



ADMINISTRATION FOR
CHILDREN & FAMILIES



Every Service Counts: Capturing Workshops and Individual Services in nFORM

Well nFORMed: nFORM and CQI Training Series, Day 3 – June 4, 2026

Data capacity and CQI TTA team, Mathematica

Welcome! In the chat, please share your name, program, and which HMRF curricula your program offers.





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

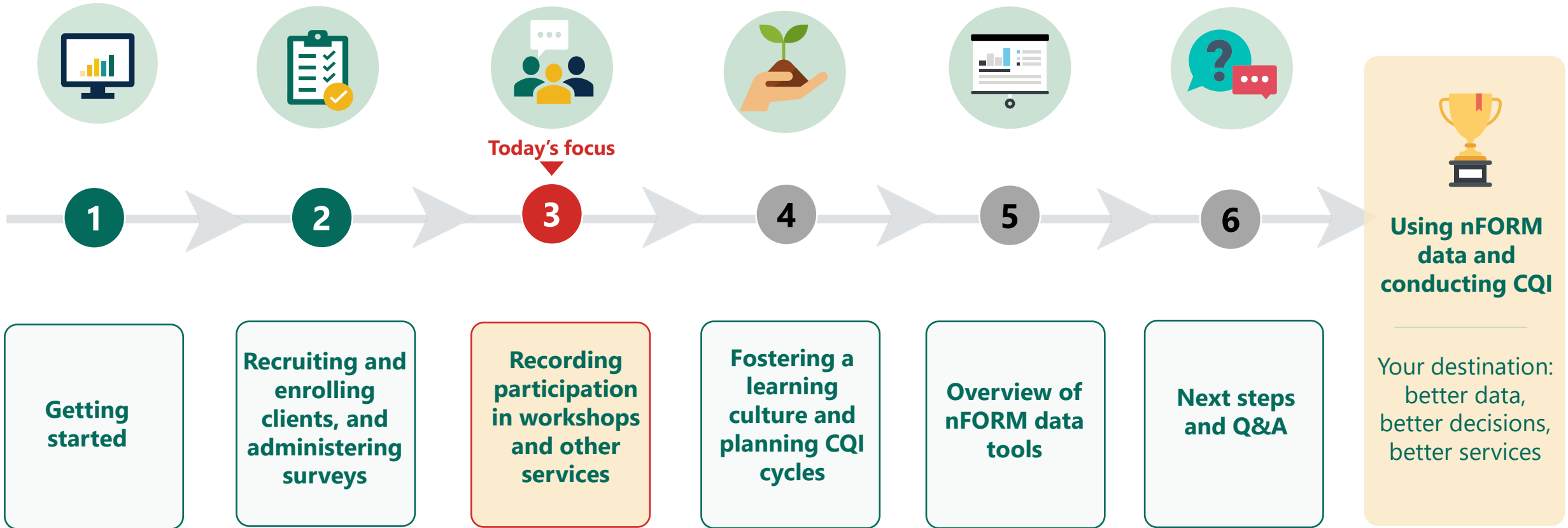
Recording and slides from today’s training will be made available on the HMRF Grant Resource site at

<https://hmrfgantresources.info/>





Well nFORMed Training Series Roadmap





Agenda

- Managing client profiles
- Setting up workshop series and recording attendance
- Capturing individual service contacts (ISCs)
- Tracking referrals to outside services
- Documenting incentives and program supports
- Questions and answers





Tell us about you...

What's your role in service delivery? Select all that apply.

- I am a data manager

- I am a case manager

- I facilitate workshops

- I collect and enter data and track services



| Managing client profiles



Client Profile Overview



Outreach tab
View outreach activities



Service History tab
See detailed services, referrals and incentives after enrollment



Workshop/Sessions tab
View registrations, attendance, and session details

Charlie Brown (Client ID 12477812)

Profile Outreach Service History Workshops / Sessions

Information on Client Screen

- View and confirm key client information
- Check survey status and follow up on incomplete surveys
- Review services, referrals, and incentives provided
- View workshop and session participation
- Edit client information and case manager assignments (use the "edit" buttons for each section)

Program Information
Client status and enrollment date

Client Information
Demographics, contact details, screening information

Service Summary
View services, referrals and incentives at a glance

Workshop Summary
Track attendance and progress towards target hour goal

Program Information [Edit](#)

Enrollment Date 4/17/2026
Client Status Active
Status Change Date 4/17/2026

Client Information [Edit](#)

Application Date 4/17/2026
Population Community father
Date of Birth 10/26/1989
Primary Language English

Language →

Application Note: Applicant has been screened for intimate partner violence or teen dating violence.

