

Student Data Summary Form Guidance and Definitions

The “Student Data Summary Form” is a sample intake tool that agencies are welcome to use or adapt as necessary for their intake procedures related to adult education programs. Many of the items included are directly tied to NRS or WIOA performance indicators or requirements and will be explained further below. Most responses, like race, gender, or employment status are self-selected responses that do not require substantiation or outside documentation to support. These self-selected/self-reported elements will also be explained. If agencies choose to adapt this form or use a different form, they are encouraged to ensure that all mandatory elements are included in the agency’s self-selected form and are welcome to contact DCAE representatives to review the procedures and forms prior to implementation. Any characteristics not selected should be reported as does not apply for data reporting purposes.

Intake Form Item	Definition	Guidance	Required for State Reporting ¹
Student Self-Reported/Self-Selected Fields			
Student Name	The student’s full legal name including first name, middle initial, last name, and appendage (such as Sr., Jr., III, etc.)	This name provided should be consistent across the student’s records and documentation	Yes
Student Email		This field is optional and may be used as the student’s personal email address or an email address established by the district or college for the student’s use.	
Social Security Number	Federal social security number.	This is a voluntary submission. However, students are encouraged to provide a valid social security number to ensure the student records are most accurately matched.	Yes (if provided)
Date of Birth	The numeric representation of the date on which the student was born.		Yes
Address, City, State, Zip Code, and County	The contact information provided by the student.	It is at the district’s discretion on how to handle cases where a consistent mailing or street address is not available.	Yes (selected elements, such as county)
Phone and Alternate Phone	The contact information provided by the student.		
Gender	The student’s gender	The student’s self-identified gender, and only one choice can be selected.	Yes
Ethnicity	A student’s self-selected identification of Hispanic or Latino ethnicity. A person of	A student should self-select this field based on their self-identified ethnicity.	Yes

¹ Please see State Data Summary Form Data Element Crosswalk for related values and data reporting guidance.

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	Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. The term, "Spanish origin" can be used in addition to "Hispanic or Latino".		
Race	A student's self-selected racial identifier	Select all that may apply. A student should self-select the race(s) based on self-identification.	Yes
Highest School Grade Completed	Student's self-selected identification of the highest school grade completed by the student at the time of entry in the current reporting year.	Student should self-select the highest level of education received. Grades 1 through 11 are collapsed into one option "Completed at least part of 1 st through 11 th grade" with a fill-in space to clarify which grade. If a student began 12 th grade but did not complete the year, the student should select "Completed at least part of 1 st through 11 th grade" and enter "11" into the blank. NOTE: An option for the "Highest School Grade Completed" must be provided.	Yes
Where this level was achieved	Indicate if the student's highest level of educational achievement was earned in the United States (US) or outside the US.		Yes
Employment Status	<p><u>Employed</u>: If the student (a) did any work as a paid employee, (b) did any work at all in his or her own business, profession, or farm, (c) worked as an unpaid worker in an enterprise operated by a member of the family, or (d) is one who was not working, but has a job or business from which he or she was temporarily absent because of illness, bad weather, vacation, labor-management dispute, or personal reasons, whether or not paid by the employer for time-off, and whether or not seeking another job.</p> <p><u>Employed but with Notice of Termination or in transition out of military service</u>: student is</p>	<p>These options are self-selected by the student based on their employment status at the start of <u>each</u> term or semester.</p> <p>NOTE: An option for the "Employment Status" must be provided.</p>	Yes

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	<p>(a) employed but has received a Notice of Termination, Notice of Military Separation, or the employer has issued a Worker Adjustment and Retraining Notification (WARN) or other notice that the facility or enterprise will close, or (b) is a transitioning service member (i.e., within 12 months of separation or 24 months of retirement).</p> <p><u>Not Employed</u>: Student is currently unemployed but seeking employment, making specific efforts to find a job, and is available to work.</p> <p><u>Not in Labor Force</u>: These individuals do not meet the other classifications or are incarcerated and ineligible for employment.</p>		
Disabilities	Students notifies administrators, self-identifying as having a disability.	Agencies should have Americans with Disabilities Act compliant policies and procedures in place to identify and assist students with disabilities.	
Youth in Foster Care	Student self-identifies as currently in foster care or has aged out of the foster care system		Yes
Single Parent	Student is unmarried, widowed, or legally separated from a spouse and has a minor child or children for which the parent has either custody or joint custody.		Yes
Single Pregnant Woman	Student is unmarried, widowed, or legally separated from a spouse and pregnant		Yes
Perceived employment barriers	Student self-selects indicating he or she perceives him or herself as possessing attitudes, beliefs, customs, or practices that influence a way of thinking that may serve as a hindrance to employment.		Yes
Previously or currently subject to any stage of	Self-identified as a person who either (a) has been subject to any stage of the criminal justice process for committing a status offense		Yes

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the criminal justice process	or delinquent act, or (b) requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction for committing delinquent acts, such as crimes against persons, crimes against property, status offenses, or other crimes.		
Low-income individual (or their dependent) employed primarily in farming currently unemployed or finding difficulty obtaining work for 12 months out of the last two years	Student self-identifies as (A) a low-income individual (i) who for the 12 consecutive months out of the 24 months prior to application for the program involved has been primarily employed in agriculture or fish farming labor that is characterized by chronic unemployment or underemployment; and (ii) faces multiple barriers to economic self-sufficiency; or (B) a dependent of the person described above		Yes
Migrant or seasonal farmworker (or their dependent)	Student self-identifies as a seasonal farmworker and whose agricultural labor requires travel to a job site such that the farmworker is unable to return to a permanent place of residence within the same day, or is a dependent of the person described above.		Yes
Homeless without a fixed, regular nighttime residence ²	Participant lacks a fixed, regular, and adequate nighttime residence; this includes an individual who is: - sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason;		Yes

² The “AGE Homeless Individuals, Children, and Youths, or Runaway Youth” data element also includes “D-Runaway Youth.” Identifying runaway youth is left to local agency discretion using locally available program participation or locally defined procedures.

