Healthy Marriage and Responsible Fatherhood Grants

Information, Family Outcomes, Reporting, and Management (nFORM 2.0) System User Manual

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OPRE

OFFICE OF FAMILY ASSISTANCE

An Office of the Administration for Children & Families

HMRF

HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

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I. Healthy Marriage and Responsible Fatherhood Grants: Data Collection and Performance Reporting Using nFORM 2.0

This manual provides a detailed description of the Information, Family Outcomes, Reporting, and Management 2.0 (nFORM 2.0) system, which Healthy Marriage and Responsible Fatherhood (HMRF) grantees will 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 grantees to use throughout the project. It provides answers to many of the questions grantees may have as they use nFORM. If grantees cannot find answers to their questions in this manual, they may ask the nFORM 2.0 Help Desk for assistance. The nFORM 2.0 Help Desk is described in Module II of this manual; several training videos and other resources are also available on nFORM 2.0's Help page.

A. What is nFORM 2.0?

nFORM 2.0 is a management information system that each HMRF grantee will use to collect the information that will be reported to the Office of Family Assistance (OFA) within ACF. Grantees will use nFORM to collect information about:

- Program operations (for example, outreach and recruitment activities, enrollment, staff qualifications and training, staff supervision and observations, and implementation challenges)
- Services (for example, case management activities, workshop attendance, and referrals)
- Client characteristics and outcomes (for example, applicant characteristics survey, program entrance and exit surveys of clients)

nFORM is designed to generate all necessary calculations at the touch of a button for the required semiannual program progress reports (PPRs) and quarterly progress reports (QPRs). Some data can also be exported to other programs, such as Microsoft Excel, for grantees to view and analyze. nFORM is web-based and does not require users to download any applications or program any code. nFORM is accessible anywhere there is Internet access and is provided free to each OFA-funded grantee.

Minimum system requirements. nFORM 2.0 is Section 508 compliant, and works on multiple platforms including desktop computers, laptops, and tablets – specifically iPads (not mini) and Samsung Galaxy Tabs. Please note that nFORM 2.0 has not been optimized for use with smartphones, and that updates to operating systems may affect nFORM 2.0 functionality.

Because nFORM is a web-based system, you must use a web browser to access nFORM and to administer the surveys to clients. nFORM and the surveys have been tested by using the Google Chrome browser app (version 86) and the Microsoft Edge browser app (version 84). nFORM has not been tested with other web browsers, such as Mozilla Firefox and Safari, and it may not work as intended with those other browsers. It is also always recommended to keep browsers updated to their latest versions so that they have the most recent bug fixes and security updates. The browser version is identified by selecting "Help" in the menu bar of the web browser and choosing "About." Please consult your tablet user guide for instructions on how to ensure that your browser version is up to date. Finally, do not use Internet Explorer due to security issues affecting that browser.

nFORM also requires the web browser to support Javascript. The browser also should allow pop-ups (external links open in a new window or tab) and accept session-based cookies. By default, the major web browsers are configured to handle these requirements.

Grantees should consider using mobile hotspots or JetPacks to enable nFORM to be used in areas that otherwise do not have sufficient Internet access. Grantees who are using mobile hotspots or JetPacks should ensure they are optimized to maximize signal strength. Grantees should also avoid running system updates or other data-intensive maintenance functions while using nFORM with a mobile hotspot or JetPack.

B. Overview of tasks performed in nFORM

nFORM is designed to (1) support collection of all required performance measure data, (2) facilitate grantees' required quarterly reporting, and (3) help grantee staff track clients and document services. Data should be entered into nFORM in real time so that it is accurate, up-to-date, and ready for required reporting to ACF. This section provides a brief overview of the tasks that staff will complete in nFORM. Module II provides more information about where to access this functionality in nFORM, as well as where in the user manual to find step-by-step instructions for each function.

Initial grantee administration tasks. Staff from the nFORM Team at Mathematica established an account for an initial site administrator at each grantee. Before serving clients, that site administrator should create user accounts for the other grantee staff who will use nFORM, customize nFORM to reflect each grantee service location and, if the grantee is conducting its own evaluation, applicable treatment and control groups. Site administrators will also add service providers and partner agencies to the system so that staff can access the service provider information to refer clients to needed services.

Client intake tasks. At client intake, grantees will share a privacy statement so that each client is aware of their data privacy rights, and then enter information about the client to create a client record. The information entered at client intake includes the application date, the population for which the client will be receiving services, and contact information. Additionally, grantees providing services to couples will use the application form to link together each partner's client record in nFORM. After the grantee creates a new client profile, nFORM will automatically generate a unique client ID number.

Using nFORM, each new client will complete an Applicant Characteristics Survey at intake. This survey collects such information as the client's demographic characteristics, financial status, and family status. Site administrators will assign a case manager to each client. If the grantee is conducting a local evaluation, staff will record a client's service assignment (treatment or control group) in nFORM after the client completes the Applicant Characteristics Survey. Module V provides more information about who is considered to be a client for purposes of creating client records in nFORM.

Workshops and sessions management. Grantee staff will use nFORM to create workshops and schedule workshop sessions. nFORM makes it easy to schedule sessions that recur for the required length of the workshop and to track attendance of clients who are registered for sessions as well as clients who drop in to sessions. nFORM also facilitates session cancellations, and rescheduling sessions to occur at different dates and times.

Service contacts, referrals, program supports, and incentives. Grantee staff will also use nFORM to track individual service contacts, referrals, and incentives provided to clients. For individual service contacts, the grantee will enter information such as the length and location of each contact and issues discussed during the contact. Case managers are responsible for noting what referrals a client receives and if the client follows up on the referral. nFORM will remind the case manager to request this information. Information on incentives includes the type of incentive and the reason for providing it to the client. Grantees that serve couples will track participation at both the individual and couple levels.

Entrance and exit surveys. At the start of their first workshop, clients will complete an Entrance Survey, and 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 one month), clients will complete an Exit Survey. These surveys ask clients questions from five outcome domains: (1) parenting, co-parenting, and fatherhood; (2) economic stability; (3) healthy marriage and relationships; (4) personal development; and (5) program perceptions.

Table I.1 below shows which surveys are administered in nFORM to each type of client population; all surveys are available in nFORM in English and Spanish. Please note that when couples are served by either FRAMEWorks or Fatherhood FIRE programs, each partner is surveyed separately.

Table I.1. Client surveys by client population

Client population	Survey
FRAMEWorks programs	
Adult individual	Adult entrance and exit survey
Adult couple	Adult entrance and exit survey
READY4Life programs	
Youth	Youth entrance and exit survey
Fatherhood FIRE programs	
Reentering individual	Reentering fathers entrance and exit survey
Community individual (father)	Community fathers entrance and exit survey
Community individual (mother)	Community mothers entrance and exit survey
Community couple (father)	Community fathers entrance and exit survey
Community couple (mother)	Community mothers entrance and exit survey

Grantee staff will make sure clients are set up to complete the correct surveys. The surveys are web-based for clients to complete on their own using a computer, laptop, or tablet. Administering the surveys via the web allows them to be linked directly to nFORM and improves data quality. For example, nFORM has skip patterns automatically programmed to direct clients to the right questions based on their previous responses. Importantly, nFORM is programmed with audio computer-assisted self-interview technology (ACASI). ACASI gives clients the option to listen to a recording of the questions and response options with headphones, rather than having to read them on the screen. Program staff will schedule clients' completion of the surveys and also track each client's completion in nFORM. Tracking and administering surveys using nFORM is easy; surveys only become available to administer to clients in their intended order of administration. The Applicant Characteristics Survey must be completed by clients first. The ability to generate a passcode for a client to access the Entrance Survey is not available until after an Applicant Characteristics Survey is submitted. Likewise, a passcode for a client to access their Exit Survey is not available until after their Entrance Survey has been submitted. nFORM automatically accesses the versions of the Entrance and Exit Surveys that match the population from the client's record. This means that clients will automatically get the survey that is tailored to them.

Program operations survey and narrative. Each quarter, program staff will use the nFORM system to complete the Program Operations Survey, which consists of questions about topics such as outreach and recruitment of clients into the program; staff qualifications; and implementation challenges. Grantees will also provide narrative answers to a set of questions to provide context for their program operations. These two elements are part of the required reports described next.

Reporting. All grantees are required to collect and report on performance measures using the nFORM system. ACF requires two types of reports: a semiannual performance progress report (PPR) and a quarterly progress report (QPR). The QPR provides a subset of the information that is reported on the PPR. Grantees are required to submit a report to ACF each quarter. The required reports alternate between QPRs and PPRs; QPRs are due in January and July and PPRs are due in April and October.

To produce the reports, grantees first complete the quarterly Program Operations Survey. All of the quantitative information for the reports is then generated at the touch of a button in nFORM. Grantees then review the quantitative information to inform the narrative they draft using a template provided in nFORM. After drafting the narrative, grantees should review the reports for accuracy before submitting them to ACF.

Grantees can analyze the data in nFORM in other ways, including a query tool, a data export, and operational reports which help grantee staff identify, for example, outstanding surveys to be completed by clients.

Guidance on using nFORM. A number of informational resources about nFORM and performance measures data collection are available on the Help page in nFORM. The nFORM Help page, which is also available when not logged into nFORM, contains links to this user manual, several training videos, a document describing data collection and logistics, a data dictionary describing the variables included in the data export, guidance on seeking IRB approval, and other resources. Grantees are encouraged to use these resources to learn how to use nFORM and to find answers to their questions about using the system. In addition, the nFORM Team will host regular office hours to highlight different nFORM functions and answer grantee questions.

Grantees may also reach out to the nFORM web help desk for technical assistance. A ticket describing the grantee's technical assistance need can be submitted on nFORM's help page. Grantees are encouraged to provide as much detail about their question as possible, including screen numbers, device and browser specifications, and client ID numbers. Grantees, however, should never include client personally identifiable information (PII), like client name, in a help desk request.

C. The BUILD Project

Mathematica is conducting the BUILD (Building Usage, Improvement, and Learning with Data in HMRF Programs) project to support ACF's learning agenda and enable the 2020 cohort of HMRF grantees to measure their program performance and make data-driven decisions for program improvement. In addition to enhancing and maintaining nFORM and providing training and technical assistance to grantees, Mathematica will provide cross-grantee analyses to support ACF's performance monitoring and reporting and to advance understanding of HMRF programs, services, and outcomes. Mathematica is obtaining a waiver of consent from the Health Media Lab Institutional Review Board to analyze grantees' nFORM data for these analyses, without specific consent from grantee clients to do so.

D. Keeping data confidential

Some of the information collected and stored in nFORM is considered confidential or sensitive. nFORM will include some PII. PII is information that can be used on its own or in combination with other information to identify an individual. PII in nFORM includes clients' contact information and aspects about clients' involvement in the HM or RF program. (However, no Social Security numbers will be recorded in nFORM). Additionally, some of the performance measures are sensitive questions on topics

including sexual behavior, criminal history, financial history, domestic violence, and children's names/initials. The security features of nFORM help protect the confidentiality of client information.

Mathematica has deployed the nFORM 2.0 system to the Amazon Web Services (AWS) cloud which is FedRAMP-certified to ensure effective, repeatable cloud security. Safeguards that will be used to protect sensitive data stored within the nFORM 2.0 system are consistent with the Privacy Act, the Health Insurance Portability and Accountability Act, the Federal Information Security Management Act (FISMA), and National Institute of Standards and Technology security and privacy standards. Identifiable data will be encrypted at all times (in transit and at rest) using cryptographic modules that are compliant with Federal Information Processing Standard 140-2, and will be securely deleted from the system when no longer needed. Access to the nFORM system will be controlled via multifactor authentication mechanisms and will be limited for both grantee and Mathematica staff. A grantee will only be able to view and report data for its own program.

In addition to these nFORM-specific procedures, Mathematica has extensive corporate administrative and security systems to prevent the unauthorized release of personal records, including state-of-the-art hardware and software for encryption that meets federal standards, other methods of data protection (e.g., requirements for regular password updating), and physical security that includes limited key card access and locked data storage areas. Mathematica also requires every employee to sign a pledge to protect the privacy of data and client identity, and breaking that pledge is grounds for immediate dismissal and possible legal action.

E. Reporting security incidents

Grantees should immediately report suspected or confirmed cases of unauthorized nFORM access. 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 a user account's multifactor authentication process settings without the user's knowledge. Grantees should be careful not to include PII when reporting such incidents; client ID numbers or other references can be used.

Grantee staff should immediately report suspected or confirmed nFORM-related security incidents to a site administrator at their organization. The site administrator should immediately report the issue to Mathematica by completing a help desk ticket as described in Module II. Grantees 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 grantees 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 2.0 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 grantee'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 within this user's manual that provides more detailed steps on the nFORM functionality within that tab.

- On the **Clients** tab, grantee staff can enroll new clients and record, view, and edit important information about clients such as client contact information; client status; service contacts, referrals, and incentives; and workshop participation. Grantee staff can also assign case managers to clients and access surveys for completion by clients. Modules V, VI, and VII describe functionality within the Clients tab.

- On the **Workshops** tab, grantee 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.

- Grantee staff use the **Service Providers** tab to add, edit, and view the service providers to which clients can be referred, the service provider's contact information, and whether the service provider is a partner agency (an organization with which the grantee has a partnering agreement such as a memorandum of understanding [MOU]). Module III describes functionality within the Service Providers tab.

- Grantees will use the **Reports** tab to record information about program operations, create reports, and analyze performance measures data. The Reports tab includes the Program Operations Survey and

Progress Narrative; creation of required ACF reports; operational reports; and the query tool. Module VIII describes the functionality within the Reports tab.

- Grantee staff use the **Settings** tab to add, edit, and view grantee locations, service assignments (for grantees conducting their own local evaluations), and user accounts. Modules III and IV describe functionality within the Settings tab.

- Grantee staff may use the **Help** tab whenever they have questions about using nFORM that are not addressed in this manual. The Help tab guides grantee staff through the process of submitting inquiries to the nFORM Help Desk. The Help tab also provides links to this nFORM User Manual and other useful resources for grantee staff. **Users should periodically clear their cached images and files to see the new versions of Help tab resources.** A phone number is listed on the help page for grantee site administrators to call should they experience any nFORM log-in issues.

