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# Preparing for the Journey: Setting up nFORM

Well nFORMed: nFORM and CQI Training Series, Day 1 – June 2, 2026

Data capacity and CQI TTA team, Mathematica

Welcome! In the chat, please share your name, program, and where you're located!





# Today's presenters



**Hannah McInerney**

Data Capacity and CQI  
TTA Team Lead



**Danielle Robinson**

Data Capacity and CQI  
TTA Team Member



# Housekeeping

Please mute your line

Access closed-captioning by clicking the “CC” icon in the lower left corner, or by pressing CTRL+SHIFT+A

Use the chat to ask questions

Answer polls through Slido

- Will automatically appear in your righthand panel when poll is launched
- If needed, click “apps” button at bottom of your screen and select Slido

Recording and slides from today’s training will be made available on the HMRF Grant Resource site at <https://hmrfgantresources.info/>





# Agenda

- nFORM and CQI road map
- Prioritizing data security
- Collecting high quality data
- Creating nFORM user accounts
- Adding grant locations and service providers
- Setting up workshops
- Questions and answers



Clients



Workshops



Service Providers



Reports



Settings



Help



**What words come to mind  
when you think about using  
data to inform your work?**

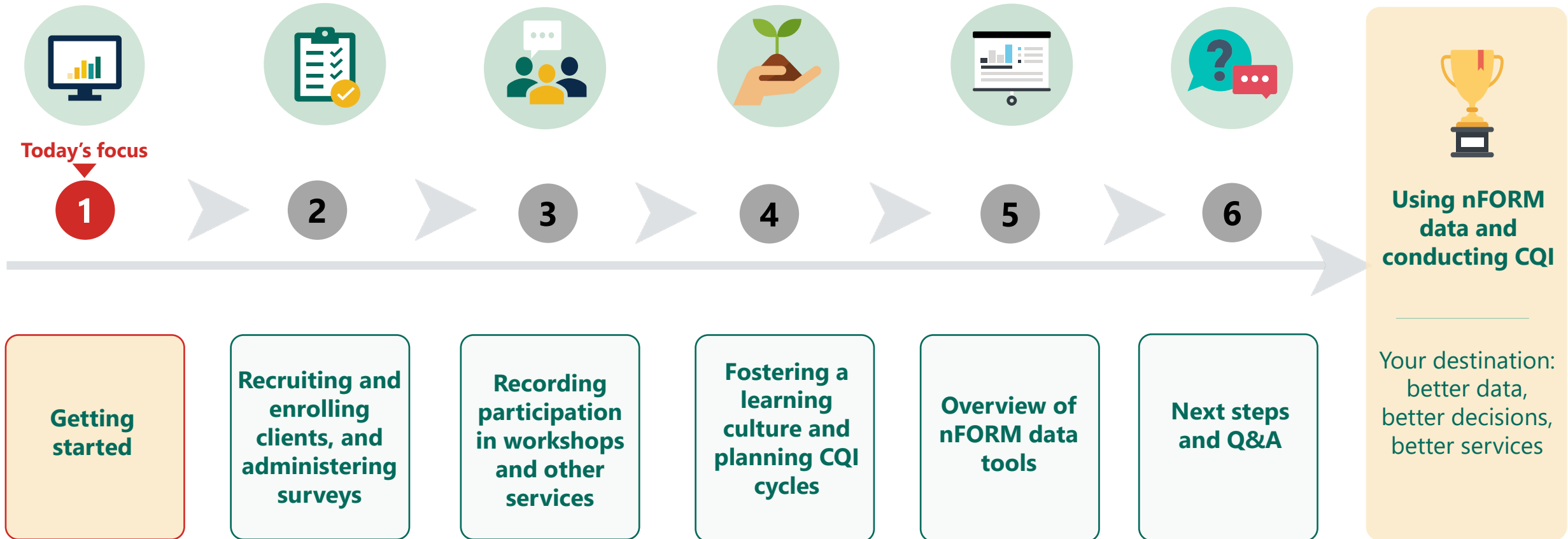
Add your responses to the Slido poll!



