Let the Journey Begin: Recruiting and Enrolling Clients, and Administering Surveys

Well nFORMed: nFORM and CQI Training Series, Day 2 – June 3, 2026

Data capacity and CQI TTA team, Mathematica

Welcome! In the chat, please share your name, program, and population(s) your program will serve.

Today's presenters

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Data Capacity and CQI
TTA Team Lead

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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://hmrfgrantresources.info/

Well nFORMed Training Series Roadmap

Today's focus

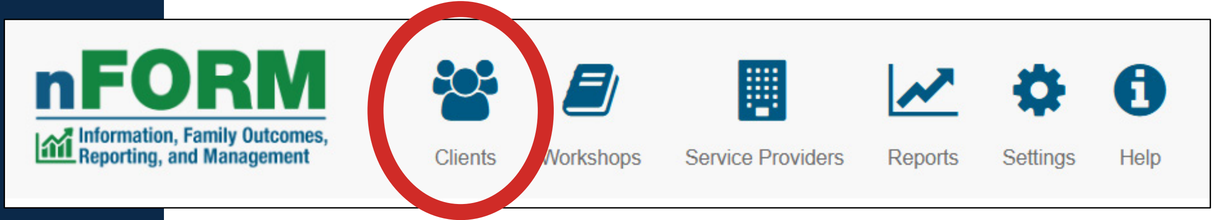
1. Getting started
2. Recruiting and enrolling clients, and administering surveys
3. Recording participation in workshops and other services
4. Fostering a learning culture and planning CQI cycles
5. Overview of nFORM data tools
6. Next steps and Q&A

Using nFORM data and conducting CQI

Your destination: better data, better decisions, better services

Agenda

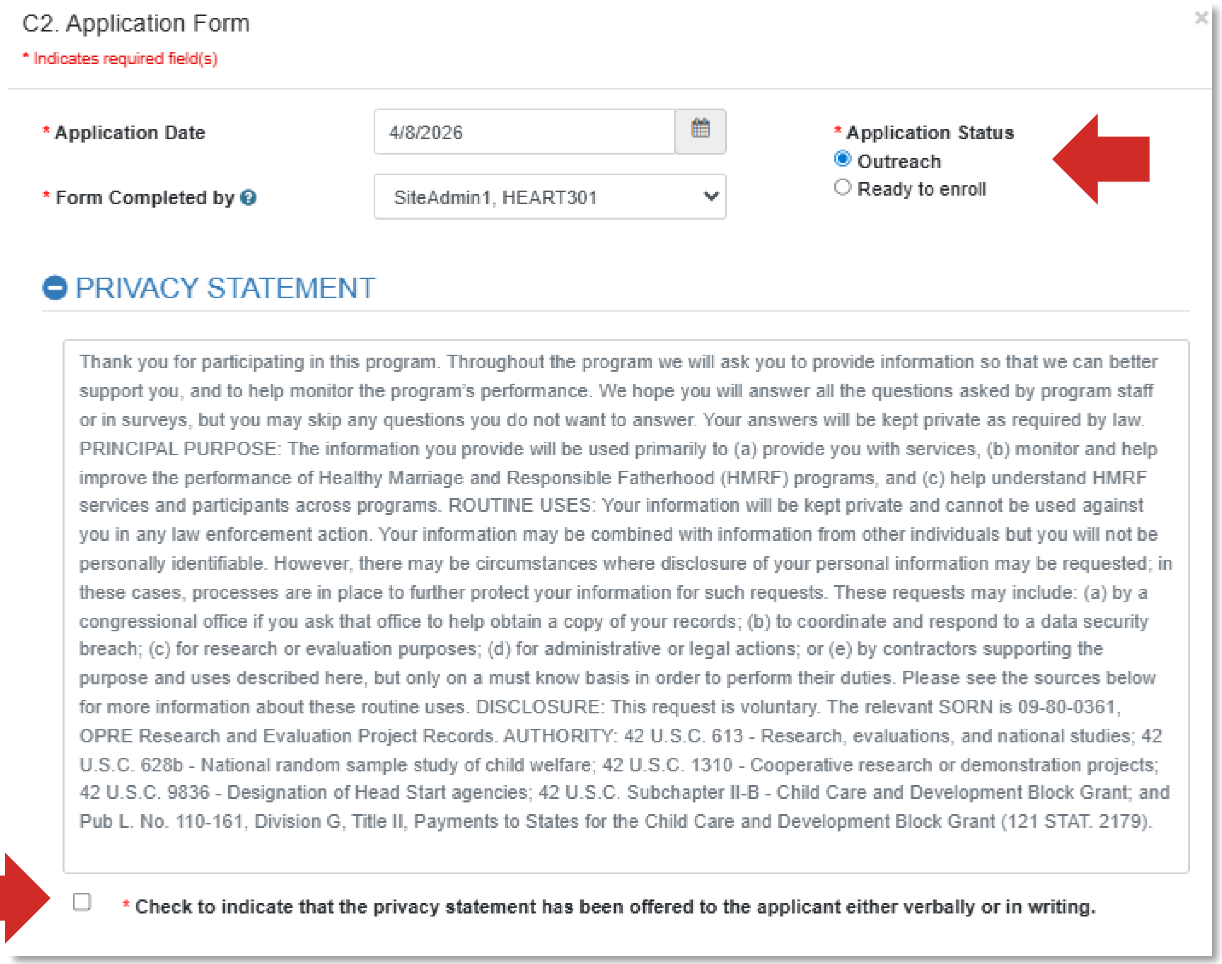
- Creating an nFORM application
- Overview of survey administration
- Steps to administer client surveys
- Survey administration in group settings, using paper surveys, and remotely
- Questions and answers



Creating an nFORM application

Grant staff can complete applications when recruiting or enrolling clients

- On Clients tab, click "+Add client" to display new Application Form.
- Select application status of "Outreach" for potential clients and "Ready to enroll" for clients who are ready to enroll.
- Provide Privacy Act Statement (PAS) to client either in writing or verbally. Check box to indicate that PAS was offered to applicant.



C2. Application Form

* Indicates required field(s)

* Application Date: 4/8/2026

* Form Completed by: SiteAdmin1, HEART301

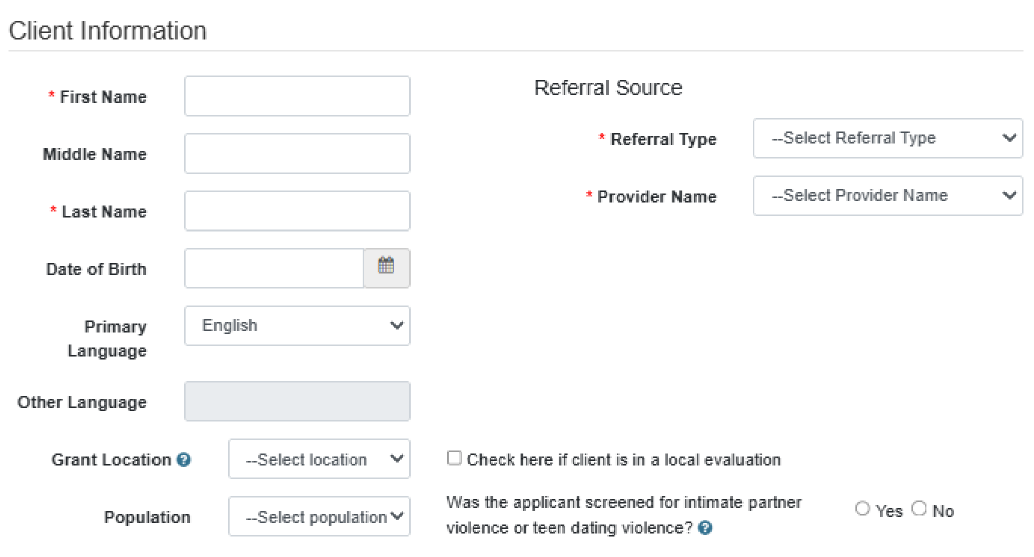
* Application Status
- Outreach
- Ready to enroll