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; grantee staff or partner agency staff must never share a user name to access nFORM. Mathematica created a user account for an initial grantee site administrator. That site administrator is responsible for configuring grantee 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 grantee (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 his or her 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, grantee staff should bookmark this URL on their computers:

https://hmrf-nform.com/nFORM/
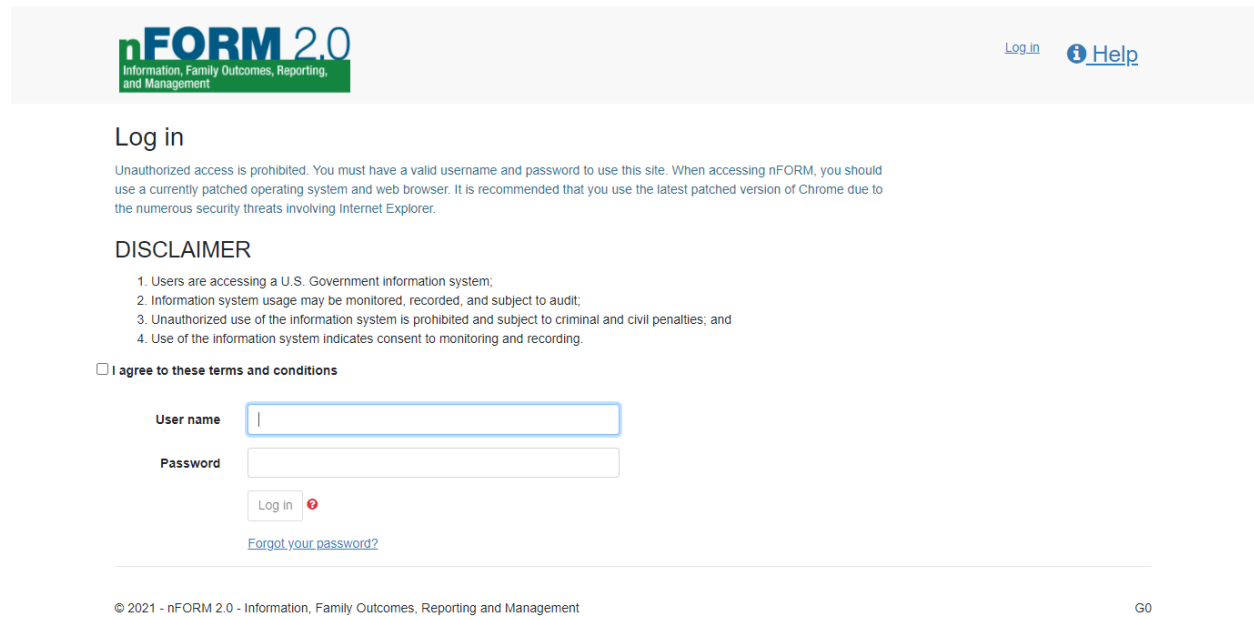
Read the disclaimer and check the box to agree to the terms and conditions. Enter your username (email address) and password and then click on the "Log in" button to begin the multifactor authentication process. Depending on the authentication method selected, a screen message will indicate that the 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.
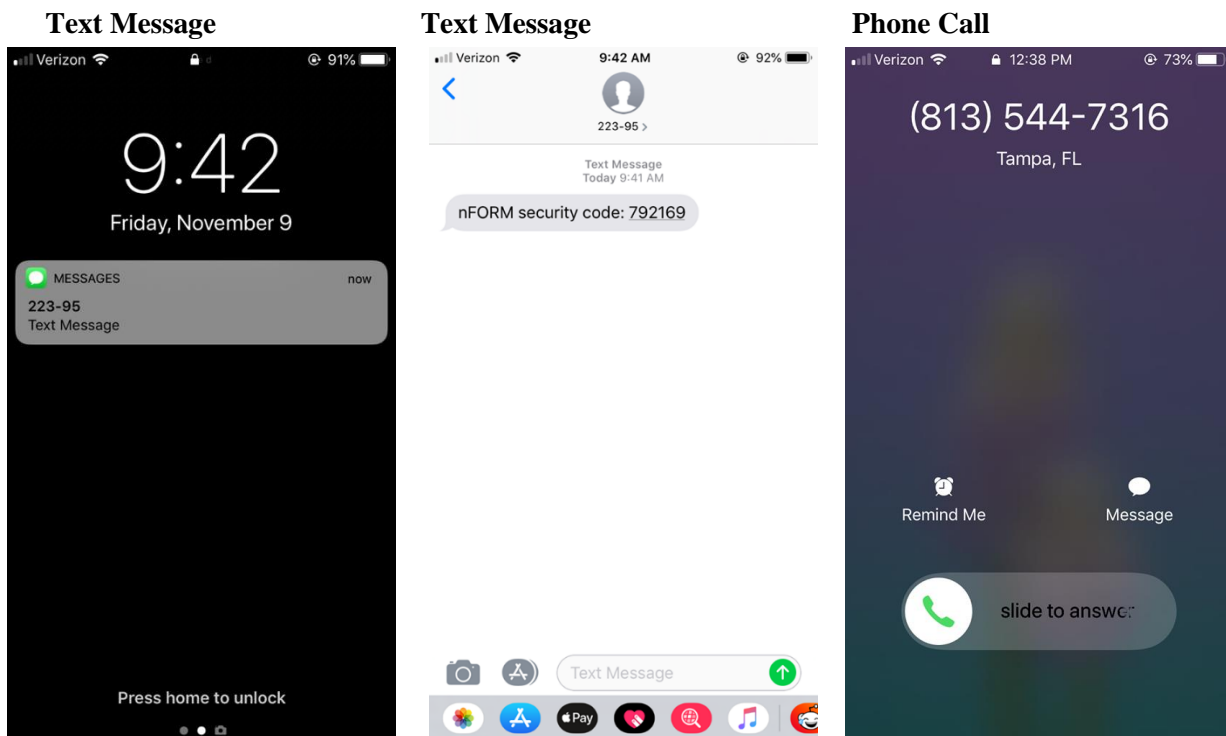
**Text Message**   **Text Message**   **Phone Call**

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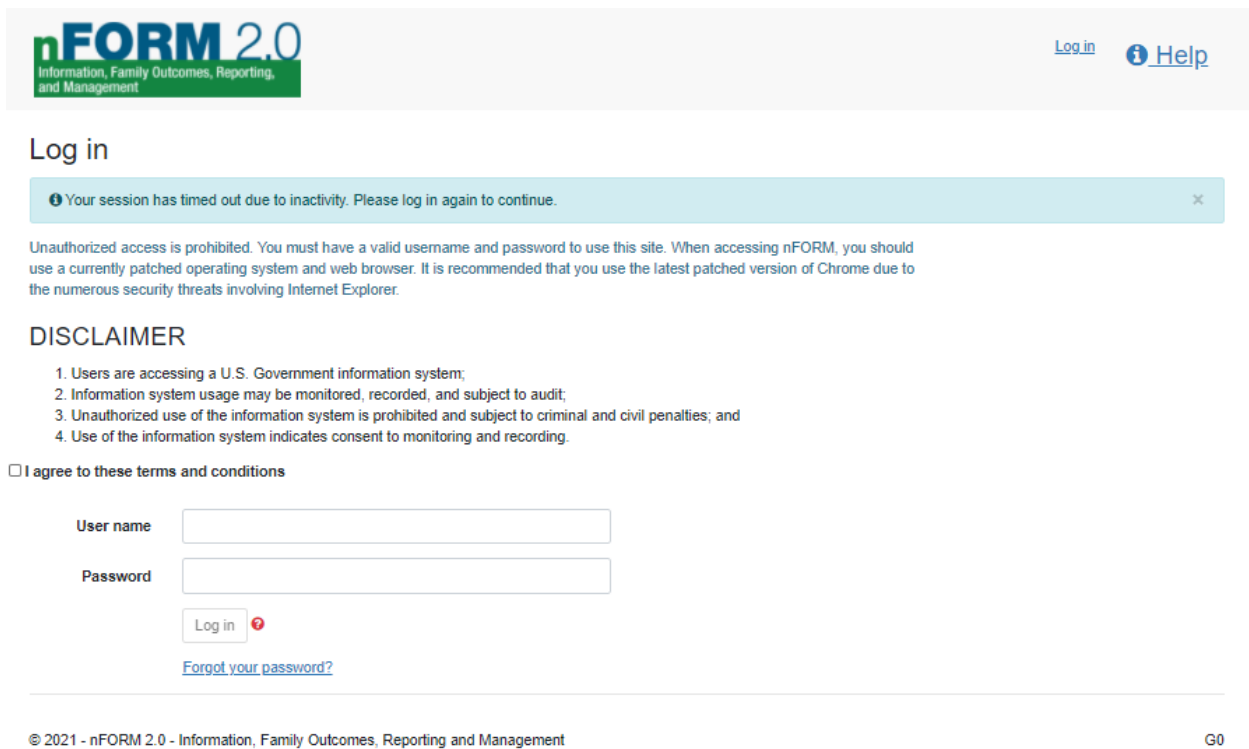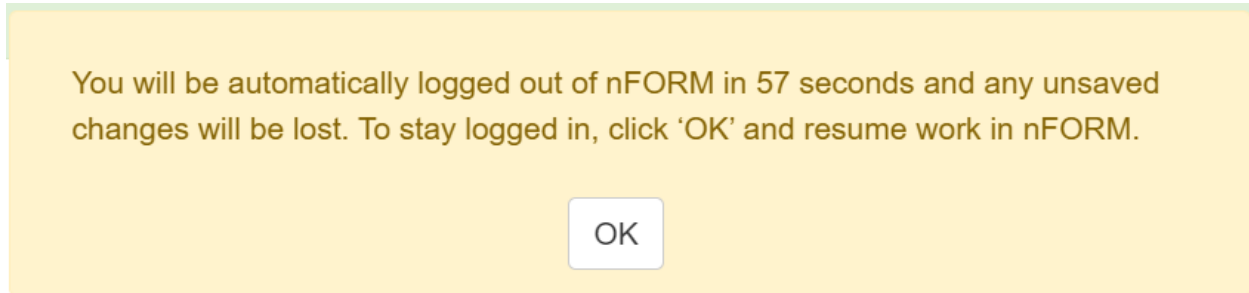
To log off nFORM at any time, click the "Log off" button located in the top right corner of any nFORM page.

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 locked 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 locked out of the system.

If you are locked out of nFORM, 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)

Grantees can request technical assistance regarding the nFORM system and performance measures by completing a help desk ticket in nFORM under the Help tab. Grantee users should contact the site administrator who set up their account for assistance with log-in issues; site administrators have the authority and tools to address log-in issues. All other types of inquiries can be submitted to your Family Assistance Program Specialist (FPS). **Grantees are encouraged to review this manual and the other informational resources available on the Help tab before submitting a help desk ticket.**

Site administrators, case managers, and general user account types can all submit help desk tickets and access the informational resources that are available on the Help tab. Grantee staff are encouraged to raise questions with a site administrator at their grantee before submitting a help desk ticket.

II.C.1 Getting help with log in issues

If a user is unable to log in to nFORM, the grantee site administrator should first ensure that the user's account is active, and that the correct phone number for the multifactor process is recorded on the user's profile. In addition, the user's password can be reset. If a user is still unable to log in, the site administrator should submit an inquiry through the nFORM Help Desk or, if necessary, call Mathematica's nFORM Log In Help Line at: 844-619-6841. The Help Line is available during regular business hours (Eastern time), excluding Federal Holidays. If you leave a voicemail, we will respond as quickly as possible.

To ensure timely response to technical assistance questions, the nFORM Log In Help Line should only be called for help with logging into nFORM. All other inquiries about nFORM and performance measures should be submitted by completing a help desk ticket in nFORM.

II.C.2 Submitting an nFORM help desk ticket

Any nFORM user may request technical assistance regarding the nFORM system and performance measures by completing a help desk tick in the Help tab (screen HD1). To begin, use the dropdown menu to select the category that best fits your nFORM system or performance measure inquiry. A description of each category and the relevant nFORM User Manual modules appear in the following table II.1.
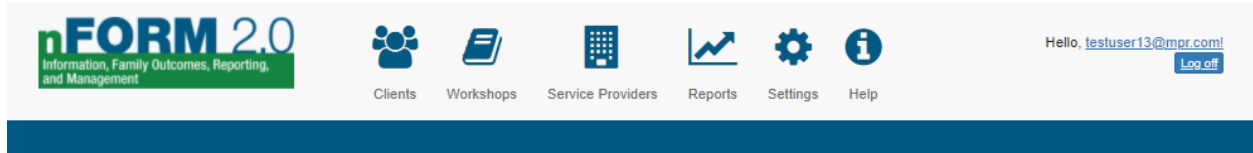
Please review the applicable section of the manual, the other informational resources, and the training videos before submitting a help desk ticket.

Table II.1. nFORM help desk categories

Category	Description
Client intake/services	Module V of the nFORM User Manual describes client enrollment; Module VII describes client case management. If submitting a ticket, please include the nFORM screen number(s) and Client ID number(s), as applicable.
Client surveys/ performance measures	Modules V and VII of the nFORM User manual describe client survey administration using nFORM; the constructs and domains document in a forthcoming crosswalk describes the performance measures on each survey. If submitting a ticket, please include the specific measures(s) if you have questions about the constructs and domains. If you have questions about survey administration, please include name of the survey, survey questions and/or pages, screen number(s), and Client ID number(s), as applicable.
Workshops	Module VI of the nFORM User Manual describes workshops and sessions. If submitting a ticket, please include the screen number(s), as applicable.
QPR/PPR reporting	Module VIII of the nFORM User Manual describes QPR and PPR reporting. If submitting a ticket, please include the nFORM screen number(s), report type/item, and reporting period, as applicable.
Query tool	Module VIII of the nFORM User Manual describes the query tool. If submitting a ticket, please include the dashboard or tab name, variable(s), and time options, as applicable.
Operational reports	Module VIII of the nFORM User Manual describes the operational reports. If submitting a ticket, please include the nFORM screen number(s) and report name(s), as applicable.
Service providers	Module III of the nFORM User Manual describes adding and editing service providers. If submitting a ticket, please include nFORM screen number(s), as applicable.