Contact Information

(555) 555-5555
cbrown1@gmail.com

Address

Address 1 - Primary →

22 Main Street
Apt 3
Anywhere NJ 11111

Additional Contact(s) +

Form Completed By Hannah McInerney

Assigned Case Manager(s) [Edit](#)

No case managers have been assigned.

Client Surveys

Type	Status	Date	Action
Entrance Survey	Complete <input checked="" type="checkbox"/>	04/17/2026	Review
Exit Survey	Incomplete	--	Action

Service Summary

Type	Total # Provided	Most Recent
Service Contacts	1	4/17/2026
Referrals Follow up needed	1	4/17/2026
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)

20
Target Hours

0
Total Hours Received



Update client status using bulk update feature

How it works

1



Open the tool

Go to Clients > Bulk Update > Change Client Status

2



Find Clients

Filter by location, status, population, case manager, workshop and series, and/or enrollment date range

3



Select new client status and click Save

The screenshot shows the 'C16. Bulk Update Client Status' tool interface. At the top, there are radio buttons for 'Potential applicants' and 'Enrolled clients'. Below this is the 'Client Selection' section, which includes a 'Filter Eligible Clients' box with dropdown menus for Grant Location, Client Status, Population, Case Manager, Workshop, and Session Series. There are also date pickers for 'Enrollment Date Range' with 'From' and 'To' fields. A 'Search' button and a 'Clear Criteria' button are located below the filters. Below the filters are two scrollable lists: 'Eligible Clients' and 'Clients to be updated'. Between these lists are 'Select Client(s)' and 'Remove Client(s)' buttons. At the bottom, there is a 'Client Status Selection' section with a dropdown menu for '* Client Status' and 'Save' and 'Cancel' buttons.

When to use it

Use the bulk update feature to update client status codes for a group of potential applicants or enrolled clients. For example:



Several potential applicants decide not to enroll → update group's status from "Outreach" to "Will not enroll"



A cohort of enrolled clients has completed their workshop, individual services and taken the exit survey → update the cohort's status from "Active" to "Completed".



Assign and unassign case managers using the bulk update feature

How it works

1



Open the tool

Go to Clients > Bulk Update > Assign Case Managers

2



Find Clients

Indicate if update is for potential or enrolled clients and find clients

3



Select case manager(s)

Move one or more case managers to "Case Managers to be assigned" box and save to apply this case manager(s) to **all** selected clients

Choose clients using filters

C15. Assign Case Managers

Apply change to: Potential applicants Enrolled clients

Client Selection

Filter Eligible Clients

Grant Location Case Manager

Client Status

Population

Enrollment Date Range: From To

Eligible Clients:

- Brown, Charlie (12477812)
- LN1, TP1 (12477113)
- LN2, TP2 (12477126)

Clients to be updated:

Client ID appears in parentheses after name.

Select case manager(s)

Case Manager Selection

Case Manager(s) available for assignment:

- CaseManager, FORGE307 (Locked)
- CaseManager, FORGE307 (Locked)
- CaseManager, FORGE307 (Locked)
- McInerney, Hannah
- SiteAdmin, FORGE307
- SiteAdmin, FORGE307 (Inactive)
- SiteAdmin, FORGE307 (Inactive)

Case Manager(s) to be assigned:



Let's pause for questions



Setting up workshop series and recording attendance



Clients



Workshops



Service Providers



Reports



Settings



Help

Include any details not captured elsewhere on screen

Allows you to register clients in advance for workshop session series

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

Reminder: Day 1 training includes information about nFORM setup, including creating workshops

W2. Add/Edit Workshop

* Indicates required field(s)

Program: FORGE Fatherhood

* Population: --Select population

* Workshop Name: [Text Field]

Description: [Text Field]

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]



Tips for workshop session series



Set up session series and modify session occurrence details (if applicable) in advance

Ensure clients receive the dates, times, and locations (or virtual connection information) for all sessions in a series

Send clients reminders for each session and encourage them to attend

Record attendance in nFORM immediately after each session and securely shred paper rosters



Include a descriptive series name that identifies curriculum, language (if applicable), and timing