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	<ul style="list-style-type: none"> - living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodations; - is living in an emergency or transitional shelter; - is abandoned in a hospital; or - is awaiting foster care placement 		
Homeless but staying in non-traditional housing ²	Participant has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, such as a car, park, abandoned building, bus or train station, airport, or camping ground		Yes
Child of migrants who have changed school districts in the last 3 years due to parents' seasonal employment ²	Participant is a migratory child who in the preceding 36 months was required to move from one school district to another due to changes in the parent's or parent's spouse's seasonal employment in agriculture, dairy, or fishing work		Yes
Previously unemployed or underemployed while caring for home and family (unpaid)	Participant worked as an adult primarily without remuneration to care for home and family and for that reason has diminished marketable skills and is unemployed or underemployed and is experiencing difficulty in obtaining any employment or suitable employment as appropriate		Yes
Previously supported by public assistance or family, and now unemployed	Participant has been dependent on public assistance or on the income of a relative but is no longer supported by such income and is unemployed or underemployed and is experiencing difficulty in obtaining any		Yes

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or underemployed	employment or suitable employment as appropriate		
Parent of a child within two years of no longer receiving TANF (formerly AFDC)	Participant is a parent whose youngest child will become ineligible (at age 16) to receive assistance under the program for Aid to Families with Dependent Children under Part A of the Title IV of the Social Security Act within two years of the parent’s application for assistance under the Act and is unemployed or underemployed and is experiencing difficulty in obtaining any employment or suitable employment as appropriate	The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996 eliminated the open-ended federal entitlement program known as “Aid to Families with Dependent Children” (AFDC) and replaced it with the time limited “Temporary Assistance for Needy Families” (TANF) block grant. TANF provides cash assistance to needy families in exchange for their participation in work activities. The four general purposes of TANF are: (1) provide cash assistance to needy families so that children can be taken care of in their homes, (2) reduce the dependency of needy families on government assistance, (3) decrease the number of out-of-wedlock births, and (4) increase the formation of two-parent families. ³	Yes
Unemployed dependent spouse of a member of the Armed Forces on active duty or is deceased or disabled as a result of military service	Participant is providing unpaid services to family members in the home and is the dependent spouse of a member of the Armed Forces on active duty (as defined in section 101(d)(1) of title 10, United States Code) and whose family income is significantly reduced because of a deployment (as defined in section 991(b) of title 10, United States Code, or pursuant to paragraph (4) of such section), a call or order to active duty pursuant to a provision of law referred to in section 101(a)(13)(B) of title 10, United States Code, a permanent change of station, or the service-connected (as defined in section 101(16) of title 38, United States Code) death or disability of the member		Yes

³ Source: http://www.floridajobs.org/PDG/factsheets/Welfare_Transition.pdf

Intake Form Item	Definition	Guidance	Required for State Reporting¹
The fields below are completed by District/College/CBO personnel.			
Enrollment Date	The first date of expected instruction in the reporting year.		
Separation Date	The date of the student's separation from the program either through withdrawal or completion of the program		
Signed Release of Information on File	Release of information signed by the student for information to be shared with other agencies and/or individuals.		
Program Enrollment Type	Student enrolled in one or more of the following adult education programs: ABE, ASE, ESOL.	Indicate the program(s) that are applicable for the student's enrollment.	Yes
Institutional Programs	Student is enrolled in one or more of listed institutional programs.	Indicate if the student is enrolled in conjunction with placement in a correctional facility (defined as "any prison, jail reformatory, work farm, detention center, or any other Federal, State, or local institution designed for the confinement or rehabilitation of criminal offenders"), a community correctional program (defined as "a community-based rehabilitation facility or halfway house"), or Other Institutional Settings (defined as "any other medical or special institution").	Yes
Assessment Name	Indicate the name of the assessment that was used to test the student.	Indicate the specific assessment used to place the student	Yes
Date	Date the assessment was administered.	Indicate the date the assessment was administered to the student for placement prior to instruction	Yes
Assessment Score Table	Indicate the form used, level, and scale scores of student assessment results.	Specify the assessment form used (such as TABE, Form 9 Survey), the level assessed (such as Level E of the TABE, Form 9 Survey), and the Scale Scores the student received	Yes
Distance Education	Distance learners are those who receive over 51% of their instruction online.	Indicate if the course will be offered through "Distance Learning."	
Class Site	Location of the class, such as main campus or a branch location.	For agencies with multiple instructional sites, indicate the site where the student will be enrolled	

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Expected Attendance Hours/Date	Provide the hours and days of the week the class meets.	Indicate the attendance expectations of the student for the selected programs.	