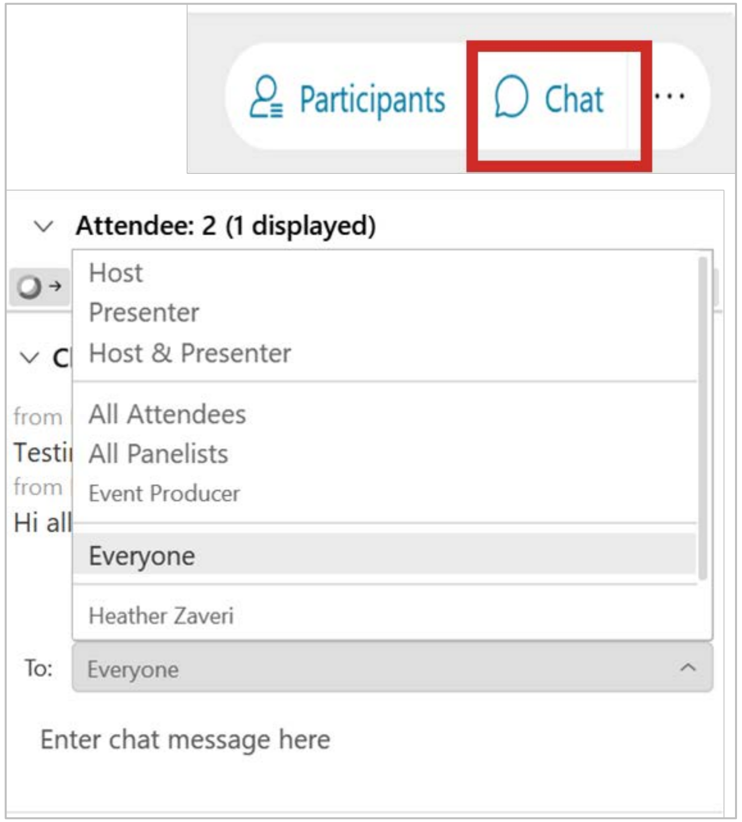
Welcome to nFORM! Overview for new (and returning) nFORM users

June 11, 2024
nFORM 2.0 Team
Mathematica

Housekeeping

- / **Use the chat to ask questions**
- / **Click on the link in the chat to access closed-captioning**

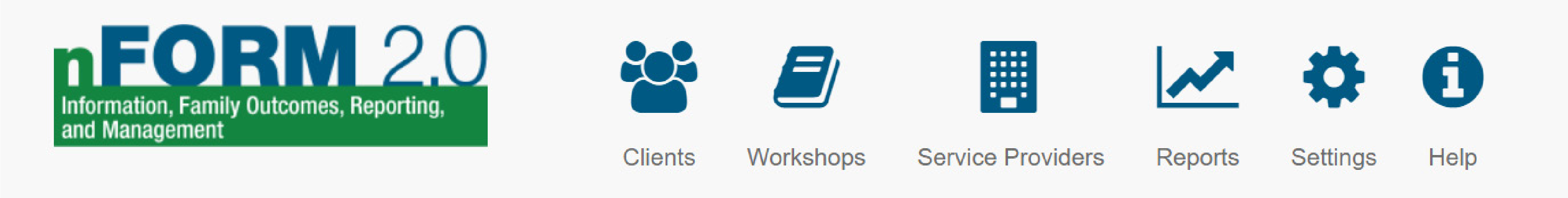


REMINDERS:

- **Never text or email personally identifiable information (PII) like client names – *including to the help desk***
  - Only refer to clients in emails by their client ID number
- **Never take screenshots of client PII from nFORM**
- **Everyone who interacts with client data should:**
  1. Watch the Keeping Data Secure training video on the resources site
  2. Review the Performance Measures and Data Collection Logistics Manual on the resources site for more information on keeping data secure

Today’s agenda

- Navigating nFORM
- nFORM access and security
- Other administrative features
- Client enrollment and survey administration
- Managing client profiles and service participation
- Program and performance monitoring
- Other resources and support



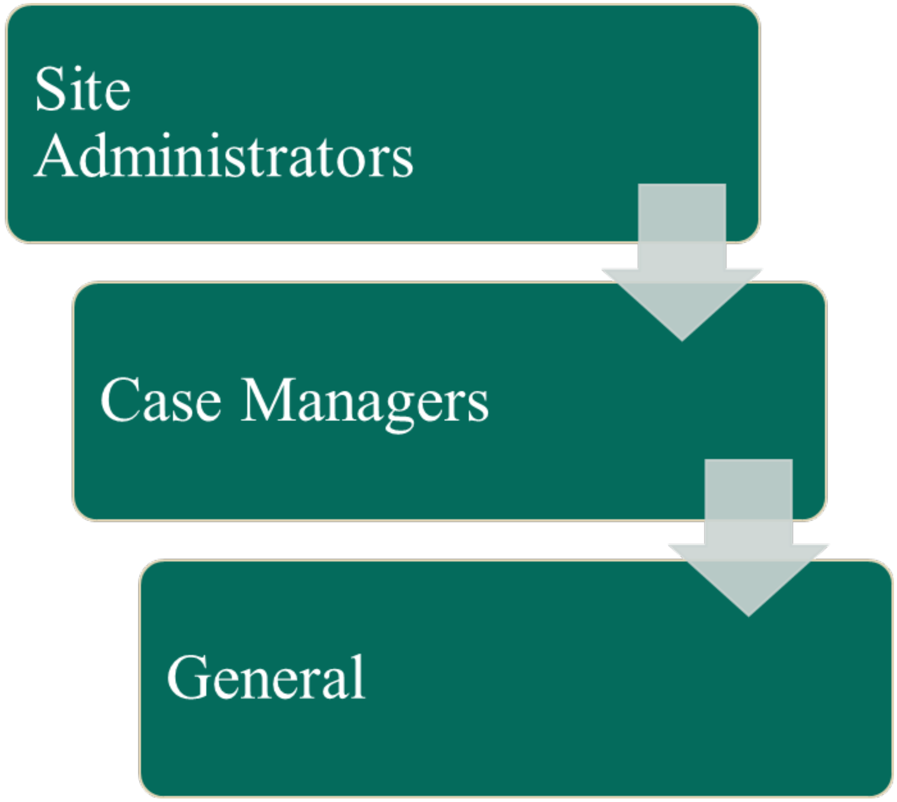
Before we get started…

- Review Welcome to nFORM: Tips for New Users for step-by-step instructions on how to prepare for collecting, entering, and monitoring nFORM data
- All nFORM TA resources are on HMRF Grant Resources site at https://www.hmrfgrantresources.info/nform2-resources
- Contact the nFORM 2.0 Web Help Desk with questions

