Using the Data Export

Data Capacity and CQI TTA Team Office Hours

October 13, 2026

Presenters



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Join us for future nFORM/CQI office hours!

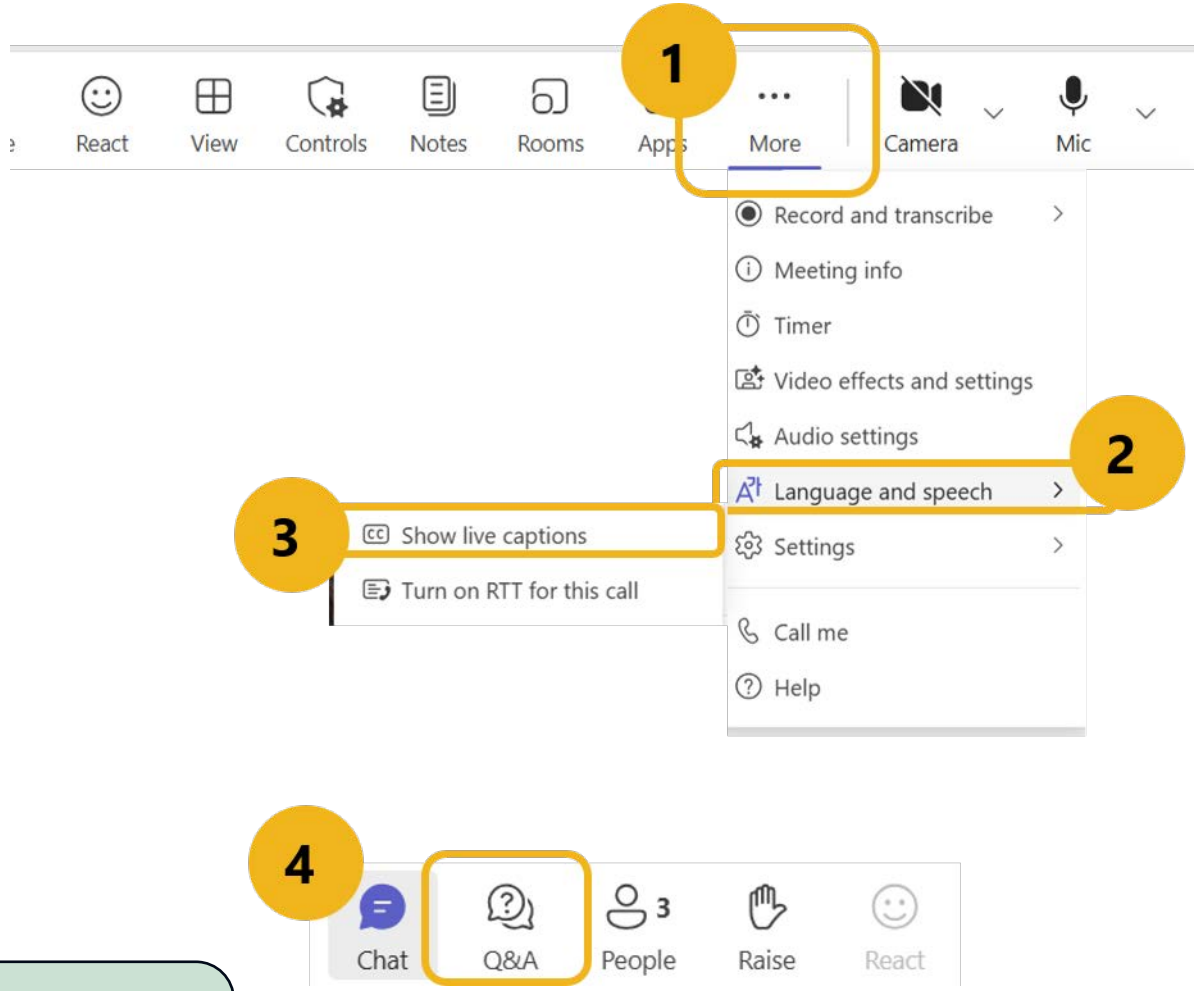
Check out the HMRF weekly grantee digest every Wednesday

- Scroll down to "nFORM and CQI Announcements" to register for office hours and find links to the latest resources
- Click on the office hours registration link; follow the registration instructions and click the "Add to calendar" button on the upper right of the Teams registration page
- Make sure everyone on your team signs up to receive the weekly digest using the "Weekly Digest Signup" link under Quick Links at the bottom of the email
- Contact us at nFORMCQITA@mathematica-mpr.com with any questions

Learn how to develop an improvement strategy during office hours on Tuesday, October 27, 2026 – 2-3pm eastern time.
The session will cover how to develop an improvement strategy that aligns with the root cause of your challenge and aligns with your SMART goal.