PRIVACY STATEMENT

Thank you for participating in this program. Throughout the program we will ask you to provide information so that we can better support you, and to help monitor the program's performance. We hope you will answer all the questions asked by program staff or in surveys, but you may skip any questions you do not want to answer. Your answers will be kept private as required by law. PRINCIPAL PURPOSE: The information you provide will be used primarily to (a) provide you with services, (b) monitor and help improve the performance of Healthy Marriage and Responsible Fatherhood (HMRF) programs, and (c) help understand HMRF services and participants across programs. ROUTINE USES: Your information will be kept private and cannot be used against you in any law enforcement action. Your information may be combined with information from other individuals but you will not be personally identifiable. However, there may be circumstances where disclosure of your personal information may be requested; in these cases, processes are in place to further protect your information for such requests. These requests may include: (a) by a congressional office if you ask that office to help obtain a copy of your records; (b) to coordinate and respond to a data security breach; (c) for research or evaluation purposes; (d) for administrative or legal actions; or (e) by contractors supporting the purpose and uses described here, but only on a must know basis in order to perform their duties. Please see the sources below for more information about these routine uses. DISCLOSURE: This request is voluntary. The relevant SORN is 09-80-0361, OPRE Research and Evaluation Project Records. AUTHORITY: 42 U.S.C. 613 - Research, evaluations, and national studies; 42 U.S.C. 628b - National random sample study of child welfare; 42 U.S.C. 1310 - Cooperative research or demonstration projects; 42 U.S.C. 9836 - Designation of Head Start agencies; 42 U.S.C. Subchapter II-B - Child Care and Development Block Grant; and Pub L. No. 110-161, Division G, Title II, Payments to States for the Child Care and Development Block Grant (121 STAT. 2179).

* Check to indicate that the privacy statement has been offered to the applicant either verbally or in writing.

Complete application form



Client Information

* First Name

Middle Name

* Last Name

Date of Birth

Primary Language: English

Other Language

Grant Location: --Select location

Population: --Select population

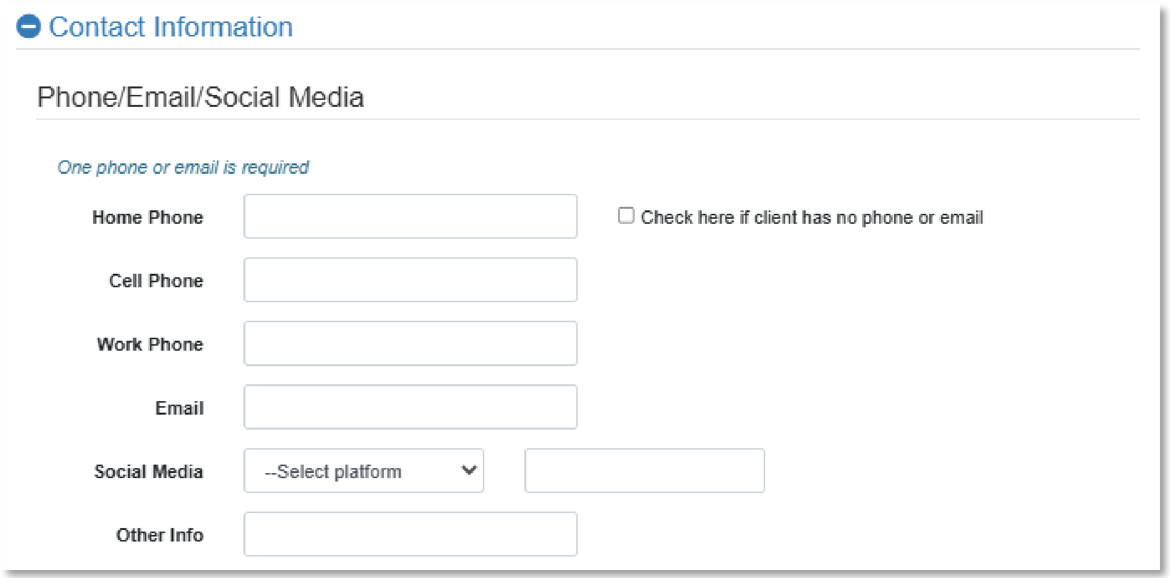
Referral Source

* Referral Type: --Select Referral Type

* Provider Name: --Select Provider Name

☐ Check here if client is in a local evaluation

Was the applicant screened for intimate partner violence or teen dating violence? ○ Yes ○ No



