



Using nFORM to conduct and monitor local evaluations

Training for HMRF grants with local evaluations

October 7, 2026





Today's agenda

- / **Setting up nFORM for local evaluations**
- / **Identifying clients as evaluation participants**
- / **Monitoring evaluation participants and progress**
- / **Q&A**





Setting up nFORM for local evaluations



nFORM has launched, with several updates for 2025 cohort grants

/ **Outreach, recruitment, and client enrollment workflow**

- Potential applicants can be tracked and linked to referral partners to track initial outreach through enrollment and program completion

/ **Client surveys**

- Eliminated applicant characteristics survey and streamlined entrance and exit surveys

/ **Workshop setup**

- New indicator for whether session series delivered in person, virtually, or both
- New indicator for whether session series offered in school, community, or transitional setting

/ **Program operations survey, PPR, and other data tools**

- Streamlined to focus on ACF's priorities for 2025 cohort along with visual and content revisions



nFORM training for local evaluation grants

All grantees received comprehensive training on nFORM functionality

- [Well nFORMed training videos](#) on HMRF Grant Resource site
- Training conducted in June, so did not cover local evaluation functionality

[HMRF Grant Resource site](#) includes OMB-approved surveys and other resources that will be useful to grants conducting local evaluations

As we walk through nFORM's local evaluation functions today, please share any questions that you have, or that grants might have during the upcoming training.



nFORM access and setup for local evaluations

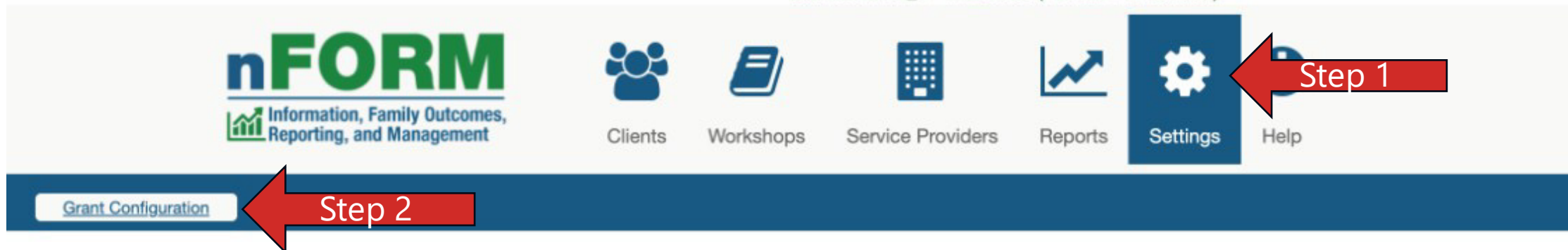
nFORM team will create nFORM accounts for LETA liaisons

- LETA liaisons will have access to PPRs, summary operational reports, and query tool for local evaluation grants

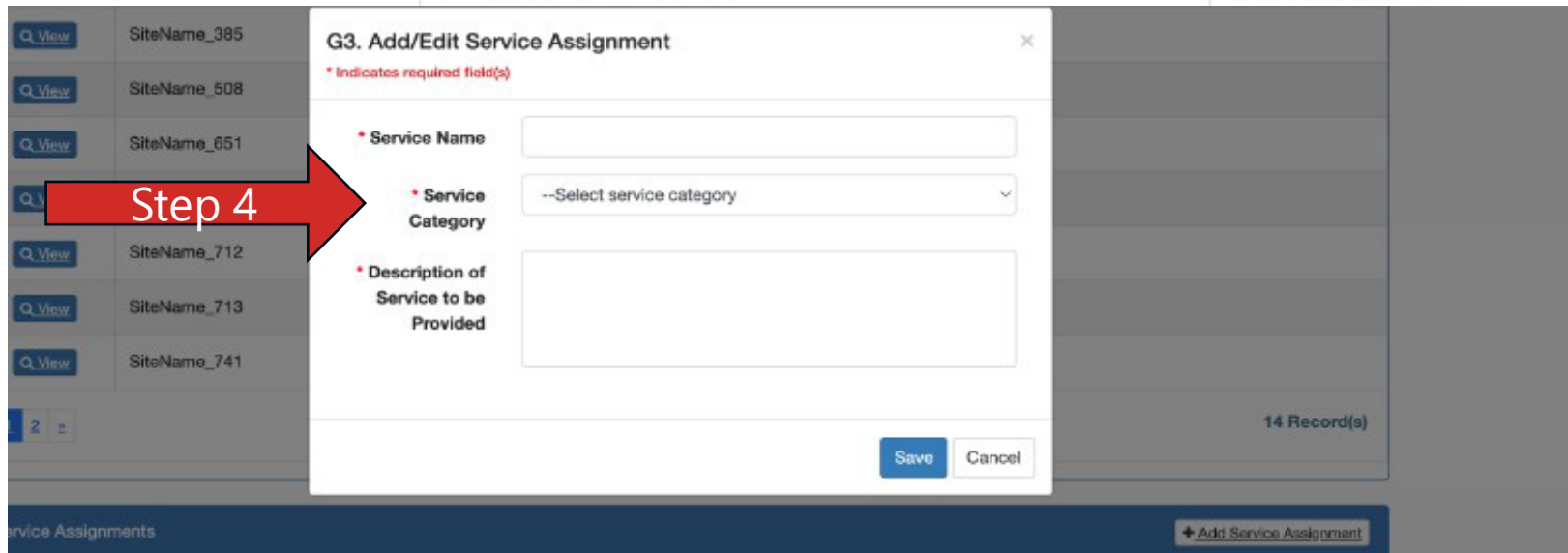
nFORM team will provide grants conducting local evaluations with access to system's local evaluation features after receiving list from ACF