# | nFORM and CQI road map



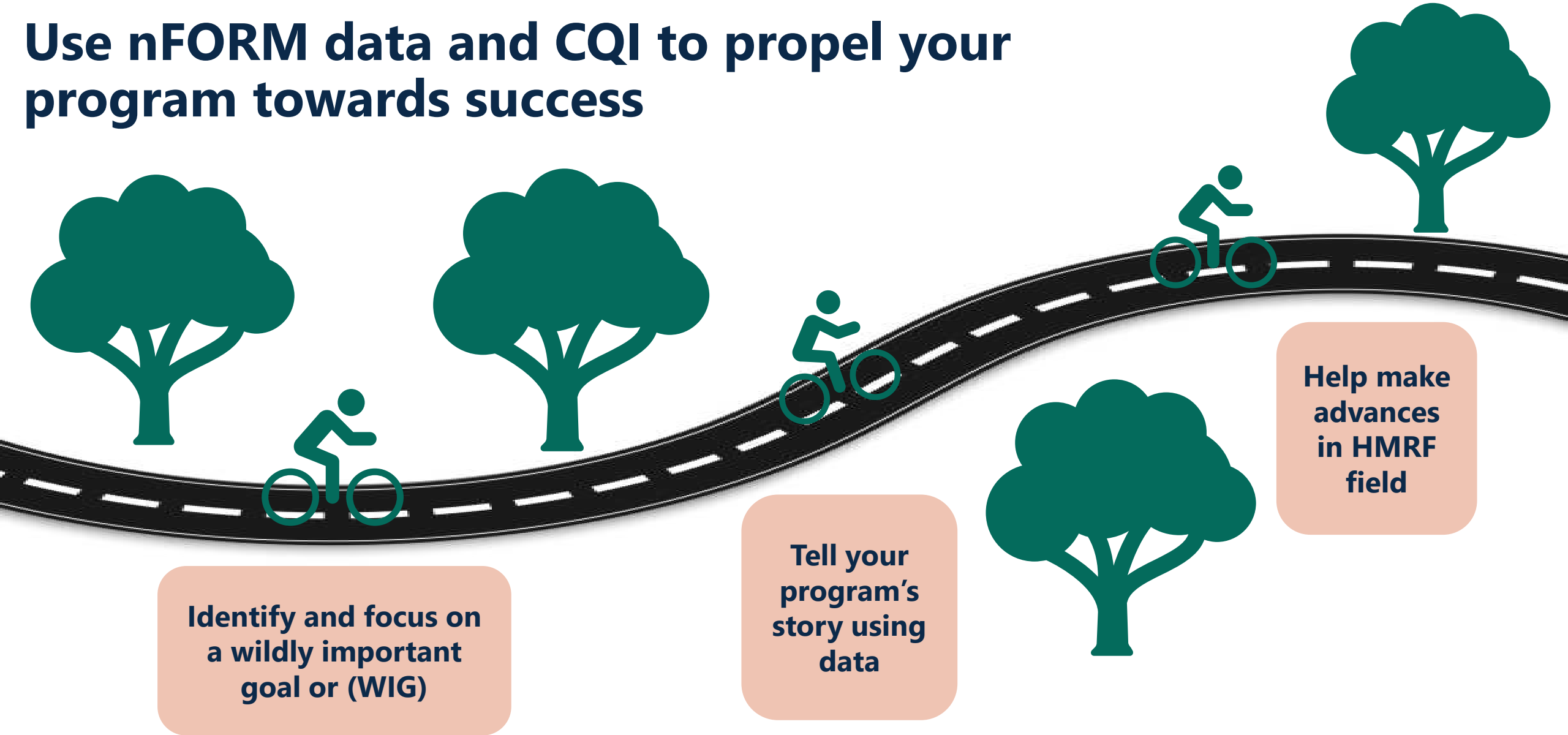
# Well nFORMed Training Series Roadmap



If you haven't yet, check out the Introduction to nFORM and CQI and Keeping Data Secure videos on the HMRF Grant Resource site



