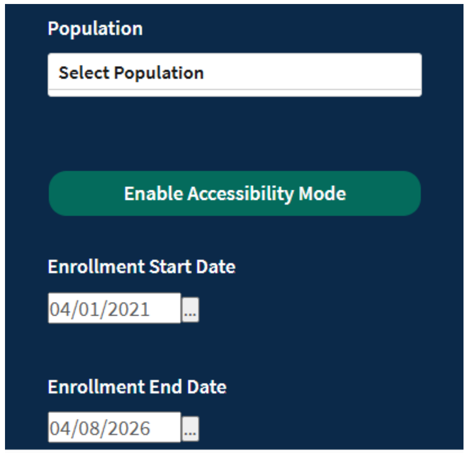
Up to three nFORM users at each grant recipient can access the query tool through the Query Tool screen (Q1) under the Reports tab. To give access to the query tool, a site administrator selects a permission when setting up or editing the user accounts.

The query tool uses Qlik Sense software to display the nFORM data. The Query Tool screen (Q1) displays a disclaimer about the Qlik Sense software that all query tool users should review.

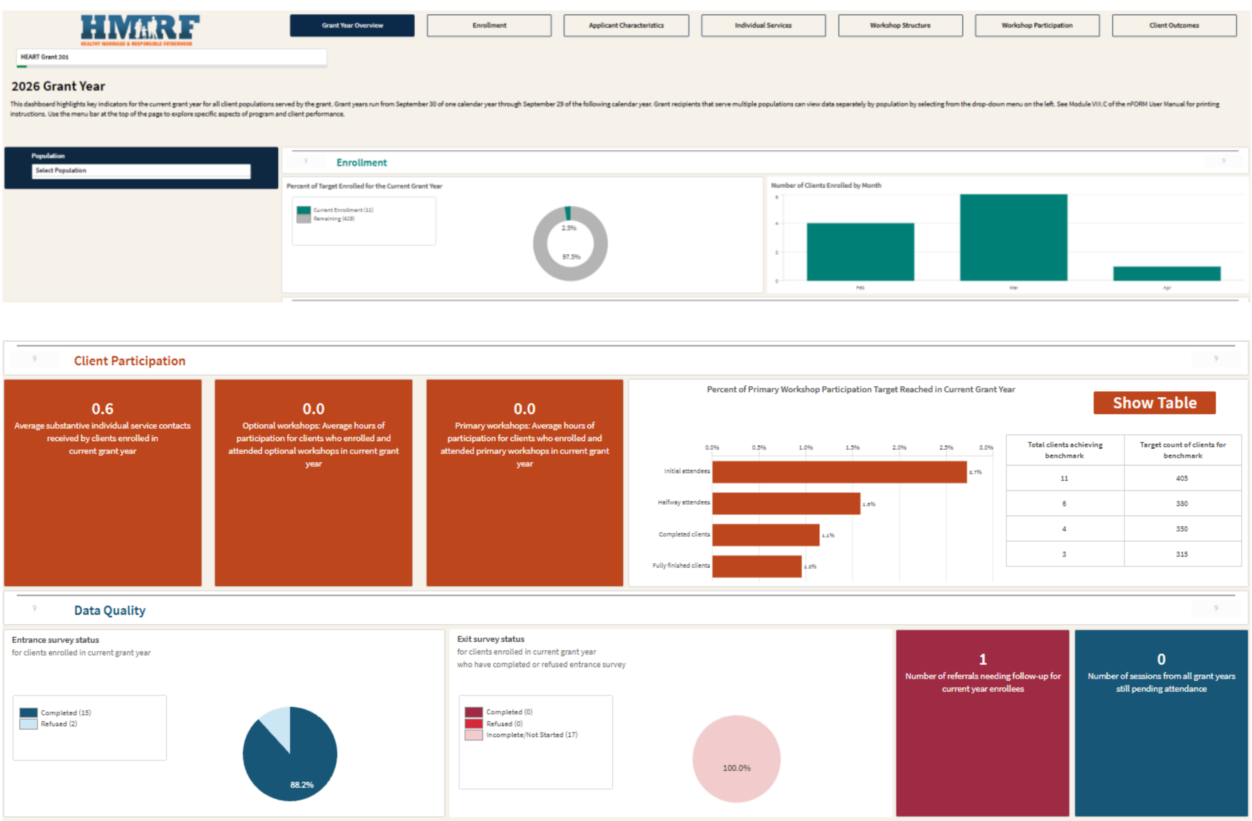
Click on the Launch Query Tool button. The query tool will open in a new browser tab.

