



USER GUIDE



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Welcome to CiviCore

Welcome to CiviCore, your new Agency Database. CiviCore will be used to track student, class, organization, and contact information for your use on a daily basis regarding the main data points listed below. As an agency, we will be able to use this data to make strategic decisions in both the short- and long-term.

Please note: This database and user guide are both works in progress. If you have any feedback or requests for changes please contact Ruby Aidun (raidun@1199ctraining.org) or another CiviCore administrator.

MAIN DATA POINTS

Student (SECTION)

Student demographics – complete student information with additional info that may be required for your program.

Employment (if relevant) – For students who come into training WITH a job and for new placements during or after training (and whether or not it is related to training)

Education –

1. The enrollment in Training Fund programs/classes (both literacy and occupational training)
2. Post-secondary transitions upon completion of participation in Training Fund programs/classes.

Status – This will show progression of a student's experience at the Training Fund.

1. General Program Status
2. Credentials
3. Process Status
4. Measurable Skill Gains

Grades – This is decided on a departmental level if you are required to use grades. Entry of grades will result in a transcript.

Classes (SECTION) – Using classes will allow you to assign teachers, activities, attendance, etc. This section can also be used to track attendance at events, e.g. information sessions. Use of classes is decided on a departmental level.

Organizations (SECTION) – This section allows us to capture partner organization information and relationship history. This should be used to manage our communication, outreach, and history with various partners including employers, educational institutions, funders, community partners, etc.

Contacts (SECTION) – This section allows us to capture individual level information for people at organizations. This should also be used to track our teacher information (within the Training Fund Organization).

Reports (SECTION) – This section should be used to run data reports. There will be standard reports available, but you will also be able to create specific reports to your specifications.

Why Do We Need a Database?

Increasingly funders are asking for concrete numbers, and often want specific data. For example, a funder may ask how many black females achieved a certain certificate rather than just asking how many females, of any race, total. Using a database to collect all of this information allows anyone with access to quickly reference numbers needed while writing a grant application or report.

Additionally, having data from every program in one location can allow the Training Fund to:

- Accurately report to the Board updates about the Training Fund
- Track goals and outcomes across the Fund
- Determine where we can grow or improve, or where we need to implement preventative measures
- Examine where in the cycle we are losing students (application, during enrollment, after enrollment, not passing, etc.)
- Investigate if our students can get jobs
- Verify if union members know about this benefit

When used continuously and well, CiviCore can be used as a tool to develop future programming.

While familiarizing yourself with the database, and the information that can be collected, consider what questions you could answer for your own program or department.

Additional Resources

You can find additional CiviCore training videos at [HR/Finance Library \(1199ctraining.org\)](https://hr.finance.library.1199ctraining.org) or on the [Civicorespecific site \(1199ctraining.org\)](https://civicorespecificsite.1199ctraining.org)

Accessing Data and FERPA Policies

Add a policy for staff access to student and other staff data

A. Every person who has been given access to Civic Core or who has access to or knowledge of confidential or sensitive information or data, is obligated to keep such data confidential. Accordingly, every District 1199c Training Fund employee, intern, volunteer, contractor, business associate, or guest who either has or will be given access to printed or online confidential data is required to read and acknowledge his or her understanding of this agreement before being granted access.

1. I will only access confidential or sensitive data for legitimate business purposes as permitted by the District 1199c Training Fund and will not use confidential or sensitive data for personal use. I understand that confidential or sensitive data includes but is not limited to databases and records containing student identifying information, contact information, educational records, work history, and income information

2. I will not leave confidential or sensitive data in view of others who do not have a legitimate business reason to view the data and I will only share confidential data with persons having authorized access. I will not discuss confidential or sensitive information or data in public places

3. I must safeguard my computer and Civic Core password and account information.

I agree to be bound by this confidentiality agreement and to take all reasonable, necessary, and appropriate steps to safeguard private data from disclosure to anyone except as permitted under this agreement and the policies listed below. I understand that violation of this agreement may subject me to possible disciplinary action affecting my employment or relationship with Princeton University.

Student education records as governed by the Family Educational Rights and Privacy Act (FERPA) and student and staff medical records as governed by the Health Insurance and Portability and Accountability Act (HIPAA).

Federal Educational Rights & Privacy Act (FERPA) Notification of Student Rights

Notification of Student Rights

The Family Educational Rights and Privacy Act (FERPA) affords students certain rights with respect to their education records, Health and Technology Training Institute respects the privacy rights of students and their families. These rights include:

1. ***The right to inspect and review the student's education records within 45 days of the day the organization receives a request for access.***

A student should submit a written request to the Administrative Assistant/Records Coordinator or Director of their program that identifies the record(s) the student wishes to inspect. Either official will make arrangements for access and notify the student of the time and place where the records may be inspected.

2. ***The right to request the amendment of the student's education records that the student believes are inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA.***

A student who wishes to ask the school to amend a record should submit a written request to the Administrative Assistant/Records Coordinator or Director of the Practical Nursing Program, clearly identify the part of the record the student wants changed, and specify why it should be changed. If the school decides not to amend the record as requested, the

designated school official will notify the student in writing of the decision and the student's right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the student when notified of the right to a hearing.

3. ***The right to provide written consent before the school discloses personally identifiable information from the student's education records, except to the extent that FERPA authorizes disclosure without consent.***

The school discloses education records without a student's prior written consent under the FERPA exception for disclosure to school officials with legitimate educational interests. A school official is a person employed by the school in an administrative, supervisory, academic or research, or support staff position (including law enforcement unit personnel and health staff); a person or company with whom the school has contracted as its agent to provide a service instead of using school employees or officials (such as an attorney, auditor, or collection agent); a person serving on the Board of Directors; or a student serving on an official committee, such as a disciplinary or grievance committee, or assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibilities for the school.

All students have records in that are maintained onsite or in archives. The privacy of

student records may be broken at a time of emergency defined in terms of the following considerations:

- the seriousness of the threat to health or safety
- the need for access to the records in meeting the emergency
- whether the person requesting the records is in a position to deal with the emergency
- the extent to which time is of the essence in dealing with the emergency.

4. ***The right to file a complaint with the U.S. Department of Education concerning alleged failures by the school to comply with the requirements of FERPA.***

The name and address of the Office that administers FERPA is:

Family Policy Compliance Office

U.S. Department of Education 400 Maryland Avenue, SW Washington, DC 20202-5901

NOTE: Any staff that has used tuition reimbursement or full-time scholarship are considered “students” in the CiviCore Database and their personal data security is protected by law.

Violation of this policy is grounds for disciplinary actions including warning and termination.

To Login:

For first time users, contact an administrator create an account for you.

Staff link to enter data:

<https://1199ctraining.civicore.com>



**DISTRICT 1199C
Training &
Upgrading
Fund**

User Login

Email

Password

[Forgot Password?](#)

If you forgot your password, please click "Forgot Password" or contact an administrator

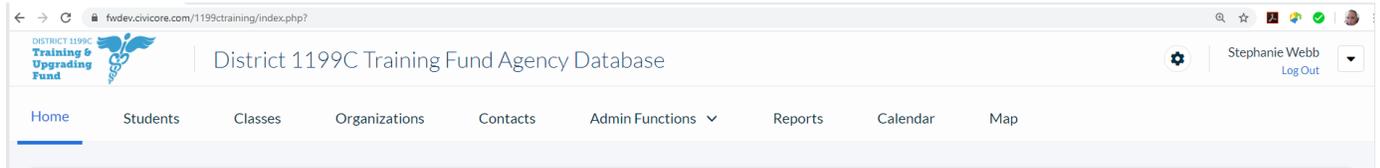
Self-registration link for students to enter their own data:

<https://1199ctraining.civicore.com/index.php?section=review&action=new>

Students should self-register. It depends on YOUR Program's process as to when students should be provided this link. Each program will be different. If you do not have students self-register, **you will be responsible for entering all student information.**

If the student has entered through assessment with Teresa Byrd, they have already completed this self-registration. You do not need to send them this link again. *Search for the student before sending them the link or inputting their information in the Students section*

Navigating CiviCore



SECTIONS

Sections are the different headings you will find at the top of the page when you log in.

Home – Where you will find any announcements or reminders, and at the bottom a dashboard to view the results of reports you’ve created.

Students – All information regarding students including demographics and outcomes

Classes – Where you will view and add attendance for all classes and events, for students or partners

Organizations – Includes information for our partner *organizations* (employer, education, funder, etc)

Contacts – *Individuals* at our partner organizations – includes teachers

Reports – Where you will go to run existing or ready-made reports

Calendar – Will show “Classes” scheduled in the system. Not used as a personal calendar

Map – Will show where a student is in relation to an organization or contact

HOME

This is where you will find any agency wide announcements that are for the whole agency or reminders that are specific things you need to do.

DISTRICT 1199C Training & Upgrading Fund | District 1199C Training Fund Agency Database | **WARNING: Development Environment Currently Loaded** | Stephanie Webb | Log Out

Home | Students | Classes | Organizations | Contacts | Admin Functions | Reports | Calendar | Map

Home

Announcements

Welcome to the first cut (aka super rough draft) of your new data management platform!

Job Workshop Event June 9th

We are almost done with this database and almost ready to go live!!!

Reminders

Items per page: 1 | 1 - 0 of 0 Items | 1 of 0 pages

Youth	Contact	Organization	Reminder Due Date	Reminder
-------	---------	--------------	-------------------	----------

Items per page: 25 | 1 - 0 of 0 Items | 1 of 0 pages

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Display Pages

Every section and child's table menu come with a **display page** that will show important "at a glance" information. Each display page is searchable and sortable.

Student Display Page:

District 1199C Training Fund Agency Database

Home Students Classes Organizations Contacts Admin Functions Reports Calendar Map

Students [Add New Student](#)

Full Name: [Show All](#) Email: [Show All](#)

Items per page: 25 | 1 - 25 of 1489 items 1 of 60 pages

First Name	Last Name	Date of Birth	Email
------------	-----------	---------------	-------

Student/Status Display Page:

Home Students Classes Organizations Contacts Admin Functions Reports Calendar Map

Students

Basic Info Referrals Reminders **Status** Case Notes Classes Grades Documents Education

Khairiyah Abdul-Basit [Add New Status](#)

Status

Items per page: 25 | 1 - 0 of 0 items 1 of 0 pages

Date	Program	General Program Status	Staff	Comments
------	---------	------------------------	-------	----------

Organizations Display page:

District 1199C Training Fund Agency Database

Home Students Classes **Organizations** Contacts Admin Functions Reports Calendar Map

Organizations [Add New Organization](#)

Organization Name: [Show All](#) Organization Type: [Show All](#) Relationship Manager: [Show All](#) Career Pathways Served: [Show All](#)

Items per page: 25 | 1 - 1 of 1 items 1 of 1 pages

Organization Name	Organization Type	Relationship Manager	Career Pathways Served
test	Community-based Organization		--

Organizations/Relationships Display Page:

District 1199C Training Fund Agency Database

Home Students Classes **Organizations** Contacts Admin Functions Reports Calendar Map

Organizations

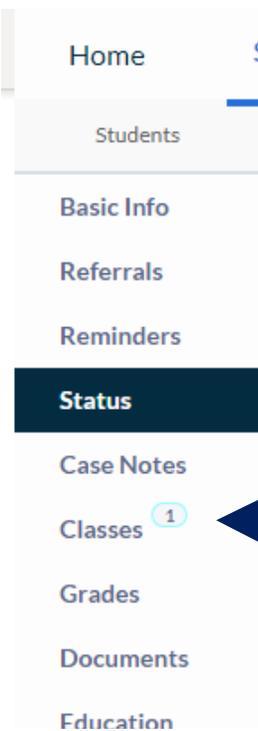
Basic Info Documents Reminders **Relationships** Apprenticeships

test [Add New Relationship](#)

Relationships

Items per page: 25 | 1 - 0 of 0 items 1 of 0 pages

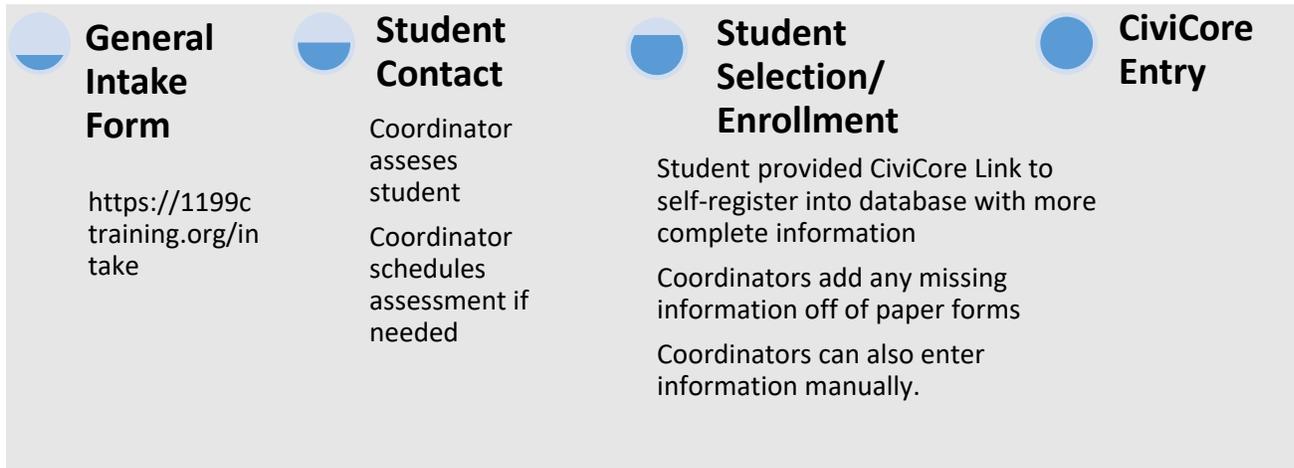
Staff Entering Notes	Date of Contact	Mode of Contact	Who was the primary point of contact for this engagement?
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IMPORANT NOTE:
Any time you see a small number next to a “child’s table” in any of the sections, that means there is information available to view. The number indicates the number of data inputs.

MY NOTES:

The Data Entry Flow



In most cases, students will enter their own information into CiviCore through a link you provided (please see “[Self-registration link](#)”), or they will have already entered their data during assessment. It is up to each department to determine if students will self-register or if that department will do basic info data entry into CiviCore.

Once a student self-registers it is up to the Staff Admins to approve the registration under Admin Functions. Please see the “[STAFF ADMIN INSTRUCTIONS](#)” section of this user guide.

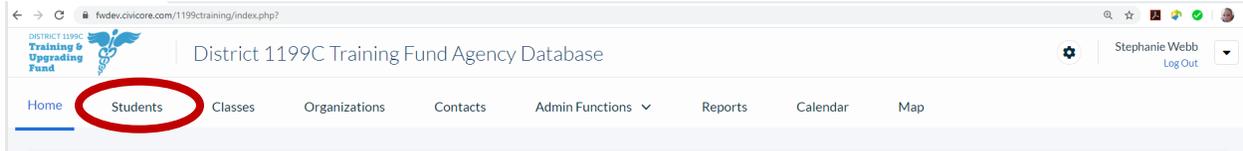
MY NOTES:

STUDENTS SECTION

Start by clicking “Students” in the top menu bar.