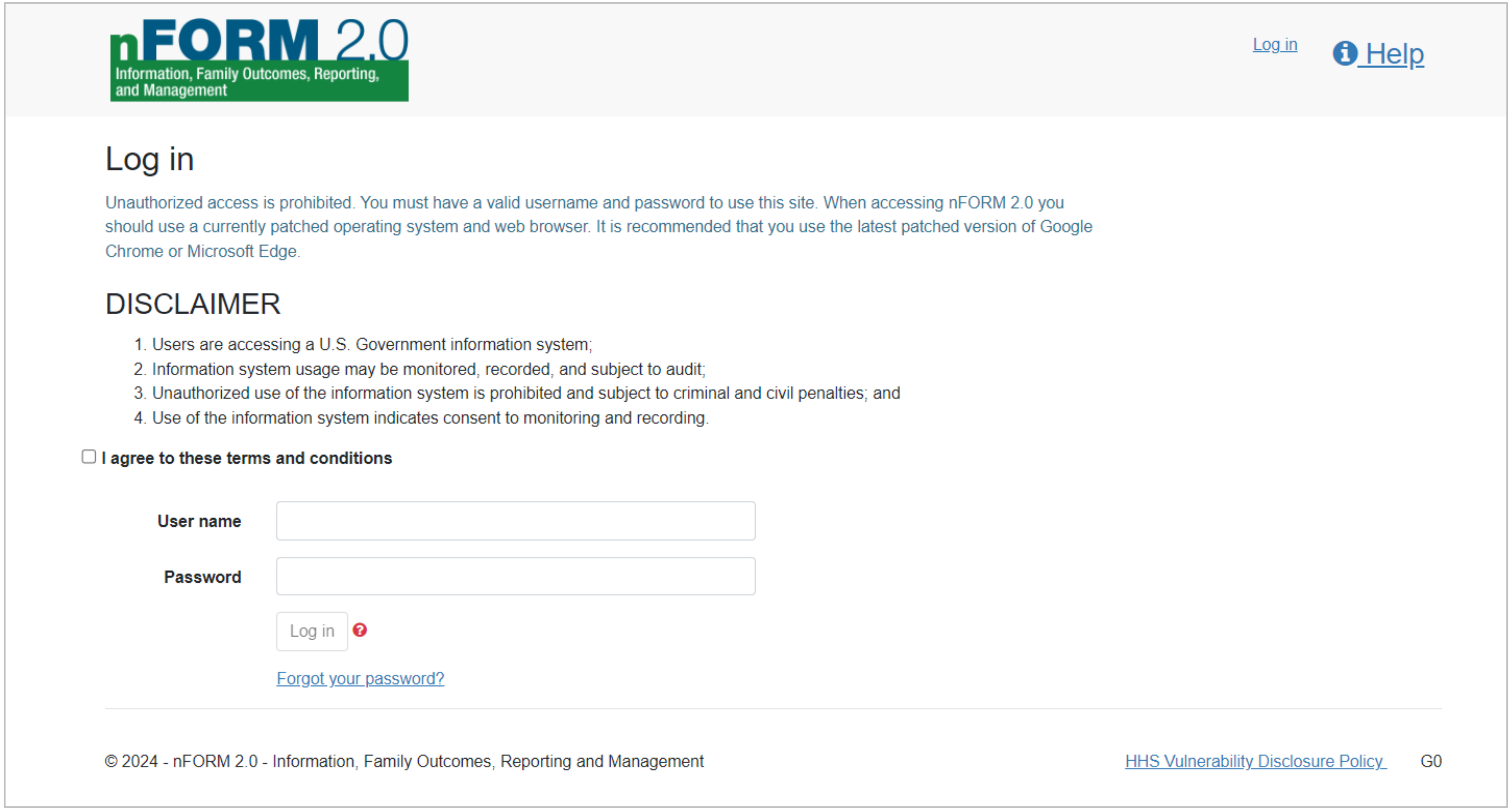
nFORM access and security

nFORM user access

- **To help protect data, each nFORM user must have their own nFORM account**
- **Site administrators have greatest access to nFORM features and manage the grant's user accounts**
- **Case manager and general account permissions are customizable**
- **Check with your site administrator or data manager to ensure you have the access needed**



Secure log in to nFORM



nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Log in Help

Log in

Unauthorized access is prohibited. You must have a valid username and password to use this site. When accessing nFORM 2.0 you should use a currently patched operating system and web browser. It is recommended that you use the latest patched version of Google Chrome or Microsoft Edge.

DISCLAIMER

1. Users are accessing a U.S. Government information system;
2. Information system usage may be monitored, recorded, and subject to audit;
3. Unauthorized use of the information system is prohibited and subject to criminal and civil penalties; and
4. Use of the information system indicates consent to monitoring and recording.

I agree to these terms and conditions

User name

Password

Log in

Forgot your password?