- Grant recipient administrators should set up any nFORM user accounts, service providers, locations, or workshops needed for their evaluation following standard nFORM procedures
- Local evaluation grants will need to set up service assignments in nFORM before they enroll any clients who may participate in their evaluation

Setting up service assignments in nFORM



Service Assignments				Step 3 → + Add Service Assignment
View	Service Name	Service Category	Description	
Q View	MyTYRO	Treatment	Enhanced services	
Q View	TYRO	Control (With Services)	Standard services	



The dialog box "G3. Add/Edit Service Assignment" is overlaid on the table. It contains three required fields: "Service Name", "Service Category" (a dropdown menu), and "Description of Service to be Provided". A red arrow labeled "Step 4" points to the "Service Name" field. The dialog has "Save" and "Cancel" buttons at the bottom. The background table shows a list of site names and a "14 Record(s)" indicator.



Create as many service assignments (or conditions) as needed based on design

- A standard experimental design will have two service assignments (treatment and control)
- A factorial design may require more than two
- A descriptive evaluation may not need service assignments

Create one service assignment at a time by entering all required fields and clicking on Save:

- **Name:** Preferred name for the research group, such as "Treatment A" or "Control B"
- **Category:** Five options – (1) Treatment, (2) Control (With Services), (3) Control (NO Services Provided), (4) Control Waitlist (With Services), or (5) Control Waitlist (NO Services Provided)
- **Description:** Brief description of service assignment and how it differs from other research groups

Service assignment screen

G3. Add/Edit Service Assignment

* Indicates required field(s)

* Service Name

* Service Category

* Description of Service to be Provided

--Select service category

Save Cancel



| Live demo –Setting up service assignments



Enrolling clients into a local evaluation



Enrollment process





Identify local evaluation participants on nFORM application form

Client Information

* First Name		Referral Source	
Middle Name		* Referral Type	--Select Referral Type
* Last Name		* Provider Name	--Select Provider Name
* Date of Birth			
* Primary Language	English		
Other Language			
Grant Location	--Select location	☐	Check here if client is in a local evaluation
* Population	--Select population		

Grant staff check here if client will be assigned to research group after completing entrance survey

Contact Information

Phone/Email/Social Media

One phone or email is required

Home Phone		☐	Check here if client has no phone or email
Cell Phone			
Work Phone			
Email			
Social Media	--Select platform		
Other Info			



Conduct random assignment

For impact evaluations, staff and evaluators conduct random assignment outside of nFORM to determine appropriate service assignment or condition

Evaluators can access demographic responses from entrance survey to support random assignment (if needed)

Client Surveys			
Type	Status	Date	Action
Entrance Survey	Complete ✓	03/04/2026	Review
Exit Survey	Incomplete	--	Action ▾



Select applicable service assignment in Program Information box of Client Profile

Service assignment drop down populated with grant's entries on "Service Name" from the Settings tab