This will allow you to:

1. access all student records
2. enter a new student

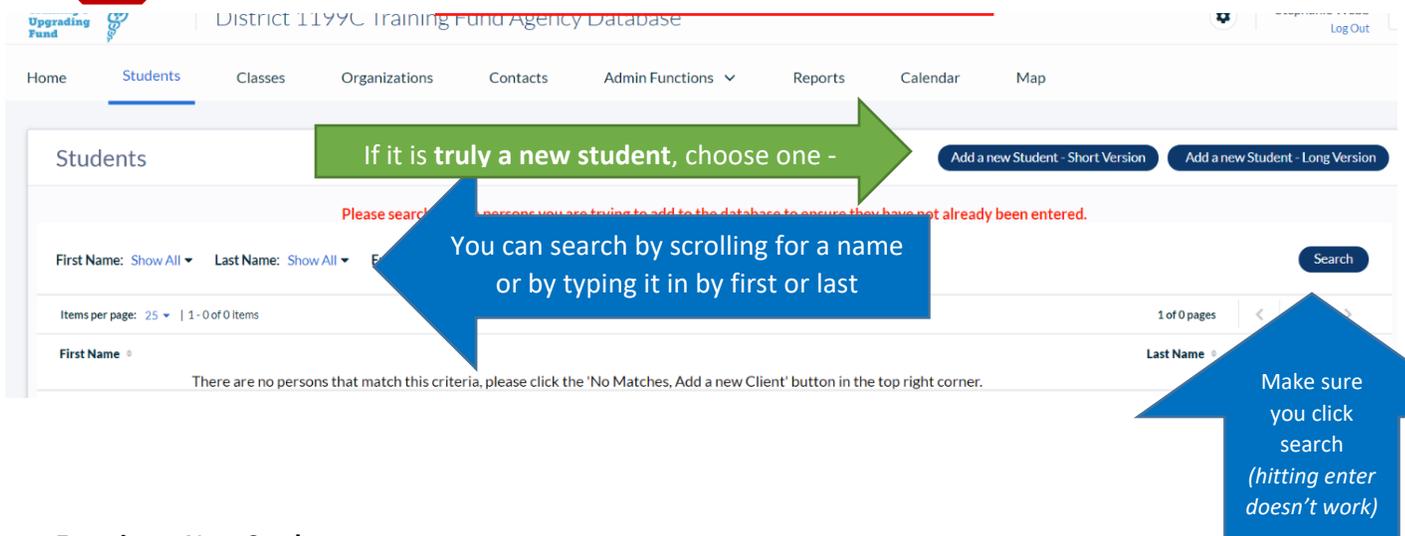


To Add a New Student:

Click on the “Add New Student” button in the top right hand corner of the Students tab. This will take you to a new page, as shown below:



First, make sure you search to see if that student exists.



Entering a New Student

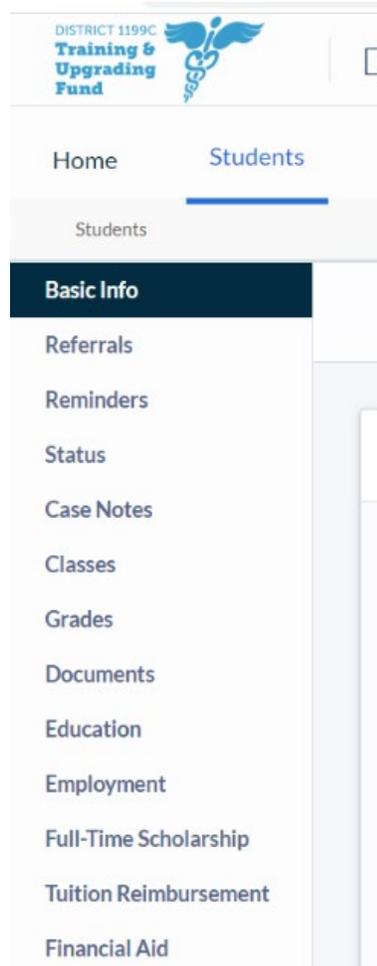
Add a new Student - Short Version

The **short form** is **only used** for programs and events that are one time or very short-term events such as OSHA training, CPR, or on-site trainings

Add a new Student - Long Version

This **long form** should be used for all students to collect the most information. Most students should fill this out on their own, but staff should go in and fill out any missing information.

Options Under Students



Child's Table	Basic Description
Basic Info	Shows student's demographics information
Referrals	Shows where students have been referred internally and externally
Reminders	Set reminders for tasks for yourself or coworkers
Status	To track the status of a student in different areas of participation
Case notes	Keep detailed notes on student progress, concerns, successes, etc.
Classes	Shows the classes students are enrolled in (tied to the "Classes" Section – View only)
Grades	Where you will enter grades for a student in your program. This is tied to reports which will allow you to run a transcript.
Documents	Attach any important documents related to a student.
Education	Tracking the current and continued education record.
Employment	Tracking the current and continued employment record.
<i>Full-Time Scholarship</i>	<i>Only available to certain users.</i>
<i>Tuition Reimbursement</i>	
<i>Financial Aid</i>	

A full description of how to use each option follows.

MY NOTES:

Students: Basic Info

Student demographics and basic background information such as current education level, employment, and income

DISTRICT 1199C Training & Upgrading Fund | District 1199C Training Fund Agency Database | WARNING: Development Environment Currently Loaded | Stephanie Webb | Log Out

Home | **Students** | Classes | Organizations | Contacts | Admin Functions | Reports | Calendar | Map

Students

Training Fund Application

Please note that you must be a District 1199C Union Member eligible under the Training Fund to take Continuing Education classes

EMPLOYMENT/UNION STATUS

* District 1199C Status: --Select-- | Inactive:

CONTACT INFORMATION

* First Name: | Middle Name: | * Last Name:

* Date of Birth: MM/DD/YYYY | Social Security Number (XXX-XX-XXXX):

* Address 1: | Address 2:

* City: | * State: | * Zip Code:

Information should be entered as completely as possible.
Required fields have a *



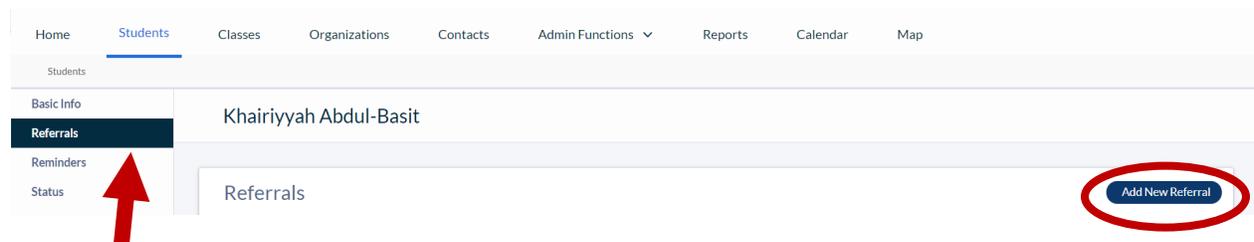
When you are viewing a student's "Basic Info", you are able to download a PDF by pressing the Print Screen button if you need an electronic or paper copy of a student's intake form.

You can also edit the data in the form to make additions or changes. This will be in the upper right corner of the page.

MY NOTES:

Students: Referrals

Used to make or track a student referral. This is mostly used internally, but there is an option at the end to track external referrals.



1. Click "Referrals"
2. Click "Add New Referral"

The screenshot shows the 'Referral' form with the following fields and callouts:

- Date of Referral:** 07/06/2020
- Staff Entering Referral:** Stephanie Webb
- Referral Status:** -- Select --
- Program:** -- Select --
- Follow-up Reminder?:** -- Select --

Callouts provide additional information:

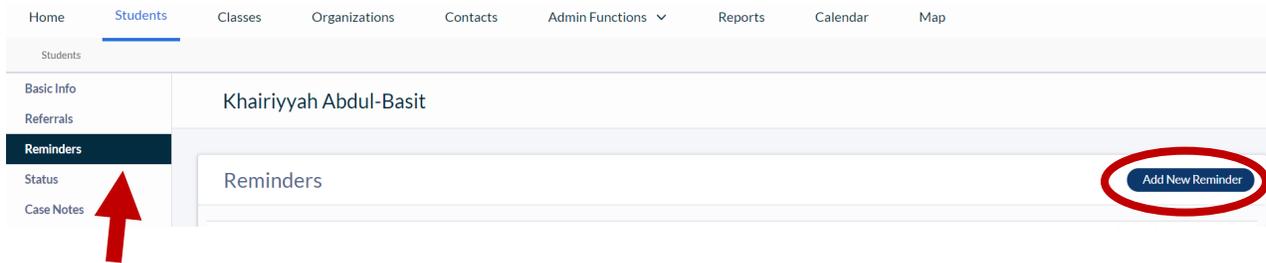
- Program:** A list of all the programs at the Training Fund. There is an option for external referral if you would like to track one you have made.
- Referral Status:** The first Referral Status will be "Referred". The other status options listed will be used to determine where a student is within the process. It is very important to follow up on all referrals you receive (and track those that you make).
- Follow Up Reminder:** reminding others or yourself of actions that need to be taken. Reminders can be added to Outlook calendars.

Buttons at the bottom are: Cancel, **Submit & Add Another Referral** (circled in red), and Submit. A red octagon callout says: Make sure you "Submit".

MY NOTES:

Students: Reminders

Used to remind yourself or others of tasks or events related to a specific student.



1. Click "Reminders"
2. Click "Add New Reminder"

The 'Reminder Information' form includes the following fields and callouts:

- Reminder to:** A dropdown menu with "-- Select --".
- Reminder from:** A text input field with "Type to search".
- Reminder Due Date:** A date input field with "Enter the date this reminder is due." and a calendar icon. Callout: **Due Date –** By when a task should be completed.
- Dashboard Date:** A date input field with "Enter the date you would like this reminder to appear on your dashboard." and a calendar icon. Callout: **Dashboard Date –** when it will show up on the user's dashboard.
- Reminder:** A large text area containing two blue callout boxes: "This should be a **detailed** note of the reminder." and "Send the user a reminder email and calendar invitation."
- Send Reminder Email:** A checkbox.
- Completed Date:** A date input field with "Enter the date that this task was completed." and a callout box: **ALL REMINDERS SHOULD BE MARKED AS COMPLETED!**
- Buttons:** "Cancel" and "Submit". A red octagonal callout box says: **Make sure you "Submit"**

Students: Status

Used to track a student's progress through a program. In this tab we are able to track information that can answer questions such as:

How many students did we enroll this year?

Of the students enrolled, how many actually completed the program?

What were the reasons some students didn't complete the program?

Of the students who completed the program, how many passed the credentialing exam?



1. Click "Status"
2. Click "Add New Status"

FOR EVERY STATUS UPDATE – You must include information on the staff entering the update, the date the update was made, and the program to which the update belongs. The staff and date fields automatically populate with your name and today's date. Be sure to change this if the status update occurred on a different day.

YOU MUST MAKE A NEW STATUS FOR EACH UPDATE, DO NOT CHANGE A PREVIOUS STATUS (unless to fix a mistake). E.g. Do not change an initial "Enrolled" status to "Completed" at the end of a course, create a new status when a student completes a program.

Status

Admin Info

Staff: Stephanie Webb | Date: 07/06/2020 | Program: -- Select --

General Program Status

* General Program Status: -- Select --

General Program Status

Last Update: October 1, 2021

There are three main types of statuses: entry, exit, and outcomes.

Entry – A student should be enrolled in a program only once. To enroll a student, follow the steps above and then select “Enrolled” from the General Program Status drop down menu

Exit – This type of status indicates that the student is no longer in the program. Options include: Completed, Withdrew, Dismissed, Suspended, Terminated, Passed, Failed

A student should only have ONE exit status per program, i.e. a student can’t be dismissed from a class twice

Outcomes – This type of status is for results after the conclusion of a program/class. Options include: Credentials, Clinical/Internship, Earned, or Measurable Skills Gain. A student CAN have more than one outcome, i.e. a student could pass a credential exam and also show MSG.

A good example:

Status					
Items per page: 25 1 - 3 of 3 items					
Date	Program	General Program Status	Credentials	Process Status Type	Measurable Skill Gain
03/17/2021	Dog Catcher Training	Completed	--	--	--
03/17/2021	Dog Catcher Training	Credentials (provide more information below)	Dog Catcher Certificate	--	--
10/26/2020	Dog Catcher Training	Enrolled	--	--	--

You can see in this good example that completing a training and earning a credential are TWO DIFFERENT status updates. The student’s record should contain a status when they finish the training and another for when they pass the credential exam, if applicable.

What to avoid:

Status					
Date	Program	General Program Status	Credentials	Process Status Type	Measurable Skill Gain
01/08/2021	Fitness Instructor Training	Enrolled	CPR	--	Earned an Industry Recognized Credential
01/08/2021	Fitness Instructor Training	Enrolled	Temporary Fitness Instructor Certificate	--	Earned an Industry Recognized Credential

In this example it appears as if the student was enrolled in the same program twice. However, the top line should have a General Program Status of “Credentials”, not “Enrolled”. The bottom line should also have a General Program Status of “Credentials”, since the student achieved a Temporary Fitness Instructor Certificate. Additionally, there should be a status that indicates the true date when the student “Enrolled” and another when the student “Completed’ the training.

Note: There are many other options in the drop-down menu (complete list below). Please discuss with your program and/or your department to ensure you understand if and when to use each option so that data entry is consistent.

- Applied
- Assigned
- Clinical/Internship
- Closed
- Completed
- Credentials (see below)
- Dismissed
- Earned
- Measurable Skills Gain (see below)
- Enrolled
- Failed
- Follow-up/retention
- Interviewed
- Leave of Absence
- Other
- Passed
- Pending
- Process Status (see below)
- Referred
- Reinstated
- Schedule Verification
- Scheduled
- Suspended
- Terminated
- Withdrew

Credentials – To track all types of credentials including certifications, HSE, and degree attainment.

Credentials

Select the type of Credential, License, Certification, or exam the student is getting

**if something needs to be added, let us know.*

Credential/License/Certification/Degree/Exam status

-- Select --

- ✓ -- Select --
- CDA
- HSE
- NCLEXRN
- NCLEXPN
- NREMT
- NA Skills

Status

-- Select --

- ✓ -- Select --
- Scheduled
- Rescheduled
- Passed
- Failed
- Earned
- Completed

Indicate the status of where a student is. **There should be a new status for each step** so we can better track how much time passes between the start and end of the process.

Process Status Type – To track where a student is within a process. *This is mostly used for Tuition Reimbursement and HTTI, however, if you have use to track a Process Status, it can be modified.*

Process Status Type

Process Status Type

-- Select --

Process Status

-- Select --

Process Status Type – indicates steps in the process.

- ✓ -- Select --
- Application Complete
- Application Submitted
- Check printed
- Check sent to school
- Check sent to student
- Document(s) collected

Process Status – indicates the outcome of the Process.

- ✓ -- Select --
- Waiting
- In Progress
- Completed
- Pending
- Full-Time schedule maintained
- Less than full-time

Measurable Skill Gain – Select the Measurable Skill Gains (MSG) as indicated by WIOA.

Measurable Skill Gain

Measurable Skill Gain

- Completion of On-The-Job Training
 - Completion of one year of an apprenticeship program
 - Earned a HSE diploma (GED/HiSET)
 - Earned an Industry Recognized Credential
 - Educational Functioning Level (EFL) Gain on post-test
 - Entered into post-secondary training
 - Placed into unsubsidized employment 
-

Notes – It's always a good idea to add detailed notes for yourself or the next person reviewing a student record.

Notes

Comments

Cancel

Submit



Make
sure you
"Submit"

Students: Case Notes

This section tracks additional services a student might receive, such as resume writing, mock interview practice, financial counseling, work or income support, barrier counseling, or academic counseling

The screenshot shows the 'Students' page for Khairiyah Abdul-Basit. The left sidebar has 'Case Notes' highlighted with a red arrow. The main content area shows a table with columns for 'Session Date', 'Staff Entering Case Note', 'Session Categories', and 'Notes'. The 'Add New Case Note' button is circled in red.

1. Click "Case Notes"
2. Click "Add New Case Note"

EVERY CASE NOTE WILL REQUIRE THE ADMIN SECTION TO BE FILLED OUT.

The screenshot shows the 'Admin' section for Case Notes. It includes fields for 'Staff Entering Case Note' (Stephanie Webb), 'Session Date' (07/06/2020), 'Duration (in minutes)', 'Mode of Contact' (dropdown), and 'Session Categories' (dropdown). A callout box explains that 'Mode of Contact is how you were in touch with the student (in person meeting, telephone, text, email, etc.)'. Another callout box states 'The duration of the sessions is important to better help us determine how long each category typically takes.' A dropdown menu for 'Session Categories' is open, showing options like Academic Counseling, Barrier Counseling, Case Management, Employment Counseling, Financial Counseling, Income Supports Counseling, and Work/Education Supports.

Employment

Employment Focus of Session

- Referred to an employer for Interview
- Employment Retention
- Verified Employment
- Mock Interview
- Resume Writing
- Application Assistance 📄

Use to track the types of employment counseling a student receives.

