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

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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/

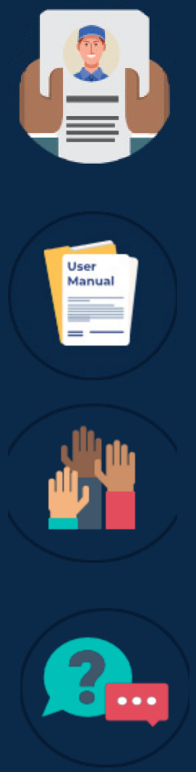
Well nFORMed Training Series Roadmap

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

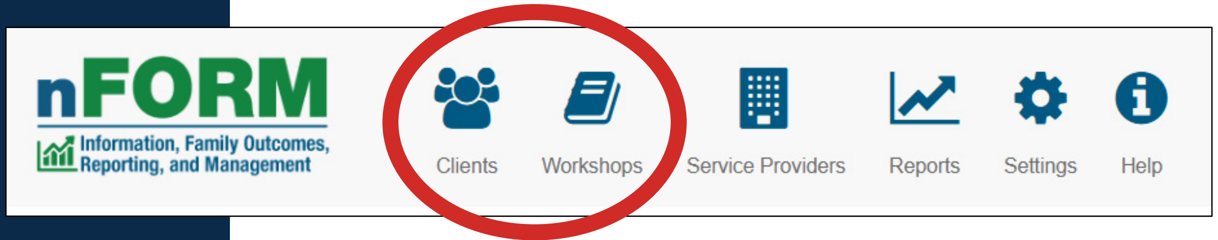
Using nFORM data and conducting CQI

Your destination: better data, better decisions, better services



Agenda

- 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

Information on Client Screen

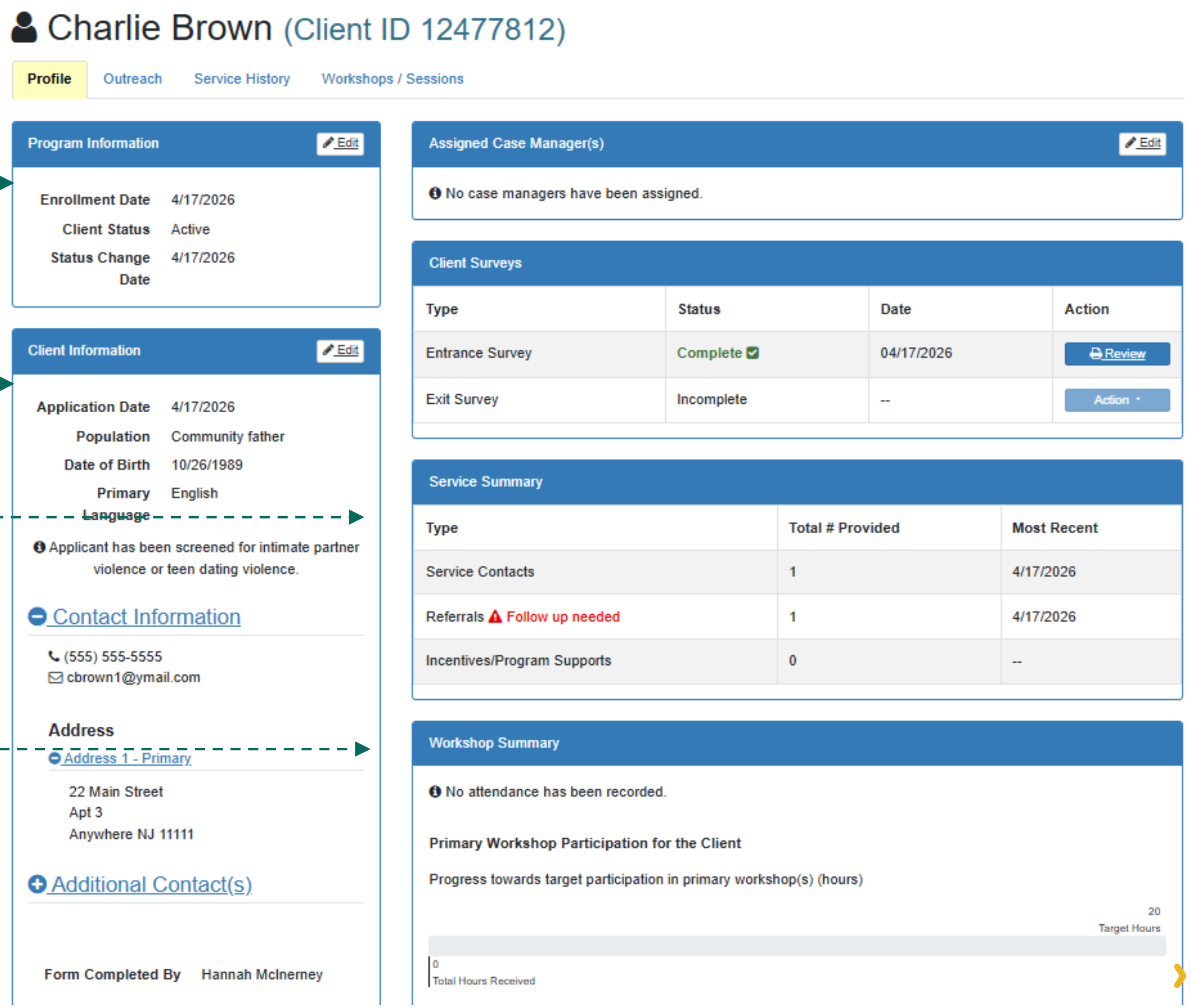
- View and confirm key client information
- Check survey status and follow up on incomplete surveys
- Review services, referrals, and incentives provided
- View workshop and session participation
- Edit client information and case manager assignments (use the “edit” buttons for each section)

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



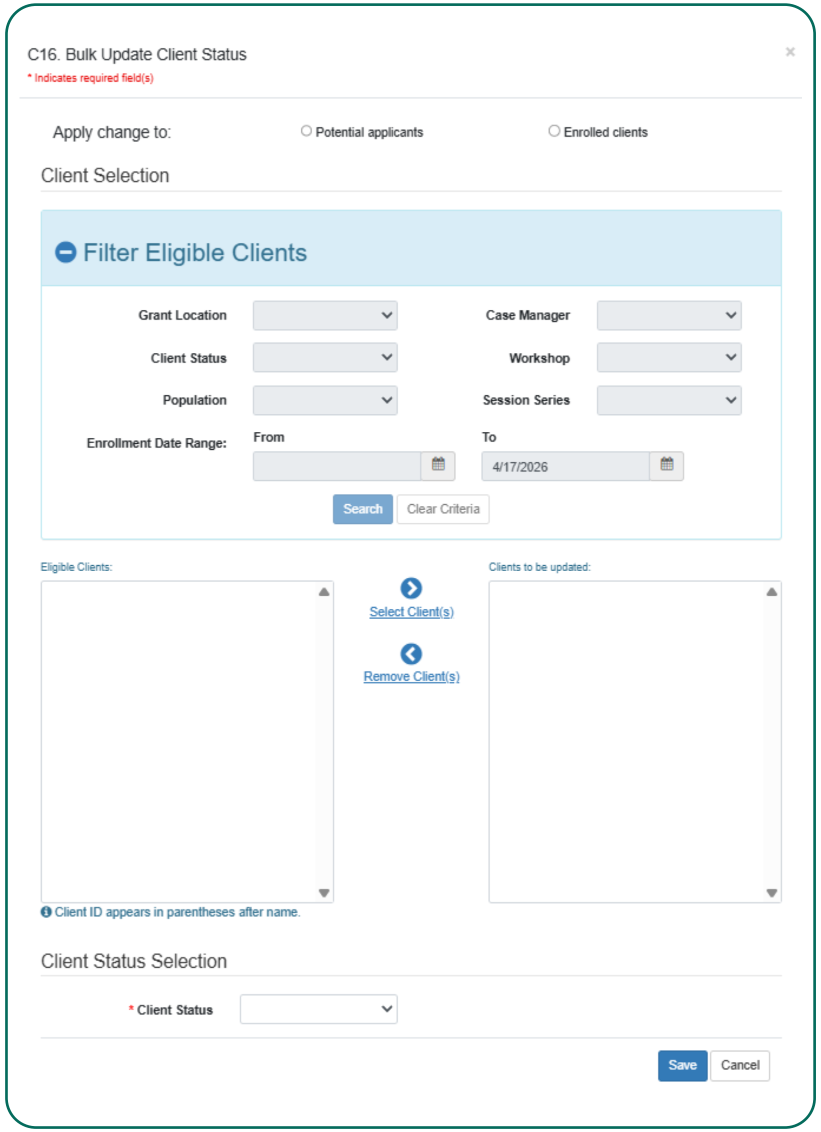
Update client status using bulk update feature