Once service assignment is saved, Client Status changes to Active and enrollment date is set

At that point, participating clients can be registered for workshops and receive other services appropriate to their research group

G3. Add/Edit Service Assignment ✕

* Indicates required field(s)

* Service Name

* Service Category

* Description of Service to be Provided

Save Cancel



Selecting service assignments

Test Tester (Client ID 12480171)

 Service Assignment must be assigned

Profile

Outreach

Program Information

 Edit

Service
Assignment

Client Status Applicant pending enrollment

Status Change
Date 9/17/2026

Client Information

 Edit

Manager(s)

 Edit

Step 1

 No case managers have been assigned.

Client Surveys

Type	Status	Date	Action
Entrance Survey	Complete 	09/17/2026	 Review

C8. Edit Program Information

* Indicates required field(s)

* Service Assignment  --Select service assignment

* Client Status Applicant pending enrollment

* Status Change Date 9/17/2026 

Save

Cancel

Step 2



| Live demo – Assigning clients



| Monitoring evaluations



nFORM can be used to monitor

Outreach &
sample
enrollment

Sample
characteristics

Dosage and
strength of
contrast

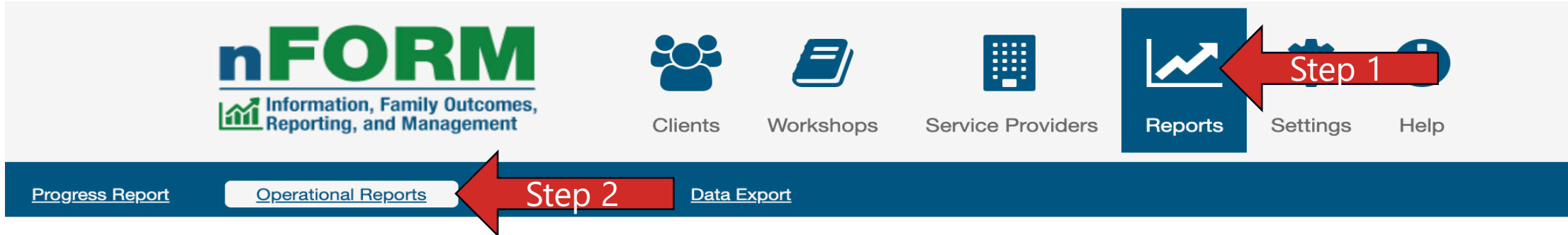
Attrition

Incentive
distribution



nFORM data tools for monitoring local evaluations

nFORM data tool	Local evaluation-specific information
PPR <i>Launched 9/30</i>	• Clients assigned to Control (NO services) or Waitlist Control (NO services) groups not counted in performance measures • Grants describe local evaluations in Section B-02.6 narrative
Query tool <i>Launched 8/4</i>	Applicant characteristics by service assignment tab will appear for grants conducting local evaluations, after they are identified in nFORM as such
Operational reports <i>Launched 7/13</i>	Local evaluation summary and detail reports
Data export <i>Launched 10/6</i>	Client information includes service assignment category and name for participating clients



Operational Reports

- [Caseload Summary](#)
- [Client Status Report Summary](#)
- [Enrolled Clients' Email and Phone Report](#)
- [Incentives Report](#)
- [Individual Service Contacts](#)
- [Local Evaluation Enrollment](#)
- [Outreach Detail](#)
- [Primary Workshop Participation Detail Report](#)
- [Primary Workshop Participation Summary](#)
- [Series Session Attendance](#)
- [Survey Completion Summary](#)
- [Survey Report - Paper Survey](#)
- [Survey Report - Refused Survey](#)
- [User Account Activity](#)
- [Zip Code Report](#)





Local evaluation and other operational reports

Local evaluation enrollment reports

- Help ACF and local evaluation grantees monitor random assignment and identify potential issues
- Summary report displays number of clients enrolled into each service assignment within and across locations
- nFORM users with permissions can also access client-level report with details about each client enrolled into the local evaluation
- For HEART grantees serving adult couples, evaluation teams can monitor whether both members of a couple are being assigned into the same service assignment by using the couple ID variable on the detailed report

Other operational reports include service assignment details to help local evaluations track dosage, attrition, and incentives

Review [Using nFORM operational reports office hours](#) and [Using nFORM data tools training](#) for more information