Financial

Financial Focus of Session

- Credit Counseling
- Housing Rental or Purchase
- Banking
- VITA Tax Preparation 📄

Only use if you are providing Financial Counseling or Referrals

Work Support Focus of Session

- Received clothing/uniform assistance
- Received supplies/equipment assistance
- Received books or assistance to purchase books
- Received stipend
- Received Individual Training Account (ITA) assistance 📄

Did Student Receive Work Support Funds \$

Yes

Clothing/Uniform Assistance \$ Amount

Supplies/Equipment Assistance \$ Amount

Books or Book Purchase Assistance \$ Amount

Stipend Assistance \$ Amount

Individual Training Account Assistance \$ Amount

Total Work Support \$ Amount

\$ 0

Use to track the Work Supports students receive. If you say "Yes" to "Did the student receive work support funds?" These other options will come up allowing you to put in the Total Amount provided to or for the student. The Total Work Support Amount will automatically calculate the total amount spent per student.

Income Supports

General Benefits Screening Results

-- Select --

Eligible Benefits

Yes

If after you screen a student you select "Yes" that they are eligible for benefits, the list of benefit types will populate. You can indicate for which you help students apply.

Eligible for the following benefits

- Child Care Subsidies
- FAFSA
- Financial Aid (Grants)
- Head Start/Early
- Medical benefit/Health Insurance
- Other Non-Recurring Assistance (cash or non-cash)
- Recurring Cash Assistance/Payments, SNAP (food stamps and comparable programs)
- Subsidized Housing
- Unemployment Compensation
- Utility Assistance
- WIC (Women, Infants and Children) 

SNAP (Application/Reapplication)

-- Select --

TANF (Application/Reapplication)

-- Select --

Child Care Subsidies

-- Select --

Received transportation assistance

-- Select --

Child support assistance

-- Select --

These are Yes/No responses if a student is already receiving these benefits.

Barrier Counseling

Barrier Focus of Session

- Barrier Plan
- Childcare
- Driver's License Acquisition/Assistance
- Housing
- Legal Aid
- Mental Health Referrals/Support
- Outreach
- Physical Health Referrals/Support
- Transportation 

Our students face barriers that prevent them from coming to school or finding employment. This is a way to track counseling that addresses those issues.

Academic Counseling

Academic Focus of Session

- Program retention
- License/certification information
- FAFSA (application, discussion, etc.)
- Financial Aid
- Transition to post-secondary
- Grades
- Attendance 

Academic Counseling is related to issues specifically related to academic or occupational training as well as transition to post-secondary training.

Case Management

Did you refer student to outside agency reference

Yes

Outside Agency Reference

Type to search

Case Management – This type of counseling requires us to refer a student to an external partner organization. If you answer “Yes”, then it will ask the Name of the Organization.

Notes

Notes

This should be **details** that will be helpful for you or someone else looking at this record.

Make sure you **“Submit”**

Cancel

Submit & Add Referral

Submit

MY NOTES:

Students: Classes

This screen would just show any of a student's scheduled classes or activities. It is tied to the "Classes" section. *You cannot edit this page.*

Home Students Classes Organizations Contacts Admin Functions Reports Calendar Map

Students

Basic Info

Referrals

Reminders

Status

Case Notes

Classes

Grades

Documents

Education

Employment

Khairiyah Abdul-Basit

Classes

Items per page: 25 | 1 - 0 of 0 Items 1 of 0 pages < 1 >

Name	Enroll Date	Completed/Dismissed date
Items per page: 25 1 - 0 of 0 Items 1 of 0 pages < 1 >		

Students: Grades

This is where you will enter all grades for a student and will allow you to ultimately create a transcript.

Reminders

Status

Case Notes

Classes

Grades

Documents

Employment

Grades

Items per page: 25 | 1 - 0 of 0 Items 1 of 0 pages < 1 >

Academic Year	Term/Cycle/Module	Program Name	Course Title & Course Code	Course Letter Grade
Items per page: 25 1 - 0 of 0 Items 1 of 0 pages < 1 >				

Add Grade Record

1. Click "Grades"
2. Click "Add New Grade"

Grades

* Staff creating record:

* Date Record Created:

* Academic Year:

* Term/Cycle/Module:

* Program Name:

* Course Title & Course Code:

Number of Credits Attempted:

Number of Credits Earned:

* Course Letter Grade:

Course Percentage Grade:

Notes

Notes should be **details** that will be helpful for you or someone else looking at this record.

Grade information should be entered completely for everything your track. What is entered is able to be put on a transcript.

**NOTE – Please provide course titles/course codes so the options can be updated*

Make sure you "Submit"

Students: Documents

Any document can be uploaded that you would like to keep an electronic copy of for your or other's records. *If the list of Document Types needs to be amended, please let us know.*

The screenshot shows a web interface for managing documents. On the left, a navigation menu includes 'Reminders', 'Status', 'Case Notes', 'Classes', 'Grades', and 'Documents', with 'Documents' selected and a red arrow pointing to it. The main area is titled 'Documents' and contains a table with columns for 'Date', 'File Name', and 'Document Type'. Above the table, there are controls for 'Items per page' (set to 25) and '1 of 0 items'. A red circle highlights the 'Add New Document' button in the top right corner of the main area.

1. Click "Documents"
2. Click "Add New Document"

Document Information

* Date
MM/DD/YYYY

* Document Type
-- Select --

Not
-- Select --
2 step PPD
Agency intake form
Attendance
CASAS registration data
CCR Paperwork
CDA Certification

* File Name ?
Name
No file is currently uploaded.
Upload File

File Name should be in this format -
DescriptiveFileName_DateOfDocument

Notes should be **details** that will
be helpful for you or someone
else looking at this record.

Cancel Submit

Make
sure you
"Submit"

MY NOTES:

Students: Education

The education record will capture placement and program completion for internal programs at the Training Fund as well as for transitions to post-secondary education or additional training.

Reminders
Status
Case Notes
Classes
Grades
Documents
Education
Employment

Education

Items per page: 25 | 1 - 0 of 0 items 1 of 0 pages < 1 >

Start Date Educational Institution Education Placement Level Specific Program Name Staff Member

Items per page: 25 | 1 - 0 of 0 items 1 of 0 pages < 1 >

1. Click “Education”
2. Click “Add New Education Record”

Admin

Contact with: -- Select --

Staff Member: Type to search

* Start Date: MM/DD/YYYY

Student began this education program prior to Training Fund Enrollment

It is very important for data purposes to indicate if a student came into the Training Fund already enrolled in or having completed another training program.

Program

* Educational Institution: Type to search

* Education Placement Level: -- Select --

Placement Level represents the type of class at the Training Fund or externally.

* Specific Program Name: [Empty field]

Exit Information

End Date: MM/DD/YYYY

-- Select --

Exit information should capture a successful completion or termination/withdraw

Successful Program Completion, No Credential
Successful Program Completion, with Credential
Exited Early from Program

Cancel Submit

MY NOTES:

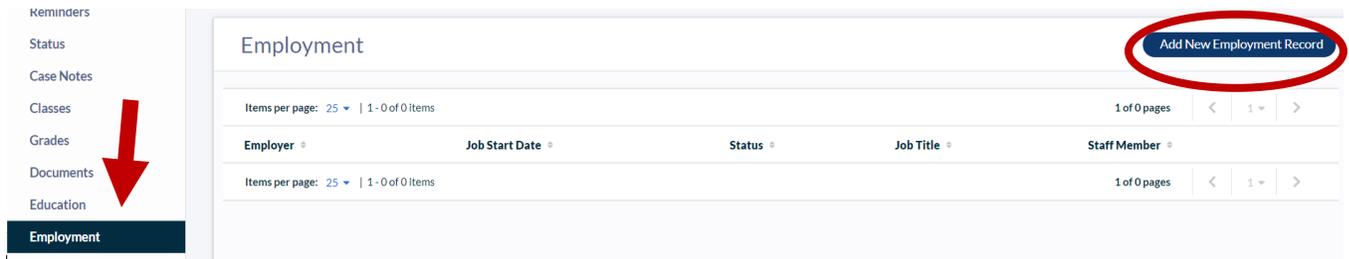


Students: Employment

The employment record will capture existing employment information for incumbent workers as well as any placements made during or after training.

Data from this section can be used to answer questions such as:

1. Did the student's wage increase after completing this training or class?
2. Is the student working in a job related to the training?
3. How long was the student able to keep the job after completing training?



1. Click "Employment"
2. Click "Add New Employment Record"

The Employment information should be as complete as possible. It is extremely important to indicate if the student had the employment before enrollment (incumbent worker), were placed after training (regardless if it is within a specific career pathway), or if it is an update to the employment record. Updates to the employment record are the only way to track increases/decreases in wages, hours, benefits, etc., or other employment changes on that record. **Every job or wage change should have its own employment record.** Otherwise, the changes cannot be tracked.

Employment Information

* Date record created 07/07/2020	Staff Member Type to search
* Employer Type to search	Phone Number at Work ###-###-####
* Job Start Date MM/DD/YYYY	Training Fund Employer -- Select --
Contact with -- Select --	* Status -- Select --

"Contact with" allows you to indicate if the contact was directly with the student or a third party like the employer or a case manager.

- ✓ -- Select --
- Had this job before enrollment
- Placed after training/education
- Update to employment (+/- wages, hours, benefits, etc.)

Placement Details

Job Type

* Job Title

* Job Category

Is this job an internship?

Is this job self-employment?

Industry Focus?

Is this job related to training?

- ✓ -- Select --
- 11-0000 Management Occupations
- 13-0000 Business and Financial Operations Occupations
- 15-0000 Computer and Mathematical Occupations
- 17-0000 Architecture and Engineering Occupations
- 19-0000 Life, Physical, and Social Science Occupations
- 21-0000 Community and Social Service Occupations

The Industry Focus is related to the Standard Occupational Classification (SOC) Codes and will allow us better to track placement data. **Don't forget to select the appropriate SOC Code.**

Pay

Wage Information is important to input correctly and completely.

Wages

* Wage Type

* Benefit type

Frequency of Pay

Does Student pay into Unemployment Compensation

* Hours per Week

* Hourly Wage

Job Termination should be captured whether it was a positive or negative termination from the job. **For terminations, it should be made on the employment record of that job.**

Job Termination

Job End Date: MM/DD/YYYY 

Reason for termination: -- Select --  

Notes

- ✓ -- Select --
- Completed temporary/seasonal job
- Fired
- Quit
- Laid off
- Positive Withdrawal



You should add “Notes” to explain any update or termination for information that is not captured elsewhere.

MY NOTES:

STUDENTS: TUITION REIMBURSEMENT/FULL-TIME SCHOLARSHIP/FINANCIAL AID

To access Tuition Reimbursement/Full-Time Scholarship/Financial Aid child's tables, you will have to be given special access and work in those departments. These options are available under the STUDENTS Section.

Full-Time Scholarship –

Full-Time Scholarship

Items per page: 25 | 1 - 0 of 0 Items

1 of 0 pages < 1 >

Date Record Created School Attending Program Full-time Scholarship Start Date Fiscal Year

Items per page: 25 | 1 - 0 of 0 Items

1 of 0 pages < 1 >

1. Click “Full-Time Scholarship”
2. Click “Add New Full-Time Scholarship Record”

The top part of the record will be when the scholarship is initiated and should include information about the school the student is attending and degree they are seeking, when their scholarship began, and the student's anticipated graduation date.

Full-Time Scholarship

* Date Record Created
07/07/2020

* School Attending
Type to search

* Program
-- Select --

* Full-time Scholarship Start Date
MM/DD/YYYY

Scholarship Anticipated Graduation or Completion Date
MM/DD/YYYY

* Fiscal Year
-- Select --

Ideally, there will be ONE RECORD per fiscal year. If all slots are taken, then you may create another record, but be sure to select the same fiscal year.

MY NOTES:

Adding Semesters

Semester 1

Semester 1 Tuition Amount Paid 	Semester 1 Check Number	Semester 1 Tuition Date Paid
\$ <input type="text"/>	<input type="text"/>	MM/DD/YYYY <input type="text"/>
Semester 1 Cost per Semester 		
\$ <input type="text"/>		
Semester 1 Start Date	Semester 1 End Date	
MM/DD/YYYY <input type="text"/>	MM/DD/YYYY <input type="text"/>	
Semester 1 Books Check Number	Semester 1 Books Check Amount	Semester 1 Books Check Disbursement date
<input type="text"/>	\$ <input type="text"/>	MM/DD/YYYY <input type="text"/>
Semester 1 Uniform Check Number	Semester 1 Uniform Check Amount	Semester 1 Uniform Check Disbursement Date
<input type="text"/>	\$ <input type="text"/>	MM/DD/YYYY <input type="text"/>
Semester 1 Tutoring A Check Number	Semester 1 Tutoring A Check Amount	Semester 1 Tutoring A Check Distribution Date
<input type="text"/>	\$ <input type="text"/>	MM/DD/YYYY <input type="text"/>
Semester 1 Tutoring B Check Number	Semester 1 Tutoring B Check Amount	Semester 1 Tutoring B Check Distribution Date
<input type="text"/>	\$ <input type="text"/>	MM/DD/YYYY <input type="text"/>
Semester 1 Tutoring C Check Number	Semester 1 Tutoring C Check Amount	Semester 1 Tutoring C Check Distribution Date
<input type="text"/>	\$ <input type="text"/>	MM/DD/YYYY <input type="text"/>

Semester 1 Course Completion Status

-- Select --  

Total Education Costs per Semester 1

\$ 0

All costs for each semester should be entered into CiviCore including tuition, books, uniforms, and tutoring. Be sure to include the check number, amounts, and dates of disbursements. The final box called Total Education Costs per Semester will calculate the total costs. There are 4 Semesters for each "new record". If additional semesters are needed, you will need to create a new record and choose the same fiscal year.

MY NOTES:

FTS has additional costs that are covered for each student on an annual basis. The amounts should be entered here.

CiviCore will automatically calculate the 4 semesters of tuition + additional scholarship cost to determine the total cost per fiscal year.

Additional Scholarship Fees

Union Dues Amount
\$

Biweekly Stipend Amount
\$

Medical Benefits Amount
\$

Calculations

Total Education Costs (All 4 Semesters)	Total Additional Scholarship Amount	Total Costs Per Fiscal Year
\$ 0	\$ 0	\$ 0

Notes



MY NOTES:

Tuition Reimbursement –

The screenshot shows a navigation sidebar on the left with 'Tuition Reimbursement' highlighted. The main content area is titled 'Tuition Reimbursement' and contains a table with columns for 'Date Record Created', 'Fiscal Year', 'Amount Paid by T&U for Fiscal Year do not use', and 'Remaining Annual Balance'. A red arrow points to the 'Tuition Reimbursement' link in the sidebar, and a red circle highlights the 'Add New Tuition Record' button in the top right corner.

1. Click “Tuition Reimbursement”
2. Click “Add New Tuition Record”

Each tuition reimbursement record should represent the Fiscal Year. There are enough slots to capture up to 10 courses per year. If you need additional courses beyond 10, you will have to create a new record but for the same fiscal year. For a second record, in the amount Eligible, it will be whatever the remaining balance is from the first record.

Tuition Reimbursement

Admin

* Amount Eligible for ?

Remaining Annual Balance

\$

This is the amount the student is eligible for based on the numbers of hours they work at their employer.

The remaining balance will populate once this form has been completed and submitted. It subtracts the amount used from the eligible amount.

Tuition Reimbursement

* Date Record Created

MM/DD/YYYY

Anticipated graduation or completion date

MM/DD/YYYY

If this course work is part of a pre-requisite requirement, specify what program you are seeking admission to

Have you applied to any other fund programs

-- Select --

* Fiscal Year

-- Select --

For students pursuing a degree or credential, what is the name of it?

If this course work is part of a vocational or degreed program, specify the diploma/degree you are seeking

MY NOTES:

Adding Courses

Course 1

1- Is this for up front tuition? -- Select --		
1 - Application Number <input type="text"/>	1 - Application Date MM/DD/YYYY <input type="text"/>	1 - Category of coursework -- Select --
1 - Course Completion Status -- Select --		
Are you entitled to receive or are you receiving tuition aid from your institution? -- Select --	1 - Check Distribution Status -- Select --	1 - Distribution Date MM/DD/YYYY <input type="text"/>
1 - Course Check # <input type="text"/>	1 - Course Check Amount \$ <input type="text"/>	
1 - What Semester Are you Asking Reimbursement for -- Select --	1 - School you wish to attend Type to search <input type="text"/>	
1 - Course Title <input type="text"/>	1 - Dept. & Catalog # <input type="text"/>	1 - Credits <input type="text"/>
1 - Start Date MM/DD/YYYY <input type="text"/>	1 - End Date MM/DD/YYYY <input type="text"/>	1 - Tuition Per Course \$ <input type="text"/>

Make
sure you
"Submit"

Cancel

Submit

It is important to answer each question. Some of the options are:

Application numbers: come from the paper or electronic applications

Category of coursework: Certification, Degree Program, Pre-Requisites, Vocational Program, Other

Course Completion Status: Pass, Fail, Complete, Incomplete, In Progress

Check Distribution Status: Mailed to student, Mailed to school, Picked up by Student

School you wish to attend: This is a searchable list. The school must be added to Organizations section first.