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**



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

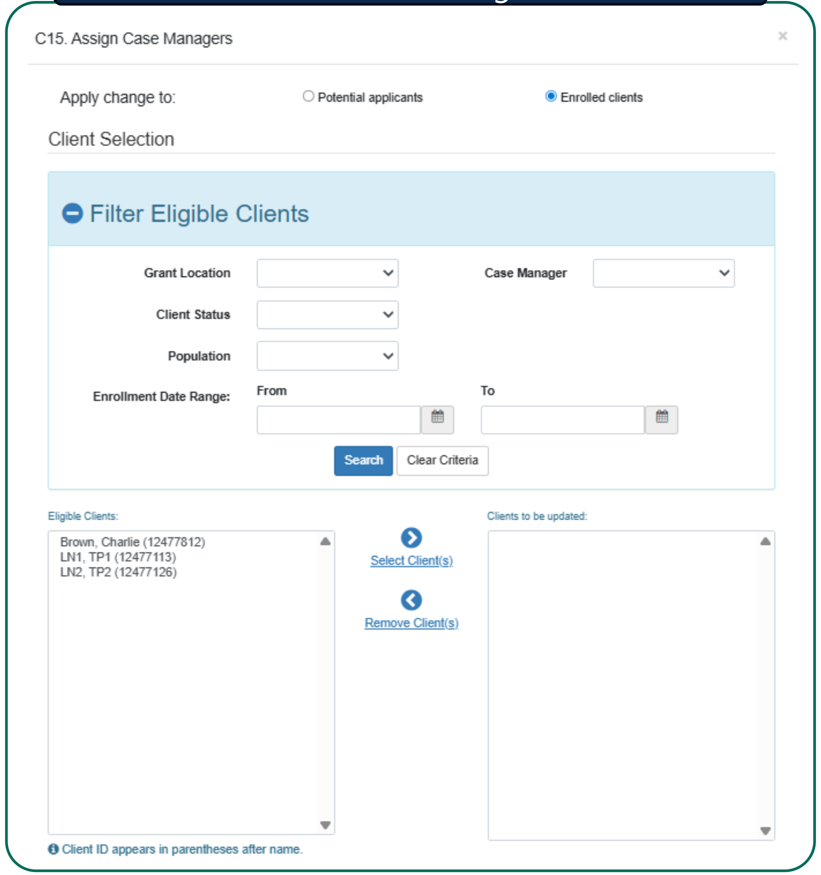
How it works

1 **Open the tool**
Go to Clients > Bulk Update > Assign Case Managers

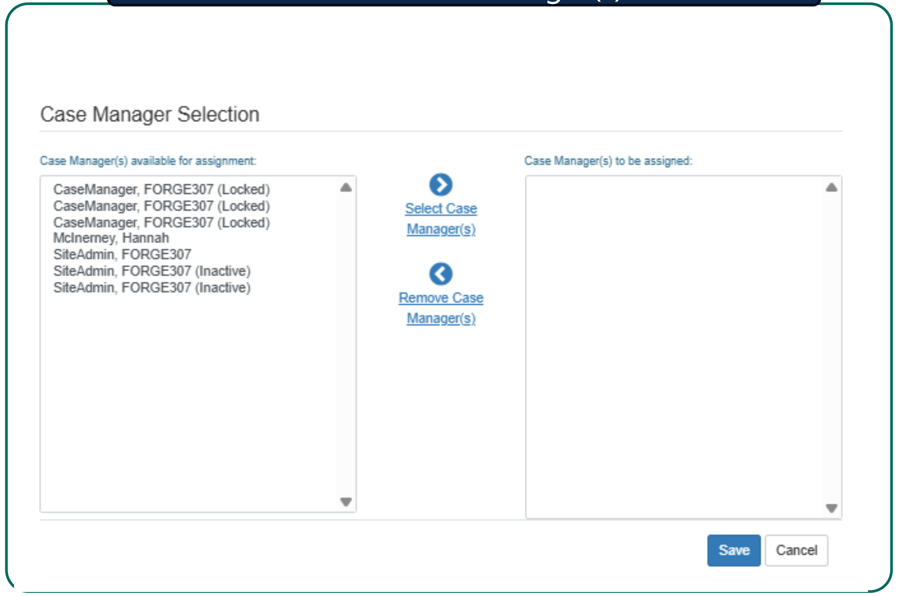
2 **Find Clients**
Indicate if update is for potential or enrolled clients and find clients

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

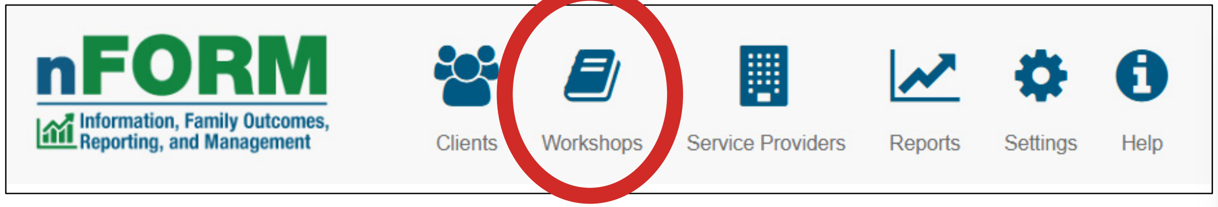


Select case manager(s)



