District 1199C Training & Upgrading Fund

District 1199C Training Fund Agency Database

USER GUIDE

POWERED BY CiviCore A neon ONE COMPANY

Last Update: October 1, 2021

Contents

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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 programing.

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) or on the Civicore specific site (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.

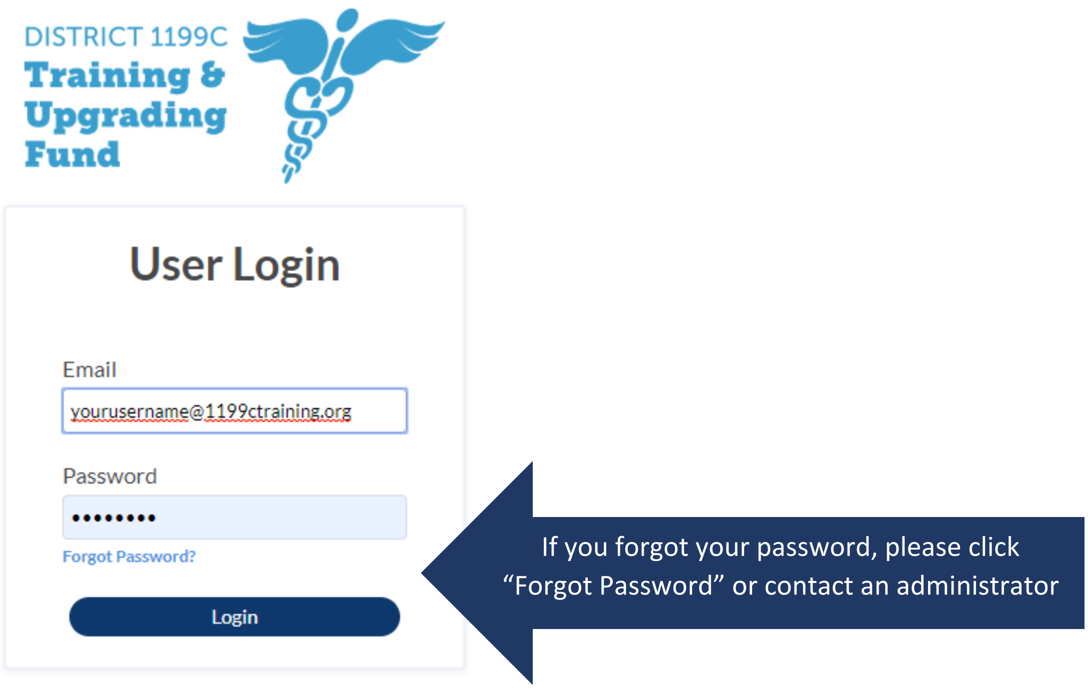
Violation of this policy is grounds for disciplinary actions including warning and termination.

To Login:

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

Staff link to enter data:

https://1199ctraining.civicore.com



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*

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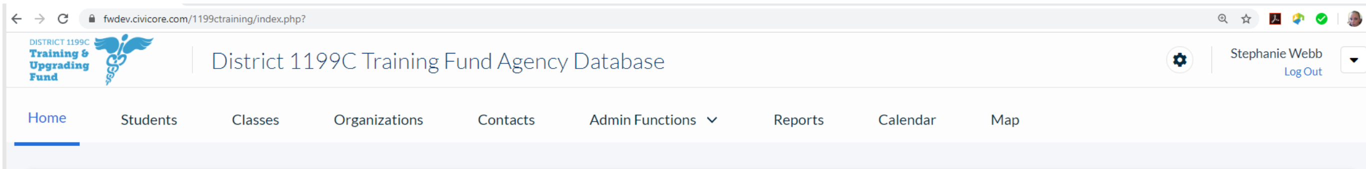
Navigating CiviCore