Set up session series

Grant recipients set up session series for each new cohort or group of clients

Create multiple series if offering the same workshop at different times and in different formats

New Select how session series will be offered (in-person, virtual or hybrid) and series setting (community, school, or correctional/transitional)

W5. Add/Edit Session Series ✕

* Indicates required field(s)

*** Workshop Name**

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**

*** Max # of Clients** No Limit

*** Delivery Mode** In-person Virtual Hybrid

Location

*** Primary Setting** Community School Correctional/Transitional

*** Location Name**

*** Street** *** City**

*** State** *** Zip** **Phone**

Facilitators: 1 (# of Facilitators)


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



Set up session series (cont'd)

Date & Time

* # of Sessions

* Session Start Date 

* Session Start Time --:-- AM

* Session End Time --:-- AM

Session Duration hour(s) and minutes

Recur Every Sun Mon Tue Wed Thur Fri Sat
(Select all that apply)

Enter number of sessions, start date, session start and end times, and when sessions will occur

- Session duration will auto-fill based on times

Total series hours offered must align with total workshop hours offered



Generate roster of registered clients

Sessions

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 11/10/2026 5:00 PM	10/6/2026 Virtual Series for Cohort 1 - Tues Evening	Hannah McInerney	Upcoming	Cancel	Generate	n/a
Tue 11/3/2026 5:00 PM	10/6/2026 Virtual Series for Cohort 1 - Tues Evening	Hannah McInerney	Upcoming	Cancel	Generate	n/a

Select the "Generate" button to create a PDF list of registered clients

Print your PDF roster to easily record in-person attendance!



24/7 Dad
Session Series: 10/6/2026 Virtual Series for Cohort 1 - Tues Evening
Session Name:
Session Date: 10/6/2026 Session Start Time: 5:00 PM
Delivery Mode: Virtual Primary Setting: Community

Please complete the following session information:

Location Name: _____

Session Start Time: _____

Session End Time: _____

Facilitator(s) for this session: _____

Attendance Roster

Registered Attendee(s):

LN1, TP1	SIGN NAME
_____	_____
LN2, TP2	_____
_____	_____

Additional Attendee(s):

PRINT NAME	SIGN NAME
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



Record attendance for a session by selecting the "Record" button in the Attendance column

Document participation within 24 hours of a session

Filter sessions by Session Status ("Pending Attendance") to identify sessions that have not yet had attendance recorded

Drill down further by Workshop and Session Series as needed

nFORM
Information, Family Outcomes, Reporting, and Management

Clients Workshops Service Providers Reports Settings Help

Hello, [user2009@masked.com!](#) [Log off](#)

Sessions

Sessions

⚠ 292 sessions are pending attendance.

Filter Criteria

Workshop: --Select workshop

Session Series: --Select session series

Session Status: Pending Attendance

Items per page 10

Occurrence	Session Series	Facilitators	Status	Info	Roster	Attendance
Wed 5/13/2026 2:00 PM	Community Dads Only	Sally Field	Pending Attendance	Cancel	Generate	Record
Wed 5/6/2026 2:00 PM	Community Dads Only	Sally Field	Pending Attendance	Cancel	Generate	Record
Wed 4/29/2026 2:00 PM	Community Dads Only	Sally Field	Pending Attendance	Cancel	Generate	Record



Registered vs. drop-in attendance

Filter on universe of enrolled clients to narrow down list of available drop-ins

Attendance

Check here if no clients attended this session

Advance Registration

Clients registered for this session:

- Cheese, Chuckie (10021260)
- Dummy, Crash (10000537)
- Griswold, Clark (10000032)
- Parker, Peter J (10000016)
- Smith, Jane (10009237)
- Smith, Will (10021257)

[Add Client\(s\)](#)

[Remove Client\(s\)](#)

[Add Client\(s\)](#)

[Remove Client\(s\)](#)

Clients who attended this session: 0

Clients who DID NOT attend this session: 0

Click here if no clients attended

Record whether each client who registered in advance either attended or did not attend

Filter Available Clients

Grant Location:

Client ID:

Last Name:

First Name:

Enrollment Date Range: Start Date End Date

Case Manager:

Client Status:

Population:

Drop-Ins

Available Clients:

- Bucket, Charlie (12474572)
- Cadbury1, Marcus1 (12475063)
- Capone, Al (12474637)
- FORGE_301, Obadiah (12475979)
- FORGE_301, Samuel (12475982)
- FORGE301, Clide (12475364)
- FORGE301, Troy (12475995)
- FORGE-301, Javier (12475377)
- Jacobs1, Smiley1 (12475788)
- Musker1, Frank1 (12475306)
- Smithers1, Farley1 (12475759)
- Sprigs1, Mickey1 (12475296)
- Tester, SurvReview T (12476020)

[Client\(s\) Attended](#)

[Remove Client\(s\)](#)

Clients who attended this session: 1

- Anders1, Wallace1 (12475555)

Client ID appears in parentheses after name.