Visuals appear in the query tool only when the relevant data have been entered in nFORM. Query tool users can download PDF images of query tool visuals by clicking "CTRL + P" and ensuring that their print settings are set to color, fit to printable area, minimum margins, and include background graphics. Single visualizations can also be downloaded either as an image (JPEG or PNG) or PDF by right-clicking on the chart and selecting "Download as…".

Query tool users can use a screen reading assistive device, such as JAWS, to review compatible information for all tables and data visuals. Select "Enable Accessibility" mode to access a compliant version of the date filter that displays dates from a drop-down menu. Contact the nFORM help desk if the specific screen reader that is being used is not compatible with specific tables in the query tool. The nFORM help desk team can provide accessible versions of any tables in the query tool on request.



The query tool opens to the **Grant Year Overview** tab. The upper left of the tab displays the current grant year and a description of the data on the tab. Hover your cursor over the tool tips icons to view more detailed descriptions of the information displayed. The left side menu includes a filter so that HEART and FORGE users can display data for one population at a time, if they have ACF-approved targets for more than one population.



The Grant Year Overview tab includes various data visualizations organized into Enrollment, Client Participation, and Data Quality sections. The Enrollment panel on this tab displays a radial chart with the percent of clients enrolled compared to enrollment targets for the current grant year, and a bar chart of the number of clients enrolled by month. Hovering your cursor over the dial and bars in the visualizations will display the number of clients enrolled or the remaining number of clients to enroll.

The Client Participation panel includes tiles that display data on substantive service contacts, optional workshop participation, primary workshop participation, and progress towards current grant year primary workshop targets. A bar chart and table of the percentage and number of clients who have reached each primary workshop participation benchmark for the current grant year is also included in the Client Participation panel. The bar chart and table in this panel align with PPR Table B-02.6, which reports primary workshop participation for all clients who will achieve each benchmark in the current grant year, regardless of when the client was enrolled. Hovering your cursor over the tool tip for this data visualization will display a reminder of which clients are included in the calculations for this visualization.

Lastly, the Data Quality panel displays pie charts for entrance and exit survey response rates, and tiles reporting the number of referrals that need follow-up for clients enrolled in the current grant year, and the number of sessions that have pending attendance from all grant years. Descriptive labels, data legends, and tool tips for each visualization on the Grant Year Overview tab clarify which clients, workshop sessions, service contacts, and referrals are included in each of the calculations.

Use the buttons at the top of the Grant Year Overview tab to navigate to tabs that drill down on specific types of data from nFORM. Following are descriptions of each of these tabs.

Enrollment. The enrollment tab shows information such as the targets and actual enrollments for the current and previous grant years, how clients heard about the program, and main reason for enrolling. While the Grant Year Overview tab focuses on the current grant year, the Enrollment tab and all other tabs allow users to select timeframes for the data displays in addition to selecting the client population. Users can select specific date ranges using the Enrollment Start Date and Enrollment End Date filters, which includes the ability to filter across calendar and grant years. You can also manually enter a date using MM/DD/YYYY format, or select the date from the calendar pop-up located to the right of the enrollment date fields. All selections will appear in the lefthand filter menu. Users can remove selected filters by clicking “Reset Filters” at the bottom of the box. To remove the most recently selected filter, select the “Undo” back arrow to the left of the “Reset Filters” option. To reapply a removed filter, select the “Redo” forward arrow to the right.