<u>SECTIONS</u>

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

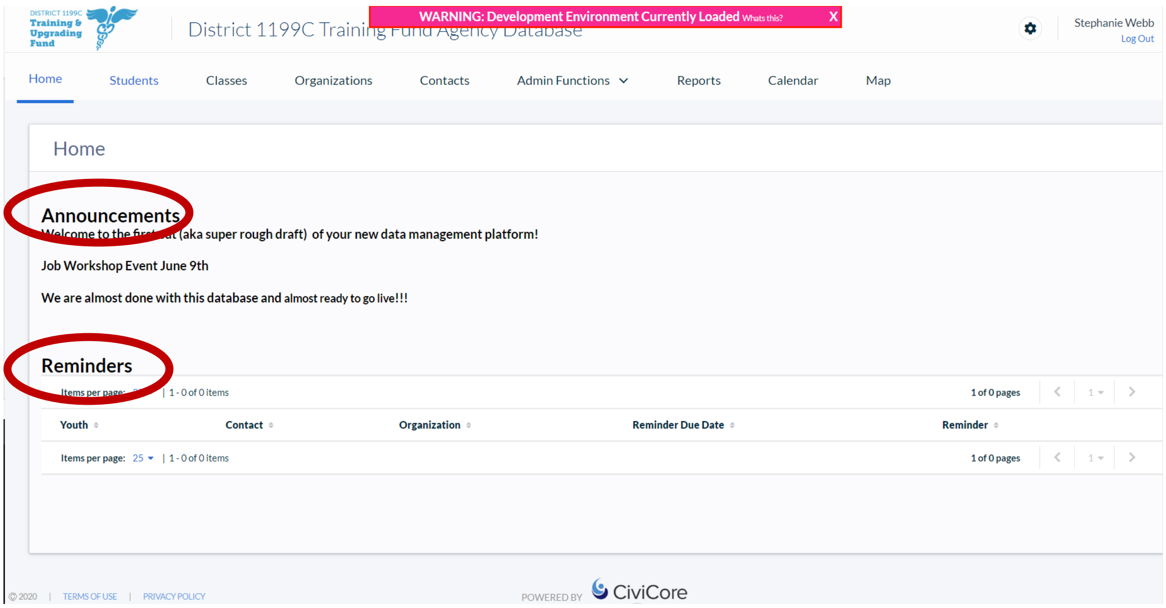
Reports – Where you will go to run existing or ready-made reports

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

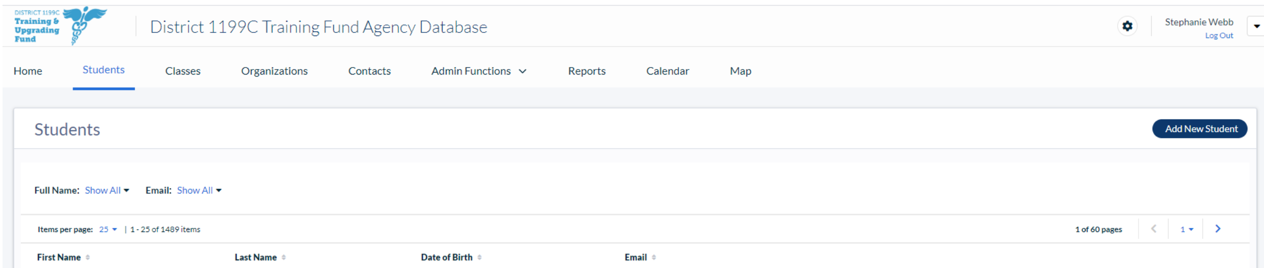
This is where you will find any agency wide announcements that are for the whole agency or reminders that are specific things you need to do.



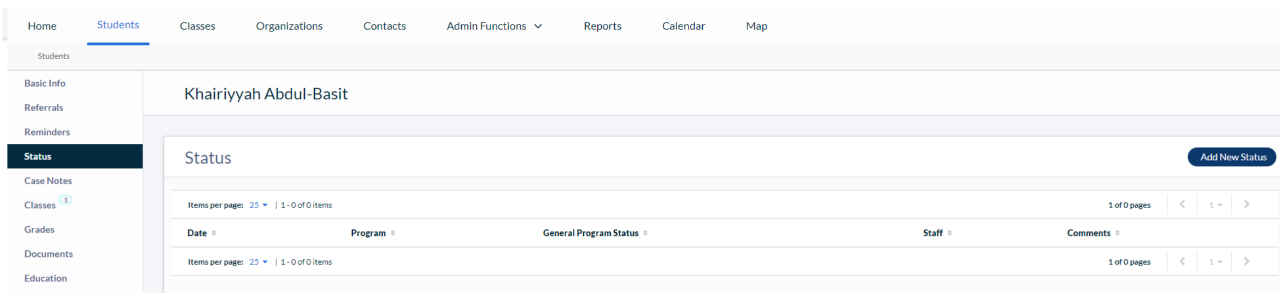
Display Pages

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.