# Use nFORM data and CQI to propel your program towards success





# Prioritizing data security





# Protecting client data



Grant recipients only access the nFORM "Production" environment – do not enter any test or fake data



Data sharing agreements document data security roles and requirements, including nFORM's compliance with federal security requirements



Secure access provided through multifactor authentication (MFA) and user account permissions



Never text, email, or take screen shots of personally identifiable information (PII) like client names. Reference only client ID numbers when contacting help desk.



Watch [Keeping Data Secure training video](#) on HMRF Grant Resource site and review Module I of nFORM User Manual more information on keeping data secure



# Collecting high quality data



# High quality data is essential to...



**Manage program services and clients**



**Monitor progress and conduct continuous quality improvement (CQI)**



**Analyze programs and outcomes to better support families and communities**



# Components of high-quality data



**Timely**



**Accurate**



**Complete**



**Secure**

**Completing and updating your data capacity and CQI plan is key to collecting high quality data**



# Data quality and CQI plans

Data capacity and CQI plans detail steps for data collection, monitoring and reporting, CQI, and staff training

Plans due already for large and small grants and by September 30 for emerging grants

After initial submission, grant recipients should regularly update plans to reflect changes in program operations and service delivery



<https://www.hmrfgrantresources.info/resource/data-capacity-and-cqi-plan-template>



**Let's pause for questions**



# | Creating nFORM user accounts



# Types of user accounts



## Site administrators

- Overall responsibility for managing nFORM for grant
- Full access to all nFORM functionality
- Most often program's data manager and other key staff



## Case managers

- Responsible for client and workshop management
- Most often case managers and other frontline staff



## General users

- Responsible for welcoming clients and recording attendance
- Can input data and view limited client-level data
- Have the most restricted access to nFORM functionality



# Permissions by account type

User type	Capabilities			
	Input data	View client-level data	Use query tool*	Administrative functions
Site administrator	✓	✓	✓	✓
Case manager	✓	✓	✓	None
General user	✓	Limited	✓	None

*\*Limited to 3 users at each grant.*

Check out the [nFORM User Accounts tip sheet](#) for more information on user account types

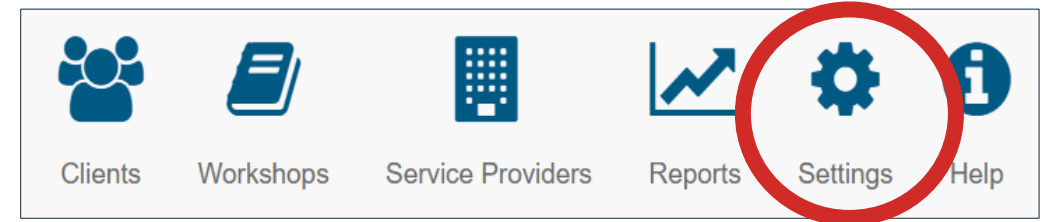


# Creating user accounts

Grants identified initial site administrators and number of user accounts when signing data sharing agreements

Mathematica will activate initial site administrator accounts and initial site administrator will create user accounts for other staff

Site administrators reset passwords if staff get locked out of nFORM



U2. Add/Edit User ×

\* Indicates required field(s)

\* First name

\* Last name

\* User name   
*Enter an email address for the user name.*

\* Phone Number

\* Authentication Method

\* User type

Grant Location

Check if this person is from a partner agency

Check if this person is a facilitator

**Permissions** (Check all that apply)

Case Manager Assignment Allow users to assign case managers to clients

Enrollment Allow users to enroll new clients

Query Tool Allow users to view the Query Tool

Random Assignment Allows users to randomly assign new clients

Service Provider Management Allow users to add/edit service providers

Sessions Series Management Allow users to add/edit session series



# Managing user accounts



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 automatically lock



To unlock user accounts, site administrators must email the data capacity and CQI TTA team