Housekeeping

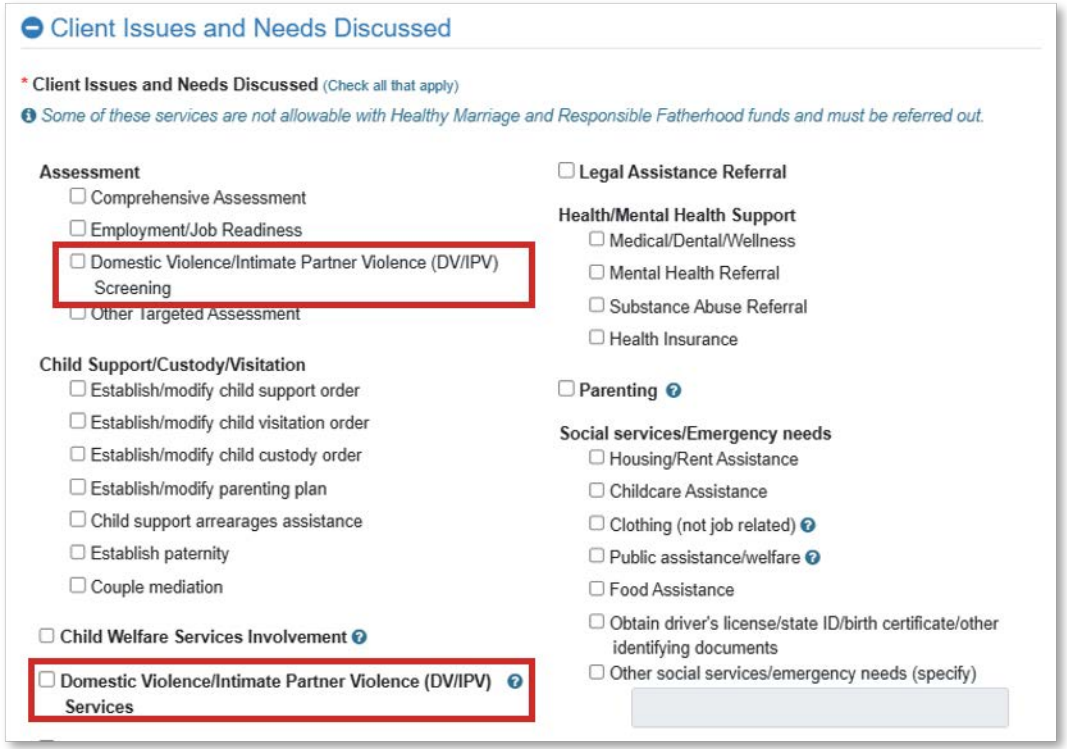
- Please mute your line
- Access closed-captioning by clicking the “More…” icon in top right corner, select language and speech, and click “show live captions” (Steps 1, 2, 3)
- Use the Q&A to ask questions (Step 4)



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

Updates and reminders

- **The data export is now available!**
- **ACF has updated the approach to collecting information on domestic and intimate partner violence in nFORM**
- **Grant year 1 PPRs must be completed and submitted to Grant Solutions before 11:59pm ET on Friday, October 30—review instructions in September 8th office hours materials and nFORM user manual on HMRF Grant Resource site**





Today’s agenda

- Overview of the data export and data dictionary
- Data export and data dictionary demo
- Tips for using the data export
- Overview of data export tabs
- Example analysis
- Questions and answers

Overview of the data export and data dictionary

What is the data export?

- An Excel file of all data recorded in nFORM, except for personally identifiable information such as client names, contact information, and service contact/referral notes
- Each tab of the export contains a different type of nFORM data
- All client level data in the export includes the nFORM Client ID to help grantees merge data across tabs of the export and with nFORM operational reports