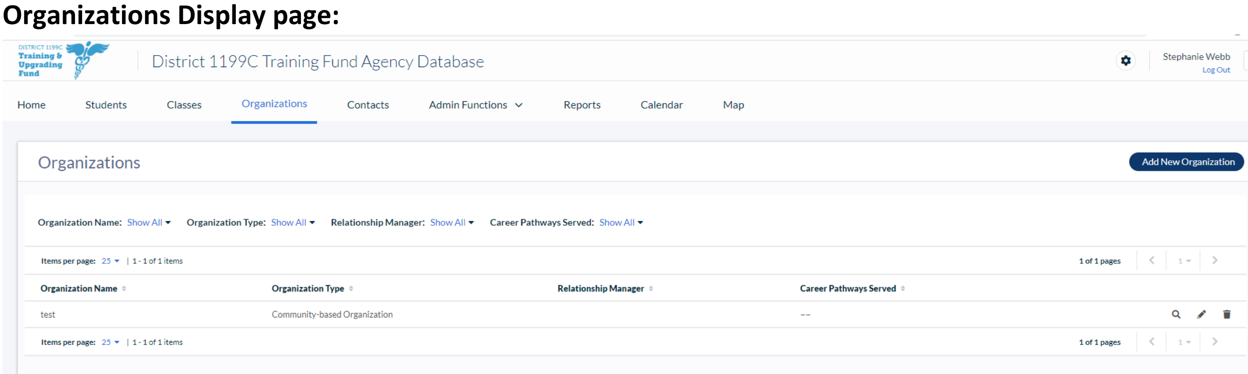
Student Display Page:



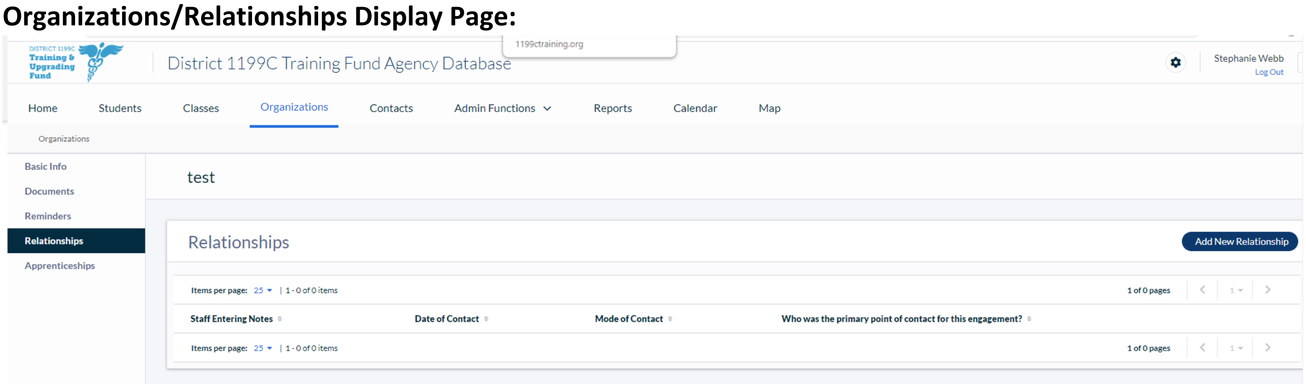
Student/Status Display Page:



Organizations Display page:



Organizations/Relationships Display Page:



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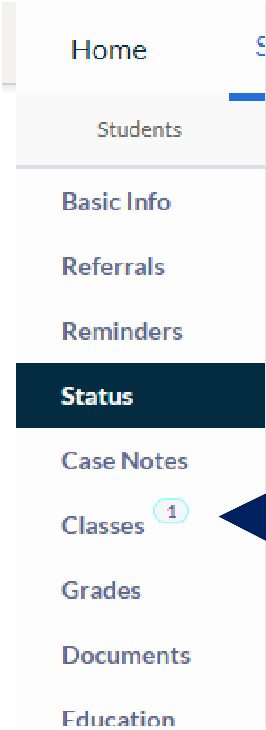


IMPORANT NOTE:

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

General Intake Form

https://1199ctraining.org/intake

Student Contact

Coordinator asseses student

Coordinator schedules assessment if needed

Student Selection/ Enrollment

Student provided CiviCore Link to self-register into database with more complete information

Coordinators add any missing information off of paper forms

Coordinators can also enter information manually.

CiviCore Entry

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.

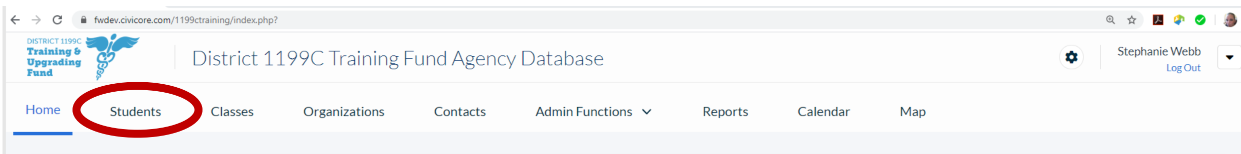
MY NOTES:

STUDENTS SECTION

Start by clicking **"Students"** in the top menu bar.