Contact Information

Phone/Email/Social Media

One phone or email is required

Home Phone

☐ Check here if client has no phone or email

Cell Phone

Work Phone

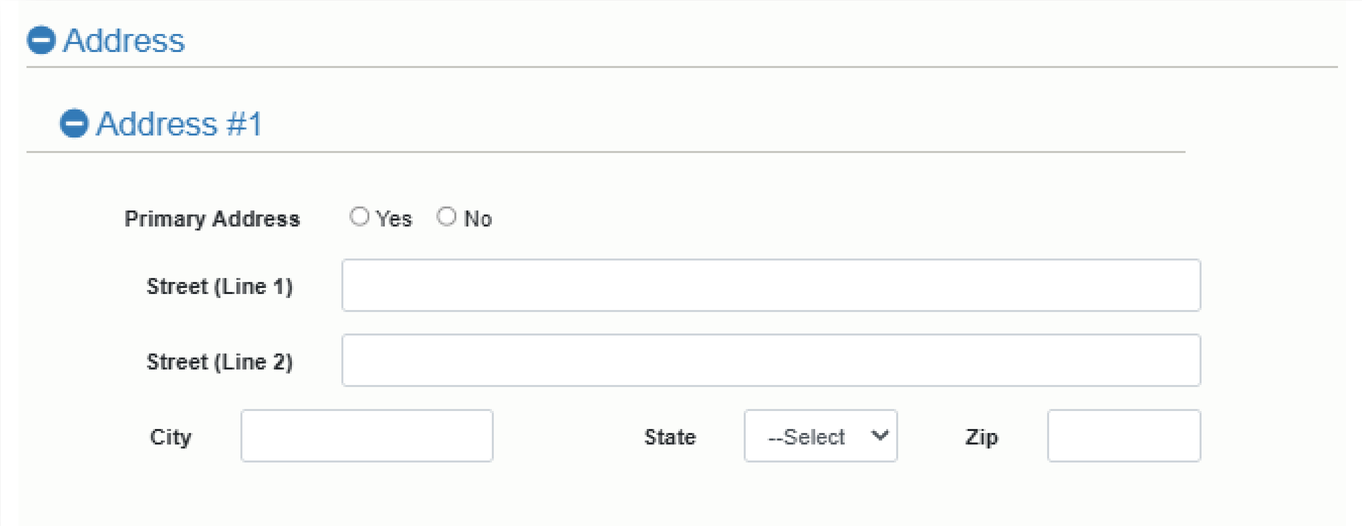
Email

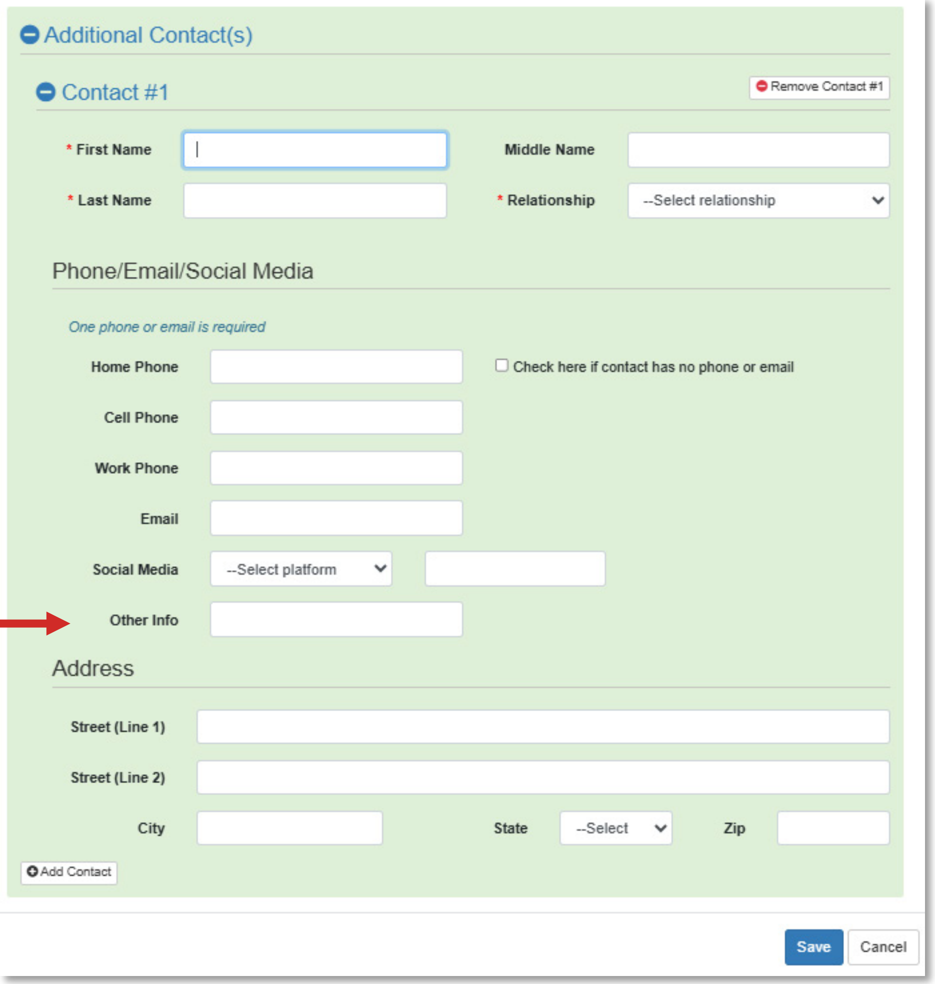
Social Media: --Select platform

Other Info

Required fields vary by Application Status –
less information is required for Outreach applicants

Complete application form (cont'd)



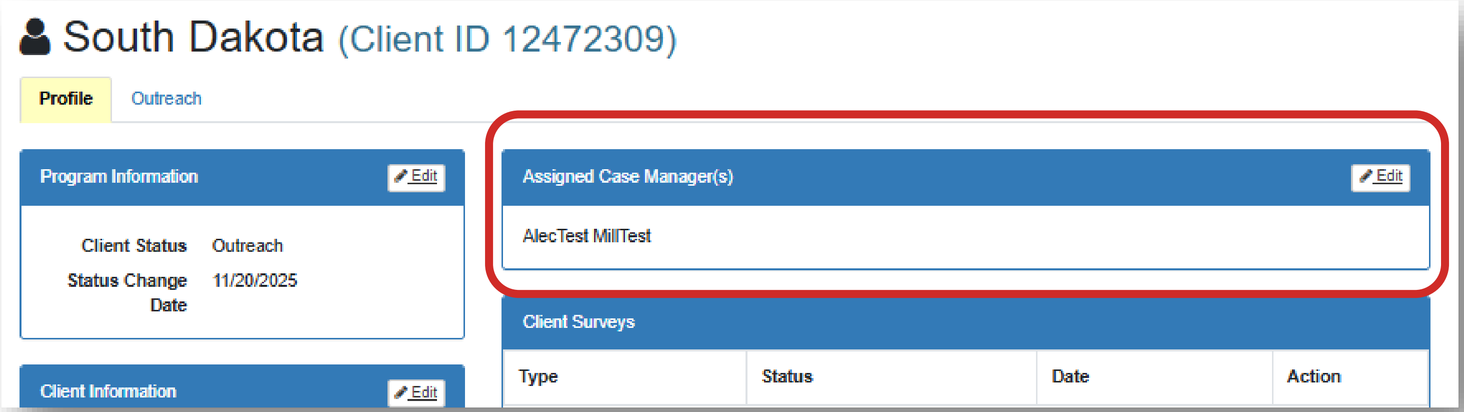


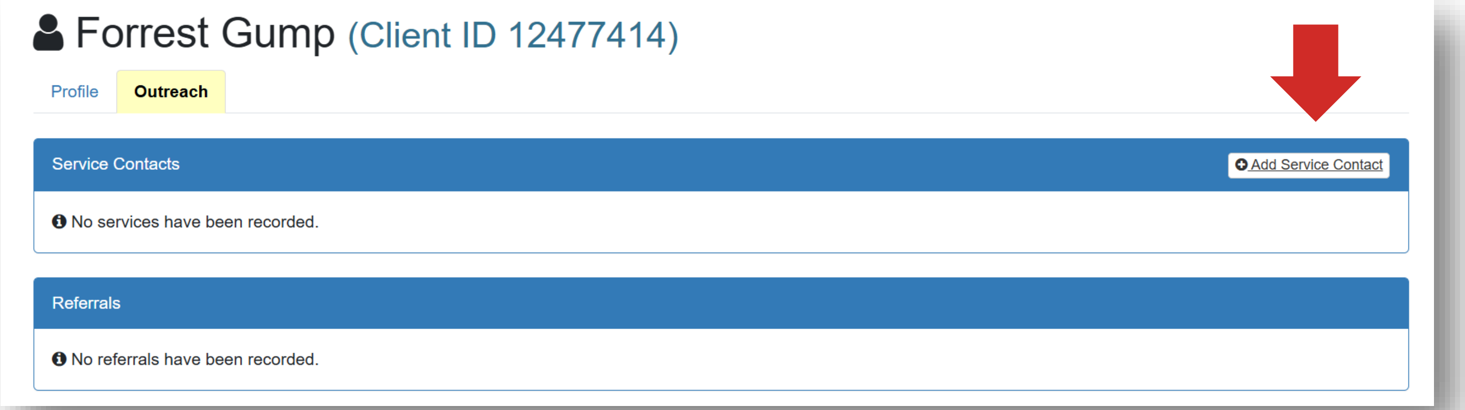
Record additional details about preferred methods for client follow up

Record individual services provided to clients prior to enrollment

Assign case managers and record all individual service contacts and referrals provided to clients prior to enrollment

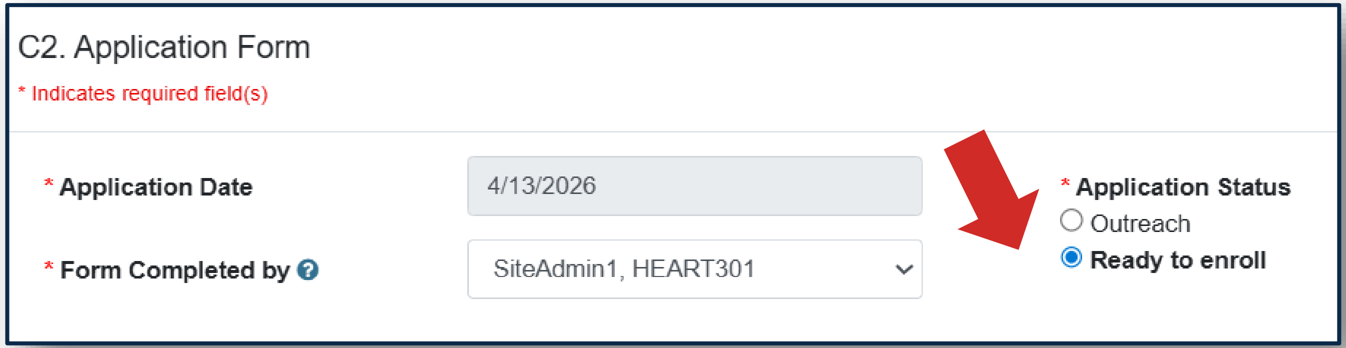
- ACF guidance is that clients must be enrolled to receive incentives and participate in workshops
- We'll cover how to record individual services on Day 3 of training!