Category	Description
Settings/user accounts	Module III of the nFORM User Manual describes nFORM settings and Module IV describes adding and editing user accounts. If submitting a ticket, please include nFORM screen number(s), as applicable. Please provide information on user accounts that have been disabled, as applicable.
Security incident	Site administrators should use this category when reporting an nFORM-related security incident to Mathematica. Immediately report suspected or confirmed cases of unauthorized nFORM access. Examples include sharing of accounts and allowing unauthorized individuals to access nFORM and view client data. Please provide a description of the incident and information on affected user accounts, as applicable.
Miscellaneous	nFORM users may submit all other types of inquiries through this category.

When you submit an inquiry, please include the information specified in the text box on the screen so that someone from Mathematica can assist you as quickly and fully as possible. It is helpful to include the screen numbers associated with the issue, example client IDs associated with the issue (if applicable), and a thorough description of the issue. **Importantly, do not include personally identifiable information, such as client names, in a help desk ticket or any email.**

For updating your enrollment targets (completed annually):
- nFORM User Account Request, Enrollment Targets, and Workshop Hours Form

For analyzing nFORM data with the data export:
- Record layout for data export: Data Dictionary

Help Desk Instructions

To begin, use the drop down menu to select the category that best fits your nFORM system or performance measure inquiry. For each category, we identify the relevant modules in the nFORM User Manual. Submit a help desk ticket, if needed, after reviewing the nFORM User Manual and performance measures resources. When you submit an inquiry, please include the information specified in the text box below so that we can assist you as quickly and fully as possible.

Select a category   Client intake/services ▾

ℹ *Module V of the nFORM User Manual describes client enrollment; Module VII describes client case management. If submitting a ticket, please include the nFORM screen number(s) and Client ID number(s), as applicable.*

Do not include any personally identifiable information about any clients in the help desk request.

> Screen number(s):
> Client ID:
> Description:

Submit Request

Clients   Workshops   Service Providers   Reports   Settings   Help

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After your ticket is submitted, a green box will appear confirming the submission. You will receive a response to your inquiry via email. Be sure to check whether emails are in your SPAM folder.

> ✔ Thank you for your inquiry to the nFORM Help Desk. Our hours of operation are Monday through Friday from 9AM-5PM EST, excluding federal holidays. We will respond to all emails and calls as soon as possible.   ✕

III. Grantee Administrative Functions

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

All site administrators can perform grantee 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. Grantee configuration (screen G1)
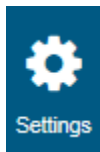
The site administrator will use the grantee configuration page under the Settings tab to add, edit, and view grantee locations and service assignments (if the grantee is conducting its own local evaluation). If a grantee is not conducting a local evaluation, the service assignments table will not display.

B. Grantee locations (screen G2)
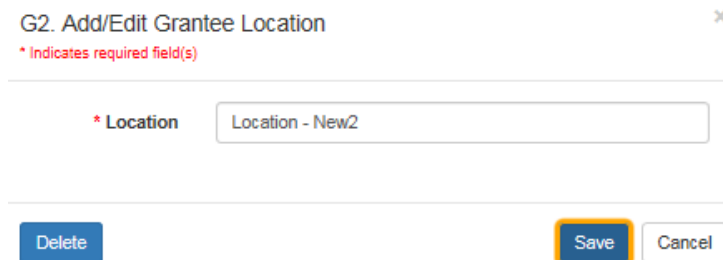
Grantees that serve clients in multiple office locations can record an nFORM user's primary location and the location where a client will be receiving services. Location is an optional field that allows grantees to track data by grantee location; however, it does not limit any functions within nFORM. Recording the grantee location in the client's Application Form allows grantees to view their program's enrollment by grantee location in the query tool. Case managers at a specified location are still able to view all clients for their grantee, regardless of their location.

Select the +Add Location button in the Grantee Locations field to open the Add/Edit Grantee Location screen (G2). Enter the name of the grantee 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 grantee locations, select the View button next to the relevant location in the Grantee Locations table. This opens the Add/Edit Grantee Location screen (G2). Select the Edit button to change the name of the grantee location and then click the Save button.

If a grantee 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 grantee locations that are not referenced in any other record in nFORM. **Grantee locations should only be deleted if created in error; deleting a grantee location means that it will no longer appear in the Grantee 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 grantees conducting their own local evaluations, site administrators can add service assignments to nFORM and view the available service assignments on the Grantee 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 grantee'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 Grantee 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 Grantee 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)
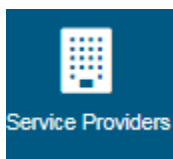
Grantees will use the Service Providers tab as a directory of the agencies and organizations to whom they refer clients for services. After service providers are added to nFORM, users can navigate to the Service Providers tab to search for a provider by type of services or the name of the provider. Users can also choose to display all service providers that have been added to the grantee'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. Grantees are responsible for keeping their service provider directory up-to-date and free of duplicate entries.
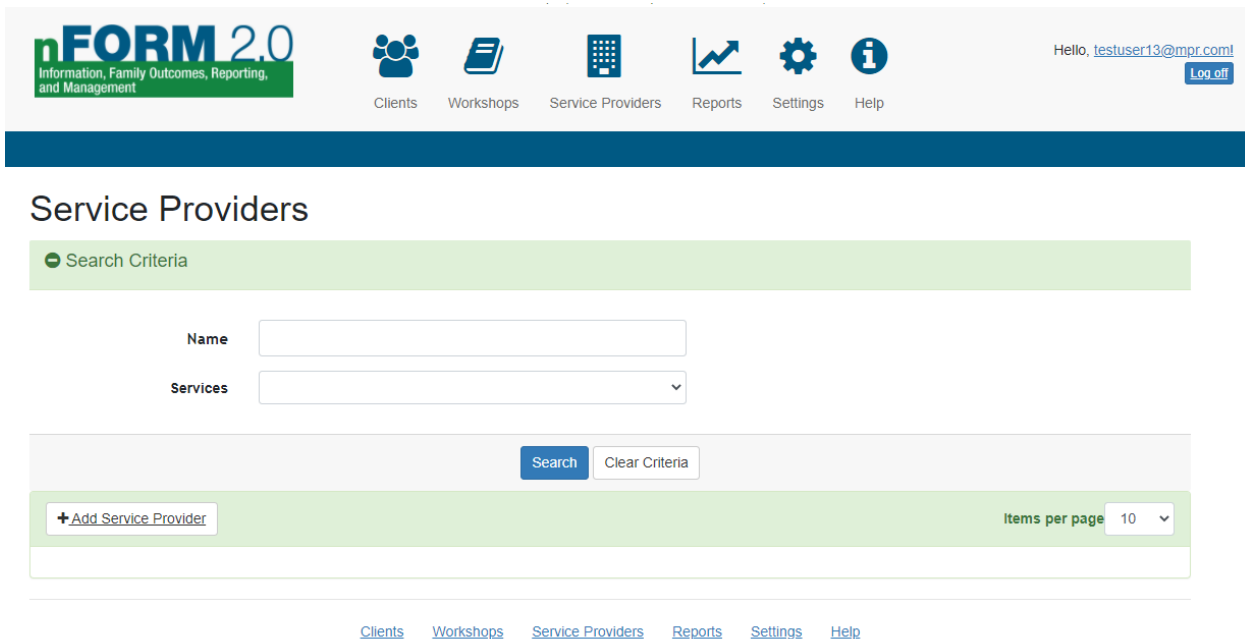
If no existing record for a service provider is found, add a new service provider to the system by selecting the +Add Service Provider button on the Service Providers tab (G4); this will open the Add/Edit Service Provider screen (G5).

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. Complete the check box if the service provider is a partner agency; a partner agency is an organization with which a grantee has a partnering agreement, such as an MOU. 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.

Next, 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.

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. You can also mark a service provider as Inactive on this screen; this will indicate to all grantee staff that the grantee is no longer referring clients to that service provider. Scroll to the bottom of the page and select the check box to indicate the service provider is inactive.

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 grantee is no longer

referring clients to a service provider, 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 or by selecting a category of service on the Service Providers tab (G4).

After entering a name and/or selecting a service category 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 from the Services dropdown menu will return all service providers that offer the selected service. Clicking Search without entering any text in the name field or selecting a service category will return all service providers for your grantee.

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

IV. Adding and Editing nFORM User Accounts

Grantee site administrators add nFORM user accounts for grantee 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, and disable user accounts for users within their own grantee. The Users page also lists each user's last name, first name, user type, user name, grantee 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 grantee 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 select 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.

Users

⊖ Filter Criteria

Grantee Location	All Locations ▾	
Last Name		User Type All User Types ▾
First Name		☐ Show Inactive Users

[Search] [Clear Criteria]

+ Add User   Items per page 10 ▾

View	Last Name ⬍	First Name ⬍	User Type ⬍	User Name ⬍	Grantee Location ⬍	Active ⬍	Query Tool Permission ⬍	Partner ⬍
🔍 View	Case Manager	Marybeth	Case Manager	testuser43@mpr.com		Y	Y	N
🔍 View	Case Manager	Test	Case Manager	testuser24@mpr.com		Y	N	Y
🔍 View	General	Marybeth	General	testuser143@mpr.com		Y	N	N
🔍 View	General	Matt	General	testuser174@mpr.com		Y	N	N
🔍 View	Site Admin	Matt	Site Administrator	testuser103@mpr.com	Location G2S1	Y	Y	N
🔍 View	Site Administrator	Marybeth	Site Administrator	testuser108@mpr.com		Y	N	N
🔍 View	Site Administrator	MarybethM	Site Administrator	testuser82@mpr.com		Y	Y	N
🔍 View	Test18	Test18	Site Administrator	jun.y.park@gmail.com		Y	N	N
🔍 View	Valenzuela	James	Site Administrator	JValenzuela@mathematica-mpr.com		Y	N	N

9 Record(s)

Clients   Workshops   Service Providers   Reports   Settings   Help

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

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

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 grantee.

- 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

Tasks	Grantee User Roles		
	Site Administrator	**Case Manager**	**General**
User Management: Other People's Accounts			
User List	Yes	No	No
Add and Disable Users	Yes	No	No
View and Edit User Profiles	Yes	No	No
Reset Passwords	Yes	No	No
User Management: Own Acccount			
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

Tasks	Grantee User Roles		
	Site Administrator	**Case Manager**	**General**
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
Generate Survey Passcode (Individually and in bulk)	Yes	Yes	Optional
View Applicant Characteristics Survey	Yes	Yes	No
Assign/Unassign Case Managers (Individually and in bulk)	Yes	Optional	No
Edit Data Outside Intake Form	Yes	Yes	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 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/Delete Messages/Reminders	Yes	Optional	Optional
View Messages/Reminders	Yes	Yes	Yes
Add/Edit/Inactivate/Delete Service Providers	Yes	Optional	Optional
View Service Provider Listing/Details	Yes	Yes	Yes
View/Add/Edit/Delete Grantee 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 QPR/PPR	Yes	No	No
Generate Operational Reports[1]	Yes	Yes	Yes
Export nFORM Data	Yes	No	No
Access Query Tool[2]	Optional	Optional	Optional

Table IV.1. (*continued*)

	Grantee User Roles		
Tasks	**Site Administrator**	**Case Manager**	**General**
Submit Help Desk Tickets	Yes	Yes	Yes

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

[1] 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.

[2] Up to three nFORM user accounts at each grantee 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 only delete the following information from nFORM: individual client service contacts, workshops, workshop session series, messages/reminders, service providers, grantee 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. Grantees are therefore encouraged to confirm applicants' program eligibility before adding them to nFORM.

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 disabled, the site administrator can re-enable the user account on the User Profile screen (U3). 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 individiuals should never share a single nFORM user account. In addition, no two user accounts (whether enabled or disabled) can share the same email address.

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:

- Grantee 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 disable or enable 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.

Disable user accounts. Disable a user account by clicking the Disable User Account button on the User Profile screen (U3). A message that the user account was disabled successfully will display at the top of the User Profile screen. The user will no longer be visible by default on the Users screen (U1), and when inactive users are shown, the value in the Active column for this user will change from a Y to N to note that the account is inactive. That user will not be able to log into nFORM with a disabled user account.

Accounts that are inactive for more than 60 days will be automatically deactivated as a security measure. These accounts will then appear with an N in the Active column on the Users screen (U1).

Enable a deactivated user account. To enable a previously deactivated user account, select the user's account on the Users page and open the User Profile screen (U3). Click the Enable User Account button on this screen. A message that the user account was successfully enabled 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-enabled, 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-enabled. If the user does not log in on the same day on which their account is re-enabled due to inactivity, the account will be disabled again overnight, and will need to be re-enabled again.

Please note that if a deactivated account remains inactive for another 30 days (90 days since last log in), nFORM will automatically terminate the account. To reactivate terminated accounts, grantee site administrators must request reactivation through the Help Desk.

V. Enrolling Clients
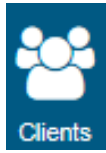
The Clients tab is used by all site administrators, all case managers, and general users with enrollment permission to complete tasks associated with client enrollment. Creating client records in nFORM enables grantee staff to track client participation in their HMRF programs.

Enrolling clients is functionality available to all site administrators, all case managers, and general users with enrollment permission. Clients include anyone served by HMRF grant funding, and, if a grantee 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 FRAMEWorks, READY4Life, or Fatherhood FIRE clients, but who are not specifically served with HMRF grant funding

- Individuals in control groups who are not receiving any services from the grantee and who will not be completing the Applicant Characteristics, 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 Applicant Characteristics Survey, they would always have a "pending enrollment" status.

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

A. Enroll new clients for individual services (screens C1 and C2)

When enrolling a new client, 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 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 client by their phone number.

All Clients

Search Criteria

Grantee Location	[dropdown]
Client ID	[field]
Last Name	[field]
First Name	[field]
Middle Name	[field]
Phone Number	[field]
Population	[dropdown]

Case Manager	[dropdown]
Application Date	[field] 📅
Enrollment Date	[field] 📅
Client Status	[dropdown]
☐ Include Duplicate Confirmed	
Service Assignment	[dropdown]

Search   Clear Criteria

+Add Client   Items per page 10 ⌄

Clients   Workshops   Service Providers   Reports   Settings   Help

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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, there is no need to create another record. Staff conducting intake may want to advise the client's assigned case manager. In addition, if the client is pending enrollment, the client can be given the applicant characteristics survey (see Section V.D below).

If the applicant is not found as a current client in the system, select the +Add Client button on the All Clients page (C1) in the Clients tab to open the Application Form (C2).