Applicant Characteristics. This tab shows key characteristics of clients in the grant recipient’s program from the entrance survey. Grant recipients conducting local evaluations can review characteristics of all clients except for those assigned to a Control (No Services) or Control Waitlist (No Services) group. As on the Enrollment tab, users can select data for specific client enrollment timeframes and for specific client populations. By default, this tab displays the number and distribution of applicants by age. To view data for another characteristic, select one characteristic at a time from the list of key characteristics on the left side of the screen. For Age, Marital Status and Sex, a pie chart displays the percentage of applicants within the selected timeframe and client population with each characteristic. For Employment Status and Race/Ethnicity, a bar chart shows the distribution of applicants by characteristic. The query tool does not provide cross tabulations if multiple characteristics are selected; grant recipients may use the data export to conduct cross-tabulation analyses of multiple characteristics.

For grant recipients conducting local evaluations, the Applicant Characteristics by Service Assignment view shows the characteristics of clients by service assignment, after clicking the tab of the same name. This helps grant recipients gauge whether similar types of clients are being assigned to treatment and comparison groups, including Control (No Services) and Control Waitlist (No Services). However, the query tool does not include any statistical testing, so it cannot be used to assess baseline equivalence.

Individual Services. This tab shows data on client issues, needs, services, referrals, and incentives. The Service Contacts and Referrals data view presents information on substantive, informational, and reminder-only ISCs, as well as referrals and referrals requiring follow-up. The most common client issues and needs covered during ISCs and most common types of referrals are displayed in bar graphs. Users can view information for a specific cohort of clients by filtering on an enrollment date range.

To view data on incentives, click on the Incentive Types/Reasons view within the tab. This tab provides information on the number of clients who have received incentives, the number of incentives provided, the average incentive amount and range of incentive amounts provided, along with the number of incentives provided by category and type.

Workshop Structure. This tab shows information about the structure of primary and optional workshop series and average hours of attendance (for sessions in which attendance has been fully recorded) to help grant teams monitor participation by different workshop offerings. Users can filter by series status: completed (series in which all sessions have taken place), in progress (the series has begun but has not yet finished), or scheduled (the series has not yet started). Additional filters include workshop type and workshop activity or element. The tab includes a table that displays each serie's start date, workshop type, delivery mode (virtual or in-person), number of planned sessions and hours, and the average hours attended by clients.

Workshop Participation. This tab provides information on average client participation in primary workshops and the number of clients achieving each primary workshop benchmark. Users can analyze primary workshop participation by client population, enrollment date range, workshop, and session series. Grant recipients with ACF-approved targets for multiple populations should select a population of interest to view progress toward the population-specific targets. Selecting specific workshops and session series filters the data to enrolled clients who attended at least one session occurrence in that series. The client population, enrollment date range, workshop, and session series filter selections will appear in the left side filter box, which helps keep track of the filters applied to your data. Regardless of the order in which filters are selected on this tab, be sure to actively click on the population selection and select specific date ranges to ensure that clients are being compared to the appropriate targets. Like the Workshop Structure tab, this tab includes only information for sessions in which attendance has been fully recorded (i.e. all clients who were registered for the session were recorded as either having attended or not attended).

