



AEPP Remote Intake Checklist

CASE MANAGER OR INTAKE COORDINATOR

AEPP PROGRAM NAME & LOCATION: _____

Student Name: _____

Course Name: _____ Start & End Date: _____

Intake Date: _____ Intake Staff: _____

INTAKE AGENDA

1. Preparation - a

- ☐ Identify the student's technology needs and its appropriateness
- ☐ Ensure that the student has a computer and reliable internet
- ☐ Set up the video call date and send the link to the platform

2. Preparation - b

- ☐ Answer student questions and provide contact in case they need help
- ☐ Provide programming information and resources
- ☐ Provide the student a copy of the ISRF form in preparation for intake

3. Remote Video Intake Activities - a

- ☐ Establish rapport and address any questions
- ☐ Help the student fully complete the ISRF form
- ☐ Identify all barriers and determine supportive resources

4. Remote Video Intake Activities - b

- ☐ Complete the American Disabilities Act disclosure form & provide resources
- ☐ Develop Employment and Education Plan (EEP) tailored to student's needs
- ☐ Provide information on pre-post test assessments

5. Remote Video Intake Activities - c

- ☐ Explain Fast Track opportunities or HSE services in your organization
- ☐ Introducing 4 Pathways to High School Equivalency (HSE): GED/AttchR/NEDP/24 cr
- ☐ Introducing students to WIOA partner services: VCC, SNAP, WIC, Health Insurance etc.

6. Remote Video Intake Activities - d

- ☐ Provide student attendance contract and program policies - signed
- ☐ Inform student of Case Mgt Services for referrals and resources
- ☐ Provide student their course schedule and expectations

7. Remote Video Intake Activities - e

- ☐ Provide students with staff contact information
- ☐ Explain the expectations of remote instruction and cameras on
- ☐ Pair up new students with student ambassadors for support

8. Remote Video Intake Activities - f

- ☐ Ask the student for alternative contact information for follow-up outcomes
- ☐ Required completion of up to 12 hours of intake & total hours of the course
- ☐ Develop plan for student post programming

9. Post Video Intake Activities - a

- ☐ Any amount of time spent with intake must be captured in ASISTS
- ☐ Intake attendance hours must be entered by the end of the month
- ☐ Follow-up with student to answer questions or provide resources

10. Post Video Intake Activities - b

- ☐ Follow-up on outstanding items or questions
- ☐ Follow-up with student periodically to check in and update contact
- ☐ Review student attendance periodically and provide support

KEY ITEMS

- ☐ ISRF must be fully completed & signed
- ☐ Technology needs have been assessed
- ☐ Identification of Barriers to Success
- ☐ Explanation of services and instruction
- ☐ Selection of programming
- ☐ Addressing accessibility needs
- ☐ Scheduling of video call
- ☐ Answering questions
- ☐ Reviewing policies and expectations

COMMENTS AND FEEDBACK

INTAKE STAFF

I have conducted intake remotely with the student listed above and I have completed all intake requirements in support of the student. The student has electronically signed the ISRF form using an approved software.

Employee Signature

Date