Options for recording makeup attendance



Update Workshop/Sessions tab in registered client's profile

- Mark "Y" for makeup attendance during service contact
- Add makeup date and notes about how makeup was conducted

Add client as a "drop-in" to a session they attended as a makeup

- If client made up missed workshop session in a corresponding series, record them as a drop-in

Capture attendance for client who enrolled after a workshop cohort-began

- If client enrolled late and can't make up missed sessions in other ways, create identical series that starts the day after the client was enrolled in nFORM



Let's pause again for questions



| Capturing individual service contacts (ISCs)



Before we continue...

Does or will your program offer any of the following to clients?
Select all that apply.

- Individual service contacts
- Referrals
- Incentives and program supports
- None of these



Individual service contacts (ISCs)

Grant staff will record in nFORM ISCs provided to clients prior to and after enrollment

Each ISC includes date, case manager, contact method, length of contact, whether there was direct client contact, and the issues/needs discussed

- HEART grants serving couples must also note whether the ISC was provided to one partner or the couple together
- All grant types can record whether anyone else was included in the contact





Types of ISCs

Substantive

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

Reminder-only

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

Informational

- Include provision of information to clients
- Includes all ISCs that do not meet the substantive or reminder-only ISC criteria



Recording ISCs

For outreach clients, record ISCs on the Outreach tab of a client's profile

For enrolled clients, record ISCs on the Service History tab of a client's profile

Staff record all issues and needs discussed during the ISC

Service contact information is used to distinguish types of ISCs

Martha HEART_18 (Client ID 12475539)
Manuel HEART_18 (Client ID 12475542)

Martha's Profile Manuel 's Profile Outreach **Service History** Workshops / Sessions

Service Contacts Add Service Contact

Service Date	Data Entered By	Service contact included	# Referrals	# Incentives and Program Supports	Contact Method	Most Recent Notes	Add Referral(s)
4/9/2026	FirstName_2695 LastName_2695	Martha HEART_18	0	0	In community		+ Add Referral
3/4/2026	FirstName_2695 LastName_2695	Couple	1	0	Other Church		+ Add Referral

C7. Add/Edit Service Contact

* Indicates required field(s)

Service Contact Information

* Service Date: 4/17/2026

* Case Manager: LastName_2695, FirstName_2695

* 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 Martha HEART_18 only Manuel HEART_18 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



ISC issues/needs

Record if ISC included a reminder or was “reminder-only” contact

If contact covered issues/needs beyond reminders, check all that were discussed

Enter more details in service notes

- Can only be viewed in client’s profile

Review the service contact for accuracy before saving

Client Issues and Needs Discussed

* Client Issues and Needs Discussed (Check all that apply)

Some of these services are not allowable with Healthy Marriage and Responsible Fatherhood funds and must be referred out.