Immediately report suspected or confirmed cases of unauthorized nFORM access



# Automated email alerts

**nFORM users receive up to three automatic emails if they are at risk of having their account deactivated**

**Log in to nFORM and resume activity, or contact your site administrator to close your account**

1

Two weeks  
before  
deactivation  
date

2

If user has still  
not logged in,  
one week  
before  
deactivation  
date

3

One day  
before  
deactivation  
date if user  
has not  
logged in



**Let's pause for questions again**



# | Adding grant locations and service providers



# Adding grant locations



G2. Add/Edit Grant Location ✕

\* Indicates required field(s)

\* Location

Additional Information

**Add grant locations to track recruitment, enrollment and participation by location**

- Multiple office sites
- Schools

**Assign clients to locations where they will be served**

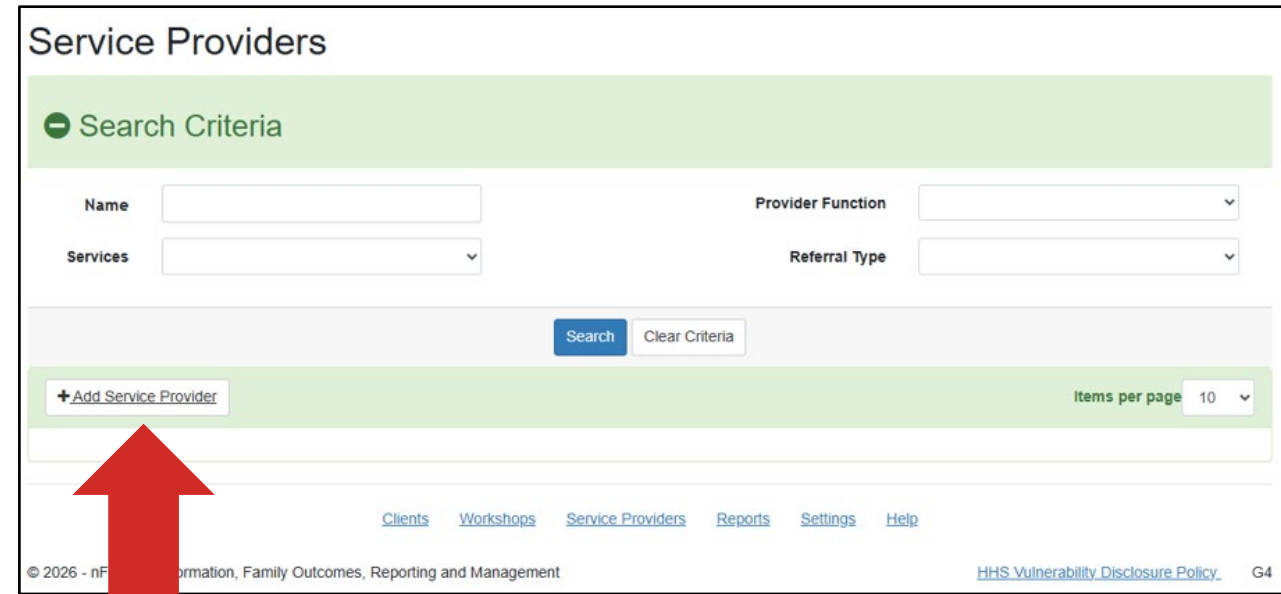
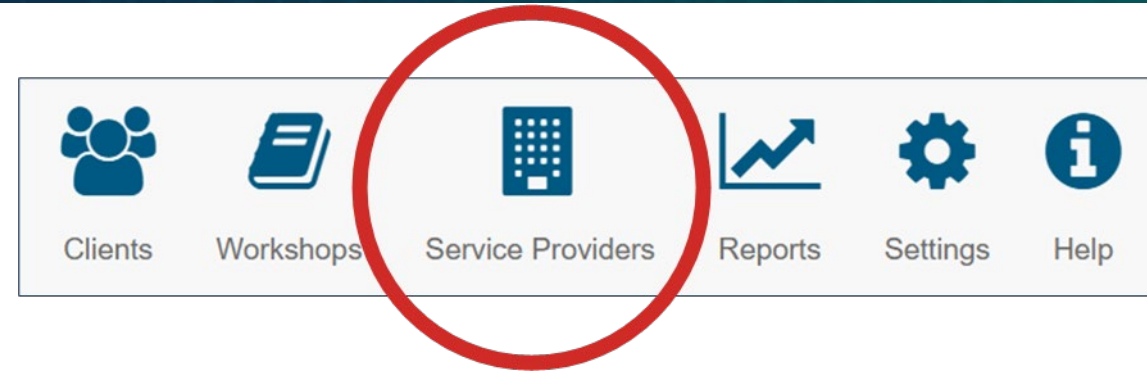
**Assign case managers and other nFORM users to locations where they will provide services**