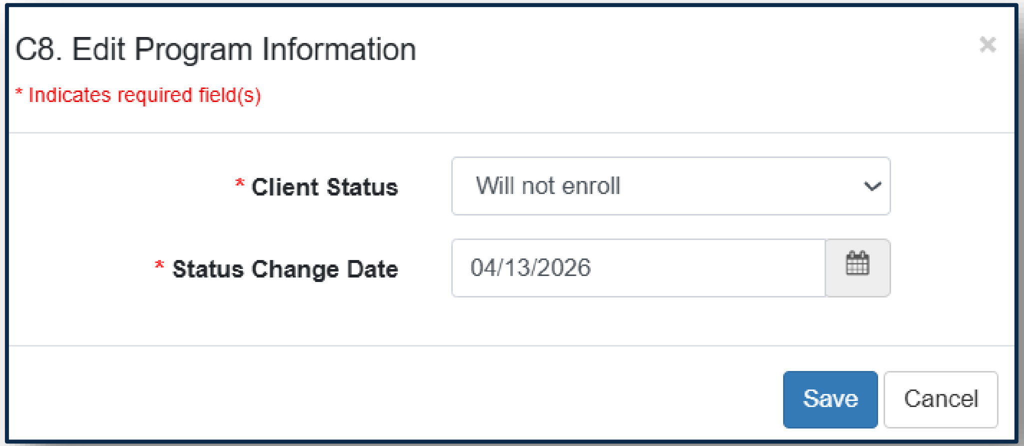




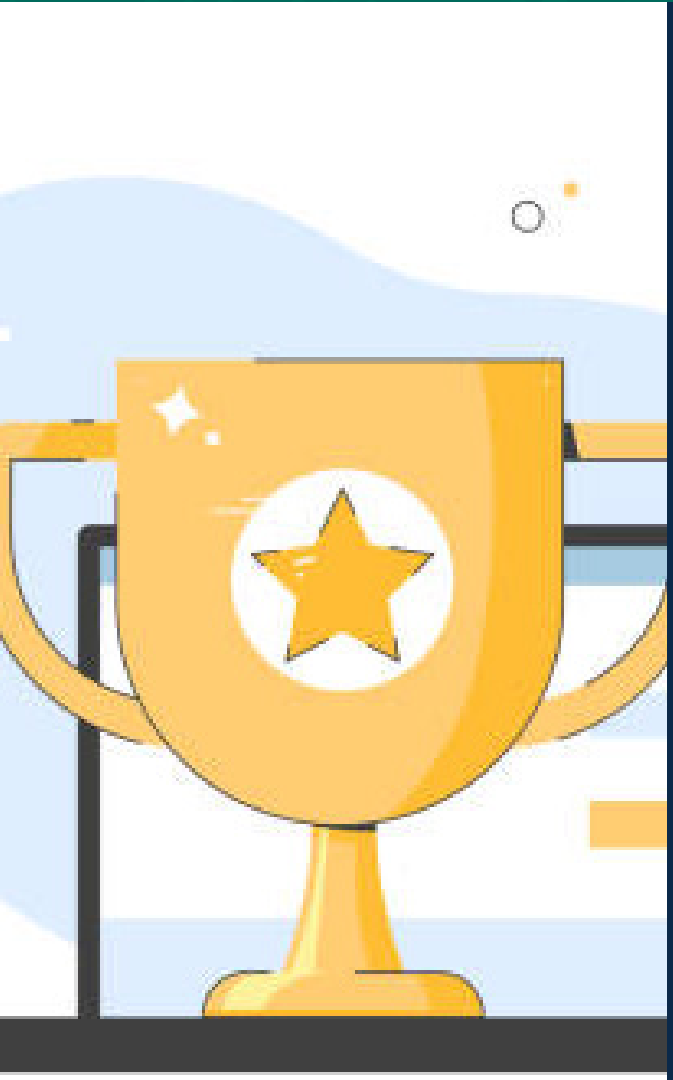
Transitioning clients from outreach to enrollment

- When outreach applicants are ready to enroll, update Application Form status from “Outreach” to “Ready to enroll”
- Provide PAS to client again
- Complete additional fields in application form and click Save
- nFORM will automatically update status to “Applicant pending enrollment”





If client decides not to enroll, update client status to “Will not enroll”



Client application is complete! Now what?

Client is *not* enrolled until they complete the Entrance survey

Once Entrance survey is complete, client status automatically updates from "Applicant pending enrollment" to "Active"

Let's discuss survey administration!

Overview of survey administration

Survey administration: What & when

Entrance Survey

- Administered after entire application form is completed
- Required for enrollment (client becomes "Active" in nFORM)

Exit Survey

- Administered at last workshop session or at least 14 days after Entrance Survey
- If workshop is shorter than 14 days, develop survey follow-up plan

Once approved by OMB, survey PDFs will be made available on resource site

Self-administered web-surveys streamline data collection

- Access entrance and exit surveys using same URL: https://nform.acf.hhs.gov/nFORM/Survey
- Surveys can be completed in English or Spanish, and on computer, laptop, tablet, or smart phone
- Clients self-administer surveys, which improves privacy and data quality
- Questions tailored to HM adults, HM youth, RF community fathers, or RF reentering fathers based on population on application form
- Automatic skip patterns direct clients to relevant questions, but clients can skip any questions they do not want to answer

Client survey administration process

Generate login information and open survey URL on device

Use survey script to introduce the survey and answer client questions

Give client login sheet with survey username and passcode

Client completes survey

Grant staff confirm that client submitted the survey

Survey administration tips

- Provide a **private**, **quiet space**, and **separate device for each client**; these must be separate from devices that staff use
- **Bookmark survey URL on all devices** that clients will use to respond to the surveys
- **Offer earbuds/headphones** for audio option (ACASI)
- Prepare and use a standard script that explains **survey logistics and confidentiality** and encourages clients to respond; clients can still enroll if they do not respond
- Review **nFORM User Manual Modules I, V, and VII.A** for detailed information on survey administration and keeping client IDs and passcodes secure

Survey passcodes protect client responses

- Generate individual passcodes from Client Profile, or bulk passcodes under Bulk Updates
- Passcodes valid for 96 hours
- Can be used up to 10 times

Generate Survey Passcode

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

To continue, please direct the client to log in at the following URL:
https://hmrf-nform3.mathematica-dev.org/Survey/.
At the log in, enter the client's id (**12474954**) and the following **passcode**:

6989230

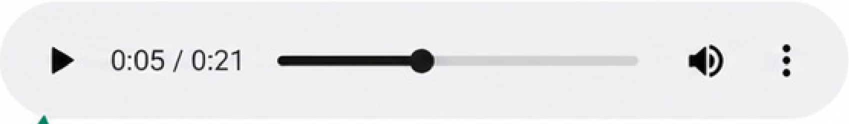
Note: This passcode will expire in 96 hours; it can be used up to 10 times before it expires.