This will allow you to:

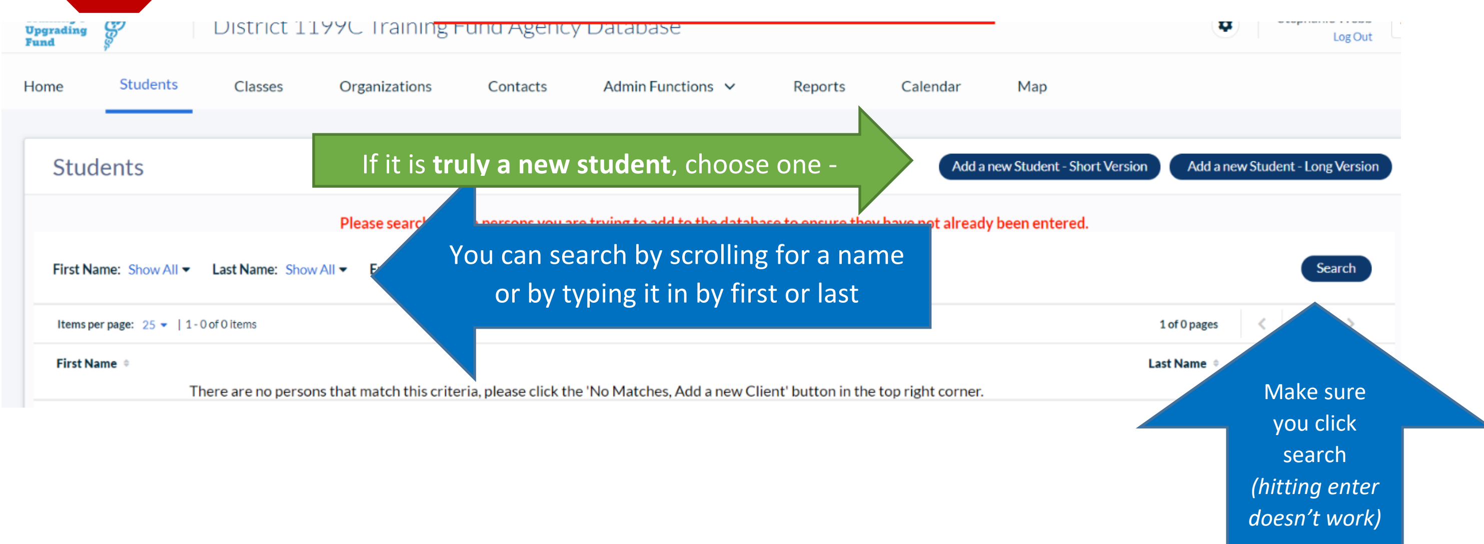
1. access all student records
2. enter a new student



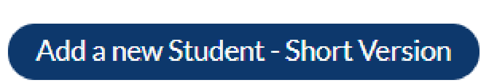
To Add a New Student:

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:

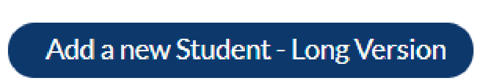
First, make sure you <u>search</u> to see if that student exists.



Entering a New Student



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



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.

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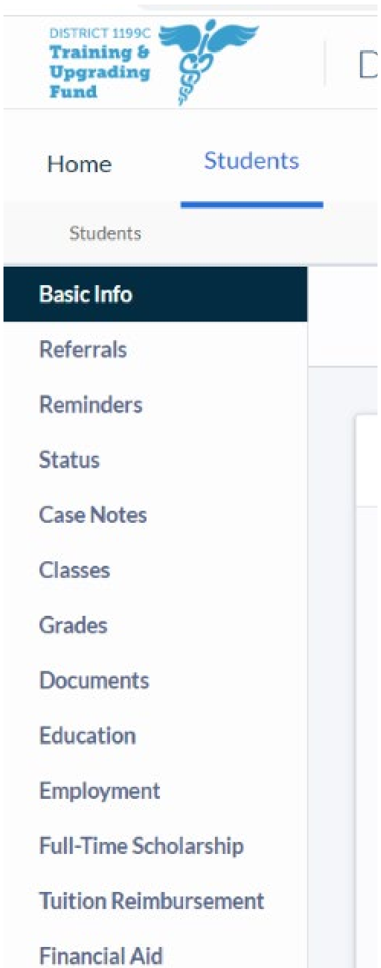
Options Under Students