Grantee staff are encouraged to confirm each applicant's eligibility for the grant program before creating a new client record in nFORM. Client records cannot be deleted from nFORM; this is a quality control feature to prevent erroneous client deletions from the system. Therefore, extraneous records for ineligible clients will be retained in nFORM with records for eligible clients, which may complicate case management.

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

Grantee staff must then present the Privacy Act Statement, printed in the application form, verbally or in writing to the applicant. The statement explains the purpose of 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.

Enter the following information about the applicant in the Client Information section of the Application Form:

- First, middle, and last name
- Date of birth
- Referred by type
- Referral organization name
- Grantee location (if applicable)
- Population
- Local evaluation status (if grantee is conducting a local evaluation)
- Intimate partner violence or teen dating violence screening and outcome
- Home, cell, and work phone numbers
- Email
- Social media information (Facebook, Twitter, other social networks)
- Address(es)

If the client refuses to provide his or her date of birth, grantee staff should try to record at least the correct month and year, or the correct year of birth for the applicant. As stated previously, clients whose age is 24 years old or younger can be assigned to the Youth population.

Grantees must select the type of agency or organization from which the client was referred to the program. If the client was not referred by another agency or organization, but rather chose to attend the program themselves, grantees can select the "Self-referrals" option.

Select a client population based on the types of services your program provides, how your program defines its target population(s), and how your program will measure performance.

- For FRAMEWorks grantees the client population options are Adult Couple and Adult Individual.
- For READY4Life grantees, the only available client population option is Youth.
- For Fatherhood FIRE grantees the client population options are Community Couple, Community Individual, and Reentering Individual.

For example, grant programming may focus on serving couples (either Adult Couples for FRAMEWorks grantees or Community Couples for Fatherhood FIRE grantees), or clients in relationships may be served as part of programming targeted for individuals. Clients whose age is between 13 and 24 years old can be assigned to the Youth population by READY4Life grantees. If enrolling a client as a Community Individual or member of a Community Couple, grantee staff will be prompted with an additional field to select if the client is a mother. The response to this question will determine which version of the surveys the client receives – those for fathers or those for mothers.

If a couple is receiving services together, this should be reflected in the client population selected on the Application Form (that is, "Adult Couple" for FRAMEWorks programs or "Community Couple" for Fatherhood FIRE programs). Grantee staff follow the same 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 section V.E in this module for more information on entering couples into nFORM.

Grantees are encouraged to speak with their FPS to finalize their target population(s). A client's population can only be modified until the client takes 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. Grantees serving 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, grantees 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.

Grantees 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 Applicant Characteristics Survey. It is important for staff to be trained on whether or not the box should be checked, particularly if grantee 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.

Grantees must enter all available client contact information into nFORM. In the case that grantees are using another system to record clients' contact information, grantees 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. Grantees 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.

If the applicant provides a cell phone number and you plan to use text messaging as a contact method, be sure to ask the applicant if they agree to be contacted by text messaging. Some people incur costs when they receive text messages, so it is important to verify in advance that applicants agree to be texted. If the applicant agrees to be contacted by text messaging, check the box to indicate this on the client's record. While additional contacts are not required, grantees 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
- Address
- Home, cell, and work phone numbers
- Email
- Social media information (Facebook, Twitter, other social networks)

Select Save to create 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, grantee 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.

B.   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 name, last name, and 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 Section V.C 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.

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

After selecting Save on the Application Form (C2), nFORM will automatically run a duplicate check using the applicant's first name, last name, and date of birth to identify whether an existing client record matches the new record on those three fields.

When a new client record matches an existing record on first name, last name, and date of birth, the nFORM user is taken to the Possible Duplicate(s) Found screen (C6) which lists potential duplicate matches based on the new client's name, client ID number, and date of birth. Additional information—service assignment, program grantee location, case manager(s), application date, and client status—is displayed for the existing clients to help grantee 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.

⚠ Possible Duplicate(s) Found

👤 Dawn Carson (Client ID 10024238, DOB 11/9/1958) ✏Edit

Client entered matches the following existing client(s)

Client ID	Last Name	First Name	Service Assignment	Grantee Location	Case Manager(s)	Application Date	Client Status
🔍 10001471	Carson	Dawn			Matthew Castro	4/28/2016	Applicant pending enrollment
							1 Record(s)

Save pending resolution   Override Duplicate (Allow Client)   Duplicate confirmed

Clients   Workshops   Service Providers   Reports   Settings   Help

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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.

D.   Administer Applicant Characteristics Survey (screen C3)

After a client record is created, the client will have a status of "Applicant pending enrollment" displayed in the Program Information section of the client's Profile page. Enrollment is completed after the client responds to the Applicant Characteristics 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 information about individual services, such as incentives, can be recorded. nFORM includes data validation checks so that any participation in workshops or services that occurs before the nFORM enrollment date cannot be recorded in nFORM.

Grantees must ensure that their data collection procedures adhere to ACF's recommended sequence so that service and participation data can be captured accurately in nFORM, and quarterly reports reflect actual services and performance.

To administer the Applicant Characteristics Survey on a laptop or tablet, click the Action button on the Client Surveys table found in the middle of the Profile page (C3), and select the Passcode option. This selection will open the Generate Survey Passcode screen, which displays the URL for the survey, the client's ID number, and a one-time passcode that is usable for the next 96 hours.

The URL for all client surveys is:

https://hmrf-nform.com/survey

Grantee staff should bookmark the survey URL on all devices that clients will use to respond to the Applicant Characteristics, Entrance, and Exit Surveys. We encourage you to bookmark the survey URL in advance of enrolling clients. 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. **Review the data collection and logistics manual found on nFORM's help tab for information on keeping client IDs and passcodes secure.**

Generate Survey Passcode ×

You have requested the generation of a *one-time* passcode to access the **Applicant Characteristics Survey**.

To continue, please direct the client to log in at the following URL:

At the log in, enter the client's id (**10023190**) and the following *one-time* **passcode**:

3181334

Note: This one-time passcode will expire in 96 hours.

If the client is accessing the Applicant Characteristics Survey from your device, please log out of nFORM before proceeding.

Cancel

Clients should complete the surveys on a separate desktop, laptop, or tablet computer than the device the grantee staff person is using. It is important for grantee staff and clients to use separate devices so clients can only access the surveys and not other parts of nFORM. The device clients use for the surveys should meet the minimum system requirements described in section 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 select 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. The Performance Measure Data Collection and Logistics document provides more information on administering surveys to differently-abled applicants and clients.

Once the client's name is confirmed, the client will answer the questions on each screen of the Applicant Characteristics 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 Applicant Characteristics Survey on the final screen. For more information on the survey process, see Module VII.

Encourage all clients to complete the Applicant Characteristics Survey, though clients are free to 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 a message that "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 survey completed on a laptop or tablet, the status of the Applicant Characteristics Survey on the Client Survey table will change to Complete.

Entering Applicant Characteristics Survey paper copies into nFORM. In some cases, grantee staff will data enter a client's paper survey responses into nFORM. In this situation, grantee staff should click the "Action" button next to the Applicant Characteristics Survey in the Client Surveys box on 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.

If grantee staff are entering data from a paper survey, staff will be prompted to select the date on which the client completed the 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, grantee staff can navigate through the questions and record clients' answers. After grantee staff submit the survey, its status will display as "Paper Complete" in the Client Surveys box on screen C3. To see the client's responses to the Applicant Characteristics Survey, click the Review button, which opens the completed survey.

Entering Applicant Characteristics Survey refusals. In some cases, clients may refuse to complete the survey altogether. (For information on refusal conversion, grantees are encouraged to review the data collection and logistics document distributed by ACF and posted in the nFORM Help Desk (see Module II).) Instead of selecting the Passcode or Paper Copy options, the staff member who set up the survey can

select the Refuse Survey option under the Action button on the Client Surveys table found in the middle of the Profile page (C3). This will load the Generate Survey Passcode screen, which will reflect that the client is refusing the survey.

The staff member will enter the client's ID and passcode as they would if the client were completing the survey. However, after confirming the client's name, the staff member will be prompted to enter the date on which the client refused the survey and the reason for the refusal.

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

V.D.1 Generating passcodes for the Applicant Characteristics Survey in bulk

Certain grantees, especially those that enroll clients into programming as a cohort, may administer the Applicant Characteristics Survey to multiple clients at the beginning of a workshop. If grantee staff plan to administer the survey to many clients at a time, they 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 Applicant Characteristics Survey. From there, grantees can search for clients based on the following criteria:

- Grantee 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. Grantee 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.

V.D.2 Recording service assignments for local evaluations

After the Applicant Characteristics 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 Applicant Characteristics 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 grantees 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. Service delivery can then be recorded for the client and the Entrance Survey automatically becomes available (see Module VII for details on the Entrance Survey, which the client will complete during the first workshop).

ACF's intended standard enrollment and data collection process is for HMRF grantees to administer the Applicant Characteristics Survey in nFORM before the first workshop or individual service contact. This standard process allows grantees to enter any service contacts and 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 service contact or workshop session occurrence that precedes their enrollment date Grantees must plan their enrollment and data collection processes accordingly.

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

For programs 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. Grantee 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 (FRAMEWorks grantees) or Community Couple (Fatherhood FIRE grantees). When one of these couple populations 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.

Client Information

* First Name	Dawn	Middle Name	
* Last Name	Carson	* Date of Birth	11/09/1958 📅
* Referred By Type	Hospitals, maternity clinics, or doctors' offices ⌄		
Referral Organization Name			
Grantee Location ❓	--Select location ⌄		
* Population	Community couple ⌄		
* Partner Name	Pending partner ⌄		
* Is the client a mother ?	◉ Yes ○ No		

After creating partner 1's client record, 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.

To add partner 2, complete an Application Form for him or her. Select the applicable 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.

Client Information

* First Name	John	Middle Name
* Last Name	Carson	* Date of Birth 11/08/1979

* Referred By Type   Hospitals, maternity clinics, or doctors' offices

Referral Organization Name

Grantee Location ❓   --Select location

* Population   Community couple

* Partner Name   Dawn Carson (DOB:11/09/1958)

* Is the client a mother ?   ○ Yes ● No

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 grantee 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, grantee 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 grantee 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 QPR and 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).

Each client, whether an individual or part of a couple, must complete the Applicant Characteristics Survey after their Application Form has been completed. This can be done simultaneously (or during the same session) if they enroll together, or during different sessions if each partner enrolls separately. Note that couples do not need to be enrolled simultaneously. It is important, however, to complete these steps

in a timely manner for both partners so that they are Active in nFORM and all client management functions are enabled. Note that as soon as one partner becomes Active, the other tabs in the client profile are available and service information can be recorded. However, only clients who are Active can be registered for workshops. It is important that grantees confirm that both partners complete the steps to become Active so that both partners can be registered for workshops.

In addition, RF grantees providing services to couples should review ACF's guidance on survey administration for women in RF programs; this guidance is included in the Performance Measures and Data Collection Logistics Document which is available on nFORM's Help page.

F.   View all clients (screen C1)

Site administrator and case manager users can search for a grantee client 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 grantee.

Search criteria include the following fields:

- Grantee 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 grantees with their own local evaluations)

All Clients

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).

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

Grantee staff who manage a case load may view an abbreviated list of clients assigned to them by clicking the My Clients (C9) link under the Clients tab. On this screen, grantee staff can view and search among the clients to whom they have been assigned as a case manager. This screen allows grantee 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.

Like the All Clients (C1) screen, the My Clients (C9) screen offers the ability to search for clients using the criteria:

- Grantee 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 grantees with their own local evaluations)

My Clients

⊖ Search Criteria

Grantee Location	[dropdown]		
Client ID	[field]	**Service Assignment**	[dropdown]
Last Name	[field]	**Application Date**	[field] 📅
First Name	[field]	**Enrollment Date**	[field] 📅
Middle Name	[field]	**Client Status**	[dropdown]
Phone Number	[field]		☐ Include Duplicate Confirmed
Population	[dropdown]		

[Search] [Clear Criteria]

Items per page 10 ▼

Client ID ⇕	Last Name ⇕	First Name ⇕	Phone Number(s) ⇕	Service Assignment ⇕	Grantee Location ⇕	Application Date ⇕	Enrollment Date ⇕	Client Status ⇕	Population ⇕
🔍 10017290	Strahan	Michael		G2 Services Control Group		4/26/2018	11/16/2020	Active	Adult individual
🔍 10021998	Test	Test NMN	(111) 111-1111; (222) 222-2222; (333) 333-3333	G2 Treatment Group		11/6/2020	12/29/2020	Active	Adult individual
🔍 10001112	Thumb	Tom	(609) 945-3388; (609) 945-3388; (609) 945-3388	G2 Treatment Group		9/30/2015	11/24/2020	Active	Adult individual
🔍 10000757	Tully	James D	(609) 945-3388	Test Assignment 1	Location - New3	9/25/2015	10/1/2015	Active	Adult individual
🔍 10006515	Walker	Tex	(524) 324-3542		Location G2S1	8/4/2016	8/4/2016	Active	Adult individual
🔍 10006683	White	Walter			Location - New3	8/25/2016	8/25/2016	Active	Adult individual
🔍 10000113	Winslow	Carlos				7/14/2015	8/13/2015	Active	Adult individual

« 1 **2**

17 Record(s)

Clients   Workshops   Service Providers   Reports   Settings   Help

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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 grantee 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.