The data export tabs include…

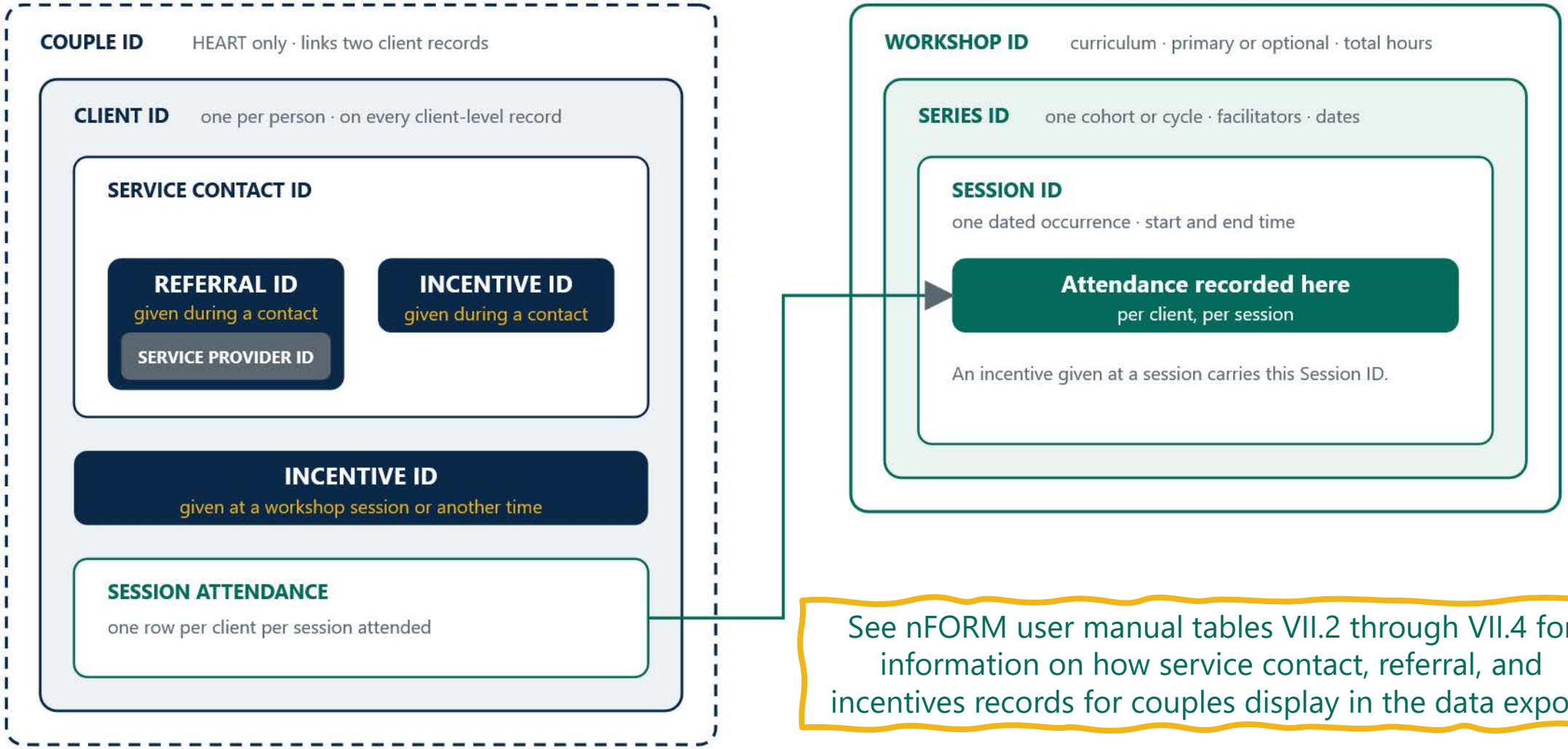
- Client Info
- Service Contacts
- Referrals
- Incentives – Program Supports
- Workshop Characteristics
- Series
- Series Facilitators
- Session Attendance
- Service Providers
- Survey Response Data
- Program Operations Survey

IDs are given across tabs to support linkage

Each tab contains relevant IDs to help link and merge data across tabs

- Client ID
- Couple ID
- Workshop ID
- Series ID
- Session ID
- Service Contact ID
- Referral ID
- Incentive – Program Support ID
- Service Provider ID