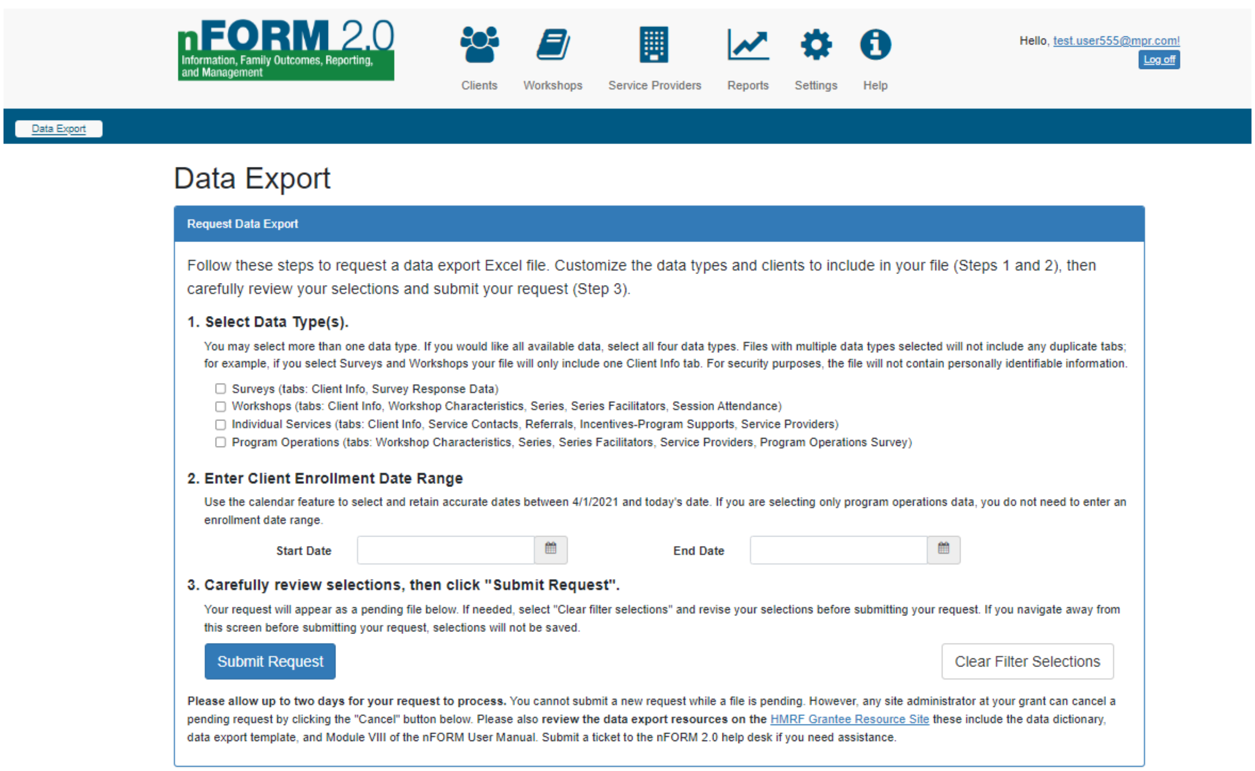
Client Outcomes. On this tab, users can view aggregate responses to selected outcomes on the entrance and exit surveys. The table on this tab displays the entrance/exit survey outcome, the applicable value ranges, and for each survey the number of clients included in the outcome average, and the average.

Users can filter on outcomes for clients enrolled in a specific time frame, and for selected client characteristics. Outcomes can also be filtered by specific outcome domains and by the universe of respondents included (either all respondents or only those who completed both an entrance and exit survey). For example, users can select to view the average outcome values under the economic well-being domain among males who completed the relevant questions on both surveys.

The data on this tab are useful for assessing whether clients' experiences are trending in the anticipated directions. However, only a rigorous evaluation can show effects of the program

D. Data Export (screen R4)

Site administrators can export all data recorded in nFORM for their grant, except for personally identifiable information (PII) such as client names and contact information (e.g., phone numbers, email address, and mailing address), case notes, and referral notes. Site administrators navigate to the Data Export screen (R4) under the Reports tab to run a data export for their grant.



The top box on the Data Export screen displays the directions for submitting a data export request. Site administrators should first select the data types they want included in the export. There are four different data types: Surveys, Workshops, Individual Services, and Program Operations. Each data type contains multiple tabs that include relevant information. At least one data type must be selected to submit a request. If more than one data type is selected, all the available tabs found in each selected data type will be included in the export. If multiple data types are selected that share the same tab, such as "Client Info", the export will include only one of that tab to avoid duplication. A full data export can be obtained by selecting all four data type options. Table VIII.2 below describes the data included on each tab.