# Service provider directory

Add and search for providers that refer potential applicants to your program and those that provide outside services

Providers appear in drop down menus for related functions in nFORM, such as client referral options and workshop providers





## Record whether service provider

- Is a partner agency
- Provides services outside grant
- Refers potential applicants to your program

## Select all that apply

Helps programs analyze connections between referral organizations and clients who enroll and participate at higher or lower rates

G5. Add/Edit Service Provider

\* Indicates required field(s)

\* Name

Website

**\* Provider Functions (Check all that apply)**

- Partner Agency: Has MOU/partnering agreement to provide grant services
- Service Provider: Provides services outside grant
- Referral Source: Refers potential applicants to grant

Physical Location

Street (Line 1)

Street (Line 2)

City

State  Zip

Mailing Address  Same as physical location

Street (Line 1)

Street (Line 2)

City

State  Zip

Key Personnel

Contact #1

\* First Name

\* Last Name


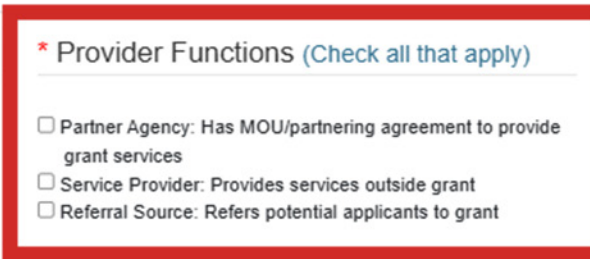
Phone

Ext.

