nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Using nFORM 2.0 Tools to Monitor HMRF Performance Measures

Grantees can use a range of data tools in nFORM 2.0 to monitor their program operations and services provided, as well as the characteristics and outcomes of their clients. To help grantees dig deeper into their performance, this tip sheet maps each type of HMRF performance data in the Performance Progress Report (PPR) to relevant nFORM 2.0 data tools. This tip sheet is organized to follow the structure of PPR Section C— Quantitative (Numeric) Performance Measures. The appendix of this tip sheet includes more information on each of these data tools and when to use them. The HMRF Grantee Resource site includes a range of additional resources to help grantees use nFORM 2.0 data tools for program monitoring, including the nFORM 2.0 User Manual (Module VIII) and the data dictionary of fields included in the data export.

Contact the nFORM 2.0 help desk with any questions about using nFORM 2.0 data tools, or anything else related to nFORM 2.0, by either submitting a ticket through the help tab of nFORM or emailing us at nform2helpdesk@mathematica-mpr.com. We are happy to help!

Topic	nFORM 2.0 Data Tools			
	PPR/QPR[a]	Query Tool	Operational Reports	Data Export
Marketing and Recruitment	**Section C-01 Recruitment** **C-07 Implementation challenges** • Obtaining referrals • Recruiting participants • Cooperation of recruitment and referral sources **Section C-08 Marketing**	**Enrollment tab** • How clients heard about the program • Primary reason clients enrolled	N/A	**Client Info tab** • Referring organization • Referring organization type **Survey Response Data tab** • How clients heard about the program • Reason(s) why clients enrolled in the program • Primary reason why clients enrolled in the program **Program Operations Survey tab** • Recruitment advertising • Recruitment methods • Referral organizations • Organizations where on-site recruitment occurred

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[a] Note that the PPR/QPR sections in the table reflect the section number in the PPR. The same information is found in QPR Section B (except for substantive service contacts, which are not reported in the QPR). READY4Life grantees serving youth in school settings can also generate the School Year Performance Report to monitor performance measures reported in the PPR using the academic calendar as the reporting period (July 1 – June 30) rather than the grant year (September 30 – September 29).

	nFORM 2.0 Data Tools			
Topic	**PPR/QPR[a]**	**Query Tool**	**Operational Reports**	**Data Export**
Client characteristics and status	**Section C-02 Applicant Characteristics**	**Applicant Characteristics tab** **Workshop Participation – All Workshops tab** • Characteristics of workshop attendees **Client Outcomes tab** • Client outcomes by characteristics	**Client Status Report Summary/Detail report** **Phone Number report** **Zip Code report**	All client-level tabs include client status **Survey Response Data tab** displays applicant characteristics by client
Enrollment	**Section C-03 Program Enrollment**	**Grant Year Overview tab** • Progress towards enrollment target(s) • Number of clients enrolled by month **Enrollment tab**	**Survey Completion Summary/Detail report** **Local Evaluation Enrollment report**	All client-level tabs include enrollment date
Survey completion status	**Section C-03 Program Enrollment[b]**	**Grant Year Overview tab** • Percent of completed, refused, and incomplete/not started Entrance and Exit surveys **Client Outcomes tab**	**Survey Completion Summary/Detail report** **Survey Report – Paper Survey** **Survey Report – Refused Survey**	**Client Info tab** • Survey completion date, mode, and language **Survey Response Data tab** • Survey completion date, mode, and language

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[b] The number of clients/couples who complete the applicant characteristics survey equals the number that have enrolled. This section does not include local evaluation clients with a service assignment of Control (no services) or Control – Waitlist (no services).

	nFORM 2.0 Data Tools			
Topic	PPR/QPR[a]	Query Tool	Operational Reports	Data Export
Primary workshop participation	**Section C-04 Program Participation** • Number and percent of clients who initially participated in their first workshop session series occurrence (PPR Section C-04.1) • Number and percent of clients who have attended workshop session series (PPR Section C-04.2a)[c] • Progress towards primary workshop target hours by grant year (PPR Section C-04.2b Table 1) • Achievement of participation benchmarks during reporting period, by client enrollment year and overall (PPR Section C-04.2b Table 2)	**Workshop Participation – All Workshops** **Workshop Participation – Primary Workshops**	**Primary Workshop Participation Detail report** **Primary Workshop Participation Summary report** **Series session attendance summary report**	**Client Info tab** • Number of workshop sessions attended **Session Attendance tab**
Optional workshop participation	**Section C-04.2a Attendance at workshops**	**Workshop Participation – All Workshops tab**	**Series Session Attendance report**	**Client Info tab** • Number of workshop sessions attended **Session Attendance tab**
Workshop/series setup	**Section C-04.2a Attendance at workshops** • Includes a table with set-up and participation details for each workshop offered during reporting period	N/A	**Series Session Attendance report** • Workshop and series setup details	**Workshop Characteristics tab** **Series tab** **Series Facilitators tab** **Session Attendance tab**

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[c] Only session series that are completed are included in the Section C-04.2a. Attendance at Workshops table(s).