Tuition Reimbursement

Admin

* Amount Eligible for 

Remaining Annual Balance

\$

1 - Tuition Per Course

\$

Total Amount Paid for Courses by T&U for Fiscal Year

\$ 0

It is very important to fill in the amounts in these boxes. This amount for each semester will total together and be subtracted from the amount for which the student is eligible. The system will automatically total the total amount of Tuition Paid for all courses and will use that calculate a student's remaining balance subtracted from the eligibility amount for the year.

Financial Aid –

1. Click “Financial Aid”
2. Click “Add New Financial Aid Record”

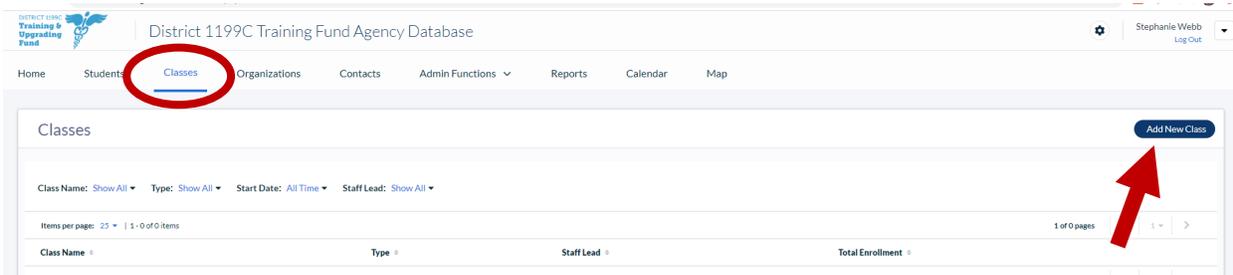
As you check boxes for the type of financial aid you are reporting on in this record, corresponding award amounts and disbursement dates will show up below.

The system will automatically calculate the Total Financial Aid Types Awarded.

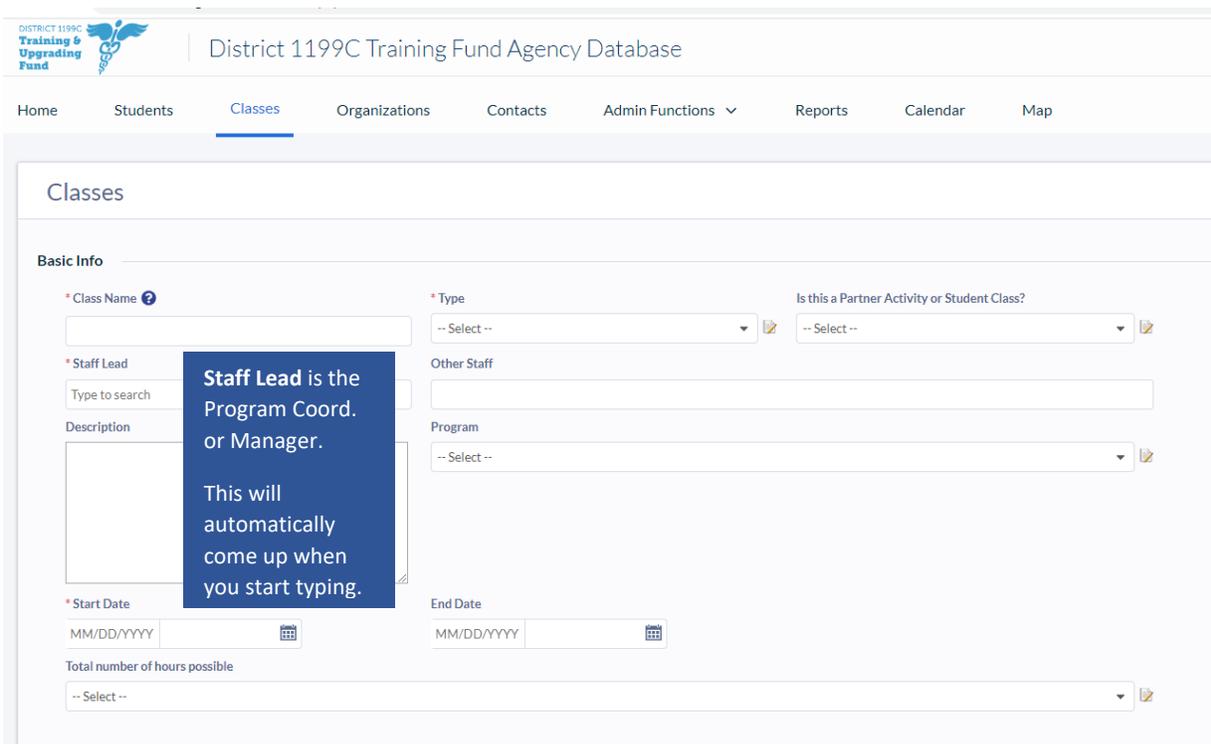
You are able to capture additional information including:

CLASSES SECTION

This section is where you will go to view or add specific class or event information.



1. Click "Classes"
2. Click "Add New Class"



The first part of the Classes section is entering basic information.

The **Class Name** should be descriptive and at a minimum should include the Course Name/Type and Session, Date, or Term. (You can click on the  for a description)

For Example:

CCR4 July 2020

HTTI NA Summer 2020

Last Update: October 1, 2021

* Type

-- Select --

Other Staff

✓ -- Select --

- After school workshop
- Bridge Program
- Career Fair Participation
- Career Workshop
- College & Career Prep Workshop
- College and Career Readiness (CCR)

Be sure to select the correct class type. This will help you and other users distinguish this class from other types of classes in which one group of students may participate.

This is also important from a data perspective when we will run reports on the types of classes being offered at the Training Fund.

It is also important to indicate if this is a Partner Activity or a Student Class.

Partner Activity: a one-time event that happens with a partner. This would most likely be a meeting that you want to capture information such as who attended. This is very important in terms of managing our partner relationships.

Student Class: This is regular daily classes or one-time/short-term events such as a career fair or workshop attended by our students.

Is this a Partner Activity or Student Class?

-- Select --

✓ -- Select --

- Partner Activity
- Student Class

Program

-- Select --

End Date

MM/DD/YYYY

✓ -- Select --

- Addictions Counselor Apprenticeship
- Addictions Counselor Certification
- All Learning Counts
- Basic Computer (Union)
- Behavioral Health Tech (Union Member Class)
- CCR ABE/GED

Select your specific program. This will help us run reports based on all the classes you are running throughout the year.

The specific start date is required. Ideally, you will also add the end date and total number of hours possible.

Total Hours possible depends on how you plan to enter attendance (daily or for the whole program).

* Start Date

MM/DD/YYYY

End Date

MM/DD/YYYY

Total number of hours possible

-- Select --

Bulk Registration

Bulk Registration Info

Is this a class where you only want to count the number of participants, not individuals?

-- Select --

Genders

Ages

Ethnicities

Hispanic

On the basic information set-up, you can add Bulk Registration information to capture basic participant information. For example, this is a useful feature if you want to track how many people attended an info session.

If you answer yes to the question, "Is this a class where you only want to count the number of participants, not individuals?", more options will come up for you to enter specific information for the group as a whole.

Genders

Not Collected

Males

Females

Transgender

Not Disclosed

Total Attendees
0

Remaining Attendees
0

Ages

Not Collected

Under 6 Years

6 to 11 Years

12 to 14 Years

15 to 18 Years

Make sure you "Submit"

MY NOTES:

Copying a Class

As seen above, a lot of information must be entered before creating a class. This is cumbersome if the class is offered every year, or several sections occur at the same time. To duplicate a class, click on the 'Copy Class' button.

Classes						Add New Class
Class Name: Show All Type: Show All Start Date: All Time Staff Lead: Show All Program: Show All						
Items per page: 25 1 - 25 of 164 items				1 of 7 pages		
Class Name	Type	Program	Staff Lead	Total Enrollment		
HTTI PN Level 4 Child Health Nursing-22	Workforce Development	HTTI Practical Nursing (PN)	Renee Orgill	0	Copy Class Q ✎ 🗑	
HTTI PN Level 4 Genrontology-22	Workforce Development	HTTI Practical Nursing (PN)	Renee Orgill	0	Copy Class Q ✎ 🗑	
HTTI PN Level 4 Nursing Care Of Childbearing Families -22	Workforce Development	HTTI Practical Nursing (PN)	Renee Orgill	0	Copy Class Q ✎ 🗑	
HTTI PN Level 4 Nursing Management-22	Workforce Development	HTTI Practical Nursing (PN)	Renee Orgill	0	Copy Class Q ✎ 🗑	
HTTI PN Level 1 Anatomy & Physiology 1-23	Workforce Development	HTTI Practical Nursing (PN)	Renee Orgill	0	Copy Class Q ✎ 🗑	

This will bring up a new window:

Basic Info

* Class Name [?](#)

* Type [🗑](#) Is this a Partner Activity or Student Class? [🗑](#)

* Staff Lead

Other Staff

Description

Program [🗑](#)

* Start Date [📅](#) End Date [📅](#)

Total number of hours possible [🗑](#)

[Cancel](#) [Submit](#)

You can review and edit any information, or leave it as is. You MUST enter in a Start Data. Once complete, hit submit. The new class will appear in the list of Classes.

Classes: Students

Home Students **Classes** Organizations Contacts Admin Functions Reports Calendar Map

Classes

Basic Info

Students

Controls

Enroll Student

Test Class

Students

Items per page: 25 | 1 - 0 of 0 items 1 of 0 pages < 1 >

Student Name Enroll Date Completed/Dismissed date

Items per page: 25 | 1 - 0 of 0 items 1 of 0 pages < 1 >

1. Click on a class name, from the Classes display page
2. Click “Students”
3. Click “Enroll Student” - **NOTE:** this does not automatically create an “enrolled” status on the student’s profile. You must go into the student’s profile and create and “enrolled” status.

Use the search to find the person you are looking for. Click on the 'Enroll' button next to the name. When done, click 'Close' in the bottom right hand corner.

First Name: Show All Last Name: Show All

Click on “Show All” to sort or search for a specific student.

Items per page: 25 | 1 - 25 of 1490 items 1 of 60 pages < 1 >

First Name	Last Name	Enroll
Khairiyah	Abdul-Basit	Enroll
Sakinah	Abdul-Fattah	Enroll
Ayanna	Abdullah	Enroll
Jamillah	Abdullah	Enroll
Nabiah	Abdullah	Enroll

When you find your student, simply click “Enroll”

Note: the student must already be entered into the Students section in order to enroll them in a class

Students

Enroll Stu

Items per page: 25 | 1 - 11 of 11 items

Student Name	Enroll Date	Completed/Dismissed date	
Elaine M. Bundy	07/12/2021	--	Unenroll
Tina Curry	07/12/2021	--	Unenroll
Claude May Damas	07/12/2021	--	Unenroll
Darren Fairell,Sr	07/12/2021	--	Unenroll
Brianna Garcia	07/12/2021	--	Unenroll
Anastasia Hall	07/12/2021	--	Unenroll
Jeffrey Hunter	07/12/2021	--	Unenroll
Isatu Jalloh	07/12/2021	--	Unenroll
Kim Jones	07/12/2021	--	Unenroll
Mary Robinson	07/12/2021	--	Unenroll

When the student finished the class, withdraws, or is dismissed, click the "Unenroll" button

The Enroll and Completed dates can be edited

Class Enrollment

* Student Name: Elaine M. Bundy

Enroll Date: 07/12/2021

Completed/Dismissed date: MM/DD/YYYY

Cancel Submit

The enroll and completed dates will automatically populate with the current date. However, if they actually enrolled or completed on a different day, the dates can be edited by clicking on the little pencil icon.

Classes: Contacts

Home Students **Classes** Organizations Contacts Admin Functions Reports Calendar Map

Classes

Basic Info

Students

Contacts

Attendance

Dismissals

Test Class

Contacts

Enroll contacts

Items per page: 25 | 1 - 0 of 0 items

Contact

Enroll Date

Unenroll Date

Items per page: 25 | 1 - 0 of 0 items

1. Click "Contacts"
2. Click "Enroll Contacts"

Contacts for classes are the individual Contacts at an organization who are involved with a class. This includes teachers as a contact.

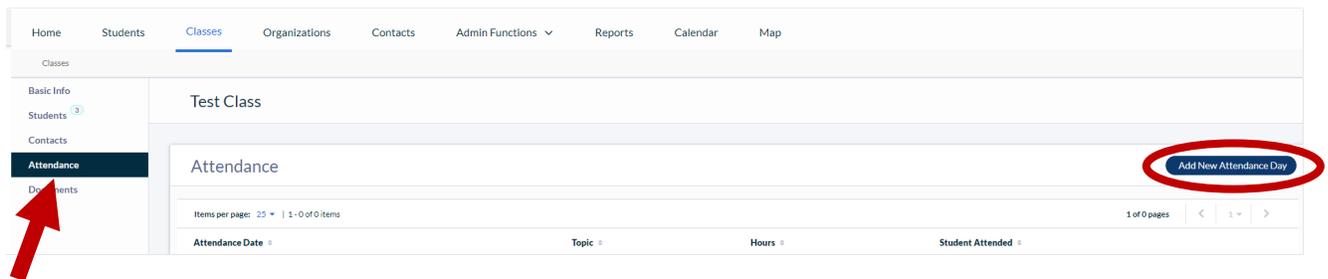
The process is the same as enrolling a student. You must make sure that the Contact is first entered under the Contact section of CiviCore.

Classes: Adding Attendance

This section is most conveniently used by the instructors on the day of the class, or immediately following. It is cumbersome to retroactively enter many days of attendance. Alternatively, this section could be used to indicate the total number of hours a class is, and in total how many hours a student completed.

Some questions that could be investigated using the data in this section include:

1. Of the students who passed the credentialing exam, on average how many hours of class did they miss?
2. Does attendance decline before a student withdraws?
3. Does attendance always drop during a certain time? Why? Is there anything we can do to support our students during this time?



The screenshot shows the CiviCore interface for a 'Test Class'. The left sidebar has a menu with 'Attendance' highlighted. A red arrow points to this menu item. The main content area shows the 'Attendance' section with a table header and a 'Add New Attendance Day' button circled in red.

1. Click "Attendance"
2. Click "Add New Attendance Day"

Test Class

Attendance

Day Information

* Attendance Date
MM/DD/YYYY

* Hours

* Topic
--Select--

* Start Time

Comments

Topic Choices

- Clinical
- Internship
- Lab
- Orientation
- Theory

Student Name	Attendance	Partial Credit Hours
Khairiyah Abdul-Basit	<input checked="" type="radio"/> Attended <input type="radio"/> Did Not Attend <input type="radio"/> Excused	<input type="text"/>
Nakiah Abdullah	<input checked="" type="radio"/> Attended <input type="radio"/> Did Not Attend <input type="radio"/> Excused	<input type="text"/>
Abosede Adekunle	<input checked="" type="radio"/> Attended <input type="radio"/> Did Not Attend <input type="radio"/> Excused	<input type="text"/>

Cancel Submit

Don't set attendance

Don't set attendance

Don't set attendance

It is important to select a Topic for you class. The topics are used to differentiate the types of attendance a student can have.

It is important to know if your program is tracking daily attendance in CiviCore or in some other database. For hours, enter in the total hours for **this class** (for example, 3 hours per class attendance record). If you are using some other database, put in the total hours possible.

Attended: If a student earns all possible hours (no absences, not tardy, didn't leave early).

Did Not Attend: If a student was absent.

Excused: The student was absent, but it was an excused absence.

Partial Credit Hours: Fill in if a student was late to class or left early and didn't early full attendance credit.