Next, enter an enrollment date range in the start date and end date fields to include only data for that time frame in the export. A date can be entered manually using the MM/DD/YYYY format without lead zeros or selected via the calendar feature by clicking the calendar icon next to the start date and end date fields. Please note that if only the Program Operations data type is selected, the date fields will be greyed out as dates are not needed for this data type only. If Program Operations is selected in addition to another data type, then a start and end date must be entered.

Review all selections carefully, as they cannot be edited after the export request is submitted. If updates are needed before the request is submitted, users can manually update each selection or they can use the "Clear Filter Selections" button to remove all selections. Navigating to a different screen in nFORM before clicking "Submit Request" will remove any selections made when a user navigates back to the Request Data Export page.

After reviewing selections, click the "Submit Request" button to initiate the data export generation process. A confirmation message will appear. If needed, a pending request can be cancelled and a new request can be created. Each grant can only submit one data export request at a time. Grant recipients can request a new data export file once the previous report has generated and becomes available.

Pending File

File	Data Types	Enrollment Date Range	Requested By	Requested On	Cancel
Pending processing	Individual Services;Program Operations	4/1/2021 - 6/10/2024	TSite Administrator4	7/29/2024 12:56:42 PM	Cancel

Available Files

Most recent 3 files available.

File	Data Types	Enrollment Date Range	Requested By	Date Generated
DataExport_2024_07_04_184745.xlsx	Surveys;Workshops;Individual Services	1/1/2023 - 12/31/2023	TSite Administrator4	7/4/2024 6:47:45 PM
DataExport_2024_07_03_100547.xlsx	All Data Types	7/3/2021 - 7/3/2024	TSite Administrator1	7/3/2024 10:05:47 AM
DataExport_2024_07_03_094011.xlsx	All Data Types	7/3/2021 - 7/3/2024	TSite Administrator1	7/3/2024 9:40:11 AM

Data export requests are processed in the order received across grant recipients. Processing time for each data export will vary based on the amount of data in each export and the number of concurrent requests for exports. Therefore, site administrators are encouraged to submit data export requests at the end of their business day so that the data export can process overnight. Please note that data exports can take up to 48 hours to generate and requesting a new data export during this period will reset the previous processing time. If an export does not generate after 48 hours, please contact the Data Capacity and CQI TTA Help Desk. Site administrators can still log out of nFORM after sending the data export request; the data export processing does not require the site administrator to be logged into nFORM.

Once the data export processing is complete, a link to an Excel file will appear in the Available File box at the bottom of the Data Export screen. The file name will list the date that the data export was processed. The Available File box will also contain the selected data type(s) in the export, the selected enrollment start and end dates, the program staff who requested the file, and when the file was generated. The Available File box contains the three most recent data exports that are available to download. Site administrators should save all exports in a secure location outside of nFORM. To save the file, either right click the link to save it to your computer or click the link to open the file in Excel and then use the Save feature in Excel to save it to your computer. Grant recipient staff can use Excel to analyze the data or import the Excel file into another program for analysis.

Each tab of the data export file contains a different type of data recorded in nFORM. The data export also provides non-client data recorded in nFORM, including information about each workshop series, the grant recipient's service provider directory, and the grant recipient's responses to the program operations survey. All data recorded at the client level, including client responses to the surveys, have the client's ID number from nFORM along with the couple ID for grant recipients serving couples populations. The data export includes other identifiers for client-level and program-level data: service contact IDs, referral IDs, incentive/program support IDs, service provider IDs, workshop IDs, workshop series IDs, and workshop session IDs. These IDs help facilitate merging the data with information collected outside of nFORM or data from other tabs of the data export and the operational reports.