<p>Assessment</p> <ul style="list-style-type: none"><input type="checkbox"/> Comprehensive Assessment<input type="checkbox"/> Employment/Job Readiness<input type="checkbox"/> Other Targeted Assessment	<p><input type="checkbox"/> Legal Assistance Referral</p>
<p>Child Support/Custody/Visitation</p> <ul style="list-style-type: none"><input type="checkbox"/> Establish/modify child support order<input type="checkbox"/> Establish/modify child visitation order<input type="checkbox"/> Establish/modify child custody order<input type="checkbox"/> Establish/modify parenting plan<input type="checkbox"/> Child support arrearages assistance<input type="checkbox"/> Establish paternity<input type="checkbox"/> Couple mediation	<p>Health/Mental Health Support</p> <ul style="list-style-type: none"><input type="checkbox"/> Medical/Dental/Wellness<input type="checkbox"/> Mental Health Referral<input type="checkbox"/> Substance Abuse Referral<input type="checkbox"/> Health Insurance
<p><input type="checkbox"/> Child Welfare Services Involvement</p>	<p><input type="checkbox"/> Parenting</p>
<p><input type="checkbox"/> Domestic Violence/Intimate Partner Violence</p>	<p>Social services/Emergency needs</p> <ul style="list-style-type: none"><input type="checkbox"/> Housing/Rent Assistance<input type="checkbox"/> Childcare Assistance<input type="checkbox"/> Clothing (not job related)<input type="checkbox"/> Public assistance/welfare<input type="checkbox"/> Food Assistance<input type="checkbox"/> Obtain driver’s license/state ID/birth certificate/other identifying documents<input type="checkbox"/> Other social services/emergency needs (specify)
<p><input type="checkbox"/> Financial Counseling</p>	<p><input type="checkbox"/> Healthy Marriage and Relationship Education Services</p>
<p>Education</p> <ul style="list-style-type: none"><input type="checkbox"/> English for Speakers of Other Languages (ESOL)<input type="checkbox"/> General Educational Development (GED)<input type="checkbox"/> Licensure/Certification (specify)<input type="checkbox"/> Other Education (specify)	<p><input type="checkbox"/> Other Service (specify)</p>
<p><input type="checkbox"/> Family Therapy/Counseling Referral</p>	<p><input type="checkbox"/> Meeting with Facilitator</p>
<p>Job/Career Advancement</p> <ul style="list-style-type: none"><input type="checkbox"/> Career planning<input type="checkbox"/> Employment resources<input type="checkbox"/> Job search assistance<input type="checkbox"/> Resume development	<p><input type="checkbox"/> Reminder contact (call, email, text)</p>
	<p><input type="checkbox"/> Youth services (specify)</p>



Bulk entry for service contacts

Use the bulk entry function to record a service contact provided to a group of clients

Record service contacts in bulk for select issues/needs; all others must be recorded in client profiles

C18. Bulk Entry - Service Contacts

* Indicates required field(s)

Enter Service Contact Information *Information entered will be saved to the profile for each client selected below*

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

Client Issues and Needs Discussed

* Client Issues and Needs Discussed (Check all that apply)

- Comprehensive Assessment
- Employment/Job Readiness
- Other Targeted Assessment
- Reminder contact (call, email, text)

Note



Use filters to identify the group of clients who received bulk service contact

Review list of eligible clients based on filters applied

Select only the clients who received the service contact

Apply change to: Potential applicants Enrolled clients

Client Selection

Filter Eligible Clients

Grant Location Case Manager

Client Status Workshop

Population Session Series

Application Date Range: From To 4/17/2028

Eligible Clients:

Add Service Contact for:



Review ISCs in a client's profile

Review and update ISCs provided during outreach on the Outreach tab and those provided after enrollment on the Service History tab

Glance at most recent case notes for each ISC

Remember data security requirements regarding screen visibility, as sensitive information may be displayed here

Elmer Fudd (Client ID 12476994)

Profile **Outreach** **Service History** Workshops / Sessions

Service Date	Data Entered By	# Referrals	# Incentives and Program Supports	Contact Method	Most Recent Notes	Add Referral(s)
Q 5/13/2026	FirstName_2009 LastName_2009	0	0	In office		+ Add Referral
Q 5/4/2026	FirstName_2009 LastName_2009	1	0	Phone call	Called client to check in about their interest in ...	+ Add Referral

2 Record(s)

Service Date	Data Entered By	Referred To	Referral Type(s)	Client Follow Up Needed
Q 5/4/2026	FirstName_2009 LastName_2009	AA&BB	Financial Counseling	N

1 Record(s)

Date Provided	Data Entered By	When Provided	Category	Type	Amount
Q 5/1/2026	FirstName_2009 LastName_2009	Workshop	Incentives: Survey Completion	Gift card	20

1 Record(s)



Review total number of individual services provided on Service Summary table on Client Profile

Includes service contacts and referrals provided both during outreach and after enrollment

Service Summary		
Type	Total # Provided	Most Recent
Service Contacts	2	5/11/2026
Referrals ⚠ Follow up needed	1	5/11/2026
Incentives/Program Supports	0	--



| Tracking referrals to outside services



Record service provider that client was referred to, how referral was provided, whether referral was also communicated to service provider, type(s) of referral, and whether referral was provided to couple (if applicable for HEART clients)

Referral type options match issues/needs on service contact menu

Add referral notes as needed

As with ISC notes, referral notes are not included in any nFORM data tools

Service Contacts

Service Date	Data Entered By	# Referrals	# Incentives and Program Supports	Contact Method	Most Recent Notes
5/13/2026	FirstName_2009 LastName_2009	0	0	In office	
5/4/2026	FirstName_2009 LastName_2009	1	0	Phone call	Called client to check in about their interest in ...