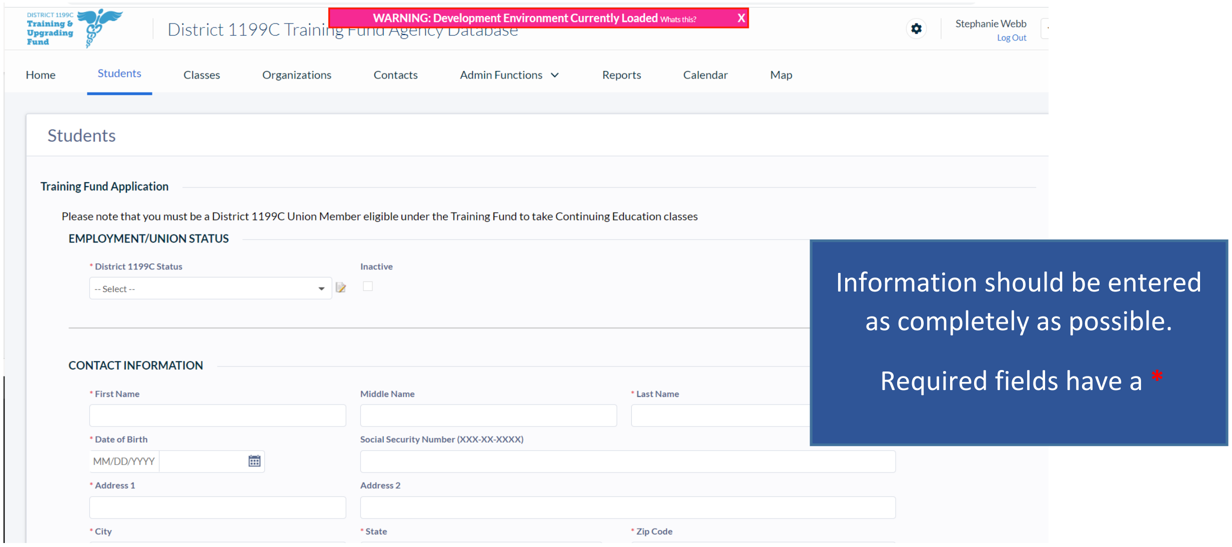
Child's Table	**Basic Description**
Basic Info	Shows student's demographics information
Referrals	Shows where students have been referred internally and externally
Reminders	Set reminders for tasks for yourself or coworkers
Status	To track the status of a student in different areas of participation
Case 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.
Full-Time Scholarship	*Only available to certain users.*
Tuition Reimbursement	
Financial Aid	

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



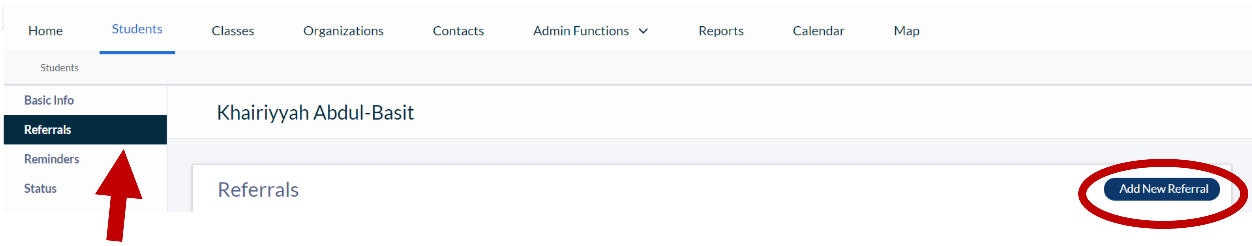
When you are viewing a studen'ts "Basic Info", you are able download a PDF by pressing the Print Screen button if you need an electronic or paper copy of a student's intake form.

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.