HHS Vulnerability Disclosure Policy G0

nFORM user account security

- **Site administrators can activate, deactivate, or lock accounts**
- **Accounts automatically deactivate if user does not log in after 60 days**
- **If not reactivated in 30 days, deactivated accounts lock automatically**
- **To unlock user accounts, site administrators must submit a ticket to nFORM 2.0 help desk**
- **Immediately report suspected or confirmed cases of unauthorized nFORM access**
  - Sharing accounts, user names, passwords; changing access settings without user's knowledge; unauthorized viewing of client data

nFORM data security

- **Personally Identifiable Information (PII) includes any information that may identify a client or others—names, birth dates, addresses, phone numbers, etc.**
- **To protect client PII**
  - Never share your nFORM username or password
  - Keep your screen out of view and lock your screen when stepping away
  - Never take screenshots of client PII from nFORM
  - Never text or email PII to a colleague or the help desk—refer to clients only by their client ID number
  - Do not store PII on any unencrypted devices, and lock physical documents in cabinets out of view

Resources: nFORM access and security

Manuals, tip sheets, and templates

- User manual
  - Module IV: Adding and editing nFORM user accounts
  - Module 1.D: Keeping data confidential
  - Module 1.E: Reporting security incidents
- nFORM Performance Measures and Data Collection Logistics Manual
  - Appendix A: Protecting PII
- Tip sheet: nFORM 2.0 User Accounts

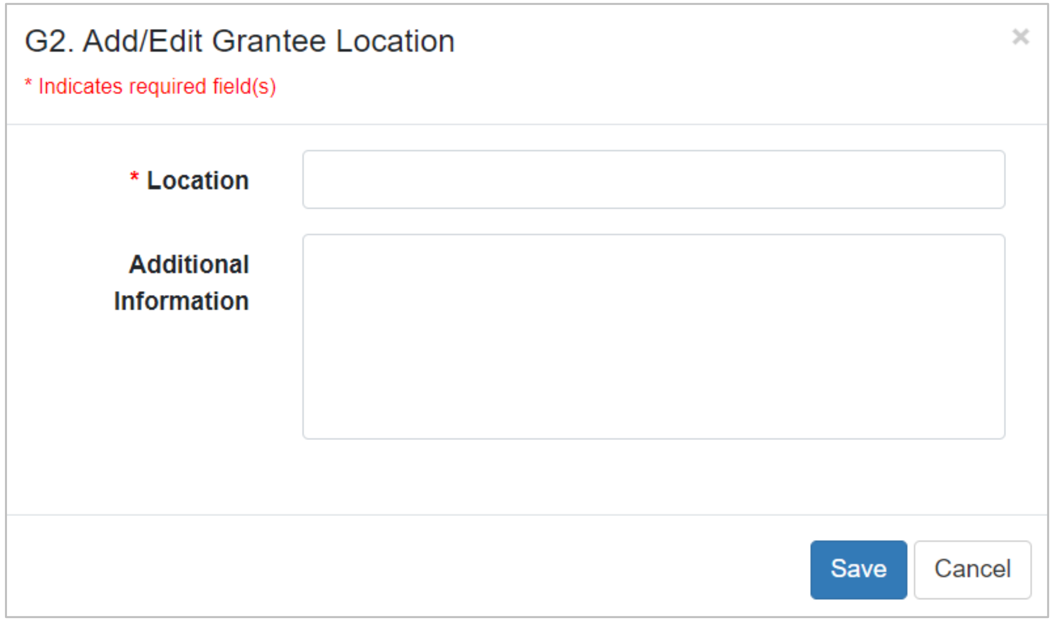
Office hours and training videos

- Training videos
  - Creating and managing user accounts
  - Keeping data secure

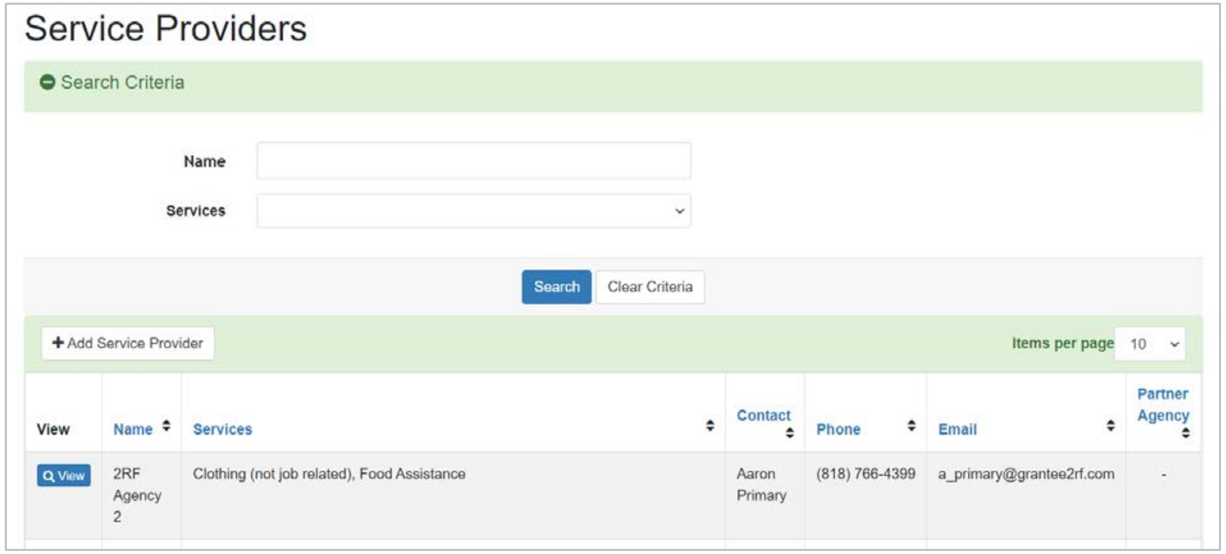
Other administrative features

Grantee locations

- Set up grantee locations to help track enrollment and services across program sites
- At enrollment, assign clients to locations where they will be served
- Assign case managers and other nFORM users to locations where they will provide services



