

Campuses: Main JMMC SV RR WS ATC WTC Referral by: _____

INTAKE FORM



Section I: To Be Completed By Student

Name:			Coach:
<i>First</i>	<i>MI</i>	<i>Last</i>	
Student ID #		Date:	
Telephone/Cell Number:		DOB: mm / dd / yy	E-Mail: _____@cnm.edu
Major:	How many semesters have you attended CNM? 1 2 3 4 5 6 7 8 9 10+		
How many people currently live with you at your home (including you)?			
How many children do you have (including adopted and/or stepchildren)?			
How many children (18 years old or younger) currently live with you?			
When was the last date you worked?		Have you ever worked for pay? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Last month, how many of your monthly bills were you able to pay? <input type="checkbox"/> None <input type="checkbox"/> Some <input type="checkbox"/> Most <input type="checkbox"/> All of your essential living expenses (food, rent, utilities)			
Do you have any debts that you are unable to pay off i.e. loans, credit cards, etc.? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Section II: To Be Completed by CNM Connect

Transportation: Transportation (WS) No transportation Develop plan Received bus passes or tokens or sticker Car repair referral Carpool plan in place Bike obtained Parking permit obtained Gas money obtained/ Insurance obtained/ Transportation in place

Income: Obtain Financial Aid (WS) Set goal to obtain FA Applied for FA Application pending Denied FA Received FA

Obtain Scholarships (WS) Set goal to obtain scholarship Applied for Application pending Denied Received Scholarship

Secure Stable Housing (Assets) Homeless Temporary housing (friends/family/shelter) Public Housing Section 8 Renting house/apartment

Food/Clothing/School Supplies: Emergency Food/Clothing/School Supplies(WS) Need identified Develop plan Referral to appropriate agency Resources obtained

Education & Difficulties in School

ESL & Adult Literacy(Ed): Develop plan Enrolled in class Attended class Dropped out Completed class Received certificate Transitioned to Post-Secondary program

Track Basic Skills to GED(Ed): Set goal to obtain GED Enrolled in GED course Attending GED course Dropped out Completed GED course Received GED Transitioned to Post-Secondary program.

Track Post Secondary Education Progress(Ed): Developed plan Enrolled Attending first semester Attending next semester Dropped out Completed course or training or program Received skills certificate one or two term program) Received certificate(one year program) Received Assoc degree Received Bachelor's degree'

Registration and Records (Ed): Withdrawal from course Petition for grade change Registration for next term Request transcript Waitlist issues Apply to CNM Graduation information Course override information (ME)

Academic Excellence Workshops(Ed): Attended workshop Attended individual lesson Follow-up after workshop Additional academic excellence resources requested Group

Tutoring(Ed): Tutoring need identified Develop tutoring plan Referred to instructor Referred to ACE Referred to Brainfuse Tutoring received

Instructor Issue(Ed): Referred by instructor File instructor complaint Excessive absences Developed success plan Conflict mediation Find resources

CNM Navigation: Identify an internal resource need Resource identified Accompanied student to appropriate resource Appropriate resource utilized Referral to other coaches

Disability : (WS) Issue Identified Referral for documentation Referral to Disability Resource Center Power Path Screening Documentation Accommodation Receiving Appropriate Resources

Legal: Legal (WS) Legal issue identified Referred to legal service Attended Law access Workshop Referred to Law access Counsel/Advice provided Brief services provided Representation of client provided Legal issue resolved

Substance Abuse: Substance Abuse (WS) Issue identified Referral to appropriate agency Develop plan Treatment in progress Treatment complete

Health Care: Physical Health(WS): Issue identified Referral to appropriate agency Develop plan Treatment in progress Treatment complete

Mental Health: Mental Health(WS): Issue identified Referral to appropriate agency Develop plan Treatment in progress Treatment complete

Financial: Education savings account (Assets): Develop plan Open account Not saving regularly Saving regularly Met savings goal

Checking account (Assets): Plan to establish Clear up issues Apply for account Initial deposit Does not use regularly Payroll or Direct deposit Uses regularly

Develop budget (Assets): Set goal to develop List sources/track income & expenses Develop budget

Improve credit score (Assets): Numeric (put credit score in)

Long-term dedicated savings(Assets): (IDA) develop long-term savings plan Open savings account Initial deposit Not saving regularly Saving regularly Met saving goal-saved full term

Manage Income & Expenses (Assets): Not able to pay any living expenses Able to pay some essential living expenses Able to pay most essential living expenses Living within budget/Able to pay expenses & make minimum payments on time

Purchase a house(Assets): Set goal to purchase house Save for down-payment Receiving high cost mortgage Receiving fair market mortgage Purchased home

Work on Credit Report (Assets): Credit Issues identified Applied credit report Obtained credit report Working credit report Corrected errors on report Credit score goal reached

Debt Reduction Plan(Fin): Set goal to reduce debt Develop complete list of all debts Develop debt reduction plan Negotiate re-payment schedule Repaying debts according to plan Client has achieved manageable level of debt Paid all debt

Fin Literacy Classes(Fin): Develop plan Enrolled in class Attended class Dropped out Completed class Received certificate

Reduce Reliance on Predatory lenders (Fin): Regularly use high cost lending options such as payday loans, loan sharks, etc. Reduced use of high cost lending options No longer using high cost lending options Secures market rate & term loans

Employment: Hard Skills Training Developed plan Enrolled Attending Dropped out Completed course training or program Received certificate.

Employment: Placement Development: Unemployed. Under Employed Working on job readiness Referral to Job Connection Ctr. Job Search Ready for interview Referred to employer for interview Went on job interview Got job o

Benefits: File Income Taxes/ Credits (WS): Did not file income taxes Filed using free tax prep services Prepared Tax Return Prepared prior year tax return Filed using non-CWF tax prep services Ineligible for child or educ tax credits or EITC refund Received child or education or EITC tax credits or other refund

Section III: BEN Screening: To Be Completed by CNM Connect

Child Care: Child Care (WS-Public Benefits) No benefits Screened Ineligible Eligible Lost contact after 3 attempts Applied Application pending Application denied Benefits received Income increase- no longer eligible

Child Health Care(WS Public Benefits): No benefits Screened Ineligible Eligible Lost contact after 3 attempts Applied Application pending Application denied Benefits received Income increase-no longer eligible

Adult Healthcare(WS): No benefits Screened Ineligible Eligible Lost contact after 3 attempts Applied Application pending Application denied Benefits received Income increase-no longer eligible

Food Stamps(WS-Public Benefits) No benefits Screened Ineligible Eligible Lost contact after 3 attempts Applied Application pending Application denied Benefits received Income increase- no longer eligible

Free or Reduced lunch(WS): No Benefits Screened Ineligible Eligible Lost contact after three attempts Applied Application pending Application denied Benefits received Increase income – no longer

eligible

Headstart (WS) No Benefits Screened Ineligible Eligible Lost contact after three attempts Applied Application pending Application denied Benefits received Increase income – no longer eligible

Public Benefits TANF (WS) No benefits Screened Ineligible Eligible Lost contact after 3 attempts Applied Application pending Application denied Benefits received Income increase-no longer eligible

Utilities: Utilities(WS) No benefits Screened Ineligible Eligible Lost contact after 3 attempts Applied Application pending Application denied Benefits received Income increase- no longer eligible

WIC(WS Public Benefit) No Benefits Screened Ineligible Eligible Lost contact after three attempts Applied Application pending Application denied Benefits received/ Increase income – no longer eligible

Notes:

Population: *(DV)* *(International Student)* *(Reentry)* *(Veteran)* *(Disability)* *(ELL)* *(Unemployed)*