Grantee 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 grantees provide clients is recorded in nFORM following the workshop, session series, and session occurrence hierarchy illustrated here:

Figure VI.1. Workshop-Session Series-Session Occurrence Hierarchy in nFORM
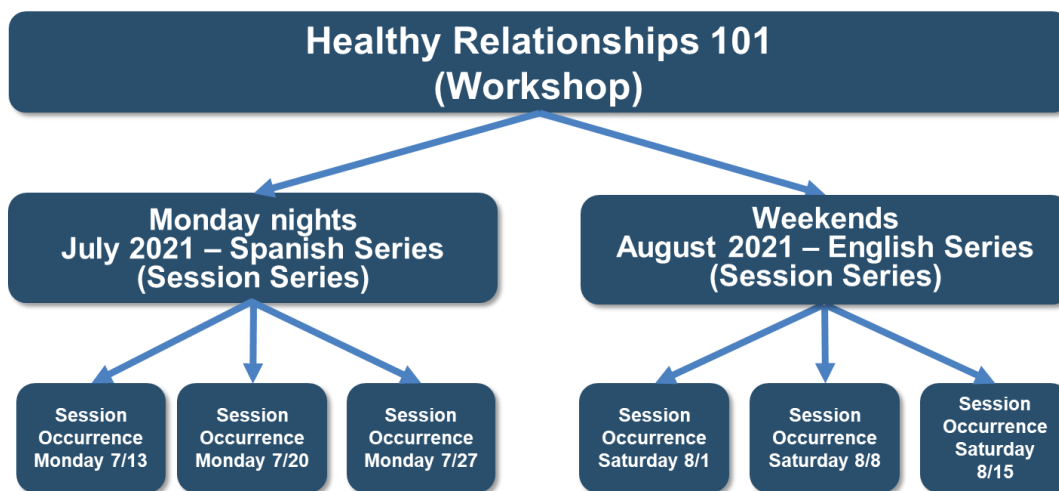
- A **workshop** is a curriculum or set of classes offered by the grantee based on the curriculum developer's specifications for group-based or individual programming. Grantees may offer multiple workshops for their clients (for example, a workshop for fathers in the community and a workshop for reentering fathers). All grantees must offer primary workshops and grantees 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 grantee plans to offer services and/or a curriculum together. Grantees 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. Grantees 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. Grantees 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, grantee 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 grantee. 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

Workshop Name	Population	Registration Required	Enrollment	Type	Total Hours
23	Youth	Yes	Cohort	Primary	140
24/7 Dad	Youth	Yes	Other	Primary	20
Atten Not Reqd Test WS 2	Adult couple	No	Open	Optional	2
Atten Reqd Test WS 1	Adult couple	Yes	Open	Optional	4
Blanco Test HMLE WS 1	Adult couple	Yes	Open	Optional	14
Blanco Test HMLE WS 2	Adult individual	No	Open	Primary	20
Blanco Test HMLE WS 3	Adult couple	Yes	Open	Optional	6
Blanco Test HMLE WS 4	Adult couple	Yes	Open	Primary	3
Chrome Atten Not Reqd Test WS 2	Adult couple	No	Open	Optional	2
Chrome Atten Reqd Test WS 1	Adult couple	Yes	Open	Optional	4

+ Add Workshop   Items per page 10

1 2 3 4 »   33 Record(s)

Clients   Workshops   Service Providers   Reports   Settings   Help

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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 grantee (that is, FRAMEWorks, READY4Life, or Fatherhood FIRE). 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. Grantee staff should also select the relevant activities and, for FRAMEWorks and READY4Life grantees, elements of the workshop. Finally, grantee 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, grantee staff should select whether the workshop is Primary, Optional, or Not in use. 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 grantee's essential group-based services. Not in use means the workshop is no longer offered by the program.

Grantees 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. Grantee 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.

Grantees can use nFORM's reporting features–the query tool, operational reports, and data export (see module VIII for more details)–to analyze workshop participation by specific workshops and session

series. The query tool's Workshop Participation – All Workshops tab analyzes the level of participation and characteristics of participants for selected workshops and series, while the Workshop Participation – Primary Workshops tab allows users to assess progress towards target participation in primary workshops by population. 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. Using these tools, grantees can describe workshop participation for each workshop in the progress narrative portion of the QPRs and PPRs.

W2. Add/Edit Workshop

* Indicates required field(s)

Program	Fatherhood FIRE
* 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)	☐ Economic stability ☐ Promote or sustain marriage ☐ Responsible parenting
* Type ❓	○ Primary ○ Optional ○ Not in Use *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**

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 (FRAMEWorks and Fatherhood FIRE grantees 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 grantee. A table shows the series name, 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.

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

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

Grantee 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, 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 2017 evenings (be sure to never include client PII like names in the name of session series, and 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.

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, grantee 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 sections 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**

Location

* **Location Name**   [   ]

* **Street**   [   ]   * **City**   [   ]

* **State**   --Select   ⌄   * **Zip**   [   ]   **Phone**   [   ]

Facilitators: 1 (# of Facilitators)

* **Enter Facilitator**   Facilitator #1
(Enter all that apply)
                    [   ]

                    ⊕ 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.**

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 session date, time, and location.

The Filter Eligible Clients section displays drop-down menus that allows nFORM users to filter clients by grantee 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 Applicant Pending Enrollment, 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 Applicant Characteristics 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). In addition, even if the client is enrolled in nFORM before the end of a session series, the client cannot be retroactively registered for a series after the last session occurrence. Finally, note that 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 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.

Grantees 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	CBE Workshop
Session Series	1/8/2021 Series for AD Cutover
Enrollment	Cohort
Type	Optional
Structure	Linked
Curriculum or other group service	Building Futures
Session Start Date	1/8/2021
Session Start Time	6:00 PM
Location Name	Library
Address	21 Hanover Road - Anytown, NJ

⊖ Filter Eligible Clients

Grantee Location	⌄	**Case Manager**	⌄
Client ID		**Client Status**	⌄
Last Name		**Population**	⌄
First Name		**Service Assignment**	⌄

Enrollment Date Range: From   To

	📅	1/28/2021 📅

[Search]   [Clear Criteria]

Use your cursor to select the names of the clients that 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 grantee. 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, grantee staff can edit details of the session, like its location or facilitators. Grantees can also add names to individual sessions, although this detail is optional. Grantee 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.

Grantees 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 Section VI.D.4 when recording attendance for the session occurrence.

W10. Session Occurrence Details   ×
* Indicates required field(s)

Session Series Name	1/8/2021 Series for AD Cutover
Agency Providing	1RF Agency 1 (Inactive) ▼
Max # of Clients	12 ☐ **No Limit**
Workshop Total Hours	24 hours
Current Series Duration	24 hour(s) and 0 minutes

Occurrence Details

Session Name	
* **Session Date**	2/2/2021
* **Session Start Time**	6 ▼ 00 ▼ PM ▼
* **Session End Time**	8 ▼ 00 ▼ PM ▼
Session Duration	2 hour(s) and 0 minutes
* **Location Name**	Library
* **Street**	21 Hanover Road
* **City**	Anytown * **State** NJ ▼
* **Zip**	07778 **Phone**

* **Enter Facilitator**
(Enter all that apply)

Facilitator #1   ⊖ Remove Facilitator

Facilitator 1

Facilitator #2   ⊖ Remove Facilitator

Facilitator 2

⊕ Add Facilitator

[Edit] [Cancel]

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.

Confirm   ✕

Are you sure you want to cancel this session? You will not be able to record attendance once you cancel.

Click OK to continue with cancellation of this session.
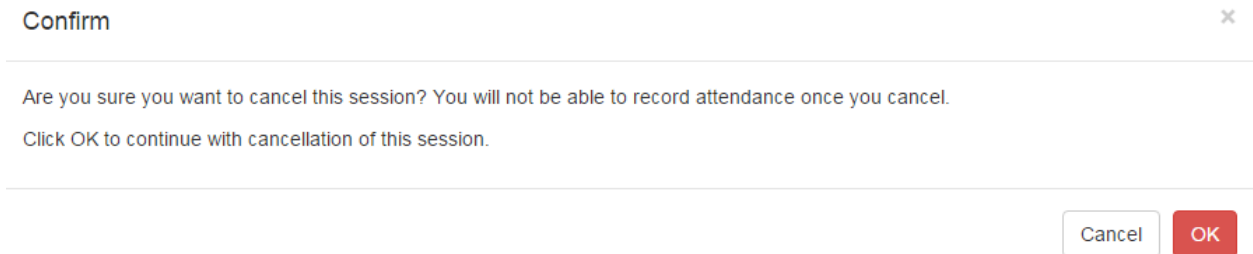
Cancel   **OK**

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.

Confirm   ✕

Are you sure you want to reinstate this session?

Click OK to continue with reinstating this session.
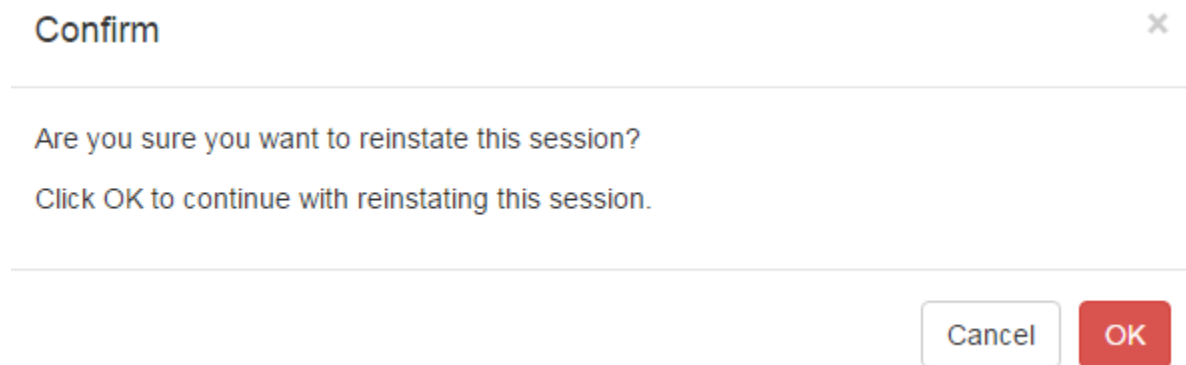
Cancel   **OK**

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.

Sessions

⚠ 519 sessions are pending attendance.

⊖ Filter Criteria

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
🔍 Tue 2/2/2021 6:00 PM	1/8/2021 Series for AD Cutover	Facilitator 1; Facilitator 2	Upcoming	⊘ Cancel	🖨 Generate	n/a
🔍 Mon 2/1/2021 6:00 PM	1/8/2021 Series for AD Cutover	Facilitator 1; Facilitator 2	Upcoming	⊘ Cancel	🖨 Generate	n/a
🔍 Fri 1/29/2021 6:00 PM	1/8/2021 Series for AD Cutover	Facilitator 1; Facilitator 2	Upcoming	⊘ Cancel	🖨 Generate	n/a
🔍 Tue 1/26/2021 6:00 PM	1/8/2021 Series for AD Cutover	Facilitator 1; Facilitator 2	Pending Attendance	⊘ Cancel	🖨 Generate	🔔 Record

a. Example of PDF roster file

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CBE Workshop
Session Series: 1/8/2021 Series for AD Cutover

Session Name:

Session Date: 1/29/2021   Session Time: 6:00 PM

Please complete the following session information: **Facilitator(s) for this session**

Location Name: _____   _____

_____   _____

Session Start Time: _____   _____

Session End Time: _____   _____

Attendance Roster

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

Cheese, Chuckie   _____

Dummy, Crash   _____

Griswold, Clark   _____

Parker, Peter J   _____

Smith, Jane   _____

Smith, Will   _____

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 grantee 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. Grantees may also use this Edit feature if their intent is to hold workshop session occurrences of varied lengths. nFORM automatically generates workshop sessions of equal durations. Grantee staff can edit these 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 <u>or</u> exceeds the Total Workshop Hours to be offered by more than 20%. In this instance, the changes can still be saved. Grantee staff can also edit occurrence details to name individual sessions, although this detail is optional. Finally, grantees can add notes about each session on this page.

Sessions

⚠ 1447 sessions are pending attendance.

⊖ Filter Criteria

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
🔍 Wed 2/6/2019 7:00 PM	1/7/2019 start date		Pending Attendance	⊘ Cancel	🖶 Generate	🔔 Record
🔍 Mon 1/28/2019 8:00 PM	1/7/2019 start date		Session Complete	⊘ Cancel	🖶 Generate	✎ View/Edit
🔍 Tue 1/22/2019 8:00 PM	1/7/2019 start date		Session Complete	⊘ Cancel	🖶 Generate	✎ View/Edit
🔍 Mon 1/14/2019 8:00 PM	1/7/2019 start date		Session Complete	⊘ Cancel	🖶 Generate	✎ View/Edit
🔍 Mon 1/7/2019 8:00 PM	1/7/2019 start date		Session Complete	⊘ Cancel	🖶 Generate	✎ View/Edit
🔍 Wed 2/6/2019 4:00 PM	1/9/2019 Start Date		Pending Attendance	⊘ Cancel	🖶 Generate	🔔 Record
🔍 Wed 1/30/2019 4:00 PM	1/9/2019 Start Date		Pending Attendance	⊘ Cancel	🖶 Generate	🔔 Record
🔍 Wed 1/23/2019 4:00 PM	1/9/2019 Start Date		Pending Attendance	⊘ Cancel	🖶 Generate	🔔 Record
🔍 Wed 1/16/2019 4:00 PM	1/9/2019 Start Date		Pending Attendance	⊘ Cancel	🖶 Generate	🔔 Record
🔍 Wed 1/9/2019 1:00 PM	1/9/2019 Start Date		Canceled	↻ Reinstate	🖶 Generate	✎ View/Edit

1 2 3 4 5 »

1560 Record(s)

Clients   Workshops   Service Providers   Reports   Settings   Help

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W9. Track Session Attendance   ✕
* Indicates required field(s)

Workshop Name	Elevate
Session Series Name	1/7/2019 start date

Workshop Total Hours   [5]   hours

Current Series Duration   [4]   hour(s) and   [50]   minutes

⊖ Occurrence Details   ✎ Edit

Session Name   [1/7/2019 start date]

* Session Date   [2/6/2019]

* Session Start Time   [7 ⌄]   [00 ⌄]   [PM ⌄]

* Session End Time   [8 ⌄]   [30 ⌄]   [PM ⌄]

Session Duration   [1]   hour(s) and   [30]   minutes

* Location Name   [YMCA]

* Street   [1234 Main Street]

* City   [Anytown]   *** State**   [NJ ⌄]

* Zip   [07777]   **Phone**   [ ]

* Enter Facilitator   Facilitator #1
(Enter all that apply)

[ ]

⊕ Add Facilitator

Notes   [   ]

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, grantee 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.

Grantee 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 Applicant Pending Enrollment, Duplicate Pending, Duplicate Confirmed, or Consent Revoked.

While all eligible clients will initially appear in the Available Clients box, grantee staff have the ability to filter this list by grantee 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 any service contact or 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.

Grantees 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).

VII. Managing Enrolled Clients
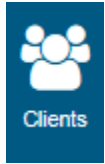
nFORM case management functions are found under the Clients tab.