Service provider directory



- **Grantees populate the searchable directory of their service providers and partner agencies**
- **When referrals are made to clients, case managers select the appropriate provider from the directory**

Workshops and service assignments

- **Site administrators create workshops in nFORM, indicating curricula, hours, if registration is required, and whether primary or optional**
  - Session series are separate offerings of a workshop, comprised of multiple sessions (classes) over time
  - Grant staff add facilitators and other session series/session specific information in nFORM, and record attendance for each session
  - Grant staff monitor client attendance in primary workshops against targets
- **Grants conducting local evaluations create service assignments for treatment, control, and control waitlist groups**
  - Clients participating in the evaluation are assigned to the appropriate group during enrollment

Resources: nFORM administrative features

Manuals, tip sheets, and templates

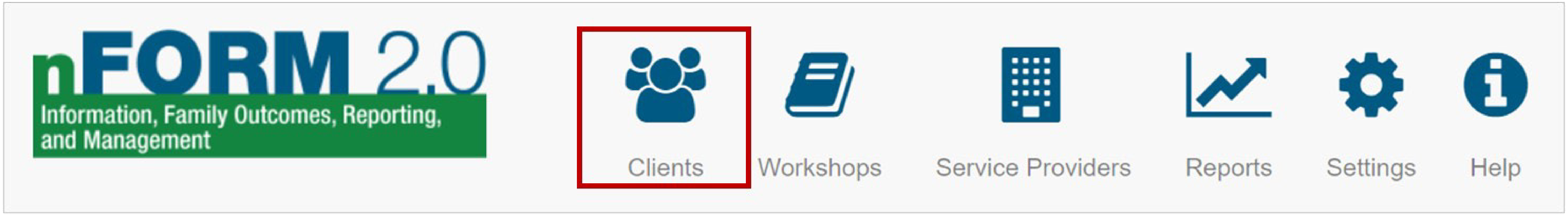
- User manual
  - Module III: Grantee Administrative Functions
  - Module VI: Managing Workshops and Sessions
- Using nFORM 2.0 for Local Evaluations manual
- Setting Up Workshops Properly in nFORM 2.0

Office hours and training videos

- May 2022 – Tailoring nFORM For Your Grantee
- Training videos
  - Adding Grantee Locations and Service Providers
  - Adding Service Assignments for Local Evaluations

Client enrollment and survey administration

Steps for enrolling clients in nFORM



1. Determine applicant eligibility
2. Confirm they are not already enrolled in nFORM
3. Complete the application form in nFORM
4. Administer the Applicant Characteristics Survey (ACS)
5. Save the client's service assignment (if applicable)

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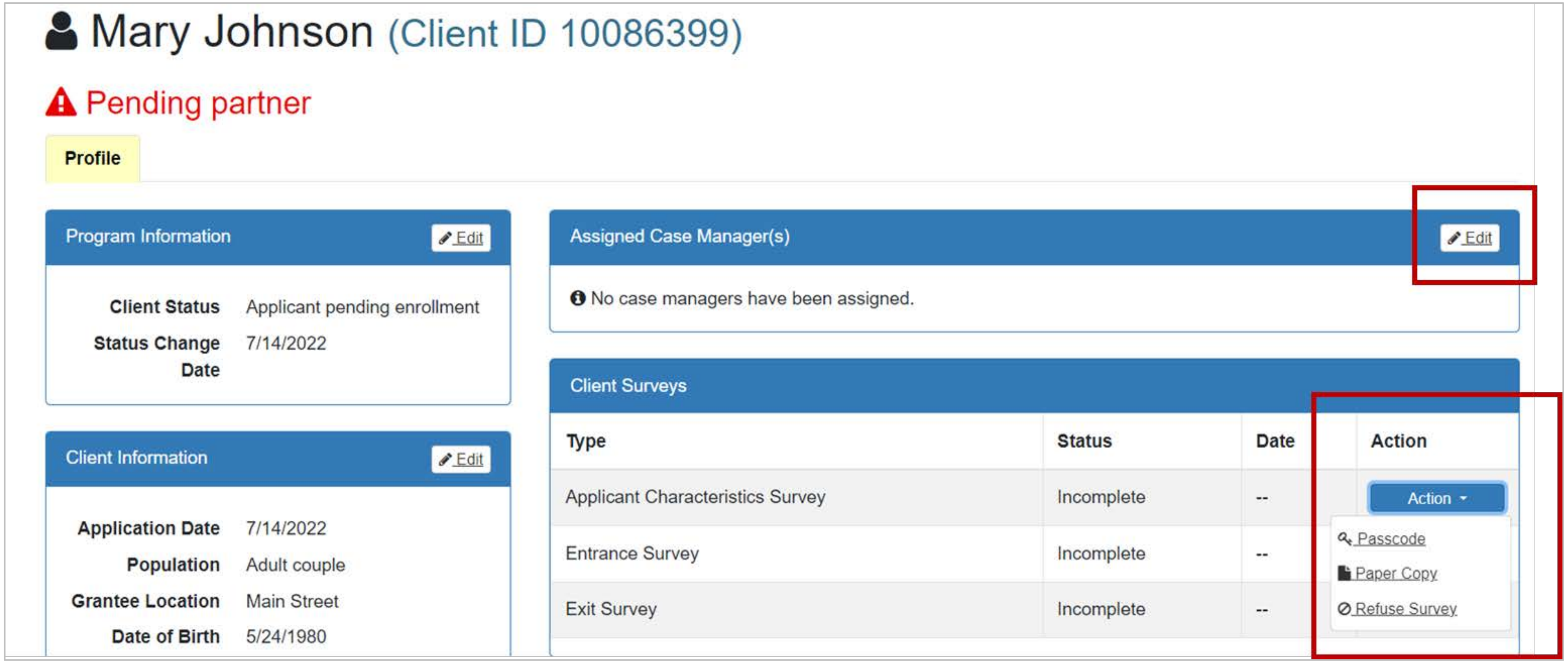
Administer ACS and other surveys from client profile, or in bulk



Select "Action" to administer a client's web survey, record paper survey responses, or record a refusal

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Survey login information is generated to submit survey or record a refusal

Grantees can bookmark survey URL

Reminder about passcode reuse

Generate Survey Passcode

×

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

To continue, please direct the client to log in at the following URL: https://famle-nform-dev-gov.com/Survey/.
At the log in, enter the client's id (**10086399**) and the following **passcode**:

5871698

Note: This passcode will expire in 96 hours; it can be used up to 10 times before it expires.