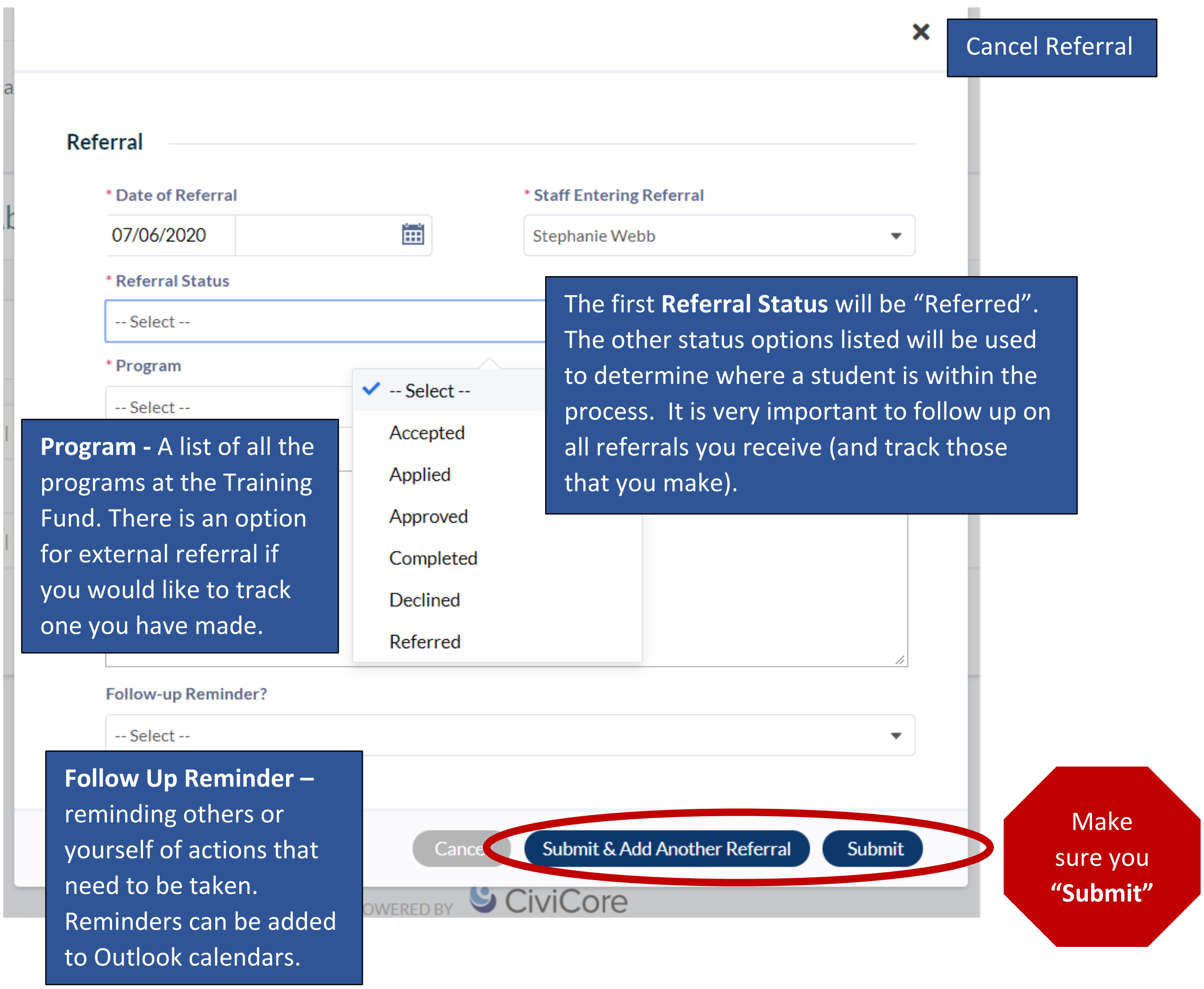
MY NOTES:

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.



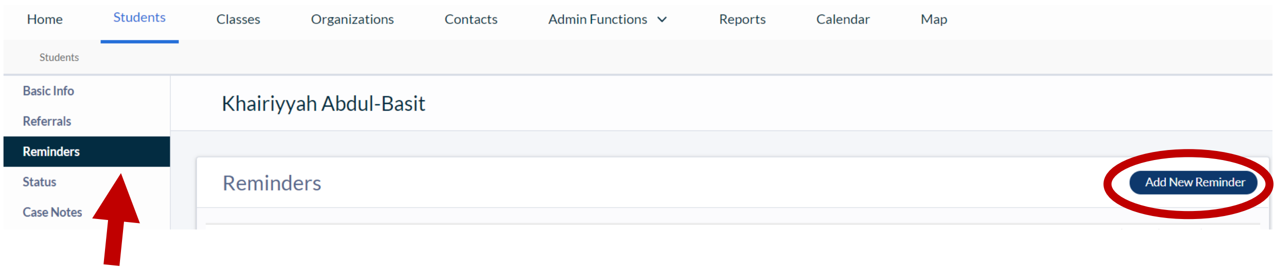
1. Click "Referrals"
2. Click "Add New Referral"