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 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 opening the client's Profile page. The Profile page summarizes the client's enrollment in the program, contact information, assigned caseworkers, client survey status, service contacts, referrals, incentives, and workshop attendance.

Moe Howard (Client ID 10021273)

Profile   Service History   Workshops / Sessions

Program Information   ✎ Edit

Enrollment Date	6/19/2020
Service Assignment	G1 Treatment Group
Client Status	Active
Status Change Date	6/19/2020

Client Information   ✎ Edit

Application Date	6/18/2020
Population	Community individual
Grantee Location	Westfield High School
Date of Birth	11/20/1990
Gender ❓	

ⓘ Applicant has not been screened for intimate partner violence or teen dating violence.

⊖ Contact Information

✉ fake@test.com
Address
⊕ Address 1

Additional Contacts

❗ No additional contact(s) have been added.

Form Completed By   Mathew Case Manager

Referred By:
    Type
    Name

Assigned Case Manager(s)   ✎ Edit

ⓘ No case managers have been assigned.

Client Surveys

Type	Status	Date	Action
Applicant Characteristics Survey	Complete ☑	06/19/2020	🖶 Review
Entrance Survey	In Progress	--	Action ▾
Exit Survey	Incomplete	--	Action ▾

Service Summary

Type	# Provided	Most Recent
Service Contacts	1	11/10/2020
Referrals ⚠ Follow up needed	7	11/10/2020
Incentives/Program Supports	0	--

Workshop Summary

ⓘ No attendance has been recorded.

Primary Workshop Participation for the Client

Progress towards target participation in primary workshop(s) (hours)

0
Target Hours

0
Total Hours Received

Clients   Workshops   Service Providers   Reports   Settings   Help

© 2021 - nFORM 2.0 - Information, Family Outcomes, Reporting and Management   C3

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 enrollment. After a client takes the Applicant Characteristics Survey, the box will also display the client's gender as the client reported it in the survey. Grantee 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 grantee 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 begins their entrance survey. Intimate partner violence/teen dating violence screening is only editable if it was originally recorded that the applicant had not been**

screen. The result of the intimate partner violence screening will also not display in the client profile. 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 Applicant Characteristics 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 Applicant Characteristics Survey.

Grantee 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 Applicant Characteristics Survey. This process is described in Module V. 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). Please see the Performance Measures Data Collection and Logistics document for more information on control waitlist clients.

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, State of emergency, and Temporary hold. Table VII.1 provides brief descriptions of each status code. Additionally, grantees should review ACF's guidance on end-of-program client status and implications for program completion, exit surveys, and QPR/PPR reporting; this guidance is included in the Performance Measures and Data Collection Logistics Document which is available on nFORM's Help page.

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. Grantee 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.

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

The Bulk Update screen (C14) button, located next to the All Clients (C1) and My Clients (C9) screen buttons, allows nFORM users to change the Client Status for multiple clients at the same time. Use the Filter Eligible Clients section at the top of the screen to find clients by grantee location, their current client status, population, case manager assignment, workshop and session series they attended, enrollment date range, and service assignment (for local evaluations only). 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 clients. After selecting the names of those clients whose statuses to change, 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.

Grantees should use the Client Status operational report to monitor client status across all of the grantee's clients. This report is described in Module VIII.B.

Table VII.1. nFORM status codes

Status code	Definition
See the data collection and logistics document on the nFORM help tab for ACF's guidance on when to use the nonresponsive, drop out, and completed/graduated statuses.	
Applicant pending enrollment	nFORM automatically sets this status after the grantee staff completes the Application Form.
Active	nFORM automatically sets this status after the client completes the Applicant Characteristics 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 grantee's program.
Duplicate pending	nFORM automatically sets this status; it cannot be selected by grantee staff. When the completed 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 grantee 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 grantee'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	Client has declared that they no longer want to participate in the grantee's program or the grantee's local evaluation, and the client's consent to participate is revoked If a client subsequently decides to participate, grantee staff must change the client's status back to Active before the client can complete any surveys.
Deceased	Client passed away.
Drop out	Client has indicated that s/he is 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 in prison or jail.
Moved out of area	Client has moved out of service area or the grantee's service area has changed.
Non-responsive	Client is not regularly attending services and does not respond to outreach efforts, as defined by the grantee.
Primary complete/optional active	Client has reached primary workshop participation target for his/her population, but is still participating in optional programming provided by grantee.
Removed from program	Grantee 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.

Status code	Definition
State of emergency	Client's participation is affected by a local or national emergency, such as a natural disaster or public health emergency.
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.4 Assigning case managers individually (screens C3 and C10)

Site administrators and case managers who are assigned to a client are listed in the Assigned Case Manager(s) box on the Profile screen (C3). Grantee 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 who a site administrator have 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). The Filter Eligible Clients section of the screen allows site administrators to select clients based on grantee location, client status, population, case manager, enrollment date range, and service assignment (for local evaluation 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, 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 grantee location (if applicable), client status, population, and enrollment date range. 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.

C20. Bulk Update - Unassign Case Manager ✕

* Indicates required field(s)

Select Case Manager to be unassigned

* Case Manager [--Select case manager ▼]

Client Selection

⊖ Filter Eligible Clients

Grantee Location [▼]   Case Manager

Client Status [▼]   Service Assignment [▼]

Population [▼]

Enrollment Date Range: From   To

[📅]   [1/22/2021]   [📅]

[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)

The Client Surveys box on the Profile page (C3) shows the status of the Applicant Characteristics, Entrance, and Exit Surveys; grantee staff access surveys for clients from this box. Clients will respond to the Applicant Characteristics survey at intake (as described in Module V), the Entrance Survey during the

client's first workshop session, and the Exit Survey at the client's last workshop session, or 14 days after the Entrance Survey if the program of services last less than one month. A date validation in nFORM prevents the Exit Survey from being generated for 14 days after the completion date of the client's Entrance Survey. The Exit Survey is not available before then to ensure that entrance and exit surveys are administered at the intervals specified by ACF. If "Passcode" is selected from the "Action" dropdown next to the survey, the completion date of the survey is automatically set by nFORM when the web survey is submitted and it cannot be changed. If "Paper Copy" or "Refusal" are selected, grantee staff can enter a date up to 4 days in the past, and the survey completion or refusal date will be set to that date.

Clients should only complete each survey once. Thus, if a client attends multiple workshops, they should take the Exit Survey at the last session of the last workshop. Survey statuses are Incomplete, In progress, Complete, Paper Complete, or Refusal. Administering the Exit Survey too soon after the Entrance Survey may result in inaccuracies in the performance measures.

To launch the Entrance and Exit Surveys, click the Action button on the Client Surveys table found in the middle of the Profile page (C3), and select the Passcode option. To enter data from a survey that was completed on paper, grantee staff can instead select the Paper Copy option. Both selections will open the Generate Survey Passcode screen, which displays the URL for the survey, the client's ID number, and a one-time passcode that is usable for the next 96 hours.

The URL for all client surveys is:

https://hmrf-nform.com/survey

Grantees can bookmark this on separate devices to be used by clients to complete the 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.

Client Surveys			
Type	**Status**	**Date**	**Action**
Applicant Characteristics Survey	Complete ☑	01/28/2021	🖨 Review
Entrance Survey	Incomplete	--	Action ▾
Exit Survey	Incomplete	--	Action ▾

Note that the Action button for the Entrance Survey only becomes functional after the client has completed the Applicant Characteristics Survey, and the Action button for the Exit Survey is only functional 14 days after the Entrance Survey is completed.

Generate Survey Passcode ✕

You have requested the generation of a *one-time* passcode to access the **Entrance Survey**.

To continue, please direct the client to log in at the following URL:

At the log in, enter the client's id (**10024212**) and the following *one-time* **passcode**:

2358766

Note: This one-time passcode will expire in 96 hours.

If the client is accessing the Entrance Survey from your device, please log out of nFORM before proceeding.

Cancel

As with the Applicant Characteristics survey, clients should complete the surveys on a different desktop, laptop, or tablet computer from the device the grantee staff person is using. It is important for grantee staff and clients to use separate devices so clients can only access the surveys and not other parts of nFORM.

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.

The Client ID number and Passcode will open the appropriate Entrance or Exit Survey based on the population selected for the client on the Application Form (C2). There are specific versions of the surveys for clients enrolled as adult individuals/couples in FRAMEWorks programs, youth in READY4Life programs, community individuals/couples (fathers and mothers) in Fatherhood FIRE programs, and reentering individuals in Fatherhood FIRE programs.

The client will be asked to confirm his or her name before beginning the survey.

The client will then be taken to the disclaimer page. After reviewing this information, the client should select Next when she or he is ready to begin the survey.

Each page of the client surveys includes audio so that clients can listen to the questions read to them. Clients can re-listen to audio for any page by clicking the triangular play button on the bottom of the page. (Note that the play buttons appear differently on computers and tablets.) Spanish-speaking clients can choose to see the questions in Spanish and listen to Spanish audio for the questions at any time during the survey by clicking on the Español link.

Responsible Fatherhood
Entrance Survey
Reentering Fathers Program

Español|Exit

SECTION A: PARENTING AND CO-PARENTING

We would like to get a sense of who you are as a parent. We realize that children are different and may require different parenting.

Questions in this section are about your child—or if you have more than one child, your youngest and oldest children—who is 24 years old or younger.

A1a.   Do you have any children who are 24 years old or younger? Please include biological children, adopted children, stepchildren, foster children, and any child or youth up to age 24 whom you are actively raising and who is the child of a partner or relative but who is not your biological or legally adopted child.

Select one only

1○ Yes, I have one child who is 24 years old or younger

2○ Yes, I have more than one child who is 24 years old or younger

3○ No, I have no children

4○ No, all my children are 25 years old or older

▶ 0:00 / 1:00 ─────────────── 🔊 ⋮
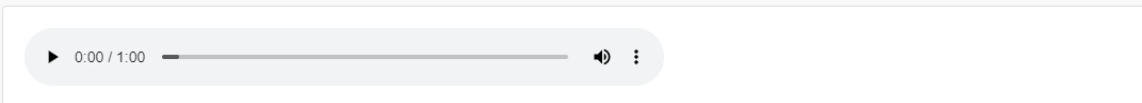
<< Back   Next >>

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After answering the questions on each page, the client will submit their completed survey on the final page of the survey. Clients who do not select "Yes, submit my survey" will have their survey appear as In Progress.

SECTION E: SUBMIT YOUR SURVEY

Your responses have been saved. Are you ready to submit your survey?

1○ Yes, submit my survey.

2○ No, return to the beginning to review responses.

3○ No, exit and submit survey later.

▶ 0:00 / 0:15 ─────────────── 🔊 ⋮
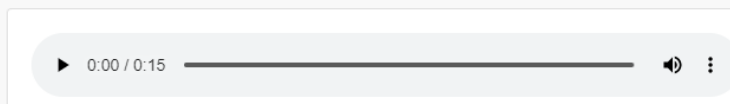
<< Back   Next >>

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Once the completed survey is submitted, the survey status on the Client Survey table of the Profile page will change to Complete, upon refreshing or reopening the Client Profile screen. Although the client's

responses to the Applicant Characteristics Survey can be reviewed to facilitate service delivery and workshop assignments, responses to the Entrance and Exit Surveys cannot be reviewed. After completing the Entrance and Exit Surveys, n/a will appear in the Action column of the Client Surveys box on the client's Profile page (C3).

Grantees should use the Survey Completion Operational report to monitor administration of the client surveys. The operational report will show when clients completed each survey and which surveys are incomplete. This report is further described in Module VIII.B.

Client Surveys			
Type	**Status**	**Date**	**Action**
Applicant Characteristics Survey	**Complete** ☑	12/14/2020	🖨 Review
Entrance Survey	**Complete** ☑	01/28/2021	n/a
Exit Survey	Incomplete	--	Action ▾

Entering paper surveys. In some cases, grantee staff will be data entering a client's paper survey responses. In this instance, grantee staff should click the "Action" button next to the Entrance or Exit Survey in the Client Surveys box on C3, but select "Paper Copy" rather than "Passcode." The Generate Survey Passcode screen will launch, but reflect the fact that staff are entering a paper survey.

Generate Survey Passcode to Record a Paper Copy ✕

You have requested the generation of a *one-time* passcode to access the **Entrance Survey**.

To continue, please log in at the following URL:

At the log in, enter the client's id (**10024212**) and the following *one-time* **passcode**:

1688824

Note: This one-time passcode will expire in 96 hours.

Cancel

Staff will then be prompted to select the date on which the client completed the 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.

Then, grantee staff can navigate through the questions and record clients' answers. After grantee staff submit the survey, its status will display as "Paper Complete" in the Client Surveys box on screen C3.

Entering survey refusals. As with the Applicant Characteristics Survey, clients may refuse to complete the Entrance or Exit Surveys altogether. Instead of selecting the Passcode or Paper Copy options, in this case, the staff member who set up the survey can select the Refuse Survey option under the Action button on the Client Surveys table found in the middle of the Profile page (C3) next to the appropriate survey. This will load the Generate Survey Passcode screen, which will reflect that staff are entering a refusal.

The staff member will enter the client's ID and passcode as they would if the client were completing the survey. However, after confirming the client's name, the staff member will be prompted to enter the date on which the client refused the survey – up to 4 days in the past – and the reason for the refusal.

Grantees are encouraged to review the data collection and logistics document distributed by ACF and posted in the nFORM Help Desk (see Module II).

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

If grantees plan to administer the Applicant Characteristics Survey, Entrance Survey, or Exit Survey to multiple clients at the same or similar times, staff can generate survey 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 appropriate survey. From there, grantees can search for clients based on the following criteria:

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

Clients that fit the specified criteria will be listed in the Eligible Clients box on screen C17. Grantee 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.

C17. Bulk Generate Survey Passcode   ✕

Select Survey

Survey   -- Select survey   ∨

Client Selection

⊖ Filter Eligible Clients

Grantee Location	∨	Case Manager	∨
Client Status	∨	Workshop	∨
Population	∨	Session Series	∨

Date   From   To

--Select date   ∨   📅   1/15/2021   📅

Search   Clear Criteria

Eligible Clients: Generate passcode for:

❯
Select Client(s)

❮
Remove Client(s)

ⓘ Client ID appears in parentheses after name.