IDs are nested



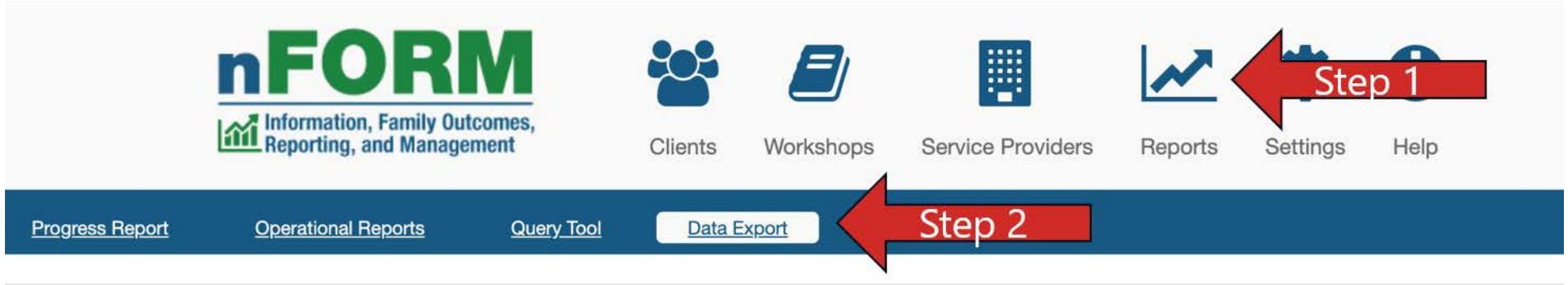
See nFORM user manual tables VII.2 through VII.4 for information on how service contact, referral, and incentives records for couples display in the data export

Accessing the data export

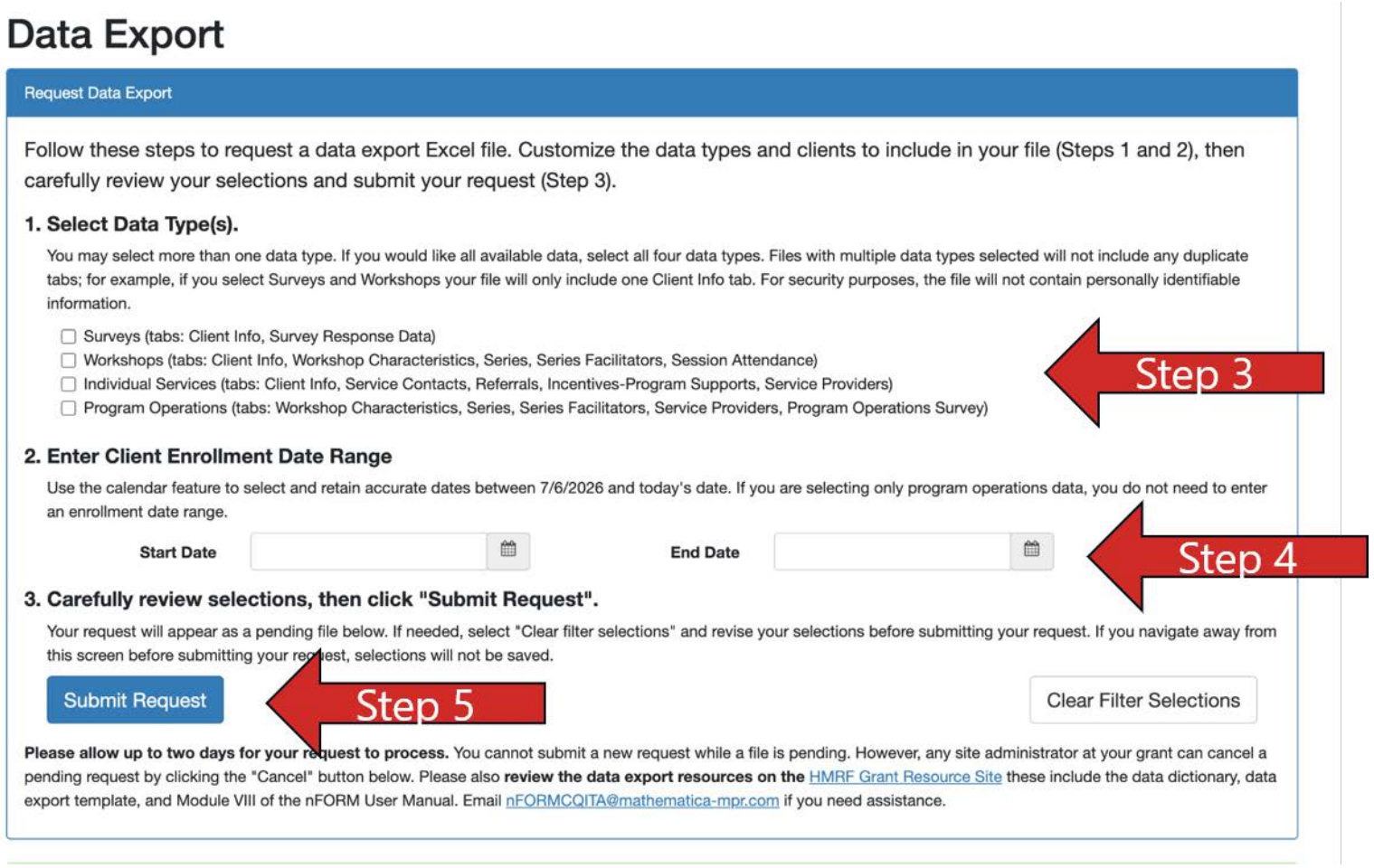
Grantee site administrators request data exports through the Data Export menu under the Reports tab in nFORM (Steps 1 and 2)