Let's pause for questions

Setting up workshop series and recording attendance

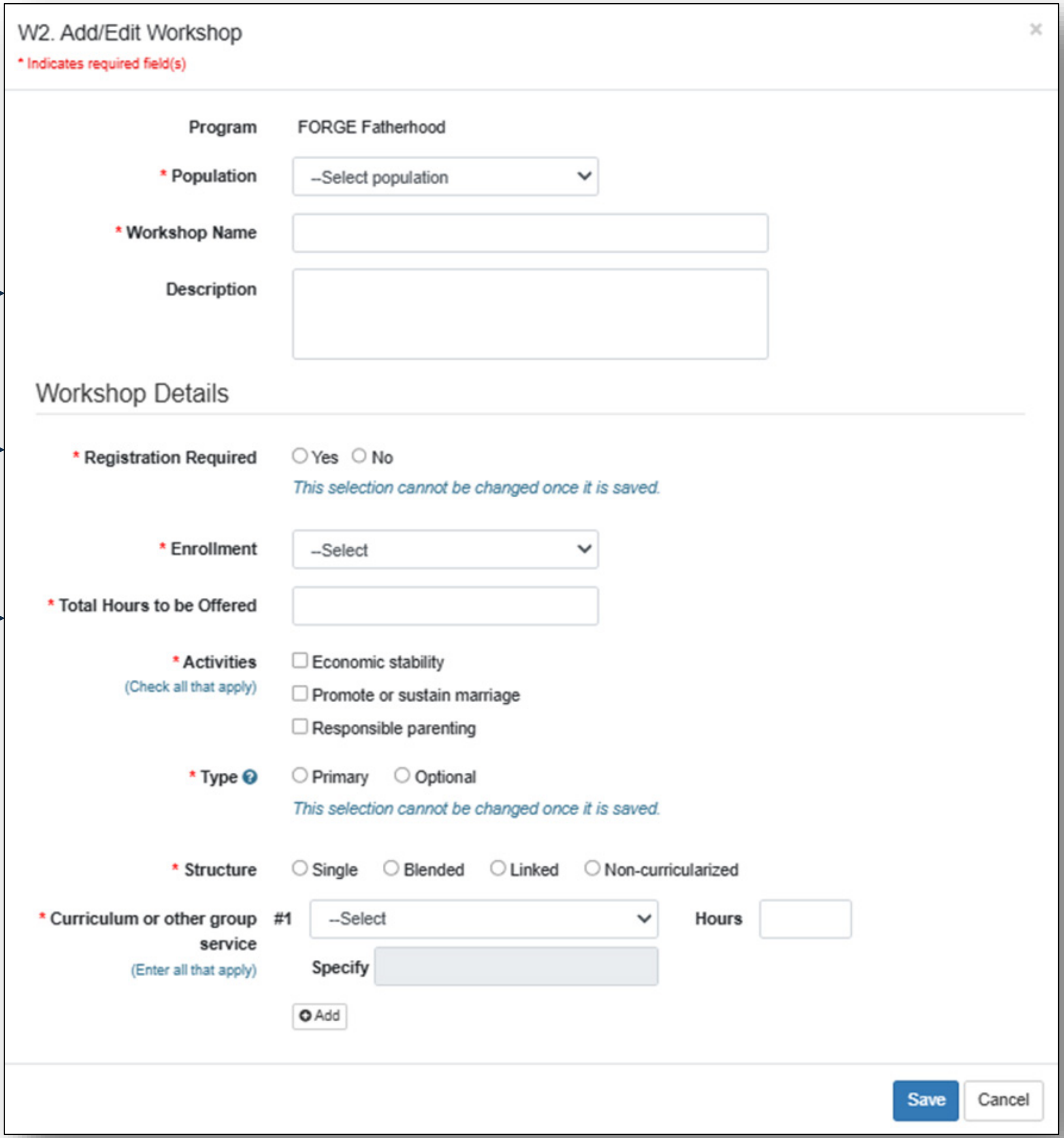


Include any details not captured elsewhere on screen

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



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

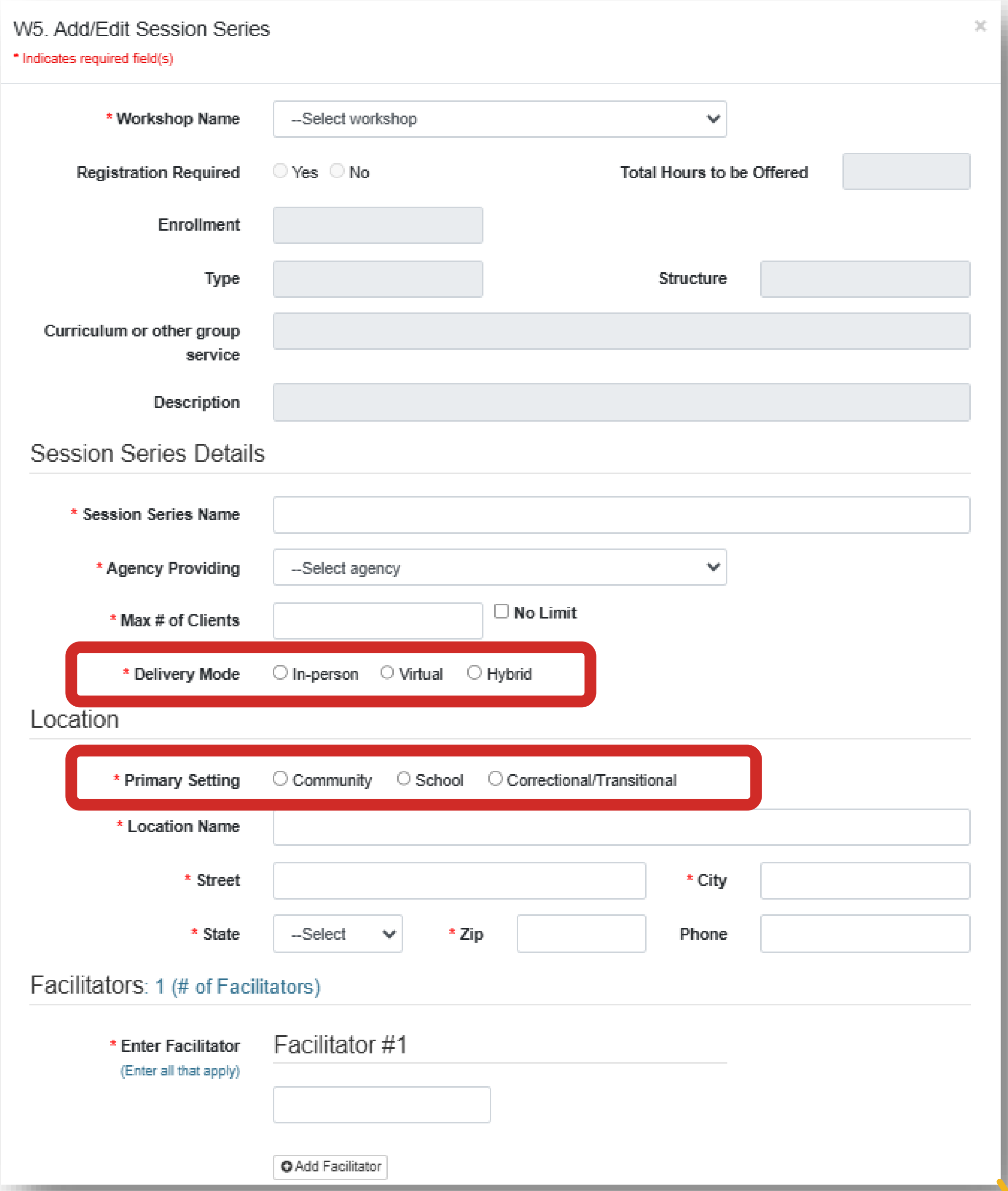
Include a descriptive series name that identifies curriculum, language (if applicable), and timing

Set up session series

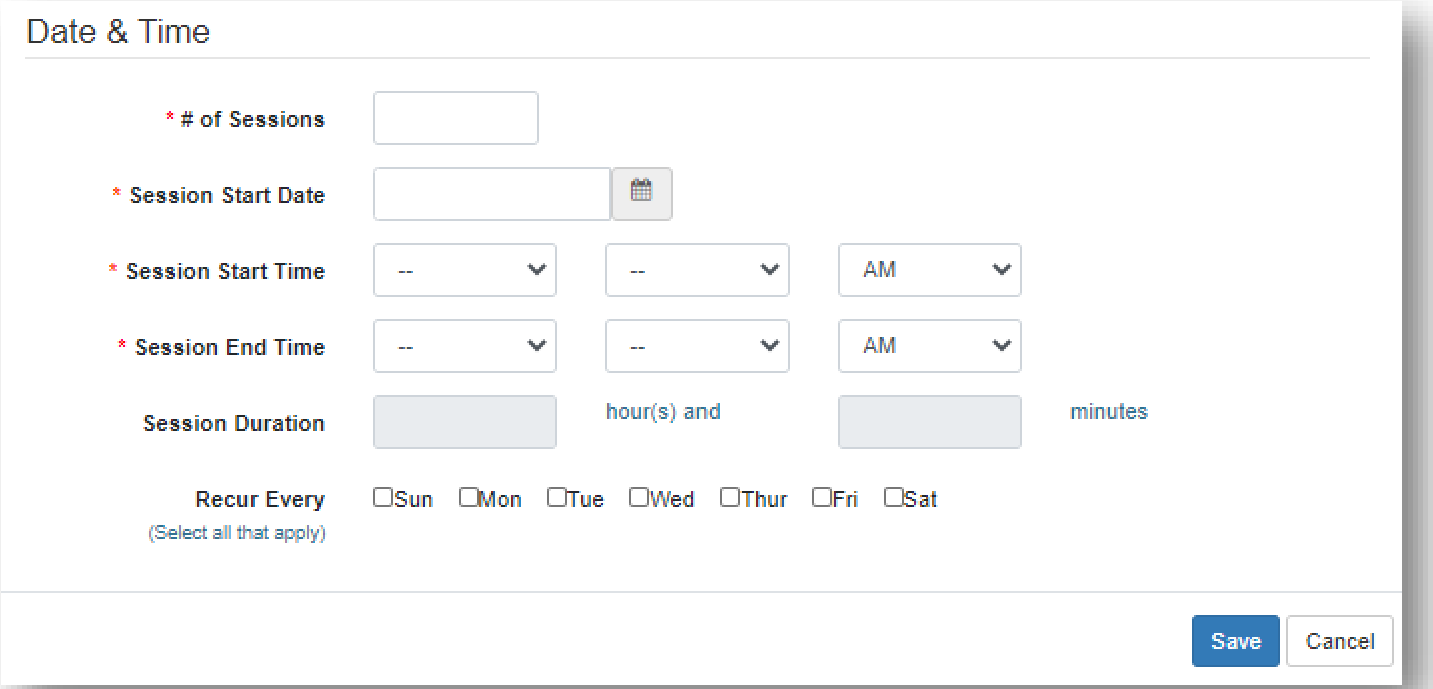
Grant recipients set up session series for each new cohort or group of clients

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

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



Set up session series (cont'd)