Save   Cancel

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 grantee staff with a snapshot of the client's service history and will alert caseworkers 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 grantee staff to review the client's Service History page so they can follow-up as needed. A red alert will also display in Incentives/Program Supports row when Incentives exceed maximum allowed.

Service Summary		
Type	**# Provided**	**Most Recent**
Service Contacts	8	1/11/2021
Referrals ⚠ Follow up needed	9	10/01/2020
Incentives/Program Supports	7	8/20/2020

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	--

Primary Workshop Participation for the Client

Progress towards target participation in primary workshop(s) (hours)

15
Target Hours

5.8
Total Hours Received

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) individual service contacts with the client, (2) 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 Applicant Characteristics Survey is completed in nFORM and, if applicable, the client's Service Assignment is selected. The client's nFORM enrollment date is the earliest date that a client is eligible to attend workshops and the earliest date for which information about individual services, such as incentives, can be recorded.

The Service History page (C4) does not display for clients who have not completed the Applicant Characteristics Survey. For grantees conducting their own local evaluations, the Service History page also does not appear for clients who are assigned to the control (no services provided) or control waitlist (no services provided) service assignment categories.

Record service contacts. Site administrators and case managers record information about service contacts, 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 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. 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 by selecting the service contact date on the Service Contacts table and clicking the Edit button at the bottom of the form.

VII.B.1 Adding service contacts in bulk

Grantee 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.

Then, staff can search for clients based on the following criteria:

- Grantee location

- Client status

- Population

- Case manager

- Workshop and session series

- Application date

- Enrollment 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 was enrolled after that date.

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

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, grantee 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.

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 Adult couple or Community couple population, you must also select if the referral was for one or both partners.

⊖ Referral Types

* Referral Types (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** ❷

☐ **Domestic Violence/Intimate Partner Violence** ❷

☐ **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 ❷
- ☐ Job search assistance ❷
- ☐ Resume development

☐ **Legal Assistance Referral**

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

☐ **Parenting** ❷

Social services/Emergency needs
- ☐ Housing/Rent Assistance
- ☐ Childcare Assistance
- ☐ Clothing (not job related) ❷
- ☐ Public assistance/welfare ❷
- ☐ 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** ❷

☐ **Other Referral (specify)**

☐ **Youth services (specify)**

⊖ Referral Notes

➕ Add Note

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 individual service contact 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 a N will appear in the Follow Up Needed column of the Referral History table.

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

Site administrator and case manager users record information about incentives and program supports provided to 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/program support was provided to the client during a service contact, during a workshop session, or another time.

C13. Add/Edit Incentives/Program Supports ✕

* Indicates required field(s)

* **When was this incentive/program support provided to the client?** ◉ During service contact
○ During workshop session
○ Another time

⊖ Service Contact Information

* **Service Date**   --Select Service Date ⌄   **Case Manager**

Contact Method   **Length of Contact**

Did service contact result in direct client contact?
Additional Participants
Client Issues and Needs
Discussed
Most Recent Note

⊖ Incentive/Program Support

ℹ *All incentives must be approved by your OFA FPS.*

* **Category**   --Select Category ⌄

* **Type** ❓   --Select Type ⌄   * **Amount** $ .00

Save   Cancel

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 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 page 13 will open. Specify the date on which the incentive/program support was provided.

C13. Add/Edit Incentives/Program Supports   ✕

* Indicates required field(s)

* **When was this incentive/program support provided to the client?**   ○ During service contact
                                                                          ○ During workshop session
                                                                          ● Another time

⊖ Incentive/Program Support

* **Date Provided** | 1/28/2021 | 📅 |

ⓘ *All incentives must be approved by your OFA FPS.*

* **Category** | --Select Category   ⌄ |

* **Type** ❓ | --Select Type   ⌄ | * **Amount** | $ | | .00 |

                                                          Save   Cancel

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**:

- Incentives: Enrollment

- Incentives: Participation/Client Milestone

- Incentives: Survey Participation

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

- Grant-funded Participation Supports: Transportation

- Grant-funded Participation Supports: Child care

- Grant-funded Participation Supports: Other

- Employment-related Supports: Work supports (e.g. work boots, clothing, tools)

- Employment-related Supports: Training

Finally, 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 grantee 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.

This incentive will exceed the maximum dollar amount ACF set for incentives. Please refer to ACF's incentive guidance or contact your FPS for more information. Click OK to continue with save. Click Cancel to return to Incentives / Program Supports form.

OK   Cancel

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).

As a reminder, all incentives and program supports must be approved by your grantee's FPS. Grantees should discuss any questions about providing incentives and program supports to clients with their FPS and should review any guidance from ACF on the distribution and monitoring of incentives and program supports.

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 only be recorded 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 caseworkers 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 caseworker. 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 Applicant Characteristics Survey. For grantees 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. Grantee 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. As always, 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).

C11. Make-Up Workshop Session   ×
* Indicates required field(s)

Workshop Name   Test 1HM Workshop 2
Session Series Name Healthy Marriage Mondays
Session Date   9/7/2015

* Make-Up Date   [   ]   📅

Notes   [   ]
                     [   ]
                     [   ]
                     [   ]

                                          [Save] [Cancel]

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. Grantee staff can then revise information about the make-up session or can delete the make-up session. Deleting the make-up session reverses 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, grantee 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 (C4), Service History (C5), and Workshop/Sessions (C6) pages for couple clients. When grantee 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, the couple's combined Service History page, and the couple's combined Workshops/Sessions page.

Please note that two partners enrolled as a couple cannot be "uncoupled" in nFORM once one of the partners has completed an Entrance Survey.

Each partner of an enrolled couple will have his or her own Profile page. 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 will have a single, combined Service History page (C4) that is nearly identical to the Service History page of individual clients; a couple's Service History page will include additional columns in the Service Contacts, Referral History, and Incentives/Program Supports tables to indicate whether the respective activity was for partner 1 only, partner 2 only, or the couple together.

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

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

Service Contacts	⊕ Add Service Contact

🛈 No services have been recorded.

Referral History

🛈 No referrals have been recorded.

Incentives/Program Supports History   ⊕ Add Incentive/Program Support

Date Provided	Data Entered By	When Provided	Provided To	Category	Type	Amount
🔍 12/28/2020	MarybethM Site Administrator		Couple	Incentives: Enrollment	Gift card	100
🔍 12/28/2020	MarybethM Site Administrator		Penny Hofstadter	Incentives: Survey Participation	Gift card	25
🔍 12/28/2020	MarybethM Site Administrator		Penny Hofstadter	Incentives: Survey Participation	Gift card	25
🔍 12/28/2020	MarybethM Site Administrator		Leonard Hofstadter	Incentives: Survey Participation	Gift card	25
🔍 12/28/2020	MarybethM Site Administrator		Penny Hofstadter	Incentives: Participation/Client Milestone	Direct payment to a vendor	75
🔍 12/28/2020	MarybethM Site Administrator		Couple	Incentives: Participation/Client Milestone	In-kind	40
🔍 12/28/2020	MarybethM Site Administrator		Couple	Incentives: Survey Participation	Gift card	201

7 Record(s)

Clients   Workshops   Service Providers   Reports   Settings   Help

© 2021 - nFORM 2.0 - Information, Family Outcomes, Reporting and Management   C4

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.

C7. Add/Edit Service Contact   ✕
* Indicates required field(s)

⊖ Service Contact Information

* **Service Date**	1/28/2021 📅	* **Case Manager**	Site Administrator, MarybethM ⌄
* **Contact Method**	--Select contact method ⌄	* **Length of Contact**	--Select length of contact ⌄

* **Did service contact result in direct client contact?** ❓   ○ Yes   ○ No

* **Service contact included**   ○ Leonard Hofstadter only   ○ Penny Hofstadter only   ○ Couple

Additional Participant(s)   ☐ Child(ren)
(Check all that apply)   ☐ Other parent(s) of child (not partner)
☐ Other service provider
☐ Parent/guardian of youth client
☐ Other

⊖ Referral Information

Type of Service ❓   --Select Type of Service ⌄

* **Referred To** ❓   --Select service provider ⌄

* **Referral For**   ○ Leonard Hofstadter only   ○ Penny Hofstadter only   ○ Couple

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

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

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.

VIII. Reports

Grantees can view and analyze the data stored 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 ACF's required reports on performance measures–called the quarterly performance progress report (QPR) and the semi-annual performance progress report (PPR).

Access to the reporting functions depends on the user account types and permissions. (User account types and permissions are described in Module IV.) Grantee site administrators will generate the QPRs and PPRs. The types of operational reports that nFORM users can generate depends on their user account type (see section VIII.B for more information). Additionally, nFORM data can be exported under the Reports tab by site administrators. At each grantee, up to three nFORM users (with any type of user account) can have query tool permissions, which gives them access to the query tool under the Reports tab.

A.   Quarterly/Semi-annual Performance Progress Reports (screen R1)

ACF requires that grantees submit two types of performance measure reports: a QPR and a more comprehensive semiannual PPR. Grantees are required to submit a report to ACF each quarter. The required reports alternate between QPRs and PPRs as indicated in table VIII.1 below; QPRs are due in January and July and PPRs are due in April and October.

Table VIII.1. Quarterly Report Due Dates

Reporting periods during each grant year quarter (Q)	Report due to ACF	Report due date
Q1: September 30 – December 31	QPR	January 30
Q2: September 30 – March 31	PPR	April 30
Q3: September 30 – June 30	QPR	July 30
Q4: September 30 – September 29	PPR	October 30

Although nFORM generates the QPR and PPR, the reports must be submitted to ACF manually by grantee staff. That is, the QPR and PPR cannot be submitted through nFORM (for more information, see section VIII.A.4). Site administrators should follow the steps below to generate the required reports.
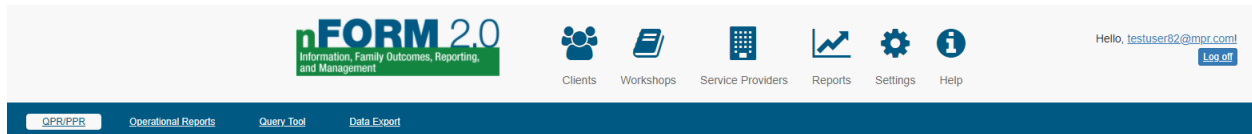
VIII.A.1 Complete Program Operations Survey

Grantees will respond to the Program Operations Survey each quarter as the first step in completing their QPR or PPR. This survey asks grantees to provide information in such areas as outreach and recruitment activities, target enrollment, staff characteristics and training, and implementation challenges. The data will be part of the required reporting to ACF, cross-grantee analysis conducted for ACF, and grantees' local evaluations, as applicable. This survey is completed for the grantee as a whole, rather than for each grantee location.

The Program Operations Survey is a web survey that site administrators may complete on a desktop or laptop computer or on a tablet. If the Program Operations Survey is completed on a tablet, the tablet should be placed in the landscape or horizontal orientation for best navigation. Unlike the client surveys, the Program Operations Survey does not include audio.

The survey is launched from the QPR/PPR screen (R1) by clicking the Start button in the 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 left 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 QPR/PPR screen (R1). This allows grantees to correct any mistakes in their Program Operations Survey.

VIII.A.2 Generate QPR/PPR Data

To generate the final version of the QPR or PPR, click the Generate QPR Data or Generate PPR Data button under the Performance Measures 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 during the grant year-to-date, and the percentage who attended services. **Please note that beginning in grant year 2, QPR Section B-02.2b and PPR Section C-04.2b have been updated to include clients' cumulative participation in workshops in the calculations of grantees' progress towards their workshop participation targets.**

Save the file to your computer (outside of nFORM). nFORM will automatically suggest a file name that labels whether it is a QPR or PPR and the date the file was created, but grantees should modify the filename to include the reporting period (for example "PPR_performance_measures_due_20211030"). The QPR and PPR can be run at any time, so grantees should also clearly identify the file to be submitted to ACF as "FINAL" to distinguish it from draft versions. Report submission instructions are provided in section VIII.A.4.

Grantees may use the QPR/PPR performance measures calculations to inform responses to the Progress Narrative (described in section VIII.A.3). 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 QPR/PPR calculations. Grantees may note any impact this has on enrollment targets in their progress narrative.

VIII.A.3 Complete Progress Narrative

Grantees are required to provide quarterly narrative information about program operations, challenges, and successes that provide context to the quantitative (numeric) data compiled in the QPR/PPR. The qualitative narrative helps grantees and ACF understand what works well in program design and implementation, and where there are challenges. The narrative can be used, for example, to describe any issues grantees have in reaching enrollment targets or, if applicable, more detailed information about workshop participation when multiple workshops are aggregated in the same participation table on the QPR/PPR (as described in Module.VI.B). Grantees 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 draft the narrative each reporting period, save the QPR or PPR Progress Narrative Template to your computer by *right* clicking the applicable link that appears above the QPR/PPR table on screen R1 (Mac users will hold down the Control key instead of right clicking). **The narrative template must be saved to your computer and opened using Adobe to be completed; the completed narrative cannot be saved in nFORM and it cannot be opened in a web browser.** If you are using Chrome, select "Save link as…." to save the PDF to your computer (outside of nFORM). If you are using Edge, select "Save target as….". After saving the file, navigate to the selected location to open and edit the file.

Report submission instructions are provided in section VIII.A.4.

<div align="center">

PERFORMANCE PROGRESS REPORT
Office of Family Assistance
Healthy Marriage and Responsible Fatherhood Grant Program
REPORT FOR RESPONSIBLE FATHERHOOD PROGRAMS

</div>

OMB Control No.: 0970-0566
Expiration Date: 4/30/2024

B-01   PERFORMANCE NARRATIVE
Please provide details on the following questions about your program and services.
1. Target population
Please provide a detailed description of your target population.

VIII.A.4 Compile and submit report

QPRs and PPRs must be submitted in Grant Solutions as a Grant Note.

The QPR or PPR submitted to ACF should include the following files:

- Cover page: Download the ACF-OGM-SF-PPR Cover Page found at https://www.acf.hhs.gov/discretionary-post-award-requirements and save this file to your computer.
- Performance measures (described in section VIII.A.2)
- Progress narrative (described in section VIII.A.3)

As a reminder, Federal Financial Reports or FFRs (SF-425) are due quarterly in the HHS Payment Management System (PMS). Please refer to your Notice of Award for more information on FFR reporting.

Please contact your FPS for additional guidance on the quarterly reports. The following flow chart summarizes the process for completing and submitting the QPR and PPR to ACF.