Best practice is to request one export at a time, at the end of the work day, and allow 48 hours for processing

Only request one export at a time



Export request form



On the data export form, customize your data export by selecting specific data types (Step 3) and enrollment date range (Step 4)

Confirm your selections, then click on Submit Request (Step 5)

Data dictionary explains data export contents

- **All variables in the data export are listed as "Field Names" in the data dictionary**
- **Helps the user understand and interpret the data in the export**
  - Example: Export will show a client's population as a code
  - The data dictionary tells you how to interpret these codes
    - 1 = Community father; 6 = Youth
- **Now available on the HMRF Grant Resource site**
- **Download the Excel file so you can add your own notes to the data dictionary as you use the data export for analysis**

Data export & data dictionary demo

Tips for using the data export

- **Conduct analyses either in Excel or another statistical software (such as SPSS, Stata, R)**
- **Exclude any client records with status of duplicate pending, duplicate confirmed, or consent revoked**
- **Combine data across tabs for more robust analyses**
  - For example, combine Client Info + Service Contacts + Session Attendance + Survey Response Data tabs to explore whether clients receiving more individual services also participate more in workshops or show different entrance-to-exit patterns
- **Start with a question, not a tab**
  - Decide what you want to learn first, then use data export to answer it
- **Pay attention to what each row represents**
  - For example, the Client Info tab has one row per enrolled client, but the Service Contacts tab can have multiple rows per client

Overview of data export tabs

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 • 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

Data export tabs (continued 1)

Data export tab	Description	Data structure	Key fields
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 • 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

Data export tabs (continued 2)

Data export tab	Description	Data structure	Key fields
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 sessions occur (as recorded as the series level), and the number of facilitators.	One row for each workshop series	• Workshop name and ID • Session series name • Series ID • Workshop location • Series start and end dates • 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

Data export tabs (continued 3)

Data export tab	Description	Data structure	Key fields
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 • 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

Data export tabs (continued 4)

Data export tab	Description	Data structure	Key fields
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
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

Example analysis: Tracking outreach to enrollment with the data export

Using nFORM data tools to monitor program flow

- **PPR and query tool present summary data on progress of enrolled clients; for example**
  - PPR Table B-02.4 shows progress toward enrollment targets, Table B-02.6 shows progress towards primary workshop participation targets, and Table B-02.7 shows progress towards target primary workshop hours
  - PPR Table B02.8 shows retention rates from enrollment through initial workshop attendance and completion by grant year of enrollment; metrics update over time to reflect clients who enroll in one grant year and complete in subsequent grant year
  - Query tool grant year overview and primary workshop participation tabs useful for monitoring retention from enrollment to program completion for target populations
- **Because PPR and query tool focus on enrolled clients, operational reports and data export are most useful for tracking outreach to enrollment**

Operational reports for tracking outreach to enrollment

nFORM operational report	Description
Client status report summary *(ACF and grantees)*	Provides point-in-time snapshot of all applicants and clients since the grant launched their program; counts of applicants or clients in each status code from outreach through program completion based on their current status. Cannot be filtered by application or enrollment date ranges to assess trends by cohort. Can be run frequently to assess progress and identify issues.
Client status report detail *(Grantees only)*	Lists applicants pending enrollment and enrolled clients since the grant launched programming by their current status code; includes service location and enrollment date for clients who have completed enrollment. Identifies applicants who are ready to enroll or need follow-up to enroll.
Outreach detail report *(Grantees only)*	Lists each potential applicant with a current status of Outreach, Will Not Enroll, or Applicant Pending Enrollment; includes application date, service location, population, name, primary language, contact information, and individual services provided. Grants can analyze by application date to assess how many in a cohort have not yet progressed to enrollment, how long recruitment takes, and how many service contacts are provided before enrollment.