Classes: Documents

Home Students **Classes** Organizations Contacts Admin Functions Reports Calendar Map

Classes

Basic Info

Students (3)

Contacts

Attendance

Documents

Test Class

Documents

Items per page: 25 | 1 - 0 of 0 items

1 of 0 pages

Date Document Type Creator of Document Record File

Add New Document

1. Click "Documents"
2. Click "Add New Document"

A screenshot of a web form for creating a document. The form is titled with a close button (X) in the top right corner. It contains the following fields and elements:

- Document Name:** A text input field.
- Document Type:** A dropdown menu with "--Select--" and a magnifying glass icon.
- Date:** A text input field with the placeholder "MM/DD/YYYY" and a calendar icon.
- Creator of Document Record:** A text input field with the placeholder "Type to search".
- File:** A section with a question mark icon, the text "No file is currently uploaded.", and an "Upload File" button.
- Notes:** A large text area for entering notes.
- Buttons:** "Cancel" and "Submit" buttons at the bottom right.

Use **Documents** to keep track of any “documents” associated with this class.

Possibilities are:

- Sign-in sheets
- MOUs
- Syllabus
- Lesson Plans
- Quizzes/tests

MY NOTES:

ORGANIZATIONS SECTION

The Organization Section is where we track information on our Partner Organizations. Partner organizations could include any of the following:

Employers

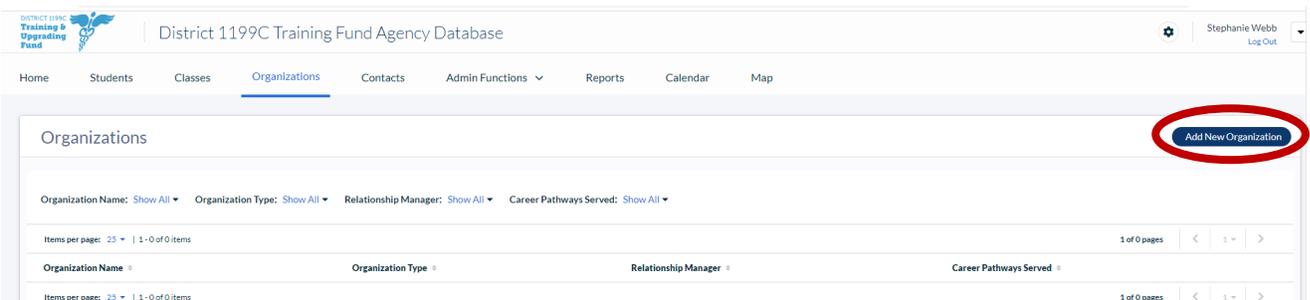
Funders

Post-secondary institutions

Training Provider

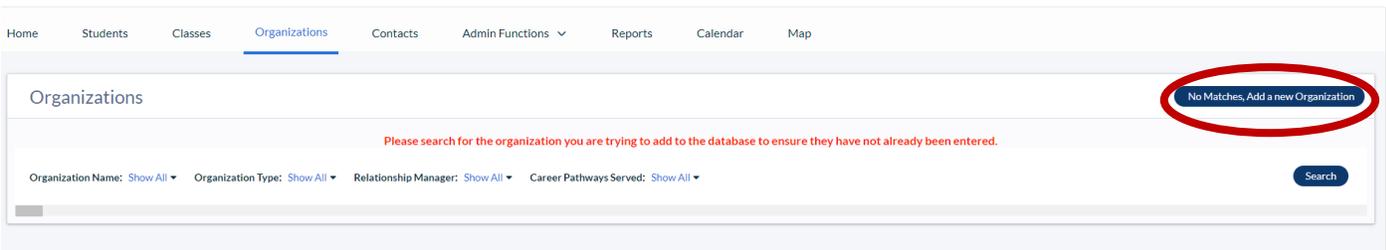
Clinical Site

Community Partners: Housing agencies, health agencies, childcare providers



1. Click "Organizations"
2. Click "Add New Organization"

Just like with adding a new student, it is important to search first to see if the organization is in CiviCore already. Double check for different spellings or abbreviations. We want to avoid duplicate entries as much as possible to avoid confusion and ensure accurate data on reports.



3. Once you are sure it is a new organization, click "No Matches, Add New Organization".

MY NOTES:

Organizations: Basic Information

Please fill out as completely and as accurately as possible. The more information we have, the less likely we are to have duplicates.

For the Organization Name, put in the full name with any abbreviations in parenthesis.

Example:

Temple University Health System (TUHS)

Community College of Philadelphia (CCP)

Basic Info

* Organization Name

* Organization Type
-- Select --

Phone 1 Phone 2 Fax

Email Website

Facebook Twitter

Additional Org. Type Info

Physical Address Information

Address 1 Address 2

City State Zip Code

Mailing Address Information

Set Mailing Address Same as Physical Address

Address 1 Address 2

City State Zip Code

Additional Org. Info

Career Pathways Served

- Nursing and Direct Care
- Allied Health
- Behavioral Health
- Early Childhood Education
- Community Health
- Health Information
- Other

Organization Engagement Levels

- Clinical Site Location
- Apprenticeship Sponsor
- Industry Partnership (IP)
- Board of Trustees
- Advisory Board
- Speaks to Classes
- Participates in Panels
- Hires Graduates
- Hosts Onsite Training
- Attends Career Fairs

Relationship Manager

Type to search

Notes

Organization Engagement Level Scale

-- Select --

- ✓ -- Select --
- New Relationship
- Working Relationship
- Strategic Partnership

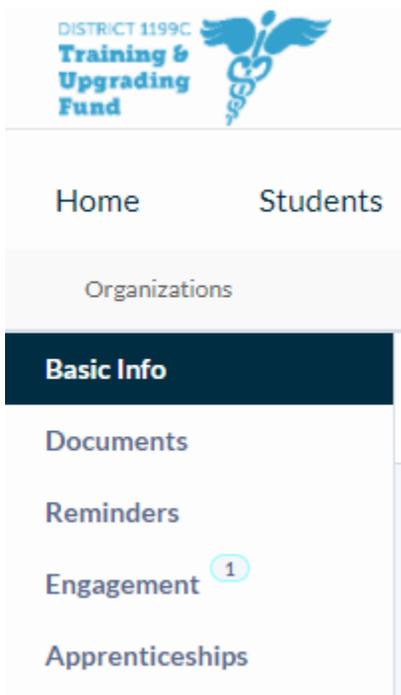
Be sure to select the:

Career Pathways Served

Organizational Engagement Levels

Organizational Engagement Levels Scale

Relationship Manager – this is the Training Fund member who will be the main point of contact with the



Organization Information is very much like student information.

Basic Info – basic organization information

Documents – a place to store any documents related to a specific organization. This may be an MOU, agreements, contracts, etc.

Reminders – you can set reminders internally for yourself or other staff to take an action with a specific organization.

Engagement and Apprenticeships are different and will be explored in more details below.

Organizations: Engagement

We are working on improving the tracking of our relationships with various partner organizations. Often, different people within the agency are talking to the same organization, but each person has a different contact or different relationship. Ideally, there will be one “lead” contact at the Training Fund who will manage the relationship.

We are using the Employer Engagement Toolkit from Jobs for the Future (JFF):

[EMPLOYER ENGAGEMENT TOOLKIT: FROM PLACEMENT TO PARTNERS](#)

DISTRICT 1199C Training & Upgrading Fund | District 1199C Training Fund Agency Database | Training Staff Log Out

Home Students Classes **Organizations** Contacts Reports Calendar Map

Organizations

Basic Info Documents Reminders **Engagement** Apprenticeships

Joy of Living Recovery Program

Engagement **Add New Engagement**

Items per page: 25 | 1 - 1 of 1 items 1 of 1 pages < 1 >

Staff Entering Notes Date of Contact Mode of Contact Who was the primary point of contact for this engagement?

1. Click “Engagement”
2. Click “Add New Engagement”

×

* Staff Entering Notes
Type to search

* Date of Contact
MM/DD/YYYY

* Mode of Contact
-- Select --

* Type of Engagement
-- Select --

* Who was the primary point of contact for this engagement?
Type to search

Advising

- Advisory boards
- Communities
- Hiring and training needs
- Students
- Support of employers
- Workforce challenges

Capacity Building

- Customized training
- Providing job candidates
- Providing support to us for space
- Equipment

Co-Designing

- Develop workforce initiatives
- Develop or inform curriculum

Cancel Submit

For the details here, the “Type of Engagement” is what is related to the JFF Toolkit.

If you select that the type of relationship you are reporting on is that the partner is **Advising** us, then you can make selections that explain more about how.

Always use the Notes section to add more details.

Please use the “Ladder of Employer Engagement” as a quick reference to define each of the types of engagement.

Ladder of Employer Engagement

	New Relationship		Working Relationship		Strategic Partnership	
	Level 1	Level 2	Level 3	Level 4	Level 5	
Key employer role	Advising	Capacity-building	Co-designing	Convening	Leading	
Stage of relationship	Initial contact / new relationship	Establishing trust and credibility	Working relationship	Trusted provider and collaborator	Full strategic partner	
Activity examples	Discuss hiring needs, skills, competencies; advise on curricula; contract training; hire graduates	Job site tours; speakers; mock interviews; internships; needs assessment; loan/donate equipment; recruiting	Curriculum and pathway development; adjunct faculty and preceptors	College-employer sectoral partnerships	Multi-employer / multi-college partnerships	

MY NOTES:

Organizations: Apprenticeships

You will use the “Apprenticeships” child’s table when you need to track the status of an apprenticeship relationship with a particular employer or educational provider. *This is not applicable to most of our Organizations.*



District 1199C Training Fund Agency Database

Stephanie Webb Log Out

Home Students Classes **Organizations** Contacts Admin Functions Reports Calendar Map

Organizations

Basic Info Documents Reminders Relationships **Apprenticeships**

Community College of Philadelphia (CCP)

Apprenticeships

Items per page: 25 | 1 - 0 of 0 Items 1 of 0 pages

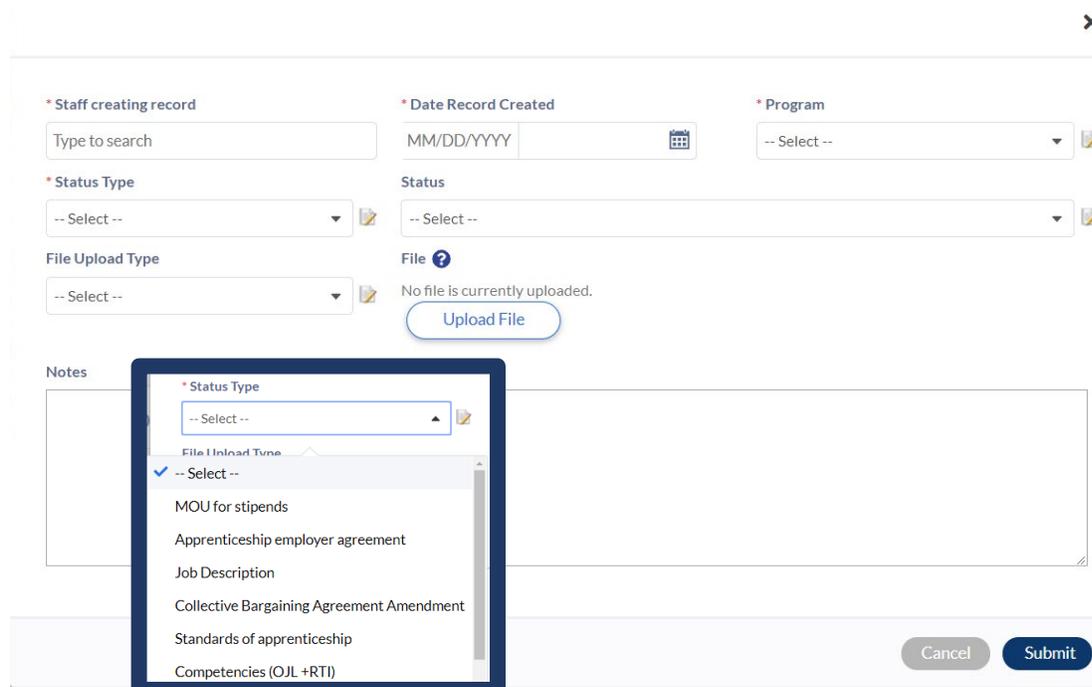
Staff creating record Date Record Created Program Status Type Status

Items per page: 25 | 1 - 0 of 0 Items 1 of 0 pages

Add New Apprenticeship

1. Click “Apprenticeships”
2. Click “Add New Apprenticeship”

Any specific apprenticeship information should only be added on this child’s table, especially if you are uploading Apprentice related documents or tracking statuses.



×

* Staff creating record

Type to search

* Date Record Created

MM/DD/YYYY

* Program

-- Select --

* Status Type

-- Select --

Status

-- Select --

File Upload Type

-- Select --

File

No file is currently uploaded.

Upload File

Notes

* Status Type

-- Select --

File Upload Type

-- Select --

MOU for stipends

Apprenticeship employer agreement

Job Description

Collective Bargaining Agreement Amendment

Standards of apprenticeship

Competencies (OJL +RTI)

Cancel Submit

CONTACTS SECTION

The screenshot shows the top navigation bar with the logo for District 1199C Training & Upgrading Fund on the left. The main title is "District 1199C Training Fund Agency Database". On the right, there is a user profile for "Stephanie Webb" with a "Log Out" link. Below the navigation bar, a menu includes "Home", "Students", "Classes", "Organizations", "Contacts" (which is highlighted), "Admin Functions", "Reports", "Calendar", and "Map". The main content area is titled "Contacts" and features an "Add New Contact" button. Below the title, there are filter options: "Full Name: Show All", "Roles: Show All", "Email Address: Show All", and "Cell Phone: Show All".

After you search to see if a contact exists in the system already, you would **Add New Contact**.

Contacts: Basic Info

Like with the Basic Info found in the Students and Organization Sections, you want to make sure you include as much detail as possible. This helps to make sure we have adequate information on the contact and helps to avoid duplicate data entry.

The screenshot shows the "Basic Information" form for adding a new contact. The form is divided into two main sections: "Basic Information" and "Home Address".

Basic Information:

- * First Name:** Text input field.
- Middle Name:** Text input field.
- * Last Name:** Text input field.
- Prefix:** Dropdown menu with "-- Select --" and a search icon.
- Suffix:** Dropdown menu with "-- Select --" and a search icon.
- Preferred Name:** Text input field.
- Preferred Pronouns:** Text input field.

Home Address:

- Home Address 1:** Text input field.
- Home Address 2:** Text input field.
- Home City:** Text input field.
- Home State:** Dropdown menu with "-- Select --" and a search icon.
- Home Zip Code:** Text input field.

MY NOTES:

Basic Info cont.

Roles: explains the type of relationship this contact has with the Training Fund or within their organization.

The screenshot shows a 'Contact Information' form with various input fields and checkboxes. A blue arrow points to the 'Email Address' field. The form includes fields for Email Address, Alternate Email Address, Cell Phone, Home Phone, Work Phone, Work Phone Ext., and a 'May Contact at Work' section with 'Yes' and 'No' radio buttons. There is a dropdown menu for 'In which career pathways/sectors is this person involved' and a search box for 'Relationship Manager'. A red callout box is overlaid on the right side of the form.

The Relationship Manager is a required field for every contact. The Relationship Manager is the **main point of contact at the Training Fund** with this Contact.

Like with the other sections, there are some common child's tables. Basic Info, Documents, and Reminders act just like for the other sections. **Relationships, Contact Status, and Classes will be explored below.**

- Contacts
- Basic Info**
- Relationships
- Contact Status
- Classes
- Documents
- Reminders

NOTE: These relationship statuses are still being defined. We will need your help to flesh them out. Please contact Ruby with any additional options you would like to have included.

Contacts: Relationships

There are three types of relationships that a Contact can have: Organization, Contact, Student

The screenshot displays three distinct sections for managing relationships, each with a table and a circled 'Add New' button:

- Organization Relationships:** The table has columns for Organization, Relationship, Relationship Type, and Career Pathways. The 'Add New Organization Relationship' button is circled in red.
- Contact Relationships:** The table has columns for Contact, Contact, Relationship, Relationship Type, and Career Pathways. The 'Add New Contact Relationship' button is circled in red.
- Student Relationships:** The table has columns for Youth and Contact Relation To Client. The 'Add New Student Relationship' button is circled in red.

If the contact you are entering is a faculty at the Community College of Philadelphia, then this would be an Organizational Relationship the contact has.

If this contact works with someone else who has their own contact entry, this would be a Contact Relationship.

If this contact teaches certain students, these would be Student Relationships.