Table VIII.2 provides a description of each tab of the data export, the data structure, data type(s) and key fields provided on that tab. The data included in the data export will reflect the data entered into nFORM up through the time the data export is processed and within the selected enrollment time frame. Grant recipients are encouraged to explore their data to note any considerations for analyses and interpretations of the data.

Table VIII.2. Data export tabs

Data export tab	Description	Data structure	Key fields
Client Info (exported when Surveys, Workshops, and Individual Services data types are selected)	Includes key client-level information on enrollment, survey completion and service receipt.	One row per enrolled client	• Client ID • Couple ID[a] • Referring organization and organization type • Enrollment date • Entrance and exit survey completion dates, modes, and language • Number of service contacts • Number of referrals • Number of incentives/program supports • Number of workshop sessions attended • Assigned case manager
Service Contacts (exported when Individual Services data type is selected)	Includes all enrolled clients whether or not they have received a service contact. Clients who have received one or more service contacts will have a single row for each service contact recorded with detailed information about the contact. If a service contact is provided to a couple, that ISC will be included as two rows with one for each partner.	One row for each service contact provided to a client, and one row for each enrolled client who has not yet received a service contact (will not have any service contact data included).	• Client ID • Couple ID • Service date • Service ID • Case manager providing service • Contact method • Length of contact • Whether the contact was provided directly to the client and whether it was provided to a couple • Additional participants • All client issues/needs discussed
Referrals (exported when Individual Services data type is selected)	Includes all enrolled clients whether or not they were provided with a referral. Clients who have been provided with one or more referrals will have a single row for each referral recorded. If a service referral is provided to a couple, it will be included as two rows with one for each partner.	One row for each referral provided to a client, and one row for each enrolled client who has not yet received a referral (will not have any referral data included).	• Client ID • Couple ID • Service contact ID referral was provided during • Service date • Referral ID • Contact method • Length of contact • Whether the referral was provided to a couple

Data export tab	Description	Data structure	Key fields
			• Service provider ID the referral was provided to and how it was provided • Whether the referral was followed up on • Referral type(s)
Incentives – Program Supports (exported when Individual Services data type is selected)	Includes client-level information on each incentive and program support recorded in nFORM. If an incentive/program support is provided to a couple, it will be included as two rows with one for each partner.	One row for each incentive/program support provided to a client, and one row for each enrolled client who has not yet received an incentive/program support (will not have any incentive/program support data included).	• Client ID • Couple ID • Service contact ID the incentive/program support was provided during (if applicable) • Incentive/program support ID • Whether the incentive/program support was provided during an ISC, workshop session, or outside • Incentive/program support date • Whether the incentive/program support was provided to a couple • Incentive amount • Incentive type • Incentive category
Workshop Characteristics (exported when Workshops and Program Operations data types are selected)	Displays details for each workshop entered into nFORM.	One row for each workshop	• Workshop name • Workshop ID • Population type workshop is intended for • Total hours • Activities and elements • Enrollment type (open, cohort, or other) • Workshop type (primary, optional, or not in use) • Workshop structure (single, blended, linked, or non-curricularized) • Curricula included
Series (exported when Workshops and Program Operations data types are selected)	Includes detailed information for each workshop series entered into nFORM such as the total number of sessions, start and end date, session details including start and end times, session duration and when the	One row for each workshop series	• Workshop name and ID • Session series name • Series ID • Workshop location • Series start and end dates