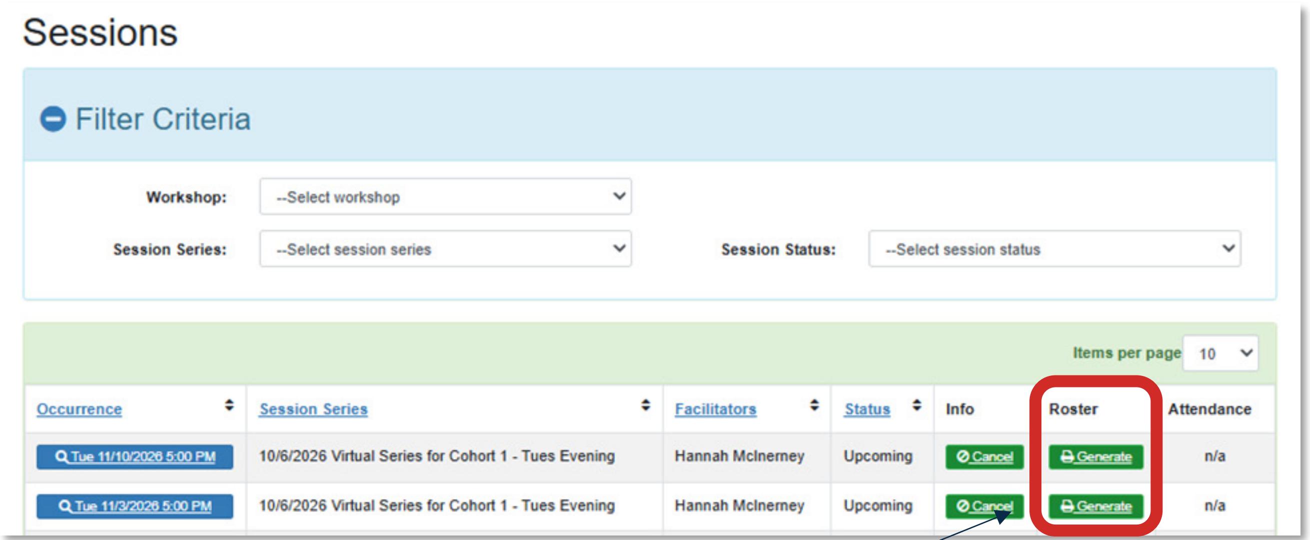


Enter number of sessions, start date, session start and end times, and when sessions will occur

- Session duration will auto-fill based on times

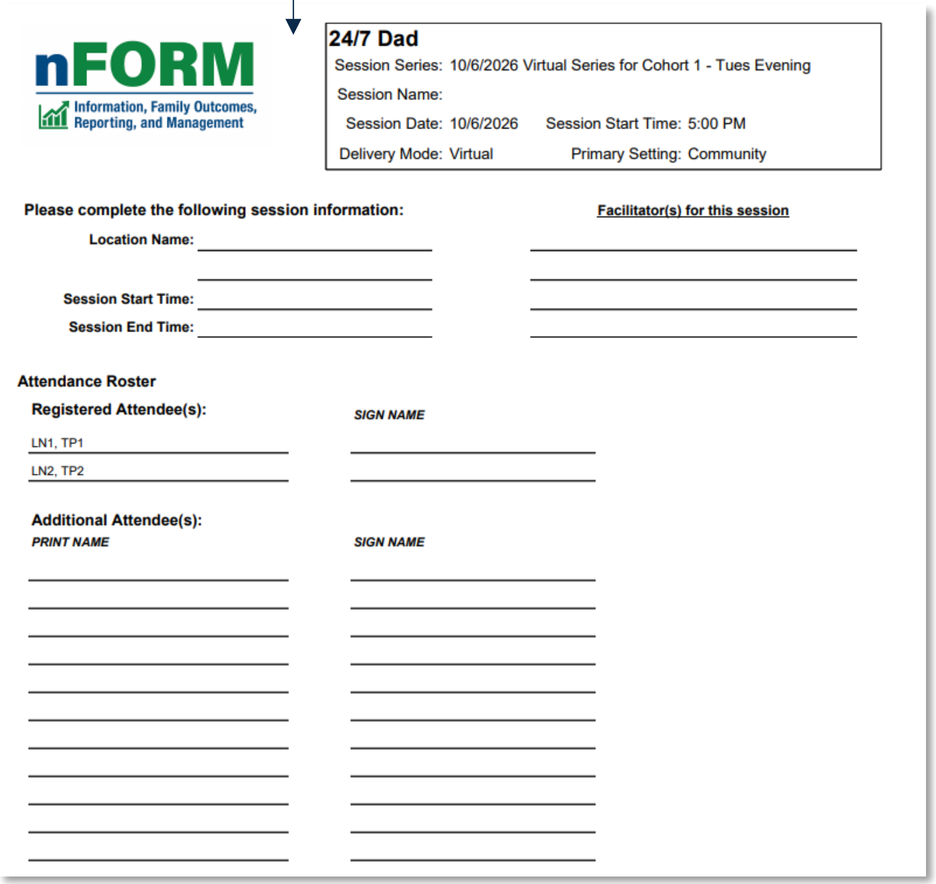
Total series hours offered must align with total workshop hours offered

Generate roster of registered clients



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

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


nFORM
Information, Family Outcomes, Reporting, and Management

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): *SIGN NAME*
LN1, TP1
LN2, TP2