Contacts: Contact Status

Status Information

* Status

-- Select --

* Staff entering notes

Type to search

* Date of contact

MM/DD/YYYY



* Mode of Contact

-- Select --

* Type of contact

-- Select --

Notes

This section is almost like a case note. It can be used to record meetings or other communications with this specific contact, including when and how it occurred, and the purpose or topic.

Contacts: Classes

Information will only show up here if the Contact is enrolled in the "Class" section

For example, entering teachers as contacts and then enrolling them in all of the classes they teach allows us to over time see what they've taught and how often they teach.

REPORTS SECTION

Why run reports in CiviCore?

- To check your data entry for accuracy and completeness
- To pull data in real time to review student progress and/or program outcomes
- To calculate the number of students with particular backgrounds or outcomes
- To easily share reports with multiple people across the agency
- Important indicators to track or questions to ask are already organized in the forms

CiviCore is a powerful tool to help you to effectively monitor your programs.

Building the Foundation

1. Discuss with your program/department to determine which portions of CiviCore to use. This should be detailed in your department's data policy.
2. Check that complete data is entered
3. Review the forms or questions in each portion of CiviCore that you are using
4. **Formulate the questions that you want your report to answer**

NOTE: Reports can only be constructed from data entered into the database. If the question is blank, i.e. there is no data, we cannot run a report nor can we learn anything. It is essential that every program collects as much accurate and complete data as possible, and then enters it into CiviCore.

Creating a Report

The screenshot shows the CiviCore interface for the District 1199C Training Fund Agency Database. The user is logged in as Ruby Aidun. The 'Reports' menu item is circled in yellow, with an annotation: 'Click here to access the report feature'. The 'Saved' report category is selected in the left sidebar, with an annotation: 'Click here to view your saved reports'. The 'Create New Report' button is circled in yellow, with an annotation: 'Click here to create a new report'. The main content area shows a list of saved reports. The first report is titled 'Temple Employees No Tuition Reimbursement FY2020-2021' and includes filters for date and employer type. Action buttons for 'Run', 'Edit', and 'Categorize' are visible for this report.

Name	Description	Report Type	Updated Date	Updated By
Temple Employees No Tuition Reimbursement FY2020-2021	For determining temple employees who didn't use tuition reimbursement Filters: is NOT tuition reimbursement Entered date between 7/1/2020 and 7/1/2021 Union Employers are Temple Episcopal and TUHs	--	08/18/2021	Ruby Aidun

Step 1 (of creating a report): Selecting Sections

Once you click on “Create New Report” you will be taken to this screen:

1 Select Sections → 2 Select Fields → 3 Select Filters → 4 View Results

New Report

[Step 1 Guide](#)

Click on the Step Guide for detailed instructions

Select the section you're interested in

✓ Data	Summary	Basic Info
Data	Summary	Referrals
Data	Summary	Reminders
✓ Data	Summary	Status
Data	Summary	Case Notes
Data	Summary	Classes
Data	Summary	Attendance
Data	Summary	Grades
Data	Summary	Documents
Data	Summary	Education
Data	Summary	Employment
Data	Summary	Full-Time Scholarship
Data	Summary	Tuition Reimbursement
Data	Summary	Financial Aid

Select the child table you're interested in by clicking the "Data" button to the left

Basic info is always selected, and you can only select one other child tab. Here Status is selected

Select Fields →

Be sure to scroll to the bottom and click "Select Fields"

Help Guide

Step 2: Selecting Fields

You can move the selected fields to reorder the columns on the report

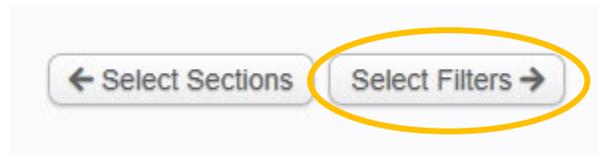
Add a field to your report by double clicking on the field OR by searching for it and then clicking "Add Selected"

Double click on the text of the field to edit the name on the report

Selected fields will appear on this list and a green star will appear next to it on the left list

The selected fields (in the list on the right) will be the columns of your report

When you have selected all of the fields you're interested in, scroll down to the bottom of the page and click "Select Filters" to proceed.



Step 3: Filtering Data

Applying filters allows you to hone in on specific information, or weed out extraneous information.

This step can be the most challenging, but also the most useful step in creating a report. Try to play around and explore all of the possibilities of filtering the data to best answer the question you originally formulated.

Add a filter by double clicking on the field or by searching and then clicking "Add Selected"

1 Select Sections → 2 Select Fields → 3 Select Filters → 4 View Results

New Report

Step 3 Guide

Search for fields

Filter Option: Match All Filters

Students - Basic Info

- Students - Basic Info - ID
- First Name
- Middle Name
- Last Name
- Date of Birth
- Gender
- Race & Ethnicity
- Email
- Home Phone
- Do you have internet access?
- Type of Internet Access
- Do you have a personal computer?
- Type of personal computer
- Address 1
- Address 2
- City
- State
- ★ Zip Code
- Inactive
- Alternate Gender

Zip Code

Is 19120 DELETE

Program

Is

- ECE Bachelor's Degree Program/Apprenticeship
- EMT
- External Referral (add notes)
- Family Childcare (FCC) Hub
- Financial Aid
- Full-Time Scholarship
- GED and Beyond- Youth
- HSE Testing
- HTTI Nurse Aide (NA)
- HTTI Practical Nursing (PN)

Once you have added a filter, you can set the parameters that you're interested in. E.g. here only records from the zip code 19120 and in the EMT class will appear in the report



When you have added all of the filters you're interested in, click "View Results" to view the data.

Dynamic Filters: If you need to run the same report every month that asks for this month's results, using a dynamic filter saves you from having to edit the date range every time you run the report.

Entered Date DELETE

Filter Date

This is for filtering the entire date.

Is between Static AND Dynamic

07/01/2021 Today

Filter Option:

Filter Option: Match All Filters

Match All Filters

Match Any Filters

At the top right of the filter page there is a drop-down menu. There are two options:

(1) Match All Filters – This option ensures that every record matches every filter. In the previous example, this means that every student record is from the 19120 zip code AND was part of the EMT program.

(2) Match Any Filters – This option allows for any records that match at least one filter. So in the previous example it would filter for student records that are either from the 19120 zip code OR was part of the EMT program.

Step 4: View Results

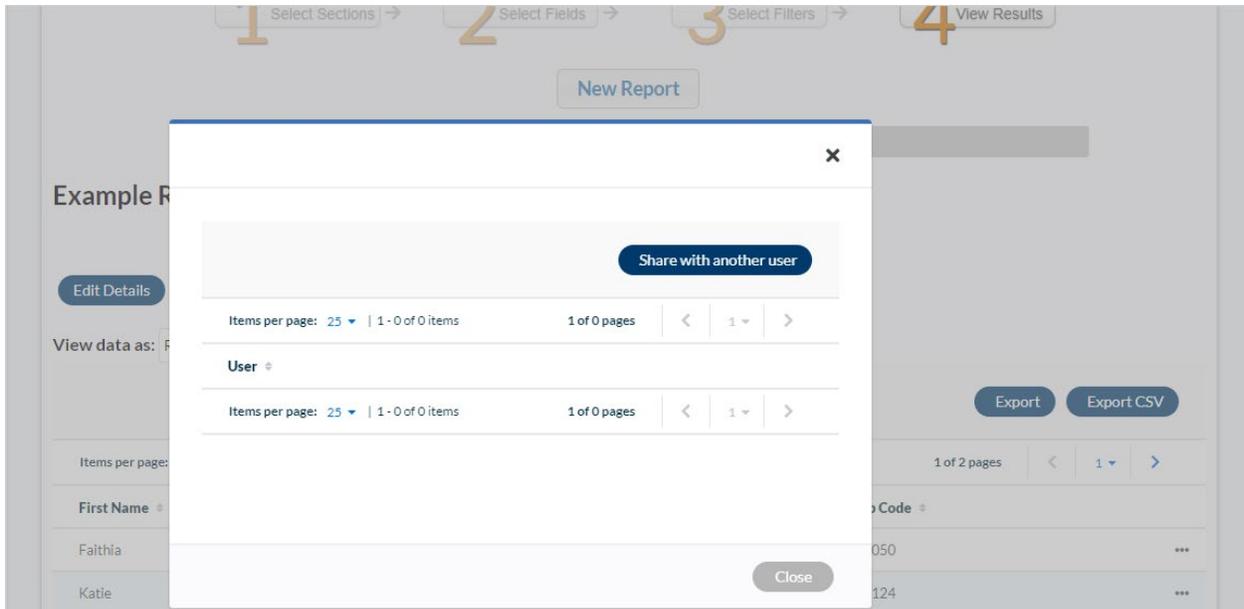
The screenshot shows the 'View Results' step of a report builder. At the top, there are four numbered steps: 1 Select Sections, 2 Select Fields, 3 Select Filters, and 4 View Results. Below these is a 'New Report' button and a 'Step 4 Guide' link. The main heading is 'Unsaved Report:: 1:54 pm 08/25/21 (Edited:: 2:36 pm 08/25/21)'. There is a 'Save Report' button, a 'View data as:' dropdown menu set to 'Raw Data', and 'Export' and 'Export CSV' buttons. At the bottom, there is a table header with columns: 'First Name', 'Last Name', 'Date of Birth', and 'Zip Code'. The table content is currently empty.

If this is a report that you want to save, once you click “Save Report” the page will become:

The screenshot shows the 'View Results' step of a report builder after the report has been saved. The layout is similar to the previous screenshot, but the main heading is 'Example Report for User Guide'. There are now 'Edit Details' and 'Share Report' buttons instead of 'Save Report'. The 'View data as:' dropdown menu is still set to 'Raw Data'. The 'Export' and 'Export CSV' buttons are present. The table header is the same: 'First Name', 'Last Name', 'Date of Birth', and 'Zip Code'. The table content is currently empty.

Edit Details: This button will allow you to rename a report, or add a description of the report.

Share Report: Clicking on this button will bring up a new window that will allow you to share this report with another CiviCore user. You can only share reports that you have saved.



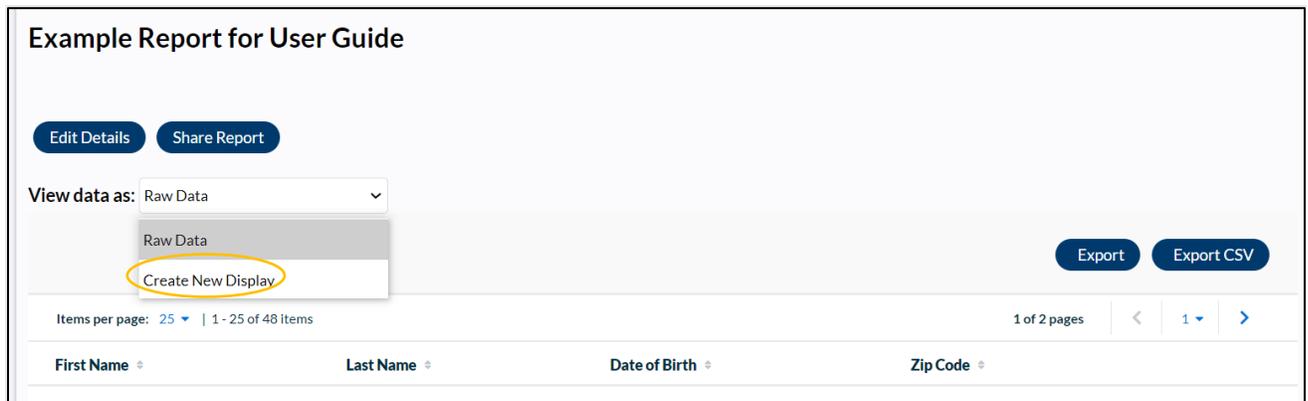
The “View Data as” drop down menu and the Export options will be discussed in the next section, Analyzing the Data.

In the future you can rerun this same report with the new and updated data in CiviCore by finding the report in your saved reports and hitting the “Run” button.



Visualizing and Analyzing the Data

Viewing Data as:



From the drop-down menu, click “Create New Display”. This will take you to a new page.

Note: You will only be able to create a new display if you created the report. This will not be an option on a report shared with you.

Edit Display

Title

Description

Do you want to create a pivot table?

No

Columns

First Name: Show

Zip Code: Show

Display as chart

Display as number

Do you want to hide table headers?

No

Quick Filters

1:

First Name	Zip Code
Khairiyah	19154
Sakinah	19149
Ayanna	19050
Jamillah	19124
Nakiah	19132
Usamah	19139
Zuria	19151
Thomas	19111
Manoucheka	19111
Ralph	19120

* Due to volume, only the first 1,000 rows are used to show how this display will appear. Once the display is saved, all rows will be used.

Creating a Pivot Table and Chart:

Edit Display

Title
Example Display

Description

Do you want to create a pivot table?
Yes

Group By
1: Zip Code

2:

Summary:
Label: Count Grouped Records
Create columns from:

Add Summary:

Quick Filters
1:

Grouped Data
Zip Code Count Grouped Records

19154	7
19149	32
19050	21
19124	39
19132	23
19139	28
19151	32
19111	32
19120	56
08104	4
19104	19
19145	16
19152	14
19115	11
19121	14
19468	2
19064	3
19143	42

Selecting Yes to create a pivot table will give you the Group By options

The Group By selection creates the rows of the pivot table.

 The Summary counts the records and gives you options for columns

Display as chart

Chart Type:
Pie

Pie

Bar

Column

19072	1
08048	1
19344	1
08063	1
19118	1
08034	1
08518	1
08083	1
19938	1
19380	1

* Due to volume, only the first 1,000 rows are used to show how this display will appear. Once the display is saved, all rows will be used.

19149
32 (4.7%)

- 19154
- 19149
- 19050
- 19124
- 19132
- 19139
- 19151
- 19111
- 19120

▲ 1/6 ▼

The data can only be presented as a chart if a pivot table has been created

Once the new display is saved you can choose to see it, the raw data, or create another display from this drop down menu

View data as:
Example Display

Edit Display Add to Dashboard Delete Display

First Name Zip Code

You can add this display to your Home page with this button

This chart can be saved or printed

Note: only the first 25 results are displayed.

To find you Dashboard, go to your Home page, scroll to the bottom, and you will see the chart from the report.

Quick Filters:

Edit Display

Title: Example Display

Description:

Do you want to create a pivot table?
No

Quick Filters

1: First Name [Delete]

2: Zip Code [Delete]

3:

These quick filters make the raw data searchable. These cannot be used simultaneously with a pivot table

Example Report for User Guide

Edit Details Edit Report Share Report

View data as:
Example Display

Edit Display Add to Dashboard Delete Display

Export Export CSV

First Name: Show All Zip Code: Show All

Quick filters can sort the data. To search all records, not just the grouped records, be sure to NOT select the pivot table option.

Exporting Data to Excel:

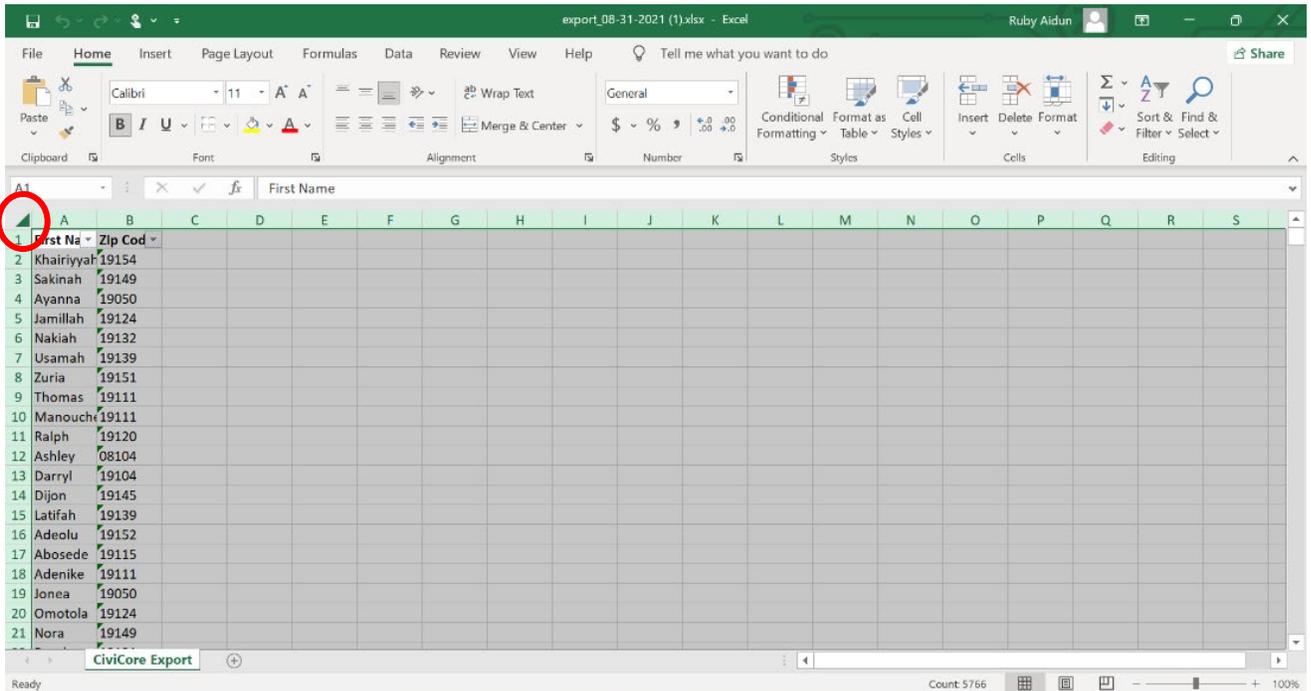
Before exporting the data as an Excel file, click on the column header that you would like the data to be sorted by. For example, if you want the data sorted in alphabetical order by last name, click on the Last Name column. Then click Export.