Local evaluation summary and detail reports

Local Evaluation Enrollment* from 4/7/2021 - 9/22/2022

Grantee Name							
Fathers Connect	Site Name	Total	Control (NO Services Provided)	Control (With Services)	Control Waitlist (NO Services Provided)	Control Waitlist (with Services)	Treatment
			Control - NO Services	Control (With Services)	Wait for IT	Control Waitlist (With Services)	Treatment Group
	Total	100	20	15	15	25	25
	Camelot	60	10	10	8	14	18
	Disneyland	40	10	5	7	11	7

Fathers Connect Service Assignment Group* from 4/7/2021 - 9/22/2022

Client Grantee Location	Client ID	Couple ID	Client Last Name	Client First Name	Service Name	Service Category	Enrollment Date
Camelot	10091465		Collins	Barnabas	Control - NO Services	Control (NO Services Provided)	9/2/2022
Camelot	10094035		Duck	Donald	Control - NO Services	Control (NO Services Provided)	9/21/2022

Grant staff can use enrollment date to monitor random assignment within a specific time period

Service assignment details also included in other operational reports—such as survey completion report—to help manage and track evaluations



Accessing the Query Tool

nFORM
Information, Family Outcomes, Reporting, and Management

Clients Workshops Service Providers Reports Settings Help

Progress Report Operational Reports **Query Tool**

Hello, [user2009@masked.com!](#) [Log off](#)

Query Tool

☒ Launch Query Tool

HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

Grant Year Overview Enrollment **Applicant Characteristics** Outcome Measure Workshop Participation Client Outcomes

GranteeName_4

For grants conducting a local evaluation, displays data for clients participating in a local evaluation in all service assignments (including those not receiving services). All other tabs of the query tool include only local evaluation clients in treatment, control with services, and waitlist control with services groups. Use this view to assess whether characteristics of treatment and comparison group clients appear similar. Use the Data Export function to produce a data set for statistical testing. **The information on this tab cannot be used to determine baseline equivalence because it has not been tested for statistical significance.**

Population
Select Population

Enable Accessibility Mode

Enrollment Start Date
04/01/2021

Enrollment End Date
09/17/2026

Characteristic
Age

Applicant Characteristics

Applicant Characteristics By Service Assignment

Number of Applicants by Service Assignment and Selected Characteristic

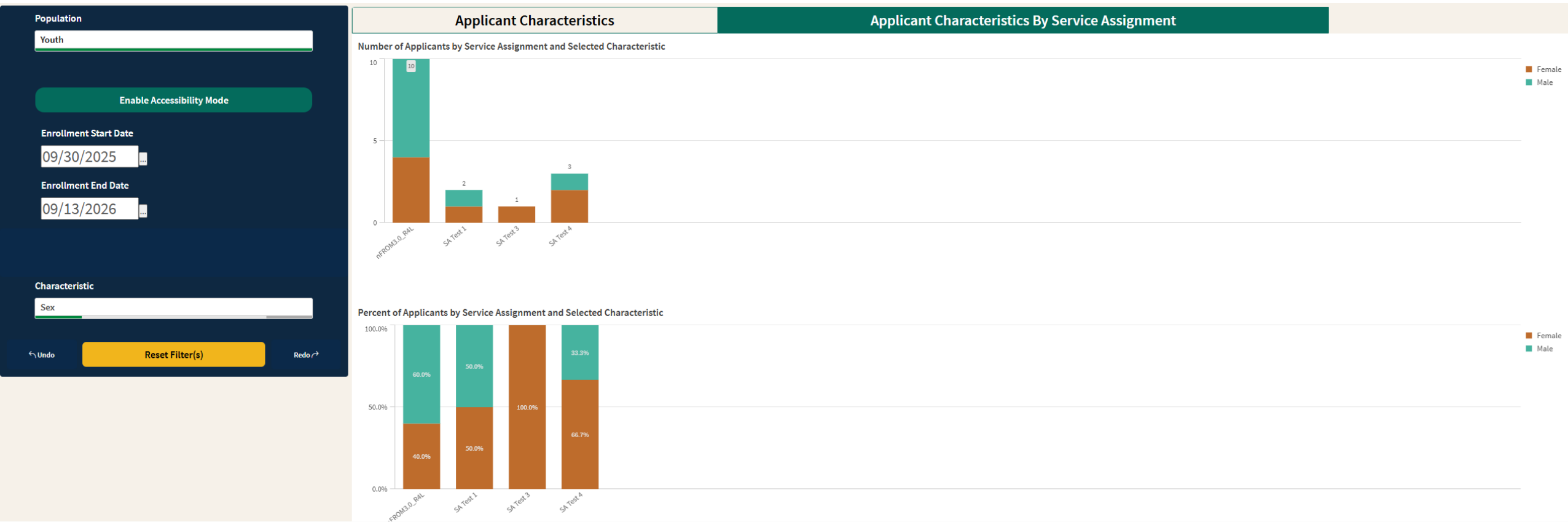
Percent of Applicants by Service Assignment and Selected Characteristic