Additional Attendee(s):
PRINT NAME *SIGN NAME*

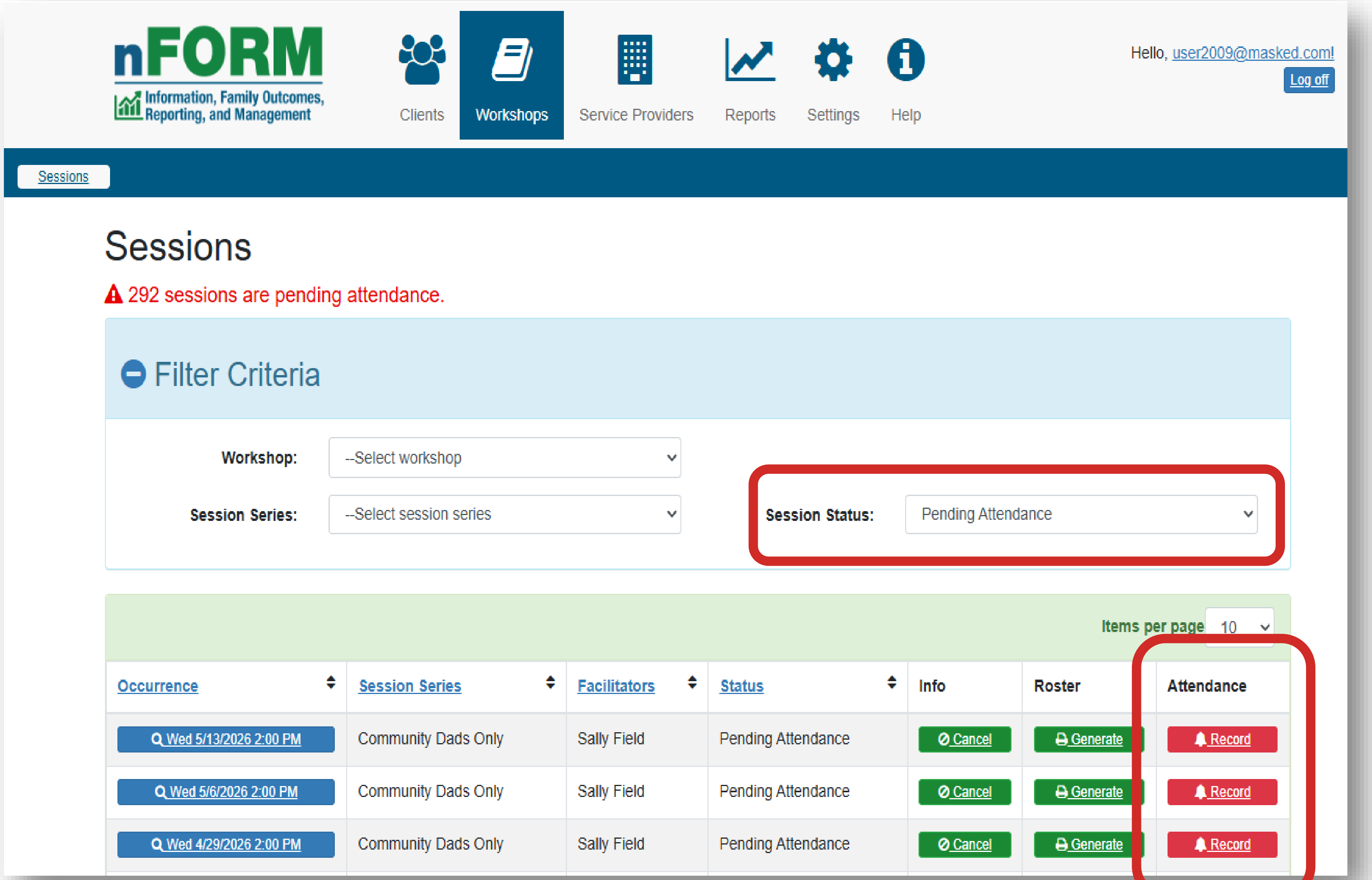
Recording attendance

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

Document participation within 24 hours of a session

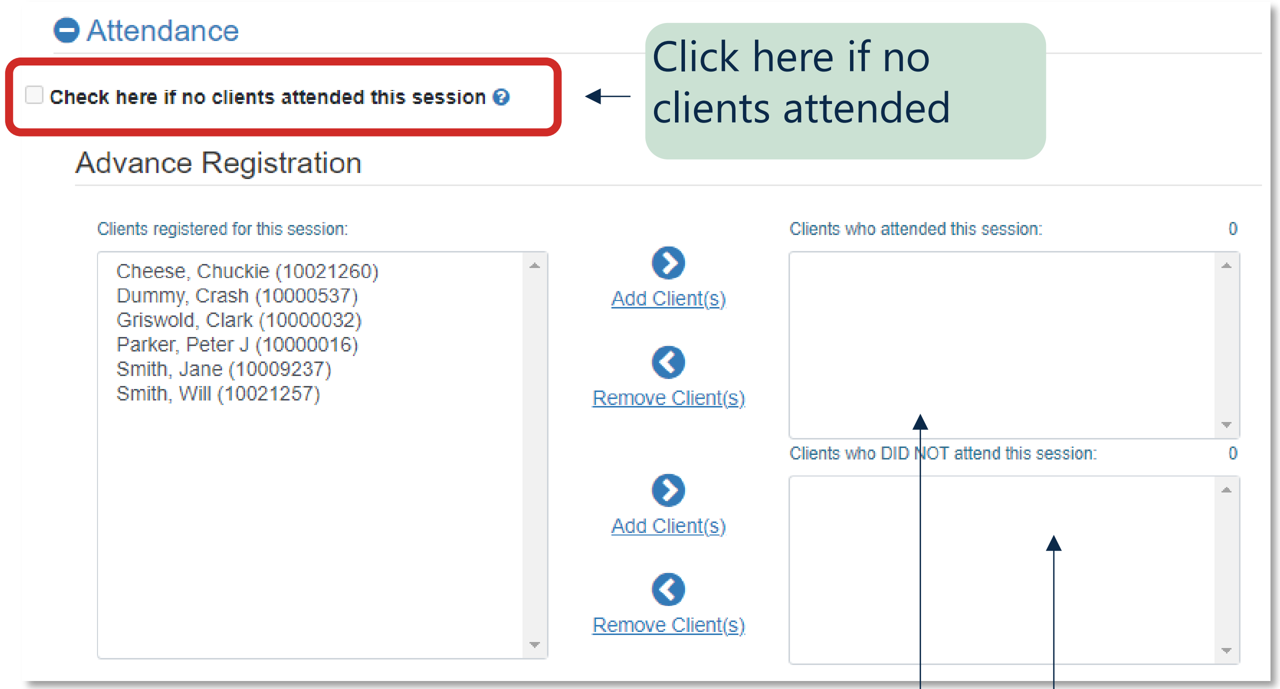
Filter sessions by Session Status ("Pending Attendance") to identify sessions that have not yet had attendance recorded