It is possible to sort in Excel, but it is not as convenient.

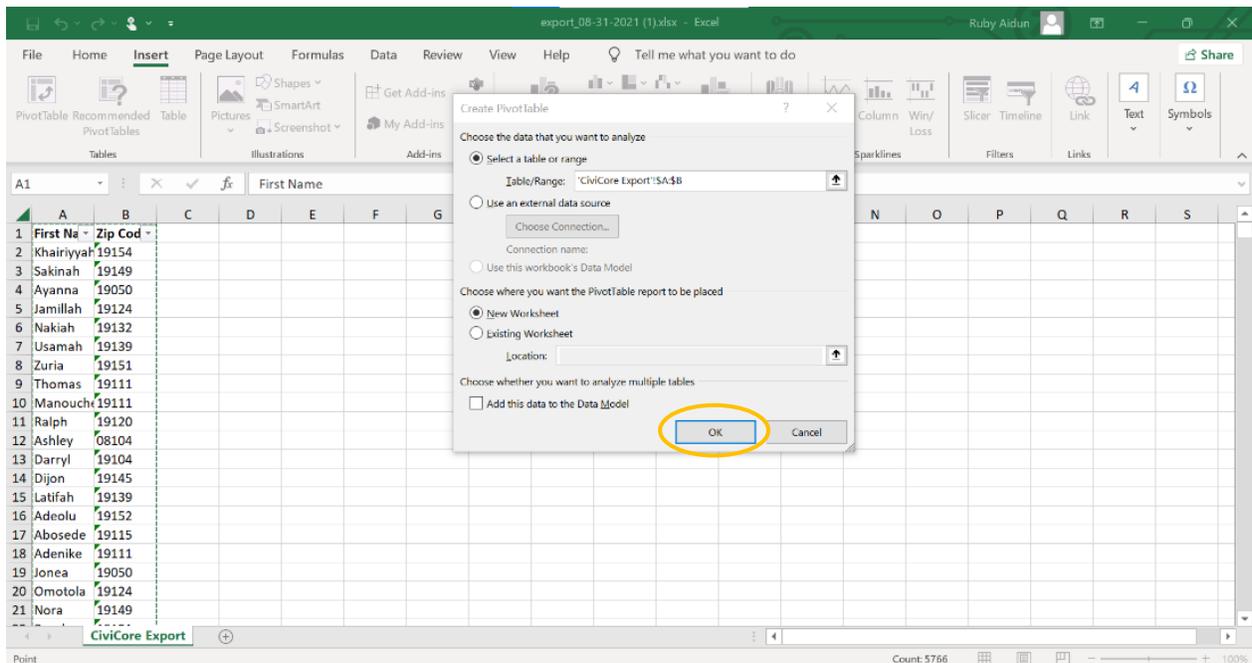
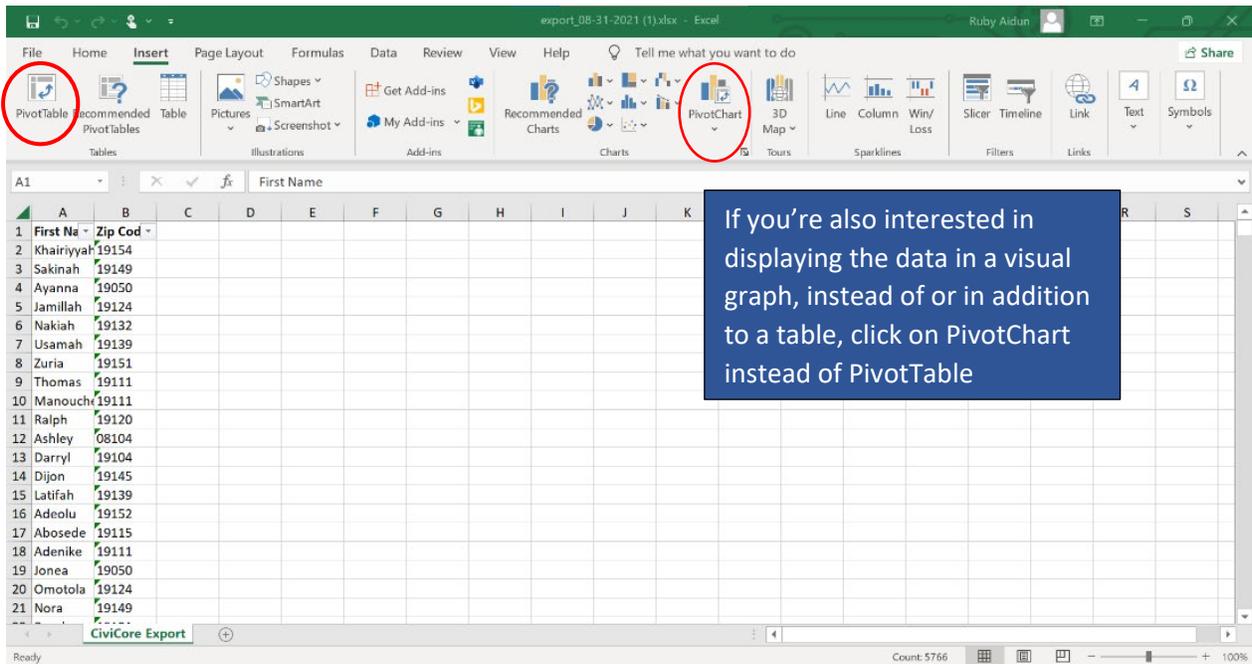


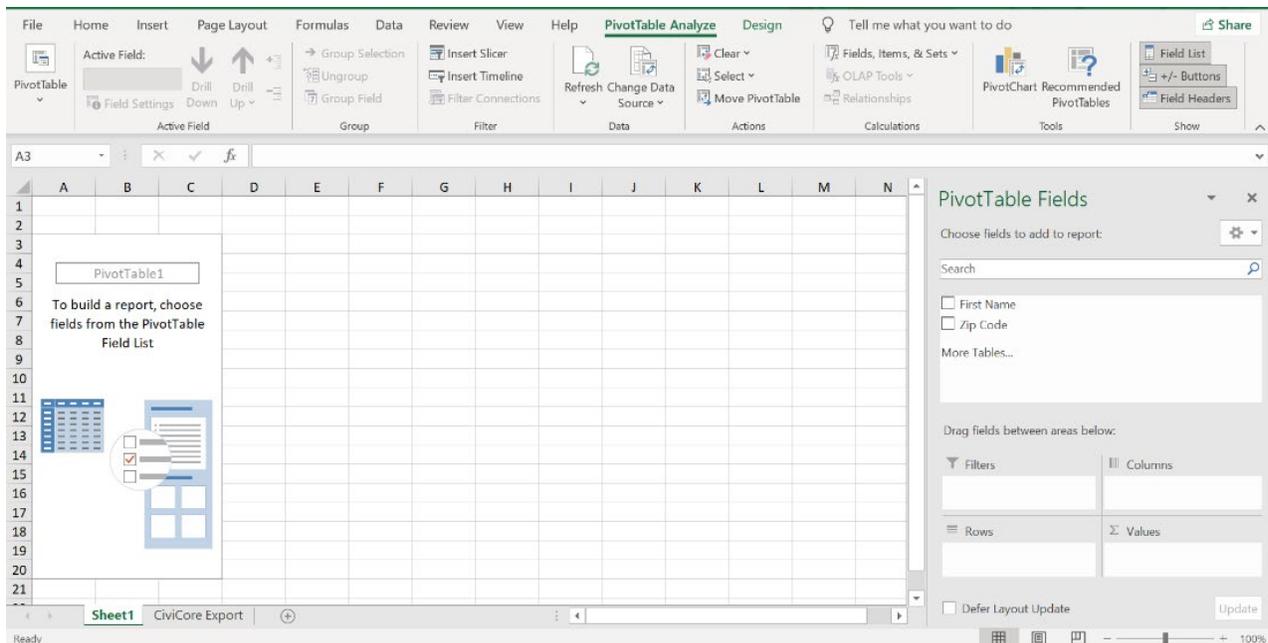
Pivot Tables in Excel:

Select all of the data in the Excel workbook by clicking on the triangle between row 1 and column A (circled in red)

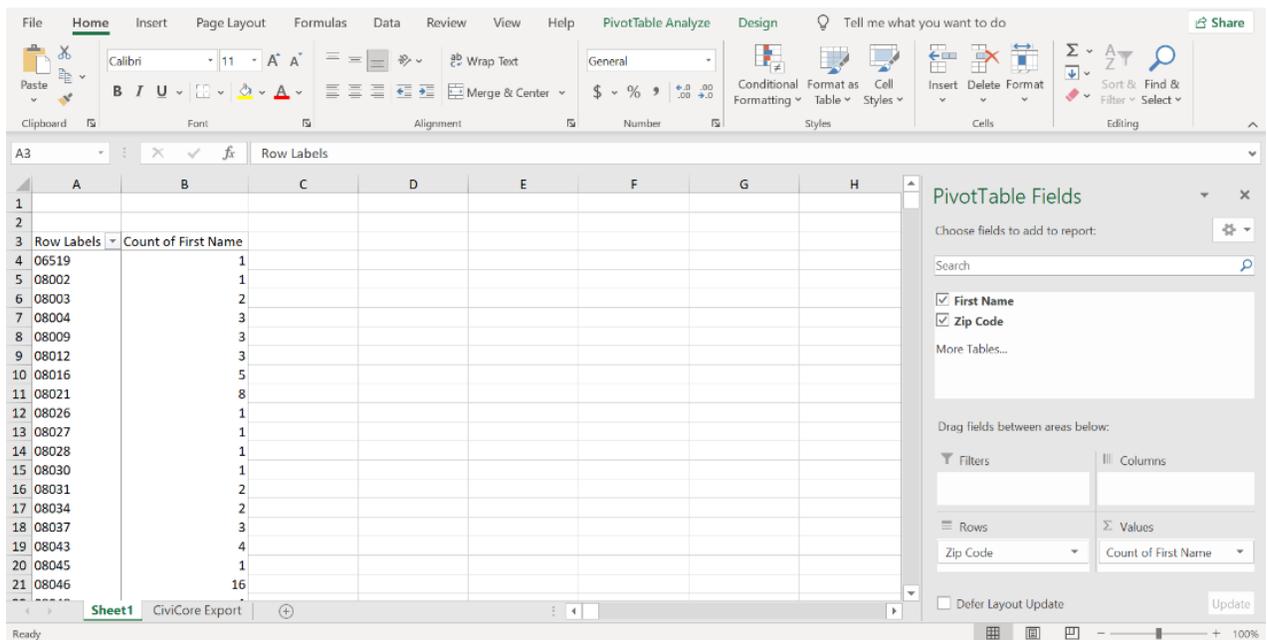


Then click on the Insert tab and click on Pivot Table





After clicking Okay, a new worksheet will be created (here it is labeled as Sheet1). Select or drag and drop the possible fields into Rows, Columns, Values, or Filters.

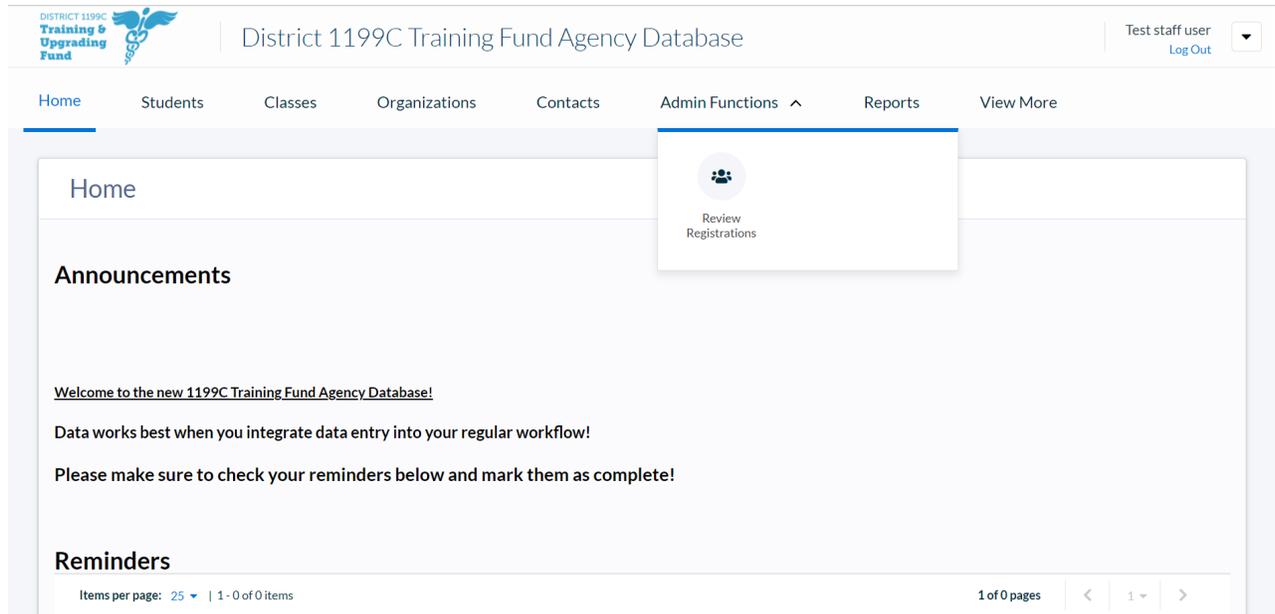


This example Pivot Table counts the names of students to give the number of students from each entered zip code. This is the same table that was shown previously on CiviCore.

For a more expansive introduction to Pivot Tables please see the Wikipedia page: [Pivot table - Wikipedia](#)

STAFF ADMIN INSTRUCTIONS

Please also reference this training video: [Watch 'Civic Core Admin Training' | Microsoft Stream](#)



Under the “Admin Functions” section, a CiviCore admin can approve or deny registrations.

Review Registrations -

If a student has used [the self-registration link](#), you must go in and approve their registration in order to find their record in the “Students” section.

Always be on the lookout for duplicates of student registrations. There should only be one record for each student.

If a training fund employee enters a student in the Students section with the long form, no registration needs to be approved.