Data export tab	Description	Data structure	Key fields
	sessions occur (as recorded as the series level), and the number of facilitators.		• Series start and end times • Series duration • Days of the week series reoccurs on
Series Facilitators (exported when Workshops and Program Operations data types are selected)	Includes information about which facilitators are assigned to lead each workshop series	One row for each facilitator assigned to a workshop series	• Workshop name and ID • Session series name • Series ID • Facilitator
Session Attendance (exported when Workshops data type is selected)	Includes client-level information for each workshop session they attend.	One row for each session a client attends, and one row for each enrolled client who has not yet participated in a workshop session (will not have any workshop participation data included).	• Client ID • Couple ID • Workshop name and ID • Session series name and ID • Session ID • Session name • Session start and end times[b] • Session duration • Whether a client attended a session they were registered for • Whether a client attended a session as a drop-in • Make up date
Service Providers (exported when Individual Services and Program Operations data types are selected)	Includes details for each service provider entered into nFORM.	One row for each service provider	• Service provider name • Service provider ID • Whether service provider is a partner agency • Service provider address information • Services provided • Contact information
Survey Response Data (exported when Surveys data type is selected)	Displays client-level survey responses to the entrance and exit surveys.	One row for each enrolled client	• Client ID • Couple ID • Client survey completion dates • Client survey completion mode and entry dates • Client survey refusal reason • Client survey completion language • Survey responses

Data export tab	Description	Data structure	Key fields
Program Operations Survey (exported when Program Operations data type is selected)	Includes all responses for each program operations survey submitted.	One row for each reporting period	• Report due date • Program operations survey responses

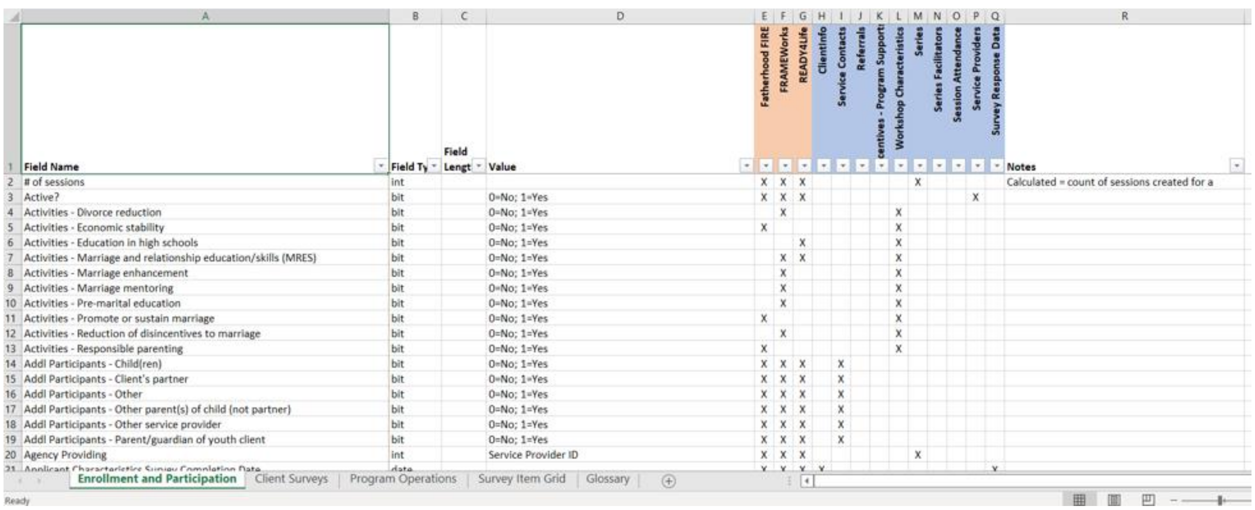
[a] Couple ID variable is not included on any tab in READY4Life data export files.

[b] Changes to details of individual session occurrences, such as start and end times, will be reflected in the individual session data but will not change the information about the session series.

VIII.D.1. Data Dictionary

Grant recipients are encouraged to review the data dictionary on the HMRF Grant Resource site when planning for analysis, program monitoring, and continuous quality improvement using the data export. The data dictionary lists all the variables from nFORM that are included in the data export. These are listed as “Field Names” in the data dictionary. Review these to find the information you want to analyze. Note that the formatting of headers in the data export may differ slightly from the list of field names in the data dictionary. Additionally, data dictionary tabs are labeled differently than data export tabs since information on each data dictionary tab may be applicable to more than one tab in the data export.