Drill down further by Workshop and Session Series as needed



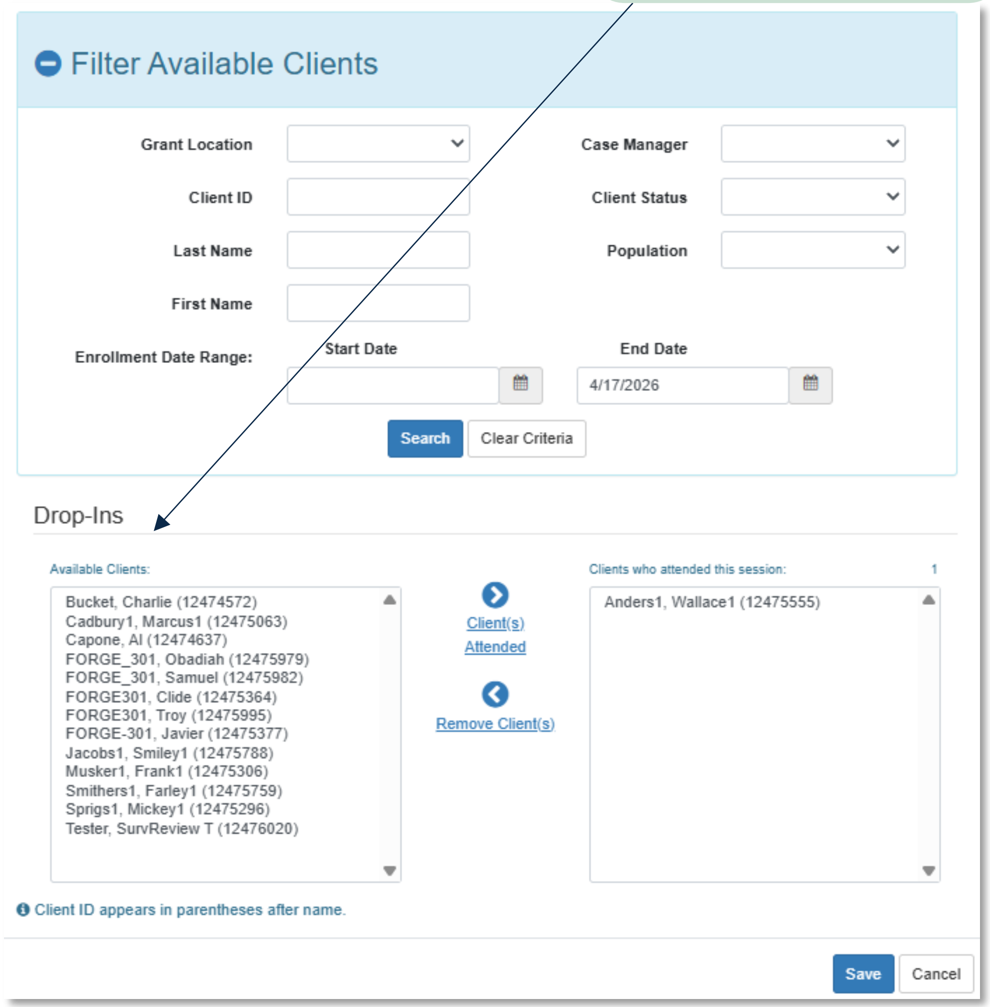
Registered vs. drop-in attendance

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



Click here if no clients attended

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



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

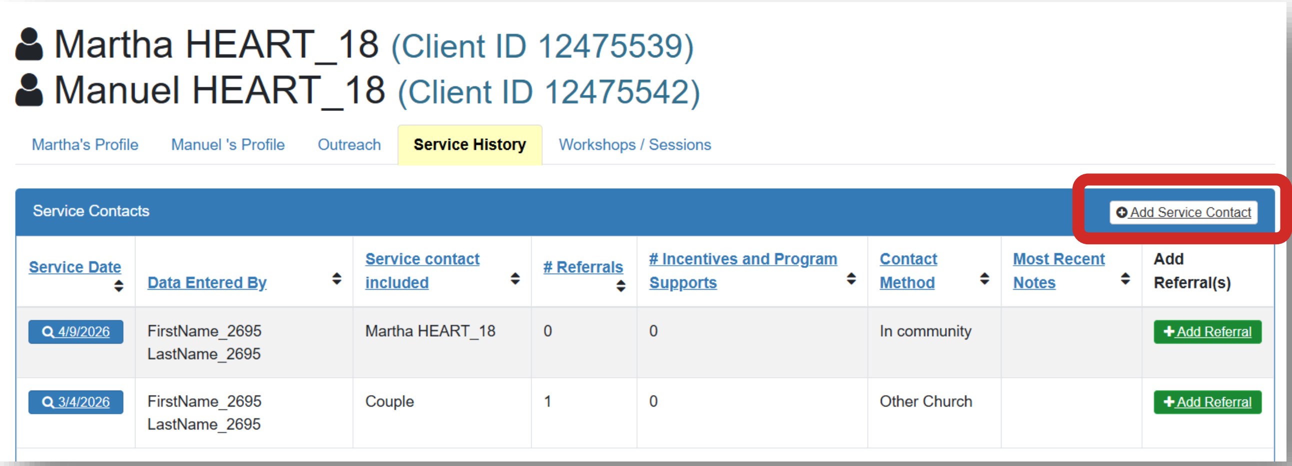
Recording ISCs

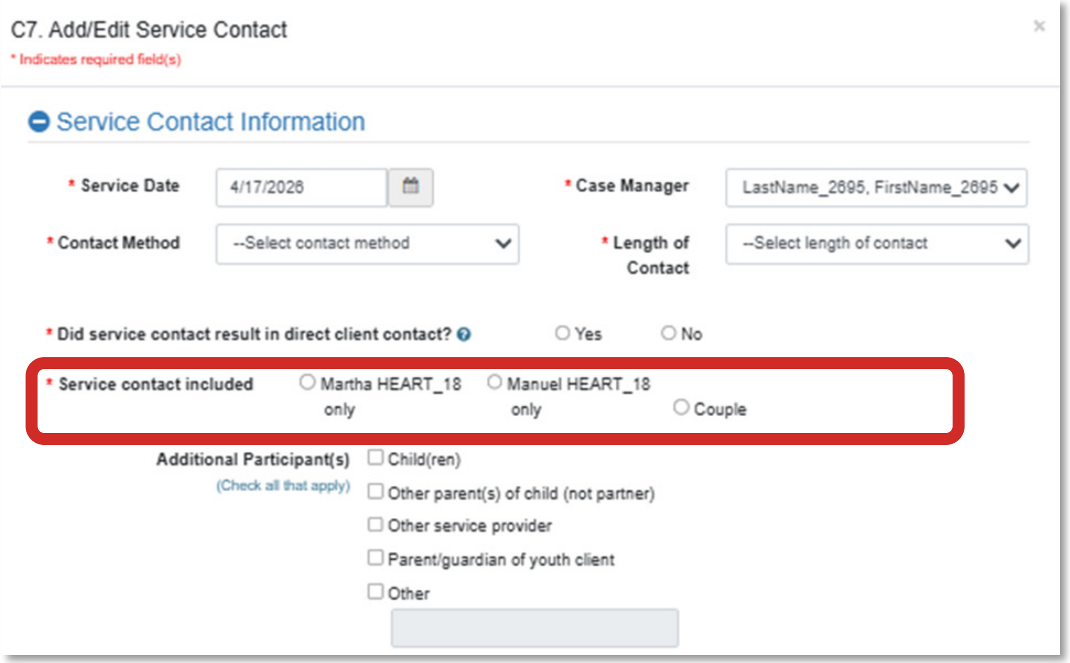
For **outreach** clients, record ISCs on the Outreach tab of a client's profile

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





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.

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)
- ☐ Other Education (specify)

☐ **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)

☐ **Healthy Marriage and Relationship Education Services**

☐ **Other Service (specify)**

☐ **Meeting with Facilitator**

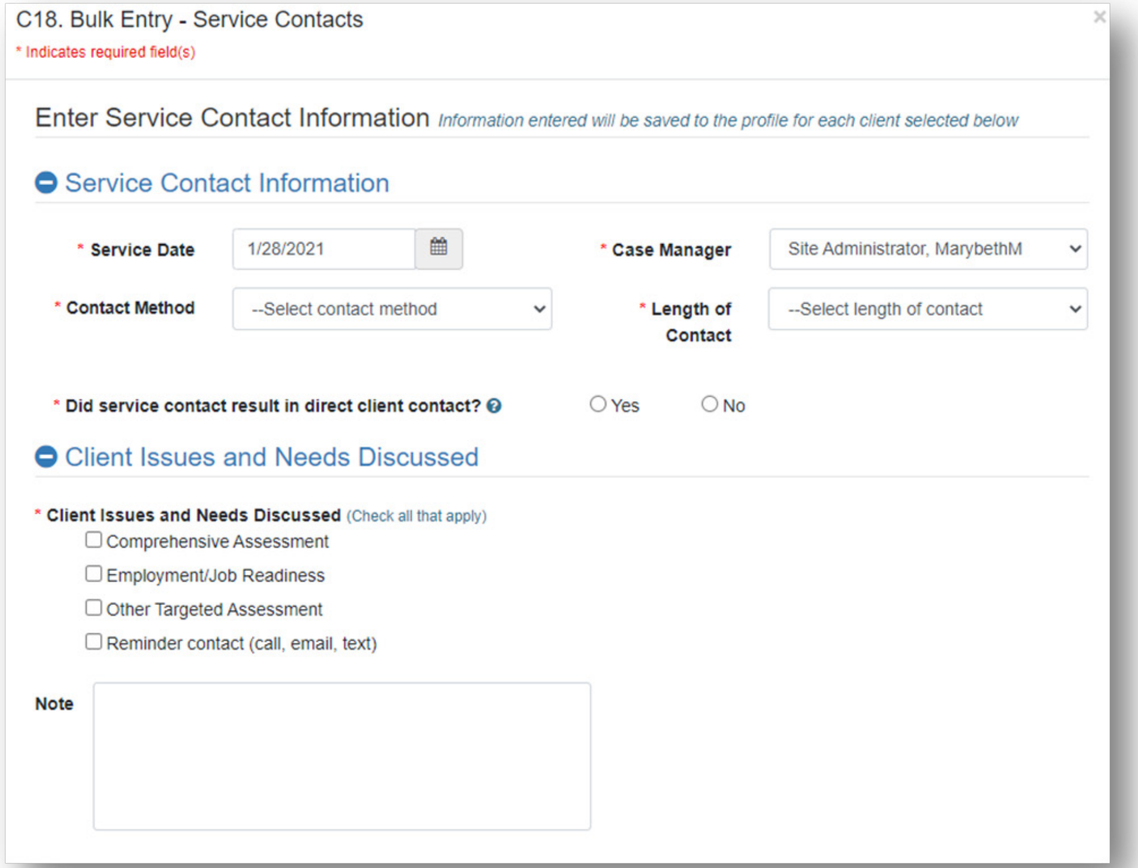
☐ **Reminder contact (call, email, text)**

☐ **Youth services (specify)**

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

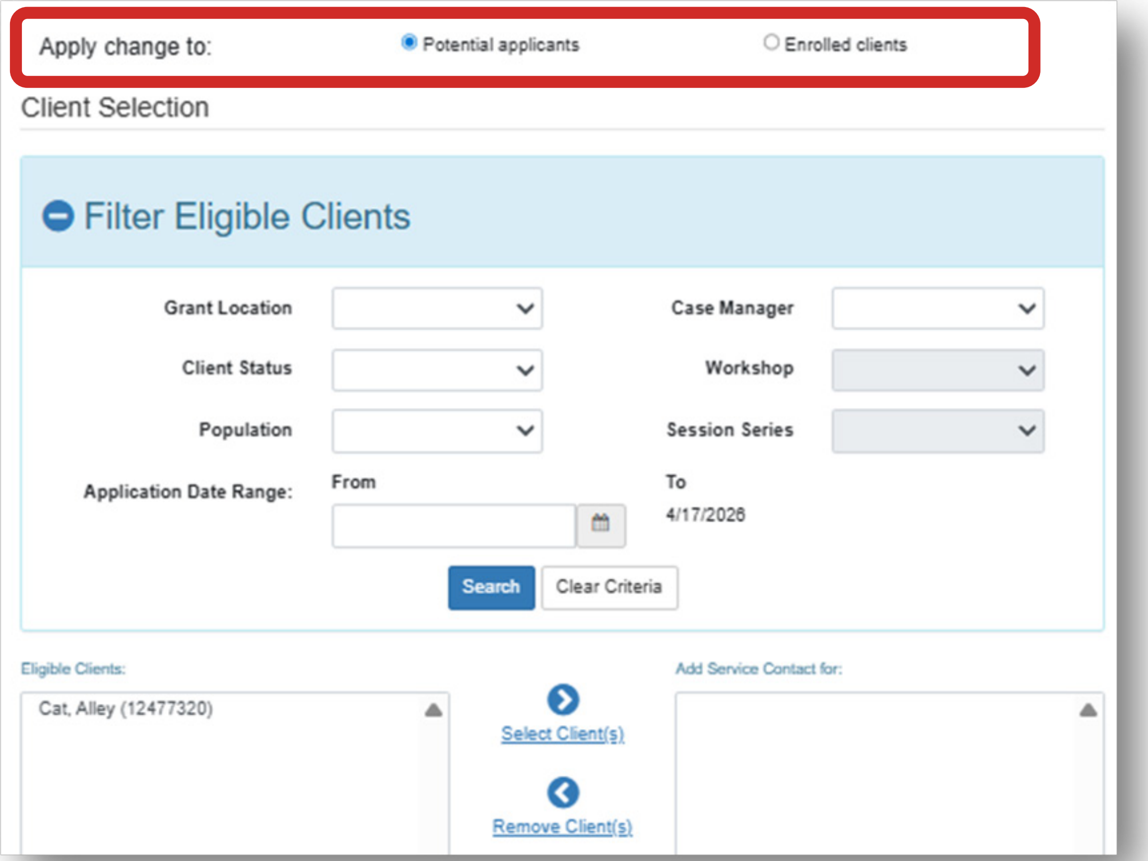
* Client Issues and Needs Discussed (Check all that apply)
  - Comprehensive Assessment
  - Employment/Job Readiness
  - Other Targeted Assessment
  - Reminder contact (call, email, text)