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

Cancel

Audio computer-assisted self-interview (ACASI) technology

Example audio player clients will see in the survey:



Tap or click the play button or anywhere on the audio bar to hear the question.

- Clients have the option to listen to questions rather than reading them
- The audio is available in English and Spanish
- Offer earbuds/headphones to all clients and show how to use audio
- Clients must tap play to hear audio (does not start automatically)

Steps to administer client surveys

Survey scripts

Why survey scripts matter:

Build trust
Help clients understand the purpose and how their information is protected

Promote consistency
Ensure all staff deliver key messages the same way

Improve data quality
Encourage complete and accurate responses across participants

Refer to the [survey scripts tip sheet](#) on the resource site

10 tips to help teams develop survey scripts

Script you can adapt for your program to use with clients

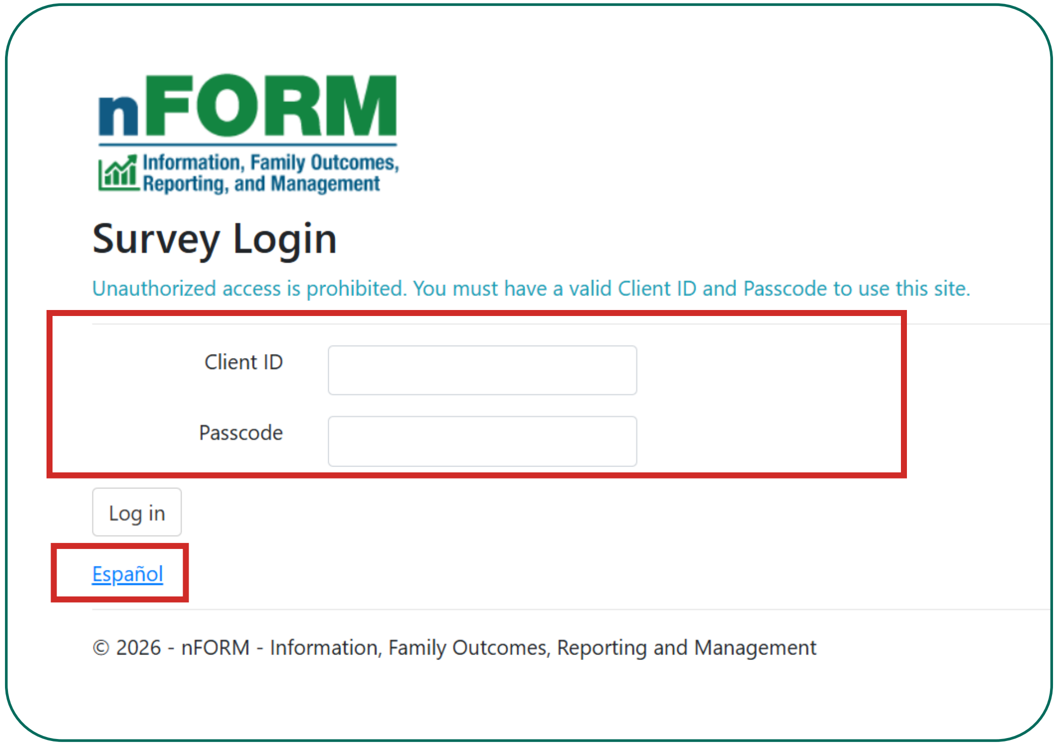
	Tips	Example Script
1	Thank clients in advance for completing the survey.	*Thank you for helping us by taking this survey! This survey is a chance for you to share your experiences so that we can identify services to help you and others like you.*
2	Introduce surveys as a chance for clients to share their experiences, so that the program can identify services to help them and others like them.	*The survey will take about 20 minutes or less. You may skip any questions in the survey that you do not feel comfortable answering, but we hope you will answer all the questions.*
3	Call the surveys "surveys." Never call them tests, exams, assessments, or evaluations.	*All information you provide will be kept confidential. {PROVIDE ANY IRB CONSENT LANGUAGE AS REQUIRED}*
4	Describe how all answers will be kept private, explain any consent information required by your Institutional Review Board (IRB), and provide the Privacy Act Statement.	*In addition, the Privacy Act establishes practices to help ensure confidentiality. Here is a copy of the Privacy Act. {PROVIDE THE PRIVACY ACT STATEMENT TO CLIENTS EITHER VERBALLY OR IN WRITING}*
5	Tell clients that they may skip any or all questions but encourage them to answer all the questions.	*You will complete the survey on this tablet. On each page of the survey, you may choose to listen to audio of the questions being read to you. Use the earbuds and tap the play button on each page to listen to the audio. {HAND THE TABLET WITH EARBUDS TO THE CLIENT} When you finish the survey, please make sure you select the "Yes, submit my survey" option on the last page.*
6	Show clients how to use the tablet, computer, or cell phone and how to listen to the questions with earbuds.	
7	Tailor scripts and the level of instructions to your target population.	
8	Remind clients to submit their survey on the final screen.	
9	Ask clients if they have any questions before they begin the survey.	*Thank you again for taking this survey! Do you have any questions before you begin?*
10	If you are administering surveys to clients in a group, plan a quiet activity to occupy clients as they finish their surveys.	*If you have any questions during the survey, please raise your hand and we will help you.*

Survey administration steps

1. **Open survey URL** on the device the client will use to complete the survey.

2. **Enter (or have the client enter) the client's ID and passcode** on the Survey Login page. The client will then confirm their name before starting the survey. (As a reminder, passcodes expire after 96 hours or 10 uses.)

3. For *Spanish-speaking clients*, **select Español** on Survey Login page before clicking "Log in".

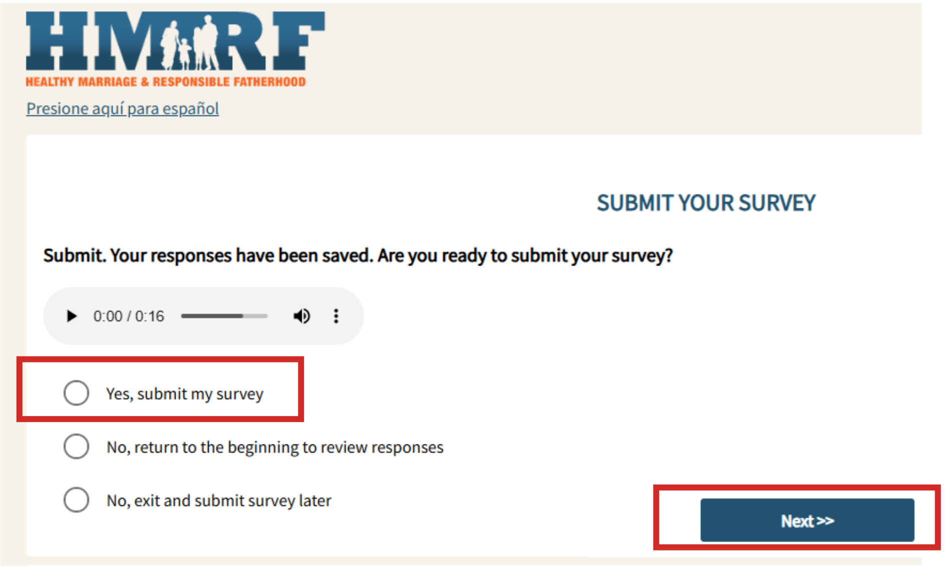


Survey administration steps (cont’d)

4. Clients may take as long as needed to complete the survey, though survey will automatically log out after 30 minutes of inactivity to keep data secure.