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

Cancel

Client ID and unique survey passcode are provided for each survey

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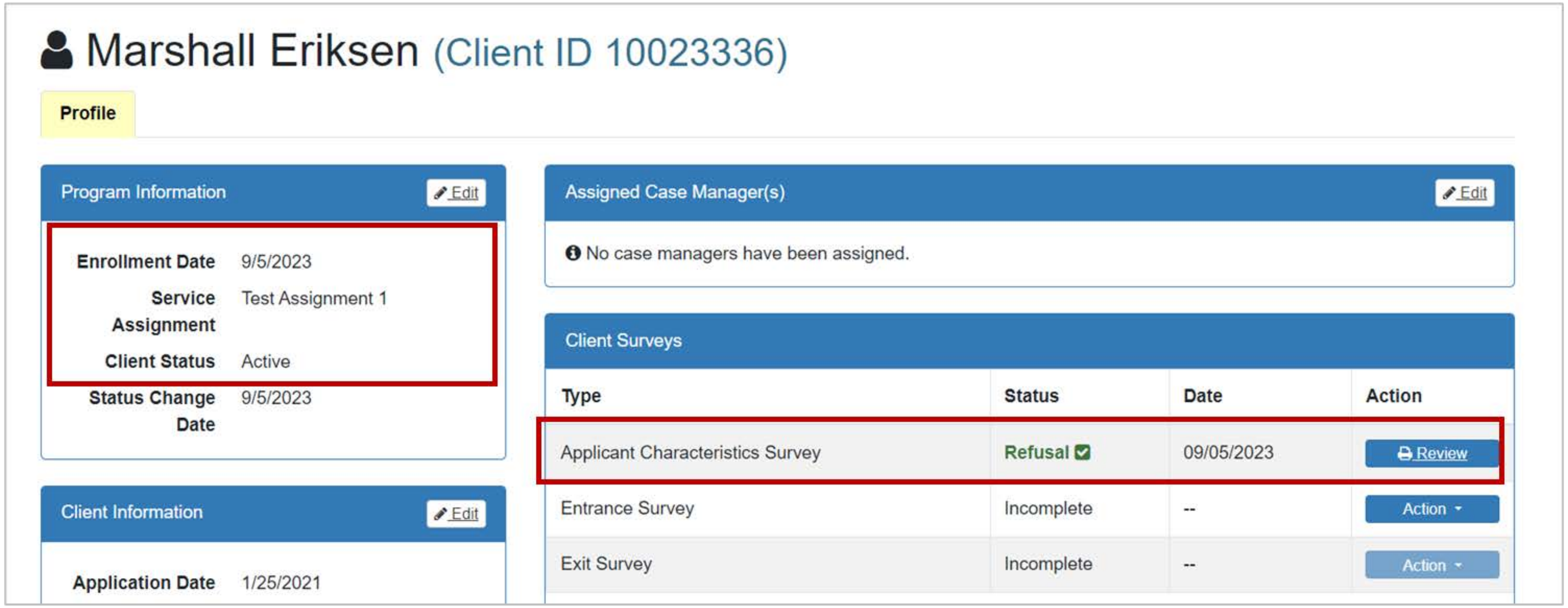
Clients automatically enrolled after submitting or refusing an ACS



Clients also take entrance survey at beginning of first workshop and exit survey at end of workshop

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Resources: Enrollment and survey administration

Manuals, tip sheets, and templates	Office hours and training videos

• User manual
  • Module V: Enrolling clients
  • Module V.D.1: Generating survey passcodes in bulk
• Performance Measures and Data Collection Logistics Manual
  • Section C: Enrolling clients
  • Section D: Administering client surveys
• Tips for Survey Scripts
• Options for Administering Surveys Virtually
• PDF Templates of the ACS, Entrance and Exit Survey
	• Examining Survey Administration with nFORM: October 2023 Office Hours and Infographic
	• Training video: Administering surveys

