Name ________________________________

1. **General**
   - Contact Information (record Preliminary data here) _______ date of initial contact
   - Initial Intake appointment scheduled for _______ (date) based on suitable match criteria

2. **Intake Appointment** (record Critical data here)
   - Personal Interviews & Initial Assessments _______ date initial intake complete
   - History of Participation Completed _______ date interview completed
   - CASAS Appraisal _______ date _______ score
   - Educational Background Screenings _______ date form completed
   - Educational Background Form _______ date interview completed
   - Reading Comprehension Interview _______ date rubric completed
   - Writing to Rubric Prompt _______ date

3. **Disclosures** (record Critical data here)
   - ADA Compliance (need for accommodations?) _______ Disclosures/Release of Confidential Info
   - Physical & Mental Health (undiagnosed conditions, special needs/supports, date of last physical or health screenings, current medications, other social & emotional supports, etc., recorded separately)
   - Eligibility to Work (I-9 Form), IRS/Work Permit _______ BCI Report, Employment References

<table>
<thead>
<tr>
<th>Enrollment OR Referral (decision / action taken based on Critical data collected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>______ enrolled  ______ counsel  ______ referred</td>
</tr>
</tbody>
</table>

*******************************************************************************

Complete sections 4 through 6 only if individual is enrolled

4. **Enrollment** (record Enrollment data here)
   - Enrollment Form completed _______ date of enrollment
   - CASAS (Reading) Pre-Test _______ date _______ score
   - CASAS (Reading) Post-Test _______ date _______ score
   - CASAS (Math) Pre-Test _______ date _______ score
   - CASAS (Math) Post-Test _______ date _______ score
   - CASAS (Listening) Pre-Test _______ date _______ score
   - CASAS (Listening) Post-Test _______ date _______ score
   - Reading Diagnostics (approx. 1 hour to administer all 4 reading components per person)
     - alphabetics _______ fluency _______ vocabulary _______ comprehension

5. **Placement** (record Placement data here)
   - Student Placement: Class/Program: ____________________________ Instructor: ____________________________
   - Orientation scheduled for ____________ Orientation completed ______ Yes ______ No
     Orientation activities may be recorded separately at agency discretion

6. **Work Skills/Vocational Training**
   - Student Interests & Goals (continue monitoring, extended planning, on-going negotiating and revising goals)
   - Program-specific activities, benchmarks, skills-training, etc.
     Goal-setting activities and progress may be recorded separately at agency discretion