5. Staff should remain available to answer questions

6. Confirm client clicks **“Yes, submit my survey”** and **“Next”** when done



After the survey is submitted

1. **Verify survey status** shows “Complete” in nFORM. After client submits a survey, the status of the entrance survey in the Client Survey table on the Client Profile will change to Complete.

2. **Clean and charge devices after use** to ensure they are ready for the next client.

Client Surveys

Type	Status	Date	Action
Entrance Survey	Complete	03/31/2026	Review
Exit Survey	Incomplete	--	Action

Let's pause for questions

Survey administration in group settings, using paper surveys, and remotely

Tips for surveys in group settings

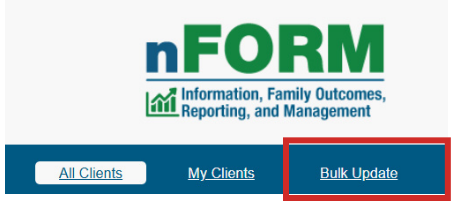
- Use nFORM's bulk passcode feature to prepare surveys for entire group
- Ensure clients are seated in a way that protects their privacy and maintains confidentiality of their IDs, passcodes, and responses
- Prepare and use a standard script to introduce the survey that explains survey logistics and what clients should do after they complete the survey
- Have an activity or refreshments for clients while waiting for everyone to finish their surveys

Generate bulk passcodes

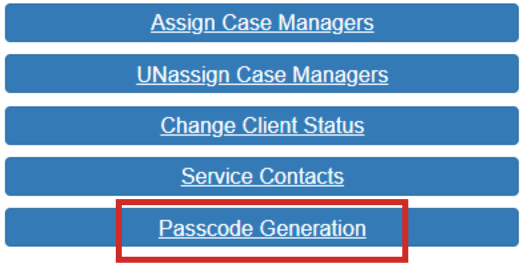
1. Go to nFORM menu, **select Clients**
2. Click **Bulk Update**
3. Select **Passcode Generation** and click **Next**

1 Click **Clients**

2 Click **Bulk Update**



3 **Passcode Generation**



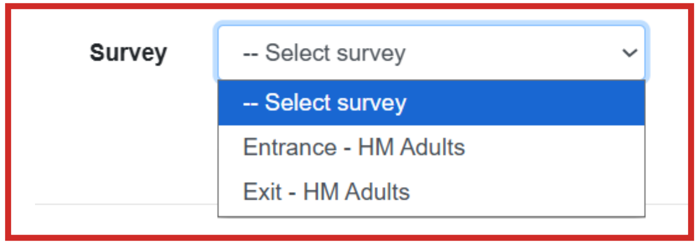
Generate bulk passcodes – selecting clients

4 Select **survey type** (entrance or exit) and click next

5 Use filters to **select clients** in the group and click next

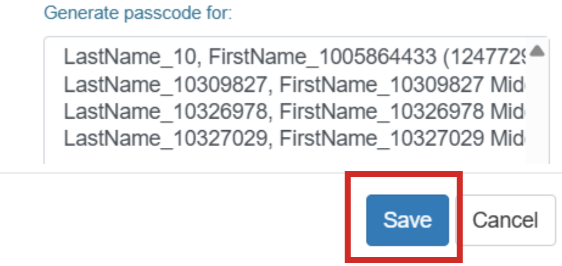
6 Confirm the list of clients and click **Save to download PDF** of login sheets for each client

4 Select **surveys**



5 Select clients

6 Click **Save**



Generate bulk passcodes – login sheets

nFORM Login Sheet: Entrance Survey - HM Adult

LastName_10786181, FirstName_10786181 M

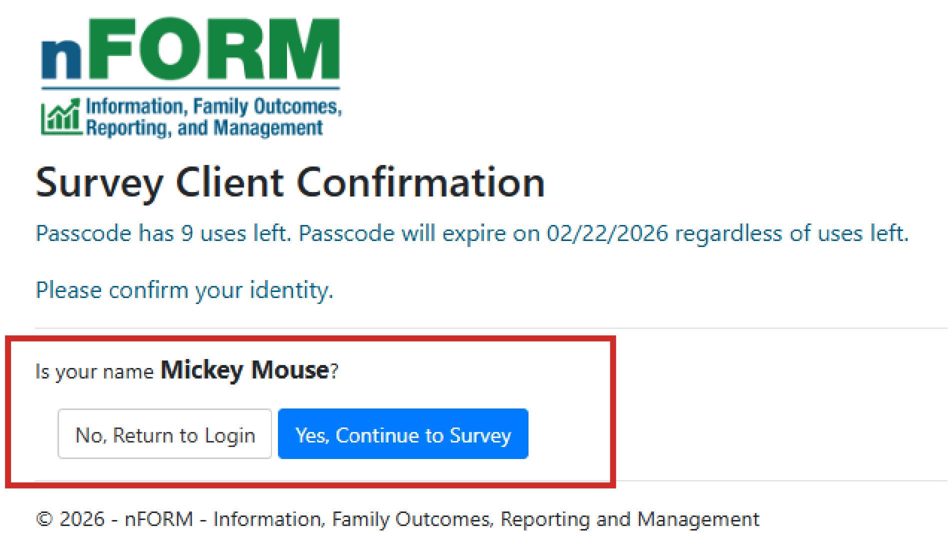
Location	SiteName_125
Passcode Generation Date	4/29/2026
Client ID	10786181
Passcode	1750806

Passcode expires four days after the passcode generation date.

PDF generates one sheet per client; save PDF locally and print paper handouts for group

Surveys in group settings: During survey

1. Distribute devices and the correct login sheet with ID/passcode to each client
2. Instruct clients to log in and confirm their identity appears correctly.
3. Remind clients to click “Yes, submit my survey” and “Next” when finished
4. Confirm survey submission in nFORM (verify completion, not responses)



nFORM

Information, Family Outcomes, Reporting, and Management

Survey Client Confirmation

Passcode has 9 uses left. Passcode will expire on 02/22/2026 regardless of uses left.

Please confirm your identity.

Is your name **Mickey Mouse**?

No, Return to Login | Yes, Continue to Survey

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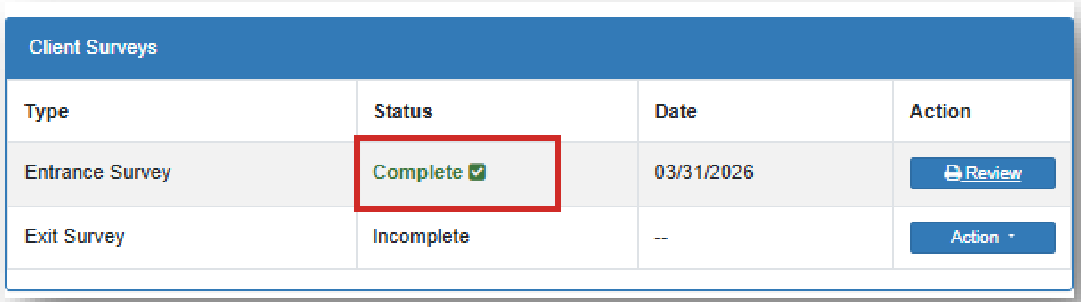
Clients are logged out after 30 minutes of inactivity

Surveys in group settings: After the survey

1. **Verify survey status** shows “Complete” in nFORM for every client in the group. If a survey does not show “Complete” follow-up to encourage clients to complete and submit

2. **Clean and charge devices after use** to ensure they are ready for the next group of clients