Email

*Phone or email is required*

Check if Primary Contact

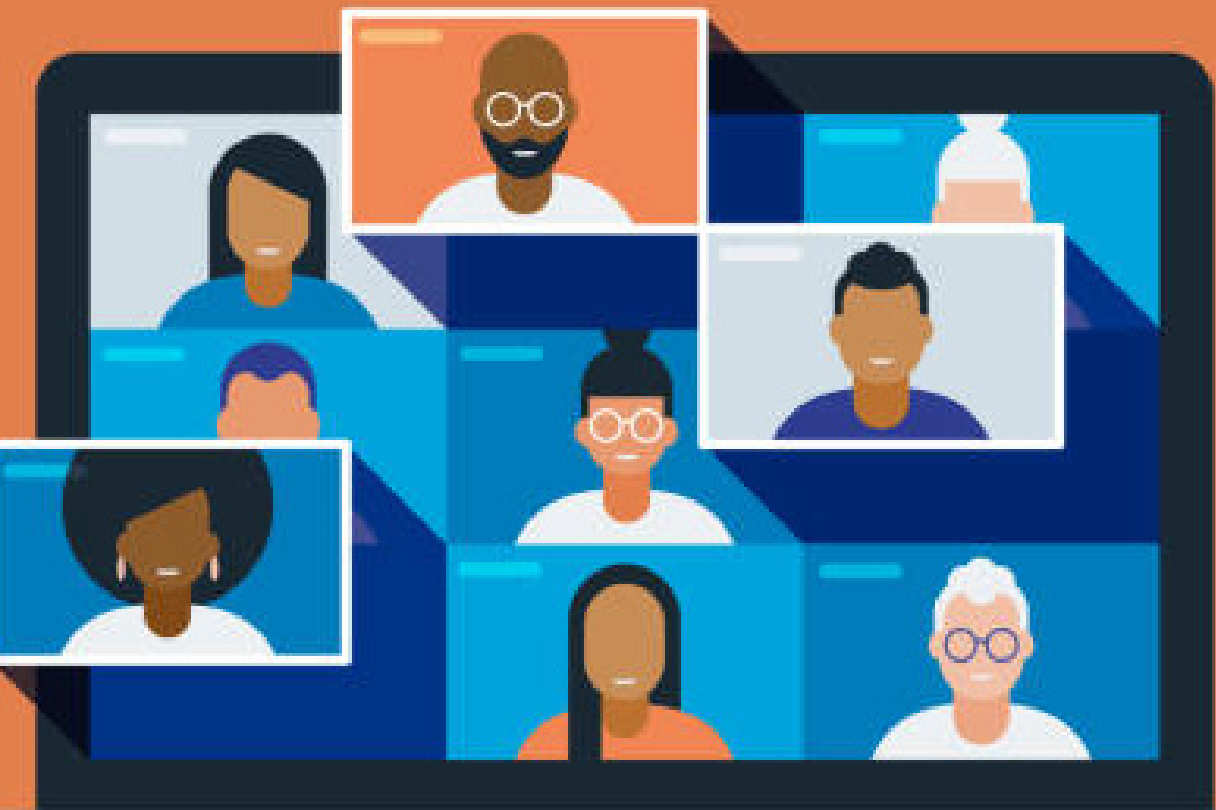




**Let's pause for questions about  
locations and service providers**



# | Setting up workshops



# Workshops are group-based services

## Primary workshops

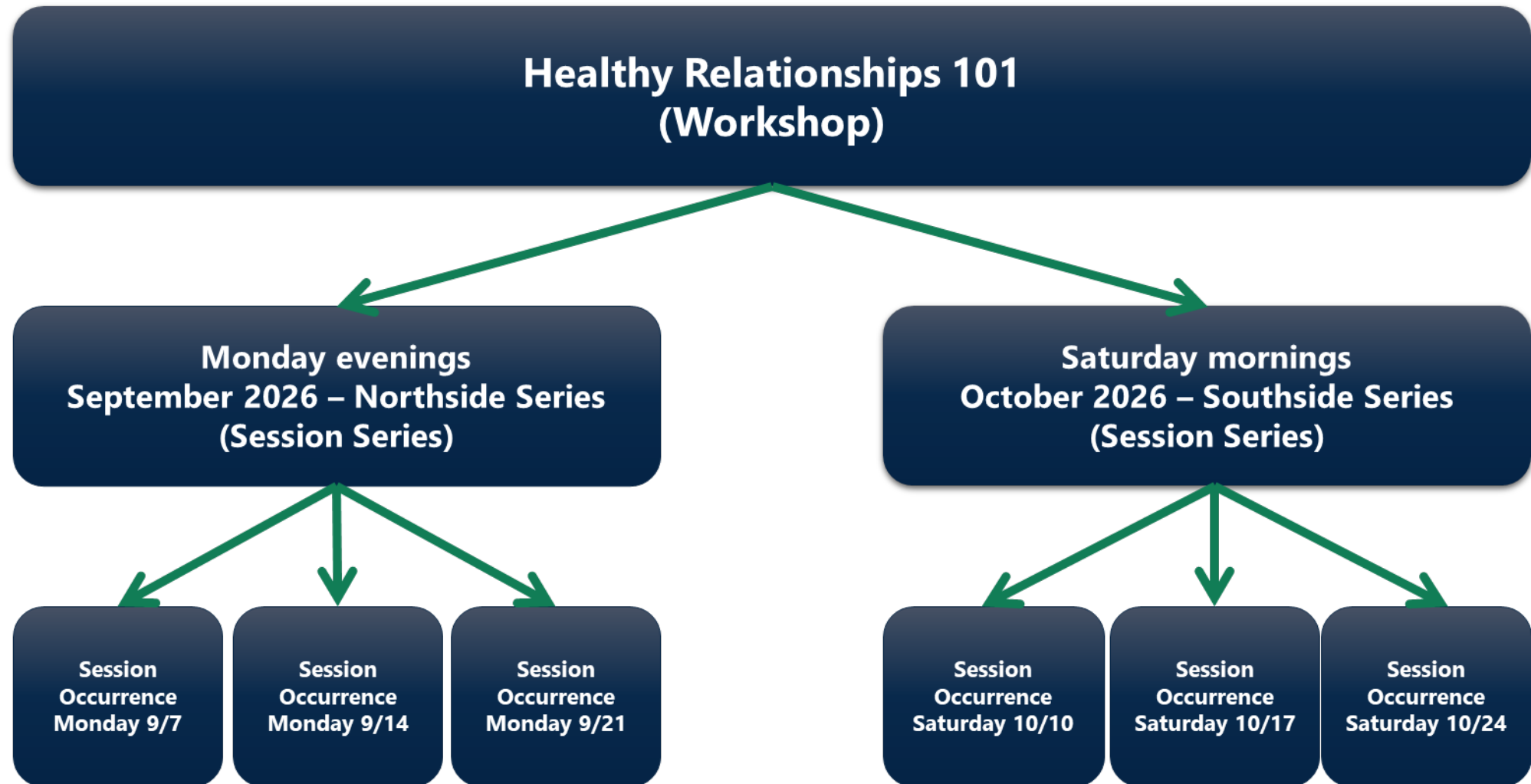
- Curriculum-based workshops that all clients are expected to complete

## Optional workshops

- Group-based services that the program offers but are not considered a “core” part of programming



# Workshop-series-session hierarchy





**nFORM**  
Information, Family Outcomes,  
Reporting, and Management

Clients **Workshops** Service Providers Reports Settings Help

Include any details not captured elsewhere on screen

Allows you to register clients in advance

If offering one primary workshop, total hours should align with primary workshop hours target

Learn about adding session series and recording workshop participation on Day 3 of training!

### W2. Add/Edit Workshop

\* Indicates required field(s)

Program: FORGE Fatherhood

\* Population: --Select population

\* Workshop Name: [Text Field]

Description: [Text Area]

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#### Workshop Details

\* Registration Required:  Yes  No  
*This selection cannot be changed once it is saved.*

\* Enrollment: --Select

\* Total Hours to be Offered: [Text Field]

\* Activities (Check all that apply):  
 Economic stability  
 Promote or sustain marriage  
 Responsible parenting

\* Type:  Primary  Optional  
*This selection cannot be changed once it is saved.*

\* Structure:  Single  Blended  Linked  Non-curricularized

\* Curriculum or other group service #1: --Select Hours: [Text Field]  
(Enter all that apply) Specify: [Text Field]

[Add]

[Save] [Cancel]



**Questions?**





# Wrap up

Review [nFORM user manual modules I, II, III, V, and VI.B](#) for more detailed information on data security and nFORM administrative functions

Check out the [nFORM User Accounts tip sheet](#) as well

All nFORM and CQI resources are posted on HMRF Grant Resource site at <https://hmrfgantresources.info/>

## Data security reminders

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

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



# Well nFORMed Training Series Roadmap: Looking ahead