Review Registrations

Applied

Add Registration

First Name: Show All Last Name: Show All Submitted Date: Show All Email: Show All

Items per page: 25 | 1 - 19 of 19 items

1 of 1 pages < 1 >

First Name	Last Name	Submitted Date	Email	District 1199C Status	
Damia	Shorts	September 08, 2021	Damias156@gmail.com	1199C Union Member with Training Fund benefit	View Registration
Hawaou	Bah	August 25, 2021	h.bah.uchs@gmail.com	Employed and NOT an 1199C Union Member	View Registration
Jhanisha	Finley	August 24, 2021	jfinley1207@gmail.com	Unknown	View Registration

After clicking on “Review Registration”:

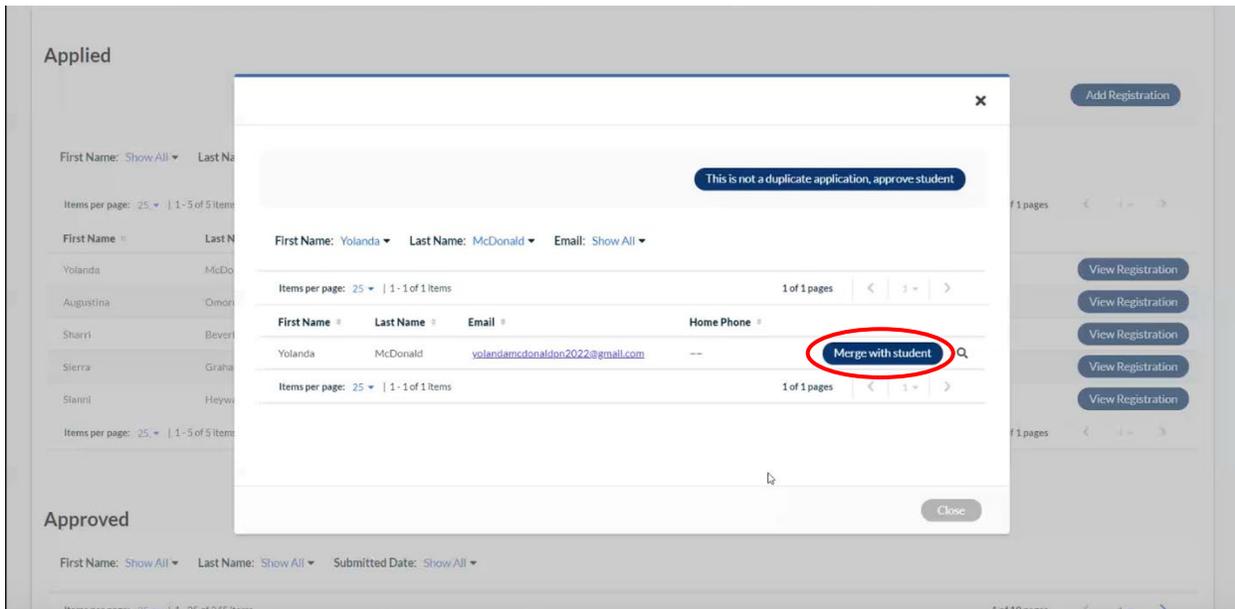
The screenshot shows a 'Training Fund Application' form. At the top right, it says 'Updated 09/08/2021 by Ruby Aidun'. Below the title, there is a note: 'Please note that you must be a District 1199C Union Member eligible under the Training Fund to take Continuing Education classes'. The form is divided into two main sections: 'EMPLOYMENT/UNION STATUS' and 'CONTACT INFORMATION'. Under 'EMPLOYMENT/UNION STATUS', there are two rows of information: 'District 1199C Status' with the value 'Inactive' and a checkbox for '1199C Union Member with Training Fund benefit' which is unchecked; and 'Union Job Title' with the value 'LPN' and 'Union Employer with Benefits' with the value 'Genesit Belvedere'. Under 'CONTACT INFORMATION', there are three columns: 'First Name' (Damia), 'Middle Name' (I), and 'Last Name' (Shorts). At the bottom right of the form, there are three buttons: 'Close', 'Approve application' (circled in red), and 'Deny application'.

After clicking on ‘Approve application’, if this is NOT a duplicate record this window will appear:

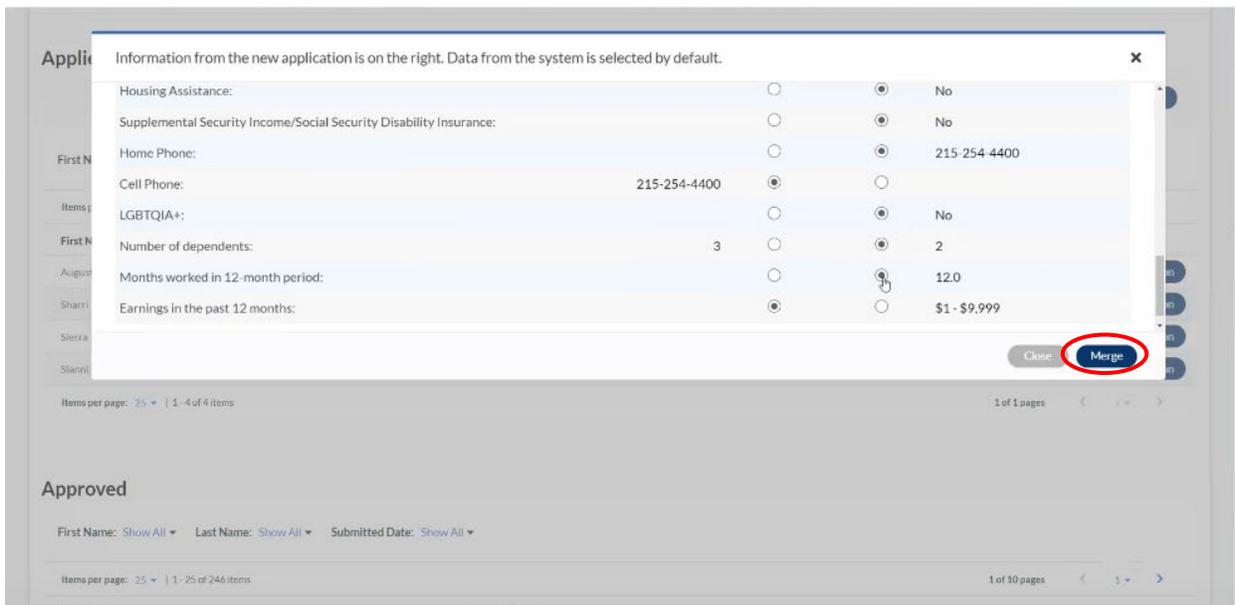
The screenshot shows a confirmation dialog box over a 'Review Registrations' page. The dialog box has a title bar with a close button. The main message inside the dialog is 'This is not a duplicate application, approve student.', which is circled in red. Below the message, there are three dropdown menus: 'First Name: Damia', 'Last Name: Shorts', and 'Email: Show All'. Below these are two pagination controls, each showing 'Items per page: 25' and '1 of 0 of 0 items' with '1 of 0 pages'. At the bottom right of the dialog is a 'Close' button. The background page shows a table of registrations with columns for First Name, Last Name, and Submit Date.

In order to approve this registration, you must click on “This is not a duplicate application, approve student’

If this is a duplicate record this window will appear:



To merge records, click 'Merge with student'. A new window will open allowing you to select which information to keep:



Scroll down the list of conflicting information and choose the non-blank options or the more correct entry. Once done, click 'Merge'.

Once a registration is approved it will appear in the "Approved Section". Scroll down to see all approved registrations. You can search by name or the date that they entered the registration.

Approved

Click "Show All" to search by name or date

First Name: Show All ▾ Last Name: Show All ▾ Submitted Date: Show All ▾

Items per page: 25 ▾ | 1 - 25 of 555 items 1 of 23 pages < 1 >

First Name	Last Name	Submitted Date	
Brandi	sparks	July 28, 2020	Jump to Student Record 🔍 ✎
Taneesha	Thomas	July 31, 2020	Jump to Student Record 🔍 ✎
Massai	Harris-Malette	August 03, 2020	Jump to Student Record 🔍 ✎
Eric	Jackson	August 03, 2020	Jump to Student Record 🔍 ✎
Brianna	Colwell	August 04, 2020	Jump to Student Record 🔍 ✎
Kori	Womack	August 05, 2020	Jump to Student Record 🔍 ✎
Keara	Dorsey	August 05, 2020	Jump to Student Record 🔍 ✎
Danielle	Berntsen	August 05, 2020	Jump to Student Record 🔍 ✎
William	Lovett	August 06, 2020	Jump to Student Record 🔍 ✎
Shakirah Duren	Duren	August 06, 2020	Jump to Student Record 🔍 ✎

At the bottom of the page is the list of all registrations that have been declined:

Declined

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First Name	Last Name	District 1199C Status
Mark	Forward	1199C Union Member with Training Fund benefit
lateisha	Hayes	1199C Union Member with Training Fund benefit
Christina	Lewis	1199C Union Member with Training Fund benefit
Katie	Jordan	1199C Union Member with Training Fund benefit
Tara	Cluff	Unemployed
Arlyn	Freed	Employed and NOT an 1199C Union Member
Aminata	Nimaga	Unemployed
Shaina	Major	1199C Union Member with Training Fund benefit
Brittany	Stith	1199C Union Member with Training Fund benefit
Skylar	Richa	Unemployed

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These registrations were declined because their records were already in the system, and their new records couldn't be merged. It is rare for a registration to be declined.

Students Section: Duplicate Checker

Under the 'Students' section there is an option for Duplicate Checker

DISTRICT 1199C Training & Upgrading Fund | District 1199C Training Fund Agency Database | Ruby Aidun Log Out

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Students

Duplicate Checker | Add New Student

Full Name: Show All | Email: Show All

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First Name	Last Name	Date of Birth	Email	Cell Phone	
James	Barkley	03/03/2021	wizzjames24@gmail.com	--	🔍 ✎ 🗑️
Eric	Dadalski	06/27/1986	edadalski@yahoo.com	--	🔍 ✎ 🗑️
Theresa	Gaye	11/25/1976	christianahiggind@yahoo.com	612-250-3863	🔍 ✎ 🗑️
Annesia	Mendez	10/01/1998	anniem.7849@gmail.com	215-808-7494	🔍 ✎ 🗑️
CHANNEL	TEAGLE-DAVIS	01/14/1980	channelteagleDavis@yahoo.com	--	🔍 ✎ 🗑️

Students

Original Record

First Name: Exact Match | Last Name: Exact Match | Date of Birth: Exact Match | Filter Matches:

First Name	Last Name	Date of Birth	Count	
angelique	stewart	1971-06-14	1	Close Duplicates

Potential Duplicates

First Name	Last Name	Date of Birth		
Angelique	Stewart	06/14/1971	Compare/Merge This Match	Not a Duplicate
angelique	stewart	06/14/1971		
Keren	Castillo	1990-10-27	1	View Duplicates
Lynda	Ait Ammar	1985-01-13	1	View Duplicates
Mary	Robinson	1983-11-17	1	View Duplicates
Talya	Craddock	1991-04-09	1	View Duplicates
Yecenia	Cardona	1992-08-11	1	View Duplicates

Click "View Duplicates" and then "Compare/Merge This Match" if there truly is a duplicate record.

Field	Value 1	Radio 1	Radio 2	Value 2
Emergency Contact Name:	Angelique Craddock	<input checked="" type="radio"/>	<input type="radio"/>	vanessa craddock
Emergency Contact Relation to you:	Other	<input checked="" type="radio"/>	<input type="radio"/>	Sibling
Emergency Contact Phone Number:	267-254-0121	<input checked="" type="radio"/>	<input type="radio"/>	215-303-4005
Are you currently in school?:	YES, adult learning program	<input checked="" type="radio"/>	<input type="radio"/>	NO
What is the name of the school you are attending?:	District 1199C Training Fund	<input checked="" type="radio"/>	<input type="radio"/>	
Ex - Offender:	No	<input checked="" type="radio"/>	<input type="radio"/>	
Low Income:	Yes	<input checked="" type="radio"/>	<input type="radio"/>	
Cell Phone:	267-254-0121	<input checked="" type="radio"/>	<input type="radio"/>	
How did you hear about the Training Fund?:	Other Word of Mouth	<input checked="" type="radio"/>	<input type="radio"/>	Other
Have you been diagnosed with a disability or impairment?:	No	<input checked="" type="radio"/>	<input type="radio"/>	Yes, a physical disability
Are you registered at the PA Careerlink (R)?:	No	<input checked="" type="radio"/>	<input type="radio"/>	

Select what values to keep in the final, merged record.

Some heuristics:

1. Go with any value over a blank field
2. Look up the student in the 'Students' section and view when each record was created (in the top right of the basic info). Choose the most recent entries.
3. If you're unsure, contact the people who entered the duplicate records to clarify. The staff member who last edited the student's information is also in the top right corner of basic info.

Class Section:

-  You can delete enrolled students
-  Be sure to **ONLY** delete enrolled students if they were enrolled in a course by mistake
-  Check in with your team to make sure that it is best to delete the enrollment instead of dismissing the student from the class. **This should be a program policy**

For example, if a student was in a class for two weeks and then quit, you should NOT delete them. Instead, you should unenroll them from the class. We want to track all students who were ever in a class, even if they don't complete.

Only delete a student from a class if they were accidentally added to a class. *Please use delete sparingly*

This only deletes the record that the student was in the class. It does not delete the student's record.

District 1199C Training & Upgrading Fund

District 1199C Training Fund Agency Database

Ruby Aidun Log Out

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Classes

Basic Info

Students

Contacts

Attendance

Documents

HTTI PN Level 4 Genrontology-21

Students

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Student Name	Enroll Date	Completed/Dismissed date	Unenroll	Trash
Meaghan Ball	07/07/2021	--	Unenroll	Trash
Chantel Brewington	07/07/2021	--	Unenroll	Trash
Cinquetta Fisher	07/07/2021	--	Unenroll	Trash
Raheem Goldwire	07/07/2021	--	Unenroll	Trash
Noris Greene	07/07/2021	--	Unenroll	Trash

'Unenroll' dismisses a student from a class, but leaves a record that they were in the class

The trash icon deletes the student from the class

Only full Administrators (rather than Staff Admins) can delete a student's entire record or delete a class. If you need this done, please contact Ruby Aidun (raidun@1199ctraining.org).

Editing Drop-down Menus:



Use the "pen and paper" edit feature to edit drop-down lists.



Use this feature to add an option that is specific and useful to your department when no other option is applicable.



Check in with your team to make sure that this is a necessary addition in order to accurately collect data. **This should be part of your policy.**

Staff Admins can add options to all drop-down menus. Please use this power sparingly, and only after you have discussed with your team and determined that no other option is applicable. Having too many options will dilute and confuse the data, making it more challenging to filter or sort.

General Program Status

* General Program Status

-- Select --

Credentials

Credential/License/Certification/Degree/Exam status

-- Select --

Credential Status

-- Select --

Process Status Type

Process Status Type

Process Status

Cancel Submit

Once you click on the pen and paper symbol, another window will pop up:

Lookup Editor

1032	Failed	<input type="checkbox"/>	
1006	Follow-up/Retention	<input type="checkbox"/>	
561	Interviewed	<input type="checkbox"/>	
1967	Leave of Absence	<input type="checkbox"/>	
1009	Other	<input type="checkbox"/>	
1031	Passed	<input type="checkbox"/>	
1008	Pending	<input type="checkbox"/>	
1474	Process Status (provide more information below)	<input type="checkbox"/>	
558	Referred	<input type="checkbox"/>	
1909	Reinstated	<input type="checkbox"/>	
1489	Schedule Verification	<input type="checkbox"/>	
1030	Scheduled	<input type="checkbox"/>	
1007	Suspended	<input type="checkbox"/>	
1010	Terminated	<input type="checkbox"/>	
1936	Withdrew	<input type="checkbox"/>	

Long Value Add

Close Order Alphabetically Cancel Submit

To edit an option, double-click on the name. To add an option, scroll to the bottom and enter the name in the 'Long Value' box and then click 'Add'. Once done, click 'Close' or the x button at the top right.

****In order to see the changes you made you must refresh the page****

What can I edit without consultation?

- Within Student Section
 - Fully edit options under grades, including course titles
 - Options under case notes
 - Options under education
 - Options under status

What do I need to consult with the Data Team about prior to editing?

- Names of programs in any section
- Any part of the Organizations and Contacts sections
- Any part of the Employment Record (in Student Section)
- Any part of the Class section

Please don't edit the Session Categories in the Case Notes (in the Students Section)

Some explanation about what you shouldn't edit:

The names of programs appear in multiple places, so if you edit it in one but not in the others there could be massive confusion when trying to pull the data from CiviCore.

We, as an organization, are still working to flesh out the Organizations and Contacts sections, so for the time being these should be no individual editing for these sections.

GLOSSARY

Child's Table – A table or tab within a section that further specifies information. E.g. basic info, status, grades, etc.

Field – The questions asked on the form within each child's table

Filter – A method for separating out information by a criterion that we set. E.g. Program, staff name, date, etc.

Section – The major grouping at the top of the database: Student, Classes, Organizations, Contacts...

(Add link here to the glossary excel on sharepoint)