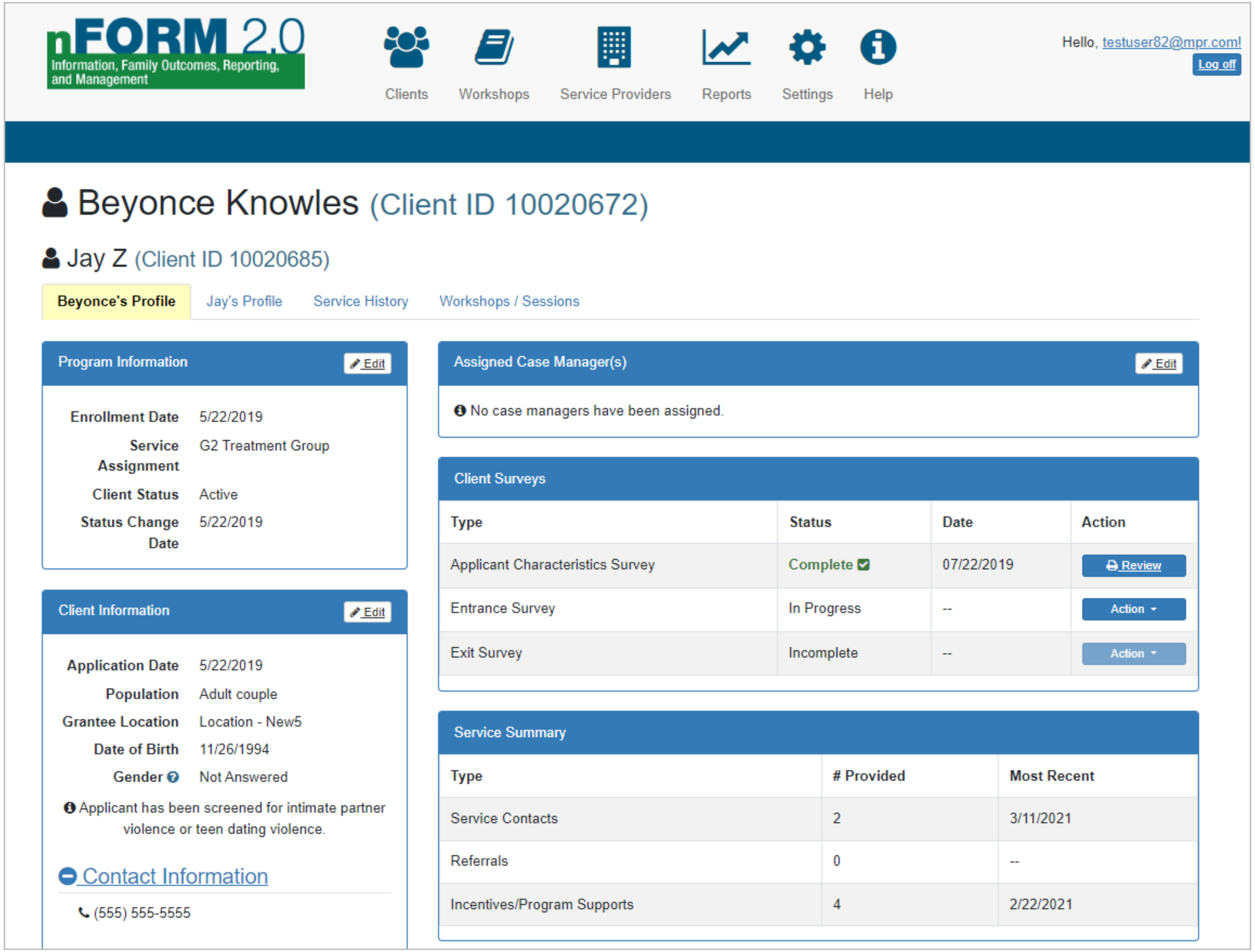
Questions?

Managing client profiles and service participation

Regularly review client profiles to…

- ✓Confirm and update client details, including contact information and case manager
- ✓Identify outstanding surveys a client is due to complete
- ✓Update client status to reflect progress in program services
- ✓Monitor client’s workshop participation and record make-up sessions
- ✓Record service contacts, referrals, incentives, and program supports

Example client profile



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Example client profile (cont'd)

2 maple way
anytown NJ 08888

Additional Contact(s)

Contact #1

Little Bo Beep
Friend
1 Fairy Tale Lane
Apt 2b
Make Believe CO 66666
(555) 555-5555
LBPeep@email.com

Form Completed By Test Case Manager

Referred By:

Type External organizations

Name Hannah's Corner

Workshop Summary

Name **Primary*	**Workshop Hours Received**	**# Session(s) Attended**	**Last Session Attended**	**Next Meeting Date**
Couple Workshop	8	3	1/12/2020	--
Atten Reqd Test WS 1	1	1	11/30/2020	--
Families 101*	3	1	7/03/2019	--
Elevate*	6	2	5/01/2019	--
Prepared Date Nights*	3	1	4/13/2021	--

Primary Workshop Participation for the Client

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

Monitor workshop participation and progress towards target

Workshops

- All clients are expected to complete target hours of primary workshops
  - Some grantees also offer optional workshops
- Use nFORM's registration feature to register clients for workshops in advance
  - Clients can also drop-in to some workshops
- Generate paper roster from nFORM before each class to record attendance
- Enter session attendance in nFORM immediately after each class, then securely shred paper roster
- Recorded attendance appears on each client's profile and in nFORM reports

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Individual service contacts (ISCs)

- **On Service History tab of client profile, record all HMRF-funded services provided to a client or couple**
  - Some ISCs can be recorded in bulk for multiple clients
- **Record ISC date, case manager, contact method, length of contact, and issues/needs discussed**
  - Record whether there was direct client contact and whether anyone else was included in the contact
  - If serving couples, record whether ISC provided to one or both partners

Types of ISCs

Substantive

- Lasts 15 minutes or longer
- Involves direct client contact
- Covers issues/needs beyond reminder contacts

Reminder-only

- Serve only as reminder to client about outstanding or upcoming service
- Only issue/need recorded is "Reminder contact"

Other

- Includes all ISCs that do not meet criteria for substantive or reminder-only ISCs
- E.g., sharing resources

ACF requires Fatherhood FIRE grantees to provide each client with at least 8 substantive ISCs

Referrals, incentives, and program supports

- **Record referrals in nFORM when given to clients**
  - Check in with clients and record in nFORM whether they follow up with referrals
- **Record incentives and program supports when offered to clients**
  - Discuss your grant's ACF-approved incentive plan with program leadership

Resources: Managing client profiles and service participation

Manuals, tip sheets, and templates

- User manual
  - Module VI: Managing workshops and sessions
  - Module VII.A: Client profile
  - Module VII.B: Service history
  - Module VII.B.1: Recording ISCs in bulk
- ACF Guidance on Program Incentives
- Setting Up Workshops Properly in nFORM 2.0
- Recording Make-Up Attendance for Workshop Sessions in nFORM

Office hours and training videos

- November 2023 office hours - Using nFORM 2.0 to Monitor Individual Service Contacts
- Training video: Recording Participation in Individual Services