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

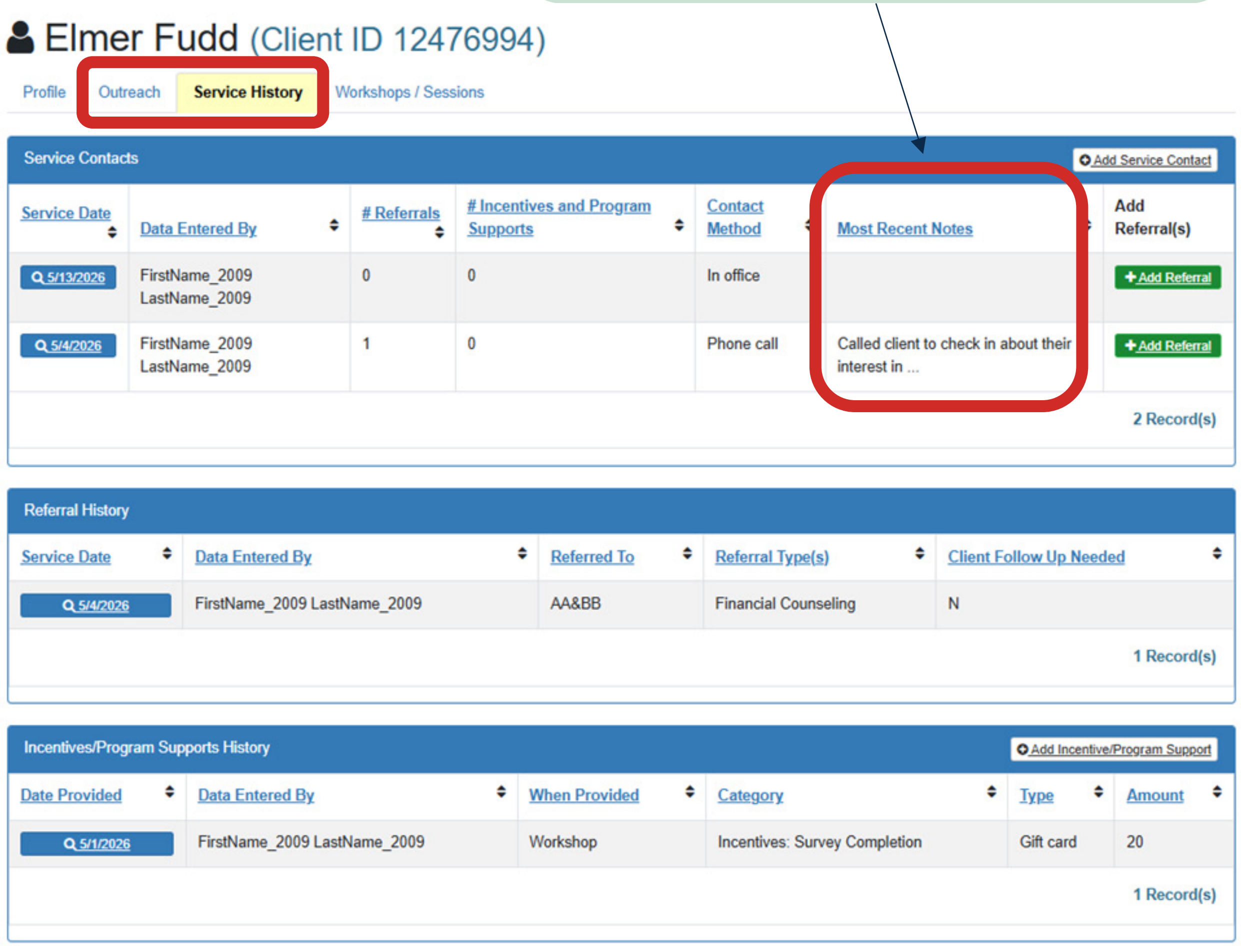


Review ISCs in a client's profile

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

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


Elmer Fudd (Client ID 12476994)

Profile | Outreach | Service History | Workshops / Sessions

Service Contacts — Add Service Contact

Service Date	Data Entered By	# Referrals	# Incentives and Program Supports	Contact Method	Most Recent Notes	Add Referral(s)
5/13/2026	FirstName_2009 LastName_2009	0	0	In office		Add Referral
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)

Referral History

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

1 Record(s)

Incentives/Program Supports History — Add Incentive/Program Support

Date Provided	Data Entered By	When Provided	Category	Type	Amount
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

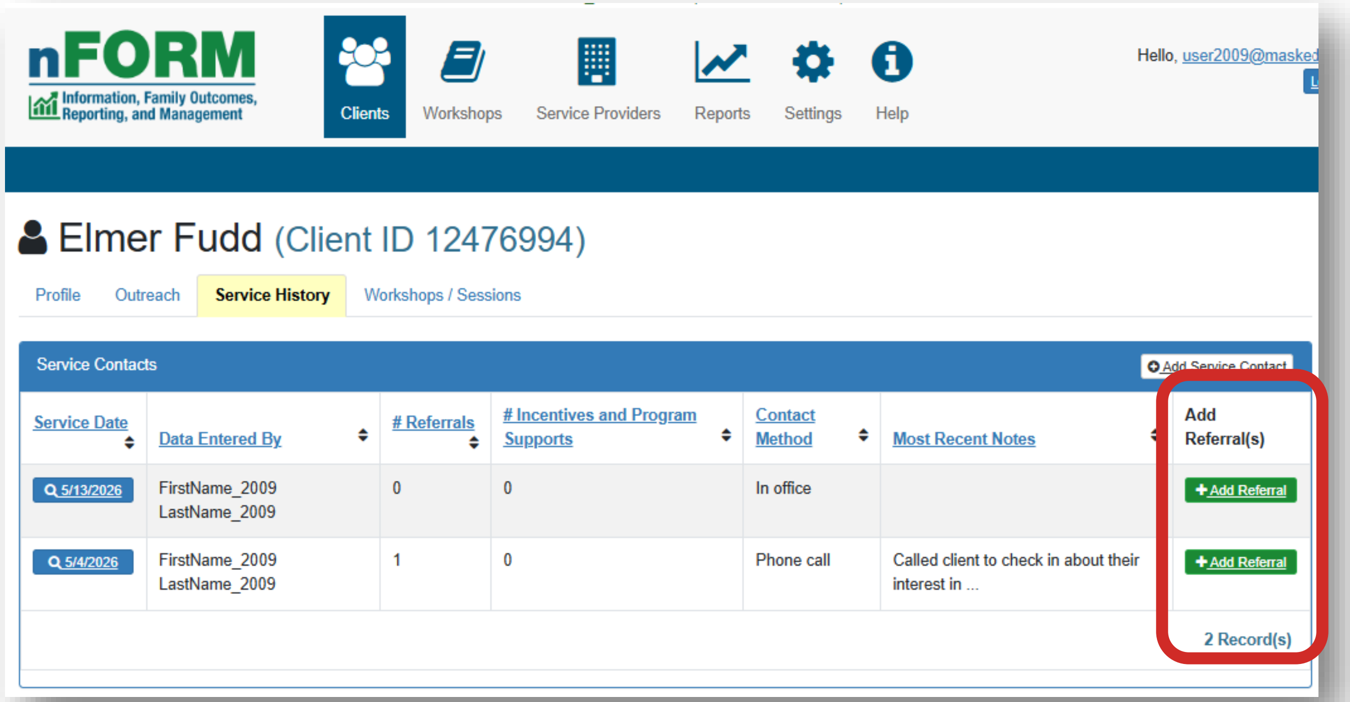
Record referrals provided during service contacts for outreach and enrolled clients

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)

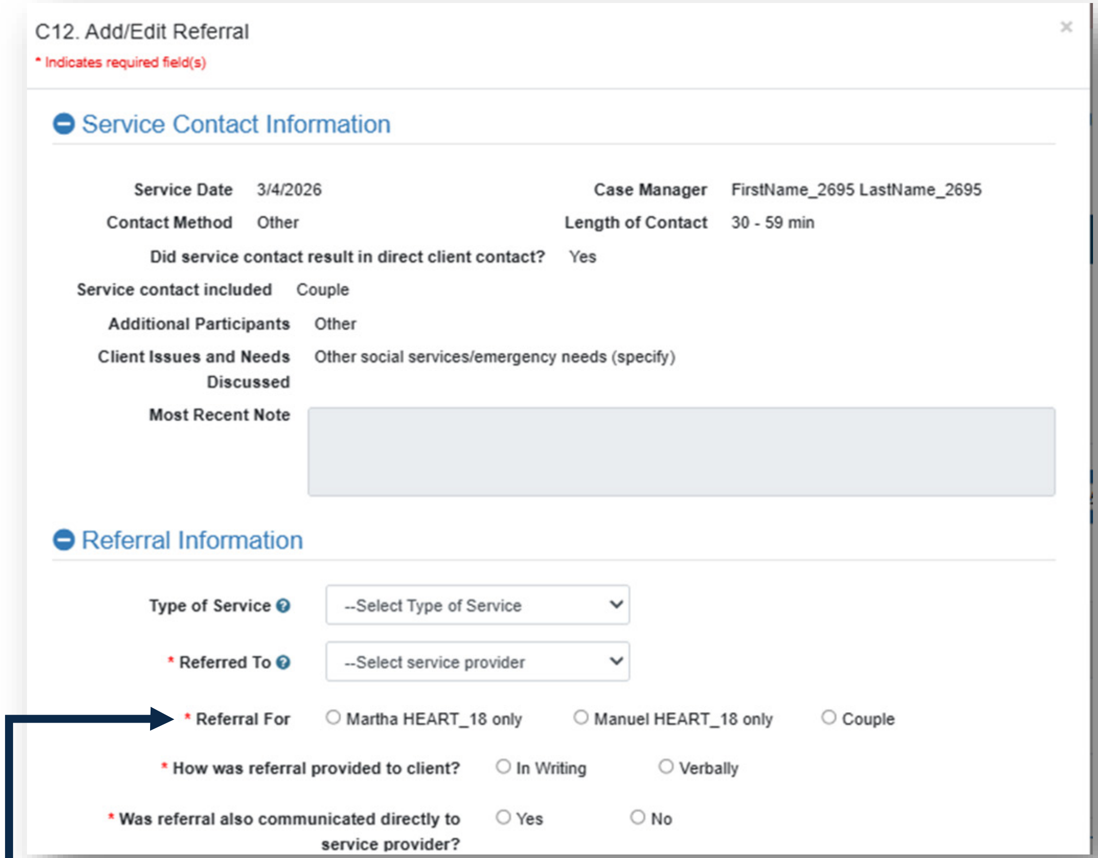
Referral type options match issues/needs on service contact menu