3. **Collect all login** sheets and shred them



Client Surveys

Type	Status	Date	Action
Entrance Survey	Complete	03/31/2026	Review
Exit Survey	Incomplete	--	Action

Tips for paper surveys

Programs with limited internet access or other restrictions may administer paper surveys **with prior approval from FPS** (approval not needed for rare cases like outages)

Access PDFs of **OMB approved surveys in English and Spanish** on the HMRF Grant Resource Site; use a professional service to translate surveys into other languages if needed

Ensure there are **sufficient paper copies** for individual or group survey administration

Prepare and use a **standard script to introduce the survey, including a description for following skip logic**

Administer paper surveys, collect when done, **enter responses into nFORM**, and **securely shred** completed surveys once data entry is complete

Steps for administering paper surveys

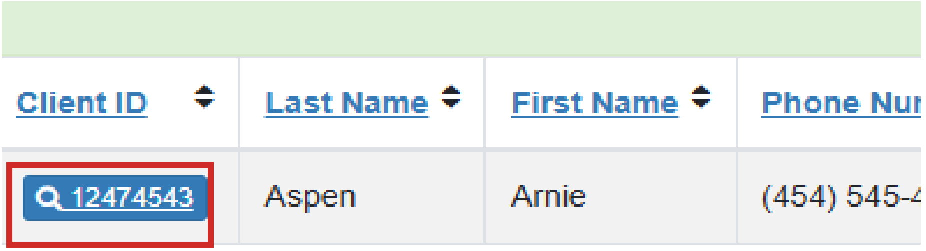
1. Look up your client who needs a paper copy under **“My Clients”.**

2. **Click on the Client ID** to open the Client Profile.

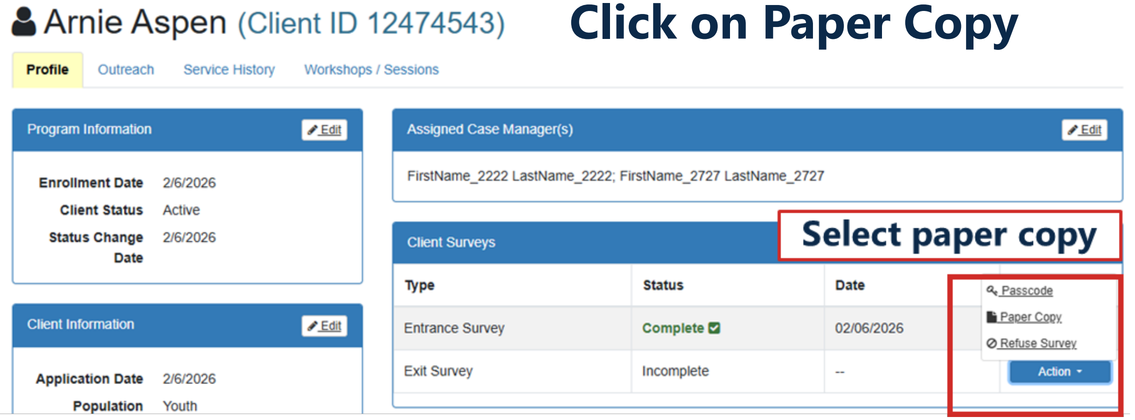
3. On the Client Profile-go to **Client Surveys**, click **Action** under survey type, and select **Paper Copy.**

1 Go to your client list

2 Click on Client ID



3 Click on Paper Copy

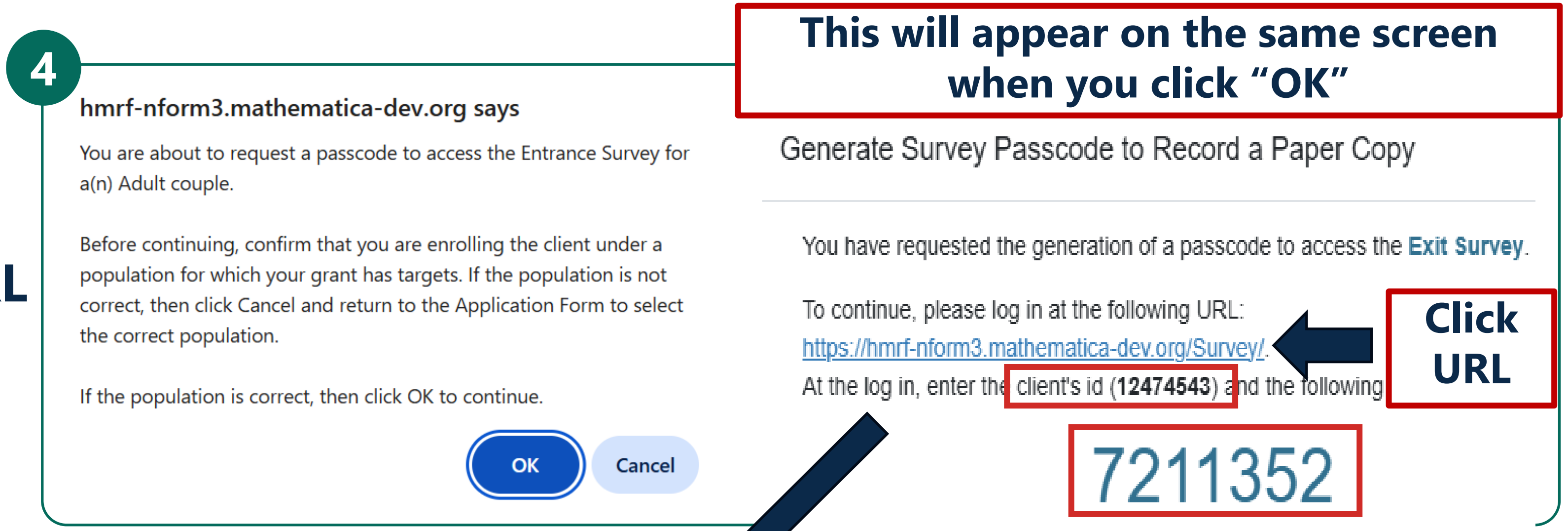


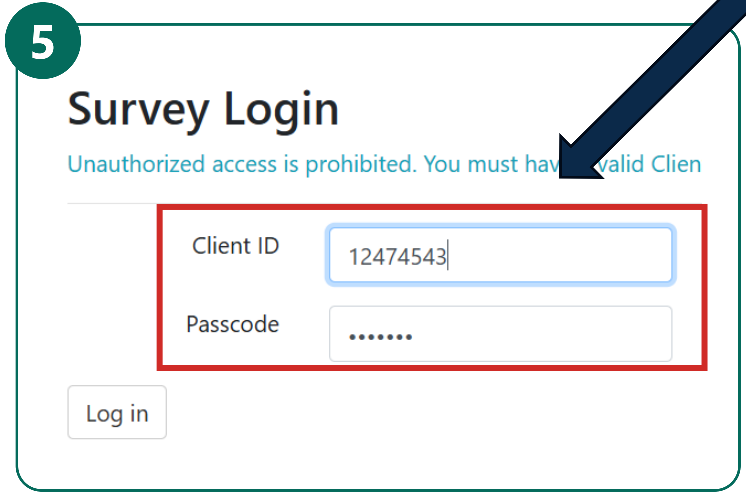
Steps for administering paper surveys – logging in