Program and performance monitoring

Use nFORM data tools to monitor progress on data collection and performance measures

- **Consider pace and design of client enrollment and service delivery to plan how and how often to review nFORM data**
  - Query tool helps programs quickly check progress towards ACF targets
  - Use nFORM data tools in combination to drill down on specific questions
- **Check frequently to make sure data are entered in a timely manner and are accurate and complete**
- **Prioritize client confidentiality when reviewing nFORM data**

nFORM 2.0 data tools

QPR/PPR

- Year-to-date progress on HMRF performance measures
- Generate current QPR or PPR (and school year performance report for R4L grantees) at any time for updated information on grantee performance

Query tool

- 7 separate tabs show visualizations of aggregate progress on client measures
- Explore performance by different factors including time frame and service type

Operational reports

- 15 Excel reports to help manage day-to-day operations and track performance
- Summary and detailed reports to be reviewed individually or combined

Data export

- Access all nFORM data except for PII
- Data organized on separate tabs by data type for in-depth analyses

Resources: nFORM data tools and reports

Manuals, tip sheets, and templates

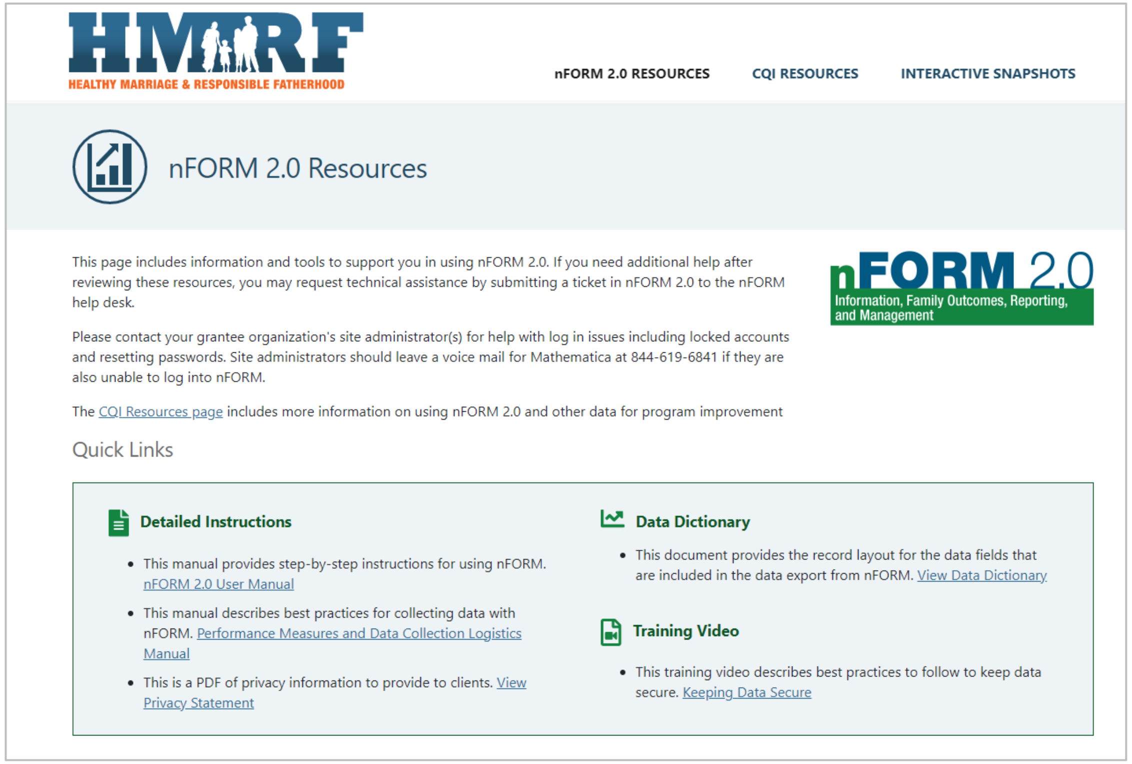
- User manual module VIII: Reports
- Using nFORM 2.0 Tools to Monitor HMRF Performance Measures
- Reviewing Workshop Participation in the QPR/PPR
- Examine Recruitment and Enrollment with nFORM
- Top 10 Ways Project Directors Can Harness the Power of nFORM
- nFORM 2.0 Data Export Template

Office hours and training videos

- January 2023 - Leveraging nFORM 2.0 Data To Answer Grantee Questions
- December 2022 - Review of the nFORM 2.0 Data Export
- November 2022 - Continued Deep Dive Into the nFORM 2.0 Operational Reports
- October 2022 - Deep Dive Into the nFORM 2.0 Operational Reports
- June 2022 and May 2023 – Query tool-focused sessions

Other resources and support

Check the HMRF Grant Resources site for all nFORM 2.0 resources!



HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

nFORM 2.0 RESOURCES | CQI RESOURCES | INTERACTIVE SNAPSHOTS

nFORM 2.0 Resources

This page includes information and tools to support you in using nFORM 2.0. If you need additional help after reviewing these resources, you may request technical assistance by submitting a ticket in nFORM 2.0 to the nFORM help desk.

Please contact your grantee organization's site administrator(s) for help with log in issues including locked accounts and resetting passwords. Site administrators should leave a voice mail for Mathematica at 844-619-6841 if they are also unable to log into nFORM.