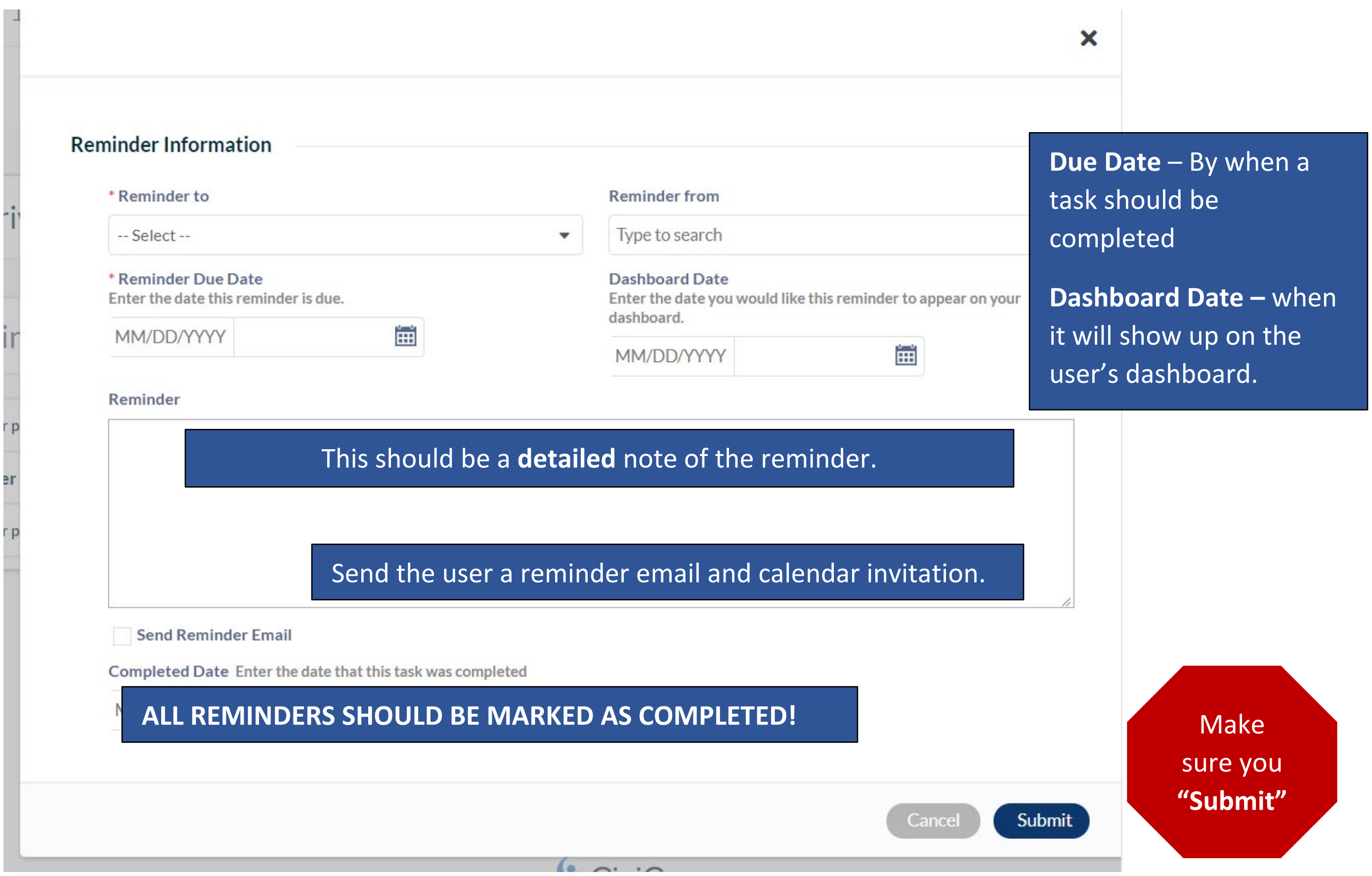
MY NOTES:

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"



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?

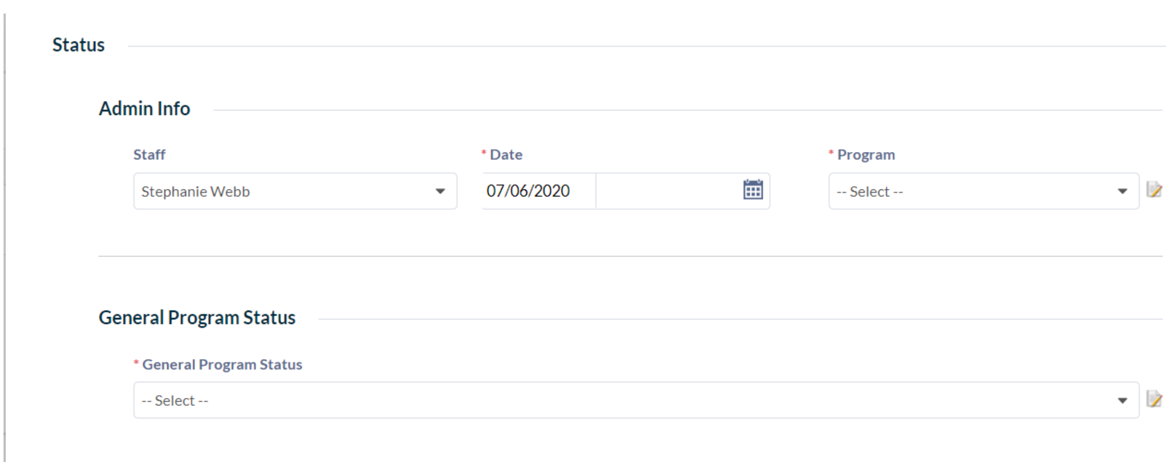
What were the reasons some students didn’t complete the program?