Figure VIII.1. Summary of OPR/PPR process

Collect Data

- **Keep client survey and participation data up-to-date in nFORM**
- **Complete Program Operations Survey quarterly in nFORM**

Generate Performance Measures Calculations

- **Generate numeric data**
- **Review data**

Write Progress Narrative

- **Download fillable PDF to your computer**
- **Write narrative**
- **Save to your computer**

Complete Cover Page (QPR & PPR)

- **Link is in nFORM User Manual, Module VIII.A.4**

Submit Files to ACF

- **Upload final files as Grant Notes in GrantSolutions**

B. Operational Reports (screen R2)

On the Operational Reports screen (R2) in the Reports tab, grantee users can access various reports to help manage the daily operations of their grant and to obtain information for the narrative portion of their QPR/PPR. For example, 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.2. 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
Individual service contacts report	Identifies the average number of substantive individual service contacts and the average number of reminder-only contacts by client population and grantee location. The report also lists for each client the date of the client's most recent substantive individual service contact, the number of substantive individual service contacts, and the number of reminder-only contacts. (As a reminder, ACF defines substantive individual service contacts 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, 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 grantee 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 grantees conducting local evaluations

Report name	Description	nFORM users with access
Maximum incentives report	Identifies incentive maximums exceeded at aggregate level (by grantee location and population) and by client, for all incentive categories and for each separate category. Note that this operational report does not include all incentives, but only those that exceed the maximums, to help grantees track incentives against ACF's incentive guidelines.	Site administrators, case managers, and general users with enrollment permission
Phone number report	Lists grantee location, population, name, phone numbers, and indicator for permission to text. Can be filtered on specific client statuses and workshops, to help in following up with groups of clients at a time.	Site administrators, case managers, and general users with enrollment permission
Primary workshop participation summary/detail	Counts of clients and their average participation in primary workshop hours compared to target, within and across grantee locations. The report also details, by location, clients and their primary workshop participation.	Site administrators, case managers, and general users with enrollment permission
School year performance report	For READY4Life grantees only, this report includes the information from the PPR with calculations based on the school year calendar (July 1 to June 30) rather than the grant year calendar (September 30 to September 29).	Site administrators from READY4Life grantees only
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 each type of survey. The report also details, by location, clients and whether they have completed each survey—Applicant Characteristics, Entrance Survey, Exit Survey.	Site administrators, case managers, and general users with enrollment permission
Survey report - paper surveys	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	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

Report name	Description	nFORM users with access
User account activity	Identifies all authorized nFORM users at the grantee, their account type and permissions, and usage.	Site administrators
Zip code report	Lists grantee 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 only see 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. Because service contacts are recorded under individual client profiles, when both partners of a couple participate in the same service contact, the operational reports and data export will include one record, which includes the couple ID number.

Each report can be opened in different formats such as a PDF or in Excel, which allows grantee 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).

Start Date	9/30/2019		End Date	1/28/2021	
Grantee	Grantee 1 HM (LE) ▾		Workshop	Select Workshop ▾	
Series	Select all Series ▾				

|◀ ◀ 1 of 5 ▶ ▶| ⟵ [   ] Find | Next 🖫▾ 🔄

Survey Completion Summary

Grantee: Grantee 1 HM (LE)

Clients Enrolled: 9/30/2019 - 1/28/2021

Grantee	Population	Number of Clients who Completed					
		Applicant Characteristics Survey*		Entrance Survey		Exit Survey	
		Completed	Refused	Completed	Refused	Completed	Refused
	All	0	0	0	0	0	0
		0	0	0	0	0	0
Grantee 1 HM (LE)	All	44	14	9	7	3	1
	Adult couple	1	8	0	1	1	0
	Adult individual	1	6	0	0	0	0
	Youth	1	0	0	0	0	0

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C. Query Tool (screen Q1)

Up to three nFORM users at each grantee will have access to the query tool at any one time. The query tool helps grantees track, monitor, and analyze the data that are collected using nFORM. To give users access to the query tool, a site administrator selects a permission when setting up or editing the user accounts. These three users will access the query tool through the Query Tool screen (Q1) under the Reports tab. Site administrators can change the query tool permissions at any time.

The query tool does not open within nFORM itself, but in a different tab in your web browser. The query tool uses QlikView software to display the nFORM data. The query tool screen in nFORM displays a disclaimer about the QlikView software that all query tool users should review. Visuals appear in the query tool only when the relevant data has been entered in nFORM.

To open the query tool, click the Launch Query Tool button on the Query Tool screen (Q1). The query tool then opens in a new browser tab. **Query tool users with a screen reading assistive device, such as JAWS, can open a compatible version of the query tool by checking the box on the Query Tool screen (Q1) before clicking on the Launch Query Tool button.** This version of nFORM displays all data on each tab in tables, so that screen reading assistive devices can navigate the page. The data that appear are exactly the same, but no data visuals are displayed. Users who want to see the pie charts and bar graphs should leave the box unchecked before clicking the Launch Query Tool button.

The query tool opens to a dashboard that provides a Grant Year Overview. The dashboard highlights grantee's current grant year progress in enrolling clients compared to enrollment targets, client participation in workshops and individual services, and completion of the client entrance and exit surveys.

The current grant year is always listed in the upper left of this tab. Next to this is a description of the data that are found on the tab. To the right of the description are buttons that allow users to display data only for certain client populations served by their grant; only data for client populations with enrollment targets will appear in the query tool. Client data from client populations without an enrollment target will only appear in the operational reports, data export, and QPRs/PPRs.

Gray circles with question marks are tool tips similar to what is found in some screens in nFORM. Hover your cursor over the tool tips icon to view a more detailed description of the information displayed. For example, some tool tips describe how couples are counted toward enrollment targets. Tool tips are used throughout all of the tabs in the query tool.

The grantee's enrollment targets are programmed into nFORM when approved by ACF.

The top of the query tool are tabs that allow users to look at different 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, and how clients heard about the program. 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 data for all or certain calendar years. Within a selected year, users can further drill down to specific months. All selections will appear in the Current Selections box on the left of the screen.

Applicant Characteristics. This tab shows key characteristics of clients in the grantee's program from the Applicant Characteristics Survey. As on the Enrollment tab, users can select data for specific timeframes and for specific client populations. To view data for a specific characteristic, select from the list of key characteristics on the left side of the screen. The bar chart will display the count of applicants by the selected characteristic. For example, selecting gender displays the count who selected male, female, and other (specify) for their gender by the date on which they completed their Applicant Characteristics Survey. The pie chart below displays the percentage of applicants within the selected timeframe and client population with each characteristic. Grantees should select one characteristic at a time for analysis on the query tool. The query tool does not provide cross tabulations if multiple characteristics are selected; grantees may use the data export to conduct cross-tabulation analyses of multiple characteristics.

For grantees conducting local evaluations, this tab also shows the characteristics of clients by service assignment, after clicking the tab of the same name. This helps grantees gauge whether similar types of clients are being assigned to treatment and comparison groups. However, the query tool does not include any statistical testing, so it cannot be used to formally assess baseline equivalence.

Individual Services. This tab shows data on client issues, needs, services, referrals, and incentives. These data all come from the individual service contact information in nFORM. The tool automatically opens to show information on contacts and referrals. To view data on incentives, click on the Incentive Types/Reasons button within the tab.

Workshop Participation – All Workshops. This tab shows information about client participation in workshops and session series since the beginning of the grant. Unlike the other tabs where users select specific timeframes, dropdown menus on the left side of this tab allow users to select which workshops and session series to view. The drop down menus include both completed and ongoing workshops. Use the dropdown menus to view information about workshop participation for specific workshops and session series within the selected workshop. Holding down the Ctrl key allows you to select more than one workshop or session series in the dropdown menu. The workshop and session series names recorded in nFORM populate these dropdown menus so it is important to use descriptive names for workshops and session series.

The Workshop Participation tab shows data for all client populations served by the grant, but users can drill down to specific populations by selecting the populations in the upper right of the screen.

Workshop Participation – Primary Workshops. A separate tab provides information on client participation in primary workshops compared to the grantee's current grant year participation targets. Data for this tab are only available for clients who were assigned to populations for which the grantee has enrollment and participation targets. Users can analyze primary workshop participation by client population, enrollment date range, workshop, and session series. Grantees serving multiple populations should select a population of interest to view progress toward the population-specific targets. Selecting specific calendar years and months filters the data to clients who enrolled during the selected timeframes.

Selecting specific workshops and session series filters the data to enrolled clients who attended at least one session occurrence in that series. Regardless of the order in which filters are selected on this tab, be sure to actively click on the population selection in the upper right corner and on the year selection in the upper left corner to ensure that clients are being compared to the appropriate targets.

Client Outcomes. On this tab, users can view summaries of client responses to the entrance and exit survey outcomes that are reported on the PPR. For both Entrance and Exit Surveys, the table on this tab displays the outcome, the applicable value ranges, the number of clients included in the outcome average, and the average. In addition to the average outcome value among all clients, users can select to view the average outcome value for selected characteristics by selecting characteristics from the box on the left of the screen. For example, users can select to view the average outcome value for males or for a specific age group. To view outcomes for more than one characteristic, hold down the Ctrl key while selecting characteristics. Outcomes for each characteristic selected will display in a separate column; the outcomes will not be cross-tabulated if multiple characteristics are selected. Outcomes appear on this tab if at least one client has answered the corresponding Entrance or Exit survey question.

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.

Navigation Instructions for Accessible Version of Query Tool. Query tool users with a screen reading assistive device, such as JAWS, can open a compatible version of the query tool by checking the box on the Query Tool screen (Q1) before clicking on the Launch Query Tool button. Users who access the query tool with an assistive device must use the following keyboard shortcuts to navigate the accessible version of the query tool. These shortcuts are also displayed on an Instructions tab within the accessible version of the query tool. 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.

Keyboard shortcuts for accessible version of query tool

General keyboard shortcuts

- Alt+0 – Navigate to first button in the toolbar (Clear button)
- Alt+1 – Navigate to the first object on currently displayed sheet (Based on the tab index set by the user this is the object with tab index of 1)
- The tab key can be used to navigate between sections of the document as follows:
   1. First tab stop in the document is the toolbar
   2. Second tab stop in the document is the apply bookmark combo box
   3. Third stop in the document is the tab row.
- The tab stops for each section of content following the tab row are at the caption.
- The caption text is also a link which when activated moves focus to the content of the object. Use the tab key to move to the next tab stop when inside an accessible extension or on the caption bar.
- The following keyboard shortcut can be used to apply selections throughout the document:

Filter list boxes

- Up arrow, down arrow to move through the list box items. Space or enter to select items in the listbox. Multiple items in the listbox need to be selected before the selection is applied to the document. Selected items are displayed with their checkbox checked.
- Use keyboard shortcut Control+Shift+A OR Control+Alt+A to apply selections.
- To search items in the list box, use the keyboard shortcut Control+Shift+S OR Control+Alt+S to move focus to the search textbox. Provide the search text in the search textbox. Next either press the enter key to search or use the tab key to move to the search button and press spacebar or enter key to perform the search and select matching items. Use tab key to move to the list items.

Straight tables

- Up / down arrow keys to move through rows, no wrap around from the first or last row. Left / right keys to move through columns, no wrap around from first or last column.
- On header rows, button is announced and can be used to sort table by pressing spacebar or enter key on that column.
- To select cell data, multiple cells can be selected before the selection is applied to the document. To select cell text, press space bar. Selected cells are highlighted using contrast colors with a contrast ratio of 10:1.
- Use keyboard shortcut Control+Shift+A or Control+Alt+A to apply selections. Once selections are applied, focus moves to the table caption since the table is refreshed with data using the selections.

Buttons

- To perform the action associated with the button use the spacebar or enter key.

D. Data Export (screen R4)

Site administrators can export all data recorded in nFORM, 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. The data export is a cumulative file of data recorded in nFORM from the start of the grantee's use of nFORM through the data export processing time. Site administrators navigate to the Data Export screen (R4) under the Reports tab to run a data export for their grantee.

The top box on the Data Export screen displays the directions for submitting a data export request. To start the export, click the Submit Request button. A message will appear indicating that the request is processing.

Data export requests are processed in the order received across grantees. Processing time for each data export will vary for several reasons, including the amount of data in each grantee's export and the number of concurrent requests for data 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. Site administrators can still log out of nFORM after submitting 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. 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. Site administrators are encouraged to save the data file to their computer or grantee network rather than access it from nFORM. Each new data export request will overwrite the file that appears in the Available File box on the Data Export screen. Only the most recent data export file will be available on the Data Export screen. Grantee 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. All data recorded at the client level, including client responses to the surveys, have the client's ID number from nFORM. This facilitates merging the data with data collected outside of nFORM or data from other tabs of the data

export. The data export also includes non-client data recorded in nFORM, including information about each workshop series, the grantee's service provider directory, and the grantee's responses to the Program Operations Survey.

The data included in the data export will reflect the data entered into nFORM up through the time the data export is processed. Grantees are encouraged to explore their data to note any considerations for analyses and interpretations of the data. For example, clients flagged as duplicate confirmed should be removed from analyses in order to not include duplicate client records in analyses. Additionally, grantees should note that 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.

A data dictionary describing each data variable in the data export is available on the Help tab in nFORM. Grantees are encouraged to review the data dictionary as part of their planning for analysis, program monitoring, and continuous quality improvement using the data export. The data dictionary lists all the information from nFORM that is included in the data export. These are listed as the "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.

The data dictionary also 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. Knowing the values will help you plan and interpret your analyses.

The data dictionary includes multiple tabs:

- The Enrollment and Participation tab shows the field names for information in the data export related to client enrollment and participation in services.

- The Client Surveys tab shows the names of the fields for the Applicant Characteristics, Entrance, and Exit surveys and how the response options for each question are coded in the data export.

- The Program Operations tab shows the fields for each item in the Program Operations Survey and how each response is coded.

- The Survey Item Grid shows each survey item and the corresponding question number across each of the client surveys; use this tab to help map a specific question from the survey to the field name for it in the data export.

- 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—Fatherhood FIRE, FRAMEWorks, and READY4Life—that only include data fields applicable to the specific program type. There is one data dictionary for the nFORM data export, but grantees can use the Fatherhood FIRE, FRAMEWorks, 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.

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.