The data dictionary shows the meaning of the numbers (or values) associated with each Field Name. For example, the data export will show a client’s population as a number 1 through 6 and the data dictionary tells you what population type is associated with each number. Further, the data dictionary will show you that a value of 0 means No and the value of 1 means Yes. Knowing the values will help you plan and interpret your analyses.



	Field Name	Field Ty	Field Lengt	Value	Fatherhood FIRE	FRAMEWorks	READY4Life	ClientInfo	Service Contacts	Referrals	centives - Program Support	Workshop Characteristics	Series	Series Facilitators	Session Attendance	Service Providers	Survey Response Data	Notes
2	# of sessions	int			X	X	X						X					Calculated = count of sessions created for a
3	Active?	bit		0=No; 1=Yes	X	X	X									X		
4	Activities - Divorce reduction	bit		0=No; 1=Yes		X						X						
5	Activities - Economic stability	bit		0=No; 1=Yes	X							X						
6	Activities - Education in high schools	bit		0=No; 1=Yes			X					X						
7	Activities - Marriage and relationship education/skills (MRES)	bit		0=No; 1=Yes		X	X					X						
8	Activities - Marriage enhancement	bit		0=No; 1=Yes		X						X						
9	Activities - Marriage mentoring	bit		0=No; 1=Yes		X						X						
10	Activities - Pre-marital education	bit		0=No; 1=Yes		X						X						
11	Activities - Promote or sustain marriage	bit		0=No; 1=Yes	X							X						
12	Activities - Reduction of disincentives to marriage	bit		0=No; 1=Yes		X						X						
13	Activities - Responsible parenting	bit		0=No; 1=Yes	X							X						
14	Addl Participants - Child(ren)	bit		0=No; 1=Yes	X	X	X		X									
15	Addl Participants - Client's partner	bit		0=No; 1=Yes	X	X	X		X									
16	Addl Participants - Other	bit		0=No; 1=Yes	X	X	X		X									
17	Addl Participants - Other parent(s) of child (not partner)	bit		0=No; 1=Yes	X	X	X		X									
18	Addl Participants - Other service provider	bit		0=No; 1=Yes	X	X	X		X									
19	Addl Participants - Parent/guardian of youth client	bit		0=No; 1=Yes	X	X	X		X									
20	Agency Providing	int		Service Provider ID	X	X	X						X					
21	Applicant Characteristics Survey Completion Date	date			X	X	X	X									X	

Enrollment and Participation | Client Surveys | Program Operations | Survey Item Grid | Glossary

Ready

The data dictionary includes multiple tabs:

- The **Enrollment and Participation tab** includes relevant information for all tabs of the data export (except for the program operations survey tab). It shows the field names for information in the data export related to client enrollment and participation in services, along with program-level data on workshop series and service providers.
- The **Client Surveys tab** shows the names of the fields for the entrance and exit surveys and how the response options for each question are coded on the Survey Response tab of the data export.
- The **Program Operations tab** shows the fields for each item in the program operations survey and how each response is coded on the Program Operations Survey tab of the data export.
- The **Survey Item Grid** shows each survey item and the corresponding question number across each of the client surveys and the program operations survey; use this tab to help map a specific question from the survey to the field name for it in the data export on the Survey Response Data and Program Operations Survey tabs.

- Finally, the **Glossary tab** of the data export provides descriptions for various elements included in the data dictionary.

There are unique data exports for each program type—FORGE Fatherhood, HEART, and READY4Life—that include only data fields applicable to the specific program type. There is one data dictionary for the nFORM data export, but grant recipients can use the FORGE Fatherhood, HEART, and READY4Life columns on each of the tabs of the data dictionary to filter the list of fields to only those that are collected for the specific program type. Additionally, grant recipients can hide any columns with fields that do not apply to their grant type.

There are also headers in the data dictionary for each tab of the data export. Use these to identify on which tab of the data export to find each field.

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