Add referral notes as needed

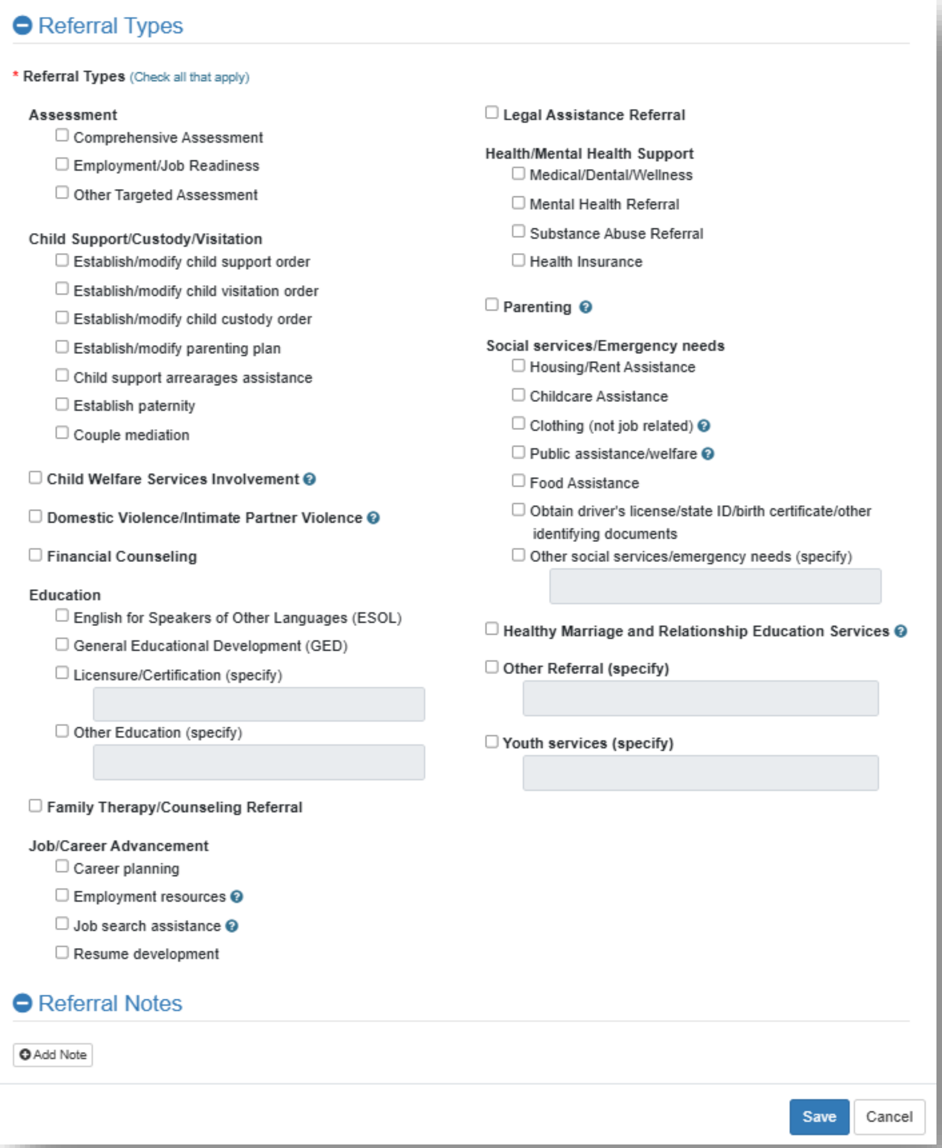
As with ISC notes, referral notes are not included in any nFORM data tools



Add referral information



HEART grants serving couples record whether referral was provided to one or both partners



Record whether client followed up on a referral

Referral History

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	N

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:

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

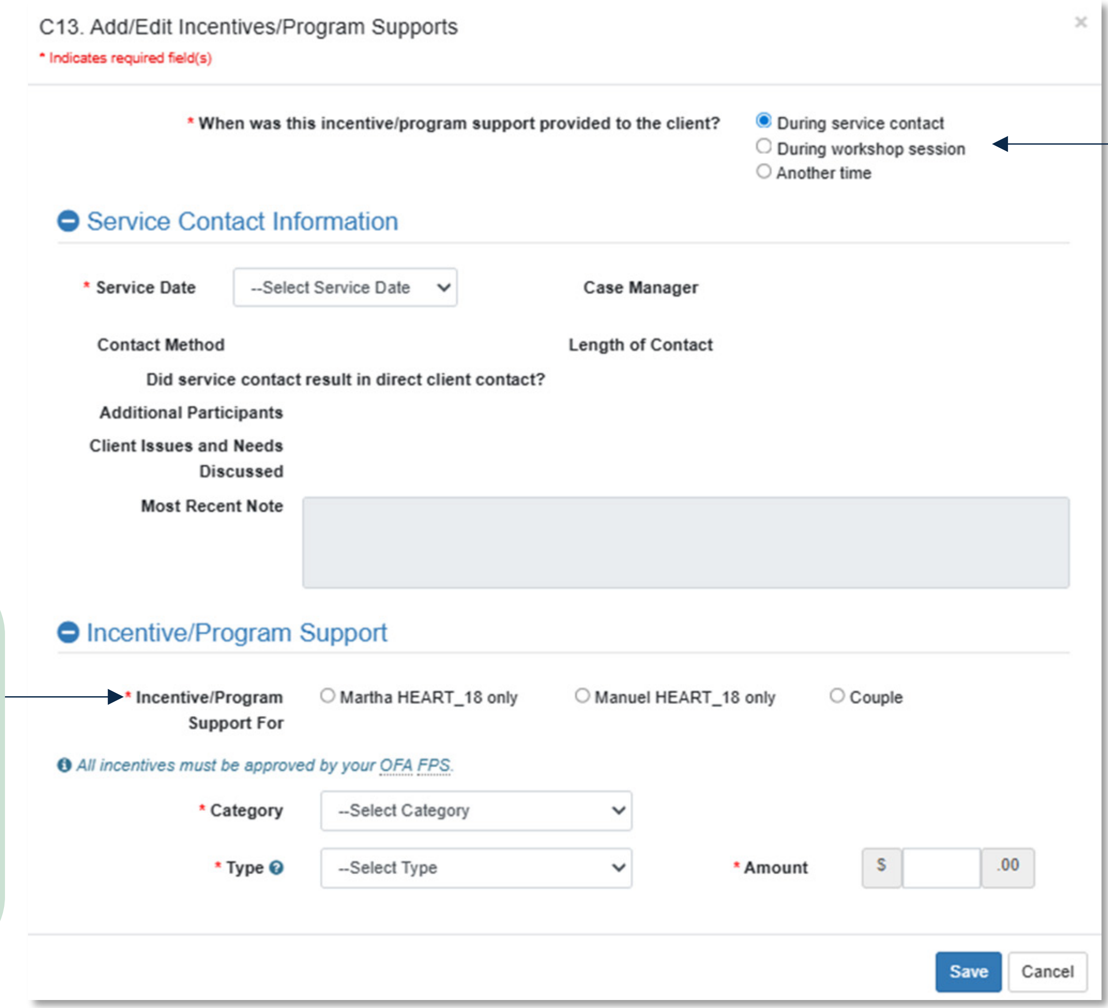
Incentives

- Enrollment
- Participation/client milestone
- Survey completion

Program Supports

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

Recording incentives and program supports (contd.)



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://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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5. Overview of nFORM data tools
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Your destination: better data, better decisions, better services