Legend: 25 - 34 years, 35 - 44 years



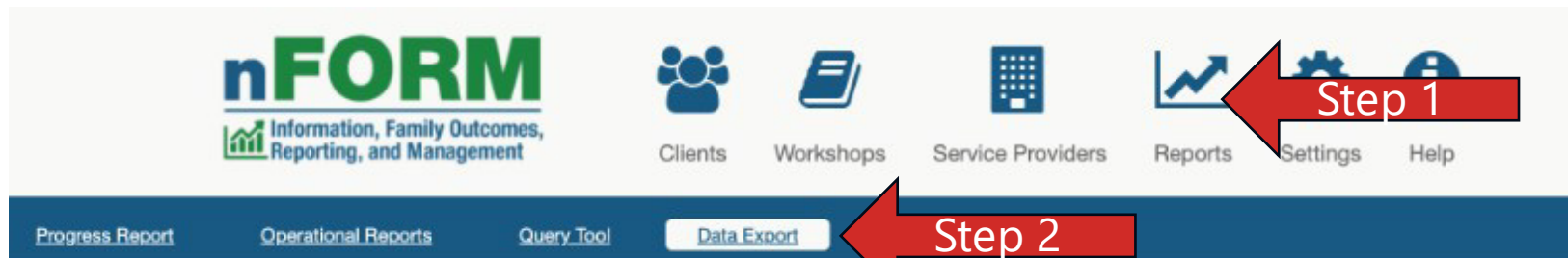
Query tool: Applicant characteristics by service assignment tab

The Applicant Characteristics tab of the query tool includes a separate view for local evaluation grants that shows number and percent of applicants with a selected characteristic, for each service assignment. This is useful for assessing whether groups appear to be similar. However, this is not tested for statistical significance, so cannot be used to determine baseline equivalence.





Accessing the Data Export



Data Export

Request Data Export

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

1. Select Data Type(s).

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

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

2. Enter Client Enrollment Date Range

Use the calendar feature to select and retain accurate dates between 7/6/2026 and today's date. If you are selecting only program operations data, you do not need to enter an enrollment date range.

Start Date

End Date

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

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

Submit Request

Clear Filter Selections

Please allow up to two days for your request to process. You cannot submit a new request while a file is pending. However, any site administrator at your grant can cancel a pending request by clicking the "Cancel" button below. Please also **review the data export resources on the [HMRP Grant Resource Site](#)** these include the data dictionary, data export template, and Module VIII of the nFORM User Manual. Email nFORMCQITA@mathematica-mpr.com if you need assistance.



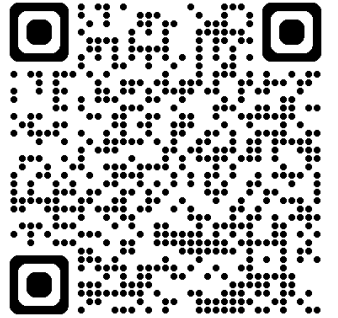
| Live demo – Accessing reports



Questions?



Wrap up



Scan QR code to access nFORM and CQI resources on HMRF Grant Resources site

Several resources related to using nFORM for local evaluations are posted or in progress for 2025 cohort

- [nFORM User Manual](#)
- [Overview of Institutional Review Board Process for HMRF Grants](#)
- Using nFORM for Local Evaluations (updates to 2020 cohort manual in process)
- HMRF Performance Measure Sources (updates to 2020 cohort manual in process)

Contact the data capacity and CQI TTA help desk with any questions at
nFORMCQITA@mathematica-mpr.com



Thank you!