The CQI Resources page includes more information on using nFORM 2.0 and other data for program improvement

nFORM 2.0
Information, Family Outcomes, Reporting, and Management

Quick Links

Detailed Instructions

- This manual provides step-by-step instructions for using nFORM. nFORM 2.0 User Manual
- This manual describes best practices for collecting data with nFORM. Performance Measures and Data Collection Logistics Manual
- This is a PDF of privacy information to provide to clients. View Privacy Statement

Data Dictionary

- This document provides the record layout for the data fields that are included in the data export from nFORM. View Data Dictionary

Training Video

- This training video describes best practices to follow to keep data secure. Keeping Data Secure

- Publicly available
- Includes nFORM manuals and detailed instructions, tip sheets, office hours materials, training videos, and templates
- Search by keyword, type or topic of question or interest

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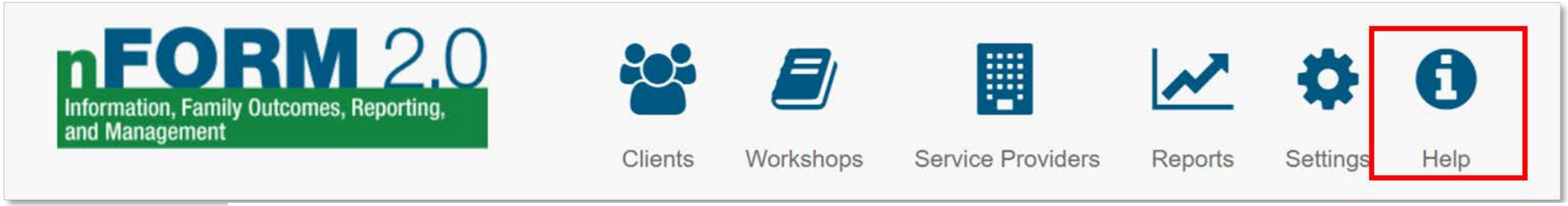
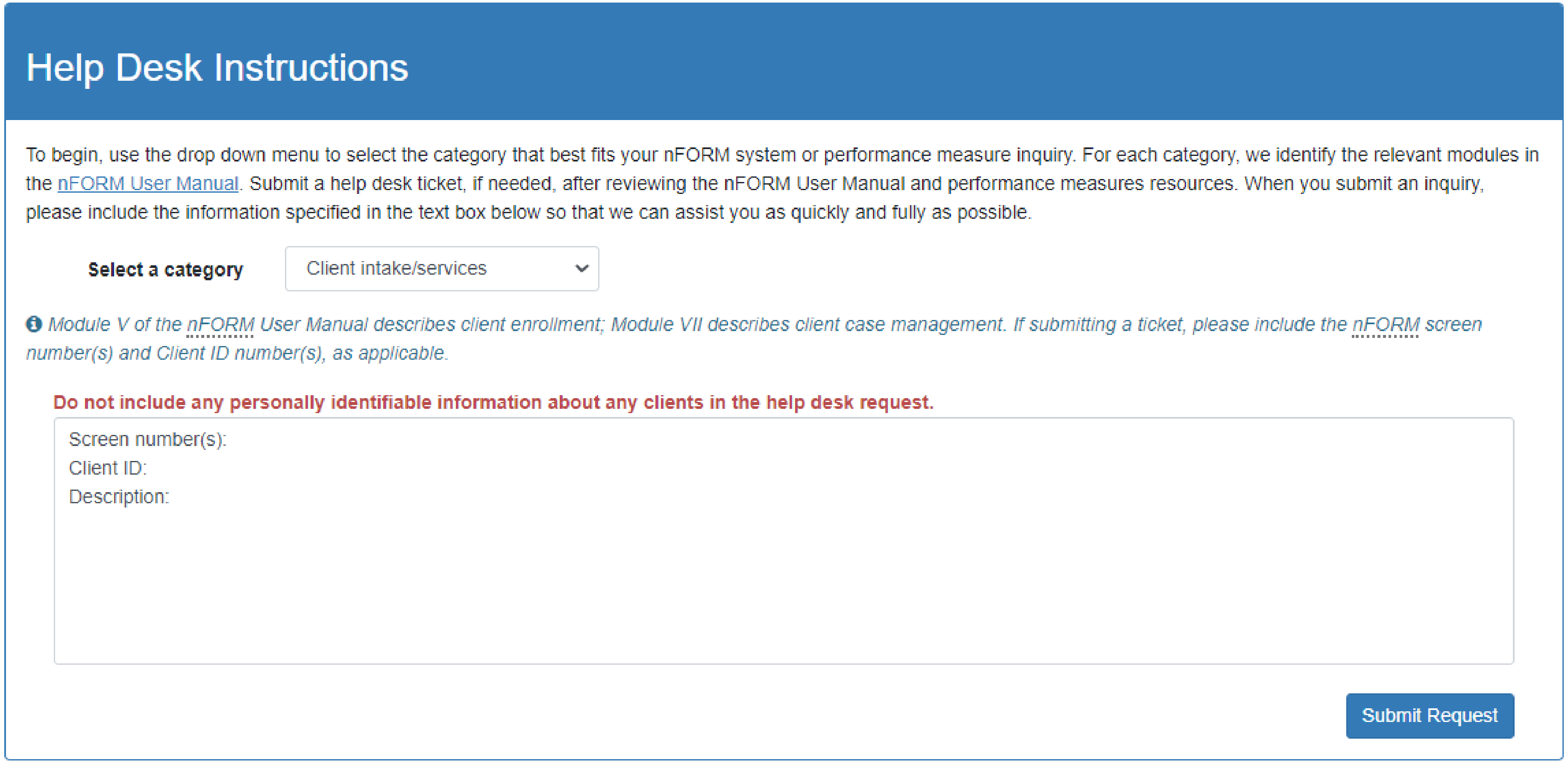


Ask your site administrator to help with log in issues

Submit a help desk ticket through nFORM for other issues



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If needed, email or call the help desk

- **Email: nform2helpdesk@mathematica-mpr.com**
- **Phone: 844-619-6841**
- **Site administrators should email or call if they cannot log in**
- **For help with Continuous Quality Improvement (CQI)**
  - Check the CQI Resources page of the Grant Resource Site
  - Email the CQI TA team at hmrfcqi@mathematica-mpr.com

Questions?