Operational reports primarily designed to identify overall trends and support day-to-day outreach activities, such as identifying applicants who may need additional touchpoints to enroll

Client status summary and detail reports—available to ACF and grantees

Summary report shows cumulative count of applicants and clients by status code; run frequently to assess flow from initial outreach through program completion and identify potential bottlenecks

Grant	Total (excl Duplicates)	Outreach	Will not enroll	Applicant Pending Enrollment	Active	Completed/ Graduated	Primary complete/optional ctive	Temporary Hold	Non-responsive	Drop out	Moved out of area	Incarcerated	Consent Revoked	Removed from program	Deceased		Duplicate Pending	Duplicate Confirmed
All Grants	34	6	0	3	25	0	0	0	0	0	0	0	0	0	0		2	0
GranteeName_4	34	6	0	3	25	0	0	0	0	0	0	0	0	0	0		2	0

Detail report includes one row for each enrolled client

- Identify specific clients who may require follow up or whose status should be updated
- Sort or filter by fields such as location, status, or enrollment date
- Outreach and Will not enroll potential applicants are listed on Outreach Detail report

Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Enrollment Date	ervice ssignment ame (If pplicable)	Client's Case Manager(s)	Primary Language	Client Status	ient Status hange Date
	Community father	12477265		Costanza	George	4/3/2026			English	Active	4/3/2026
	Community father	12477427		Day	Spring1				English	Applicant pending enrollment	4/14/2026

Outreach detail report--available to grantees only

Grant: HEART Grant 301 | Exclude Will Not Enroll: True / False

Start Date: 9/30/2025 | End Date: 4/16/2026

1 of 1 | Find | Next

Can exclude applicants with status of "Will Not Enroll" to make it easier to identify who might still progress to enrollment

HEART Grant 301

Outreach Detail Report*

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

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

Review Application Dates to assess how long the recruitment process is taking

Check service contacts and referrals for applicants to see who might need more touch points to enroll

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

Page 1 of 1

Grant recipients can use the data export to analyze how potential applicants convert to enrolled participants

The data export can be used to answer a wide range of questions

- What is the grant's conversion rate from outreach to enrollment? In other words, how many people does a grant need to recruit to meet its annual enrollment target?
- Do conversion rates differ by time frames or other factors?
- Which referral sources resulted in the most enrollments?
- How long did it take for potential applicants to enroll, on average, after the first outreach contact?
- Do potential applicants who receive individual services tend to enroll more frequently than those who don't?
- On average, how many service contacts are provided before potential applicants enroll?

Using the data export

To determine how many potential applicants went on to enroll, grant teams can follow these steps:

1. **Request data export for the enrollment date range of interest (e.g., all of GY1). The export will include everyone enrolled in that date range + every potential applicant as of the export generation date.**
2. **Open the Client Info tab and focus on 3 columns :**
   - Initial application status — Outreach (1) or Ready to Enroll (2)
   - Enrollment date — Blank if not yet enrolled
   - Current client status – Where are they now?
3. **Remove records with current client status of duplicate pending or confirmed, or consent revoked.**
4. **Filter remaining rows by initial application status = 1. That's everyone who started in Outreach.**
5. **Count filtered rows with an enrollment date. These are your conversions from Outreach.**
6. **Conversion rate = Enrolled among those who start in Outreach ÷ initial application status of Outreach.**
7. **Repeat analysis to calculate conversion rate of anyone who started in Ready to Enroll status. Or, analyze overall conversion rate for both Outreach and Ready to Enroll.**
8. ***Advanced analyses:*** **Analyze by population or client referring organization to see where conversion from application to enrollment is strongest. Grant teams can also use export to calculate conversion rate from initial applicants to program completion.**

Blue[a] = Data for advanced analysis

Yellow[b] = Data for analysis steps 3, 4, and 5

	A	B	C	D	E	F	G	H	I	J
1	Client ID	Client Population[a]	Initial Application Status[b]	Application Status Change Date	Current Application Status	Client Referring Organization[a]	Client Referring Organization Type[a]	Enrollment Date[b]	Current Client Status[b]	Client Status Change Date
2	12474572	1	2		2	First United Church	3	2/11/2026	2	2/11/2026
	12474637	3	2		2	First United	3	2/11/2026	2	2/11/2026

Note: Some columns have been deleted for presentation purposes.

Questions

Wrap up

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

Submit your PPR to Grant Solutions by October 30, 2026 by 11:59 pm ET

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

Data security reminders

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

Don't forget to register for the next office hours on **October 27!**