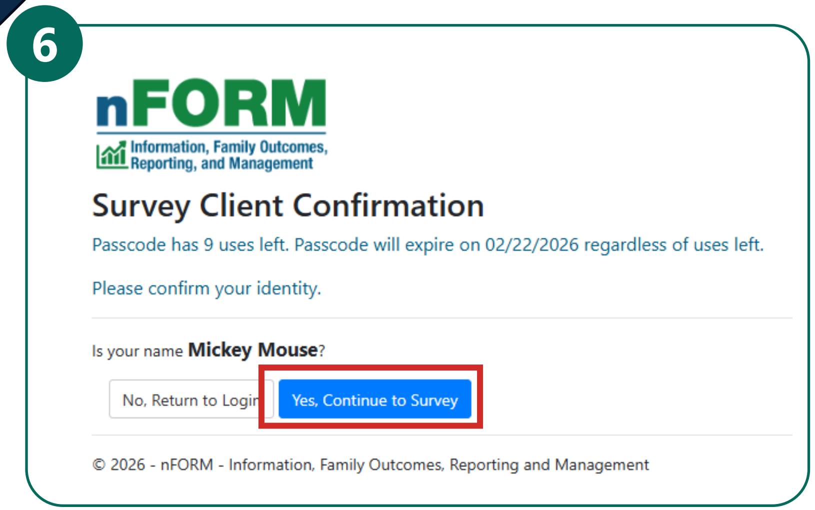
4. **Click OK** on the popup screen and a passcode will generate on that screen; click on the **URL** to open Survey Login screen.

5. Enter the Client ID and passcode on the Survey Login screen and click Log in

6. On the Survey Client Confirmation screen, confirm the client name matches the survey respondent.







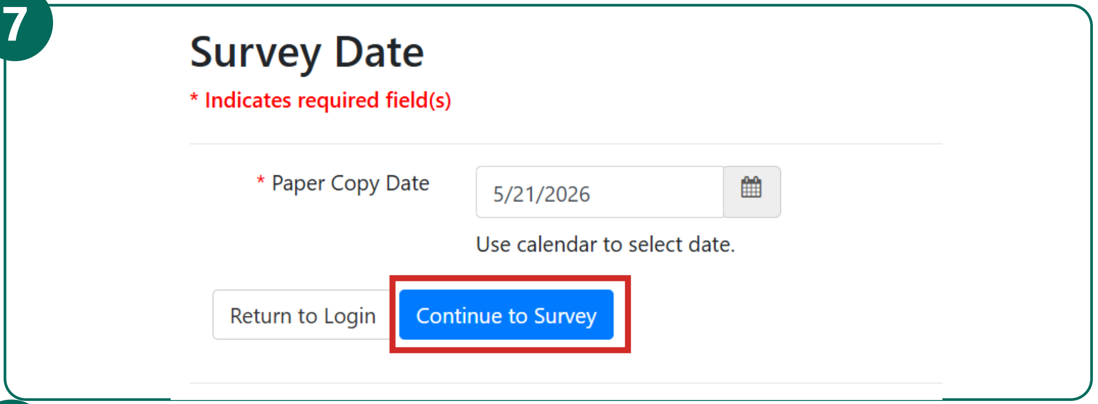
Steps for administering paper surveys – completing the survey

7. Enter the date the client completed the paper survey. **Click Continue to Survey** to open the survey.

8. Enter responses on the paper copy into nFORM for each survey question. Click **“Yes, submit my survey” and “Next”** when complete.

9. Confirm survey status is **“Complete”** in Client Surveys box on Client Profile

7



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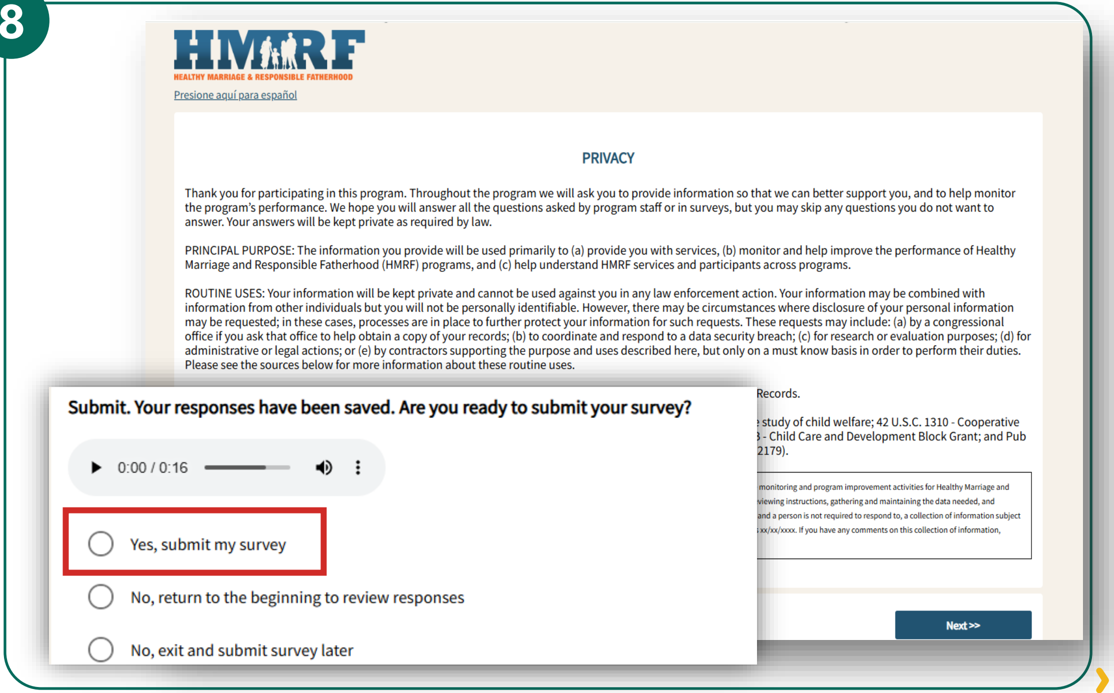

Protect PII when administering paper surveys

- Safeguard all paper surveys containing client information
- Store in secure, locked cabinets
- Do not leave paper surveys unattended at any time
- Transport surveys securely between locations
- Enter paper survey completion date in nFORM within 4 calendar days
- Shred paper copies after data are entered into nFORM

Tips for administering surveys remotely

Remote surveys allow you to collect data when services are delivered virtually, when clients have accessibility needs, or when in-person administration is not possible for other reasons

Phone or video administration:

- Follow the same survey process as in-person administration
- Use web survey during calls when possible
- Staff ask questions and enter responses **directly in nFORM**

Key considerations:

- Follow all virtual survey administration best practices
- **Protect client PII** at all times

Pause:

- Be sure to review the virtual survey administration tip sheet on the HMRF Grant Resource site

Completing surveys by phone or video

Before the survey

- Introduce the survey using a script
- Confirm client is in a safe and private space
- Ensure you have access to nFORM during the call

During the survey

- Use web survey during call
- Follow the survey order exactly as written
- Ask questions and enter responses directly into nFORM
- Confirm responses for accuracy as you go

Set up for success

- Use reliable internet for video calls
- Maintain a professional, distraction-free setting
- Remind client that if they get disconnected staff will call client back to continue the survey

When sending survey login information by email or text, remember to...

Send securely: Email a password-protected ZIP with survey link, client ID, and passcode; send password in separate email or text

Protect privacy: Do not include PII such as client names in emails/texts unless inside the secure, password-protected file

Ensure safe completion: Ask clients to complete the survey with internet access and full privacy

Plan for expiration: Passcodes expire after 96 hours or 10 uses, regenerate and resend as needed

Questions?

Wrap up

Review nFORM user manual modules I, V, and VII.A for more information on data security, client applications, and survey administration

Check out Tips for Survey Scripts and Virtual Survey Administration tip sheets

All nFORM and CQI resources are posted on HMRF Grant Resource site at https://hmrfgrantresources.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**

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