2 Record(s)



Add referral information

C12. Add/Edit Referral

* Indicates required field(s)

Service Contact Information

Service Date: 3/4/2026 Case Manager: FirstName_2695 LastName_2695
Contact Method: Other Length of Contact: 30 - 59 min
Did service contact result in direct client contact? Yes
Service contact included: Couple
Additional Participants: Other
Client Issues and Needs Discussed: Other social services/emergency needs (specify)
Most Recent Note: [Text Area]

Referral Information

Type of Service: --Select Type of Service
* Referred To: --Select service provider
* Referral For: Martha HEART_18 only Manuel HEART_18 only Couple
* How was referral provided to client? In Writing Verbally
* Was referral also communicated directly to service provider? Yes No

HEART grants serving couples record whether referral was provided to 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
- Domestic Violence/Intimate Partner Violence
- Financial Counseling
- Education**
 - English for Speakers of Other Languages (ESOL)
 - General Educational Development (GED)
 - Licensure/Certification (specify) [Text Area]
 - Other Education (specify) [Text Area]
- Family Therapy/Counseling Referral
- Job/Career Advancement**
 - Career planning
 - Employment resources
 - Job search assistance
 - Resume development
- Legal Assistance Referral
- Health/Mental Health Support**
 - Medical/Dental/Wellness
 - Mental Health Referral
 - Substance Abuse Referral
 - Health Insurance
- Parenting
- Social services/Emergency needs**
 - Housing/Rent Assistance
 - Childcare Assistance
 - Clothing (not job related)
 - Public assistance/welfare
 - Food Assistance
 - Obtain driver's license/state ID/birth certificate/other identifying documents
 - Other social services/emergency needs (specify) [Text Area]
- Healthy Marriage and Relationship Education Services
- Other Referral (specify) [Text Area]
- Youth services (specify) [Text Area]

Referral Notes

+ Add Note

Save Cancel



Record whether client followed up on a referral

Service Date	Data Entered By	Referred To	Referral Type(s)	Client Follow Up Needed
5/13/2026	FirstName_2009 LastName_2009	Agency_07228	Parenting	Y
5/4/2026	FirstName_2009 LastName_2009	AA&BB	Financial Counseling	

C12. Add/Edit Referral

* Indicates required field(s)

Service Contact Information

Service Date: 5/13/2026 Case Manager: FirstName_2009 LastName_2009
Contact Method: In office Length of Contact: 30 - 59 min
Did service contact result in direct client contact? Yes
Additional Participants: Client's partner
Client Issues and Needs Discussed: Employment/Job Readiness, Financial Counseling, Employment resources
Most Recent Note: [Text Area]

Referral Information

Did the client follow-through on the referral below? Yes No Unknown

Type of Service: --Select Type of Service
* Referred To: Agency_07228

During ISCs, ask clients whether they pursued referrals to outside services that were provided during previous service contacts



| Documenting incentives and program supports



Record incentives and program supports provided to enrolled clients

Grant recipients document incentive or program support type, when it was provided, and amount

Incentive and program support plans must be approved by your Family Assistance Program Specialist (FPS)

Total incentives cannot exceed ACF's maximum of \$350 per client



Incentives

- Enrollment
- Participation/client milestone
- Survey completion



Program Supports

- Transportation
- Childcare
- Other
- Employment related
 - Work supports
 - Training



Recording incentives and program supports (contd.)

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

* Incentive/Program Support For: Martha HEART_18 only Manuel HEART_18 only Couple

All incentives must be approved by your OFA FPS.

* Category: --Select Category
* Type: --Select Type
* Amount: \$ _____ .00

Save Cancel

Incentives can be provided at different points during client participation

HEART grants serving Adult Couples – note whether the incentive was provided to an individual partner or for both partners in a couple



| Questions?





Wrap up

Review [nFORM user manual modules VI.D and VII.B](#) for more detailed information on recording workshop attendance, ISCs, referrals to outside services, and incentives and program supports

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



Well nFORMed Training Series Roadmap