	nFORM 2.0 Data Tools			
Topic	**PPR/QPR[a]**	**Query Tool**	**Operational Reports**	**Data Export**
Individual service contacts	**Section C-04.3 Substantive individual service contacts**	**Individual Services tab**	**Individual Service Contacts report**	**Client Info tab** • Number of Service Contacts • Assigned case manager(s) **Service Contacts tab**
Referrals	**Section C-06 Referrals**	**Grant Year Overview tab** • Number of referrals needing follow-up **Individual Services tab**	**Caseload Summary/Detail report** • Number of referrals requiring follow up	**Client Info tab** • Number of referrals **Referrals tab**
Incentives/program supports	N/A	**Individual Services tab**	**Incentives report** **Caseload Summary/Detail report** • Number of incentives provided	**Client Info tab** • Number of incentives/program supports **Incentives – Program Supports tab**
Client outcomes	**C-09 Participant Outcomes**	**Client Outcomes tab**	N/A	**Survey Response Data tab**
Staffing, supervision, and training	**Section C-05 Quality assurance and monitoring** **Section C-07 Implementation challenges** • Recruiting qualified staff • Maintaining staff performance • Ensuring facilitators understand content • Retaining staff • Filling open staff positions • Staff hiring and turnover	N/A	N/A	**Program Operations Survey tab** • Staffing • Supervision • Training

Appendix

Figure A.1. Overview of nFORM 2.0 Data Tools

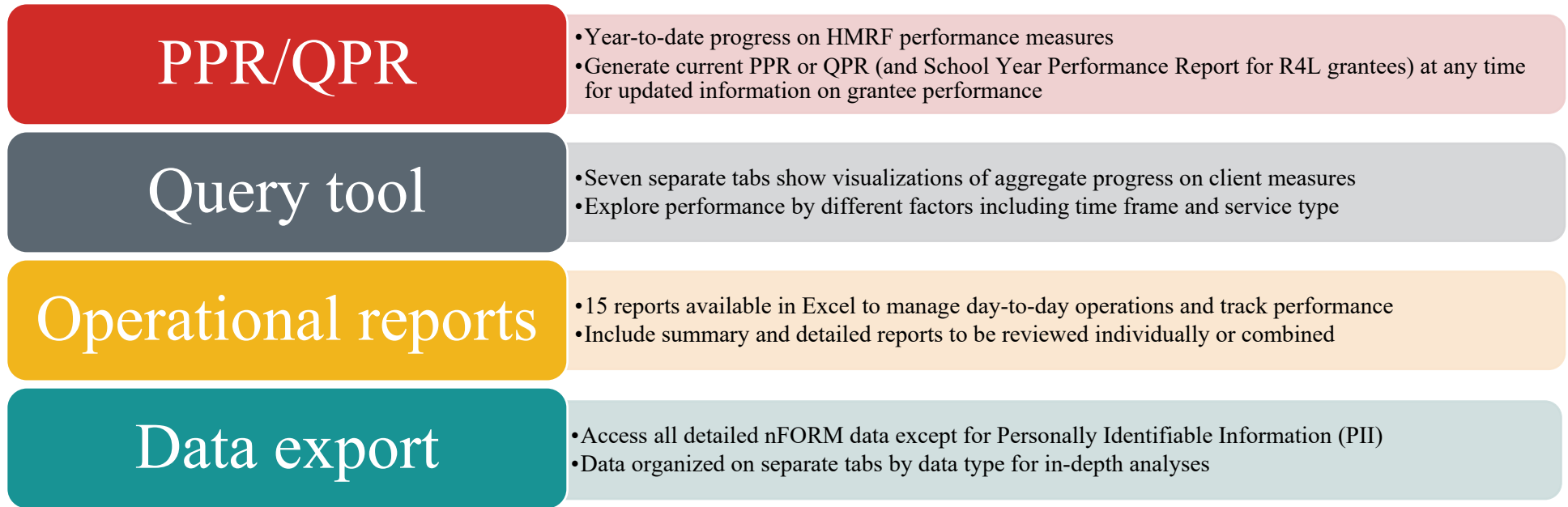|	
PPR/QPR	• Year-to-date progress on HMRF performance measures • Generate current PPR or QPR (and School Year Performance Report for R4L grantees) at any time for updated information on grantee performance
Query tool	• Seven separate tabs show visualizations of aggregate progress on client measures • Explore performance by different factors including time frame and service type
Operational reports	• 15 reports available in Excel to manage day-to-day operations and track performance • Include summary and detailed reports to be reviewed individually or combined
Data export	• Access all detailed nFORM data except for Personally Identifiable Information (PII) • Data organized on separate tabs by data type for in-depth analyses

Figure A.2. When to Use nFORM 2.0 Data Tools

Daily	Weekly/ Monthly	Quarterly	As needed
Use the **query tool** to view performance on multiple client measures and to filter for custom visuals; download **operational reports** to answer specific grantee questions and drill down on individual clients.	Request the **data export** to monitor additional data not available in the operational reports such as survey responses and service contact and referral issues/needs addressed; conduct in-depth analyses by merging data from multiple tabs.	Generate the **PPR/QPR Quantitative Performance Measures** to review information on a range of client and program measures by grant year-to-date. School-based programs can generate the **School Year Performance Report**.	Review or combine data from any of the nFORM data tools and reports to investigate major questions or concerns outside of regular program monitoring.

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