Of the students who completed the program, how many passed the credentialling 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.

<u>YOU MUST MAKE A NEW STATUS FOR EACH UPDATE, DO NOT CHANGE A PREVIOUS STATUS</u> (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.



<u>General Program Status</u>

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

Items per page: 25 | 1 - 2 of 2 items

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.

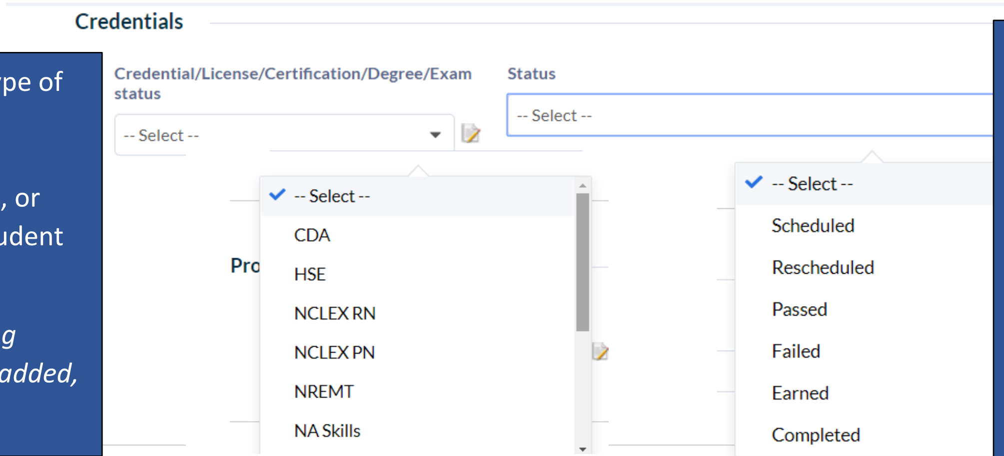
Note: There are many other options in the drop-down menu (complete list below). Please discuss with your program and/or your department to ensure you understand if and when to use each option so that data entry is consistent.

- 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.

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

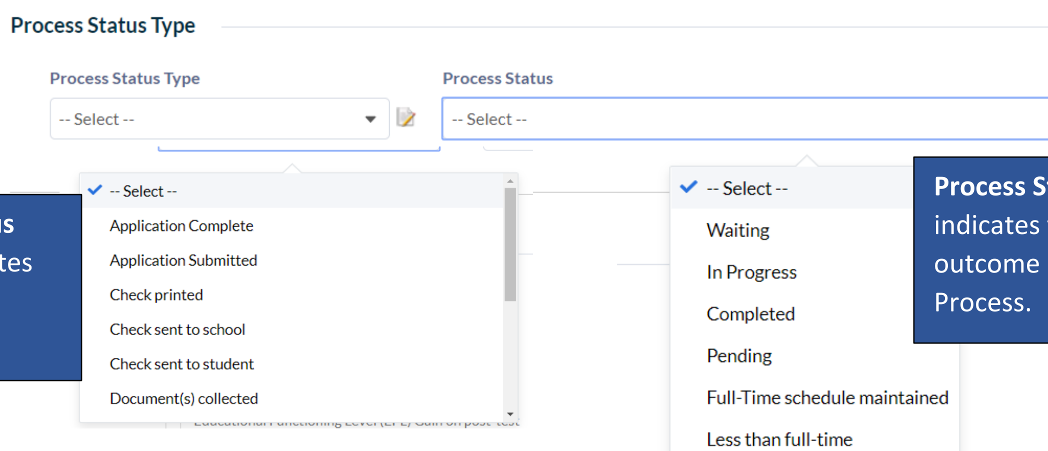
**if something needs to be added, let us know.*



Indicate the status of where a student is. **<u>There should be a new status for each step</u>** 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 – indicates steps in the process.



Process Status – indicates the outcome of the Process.

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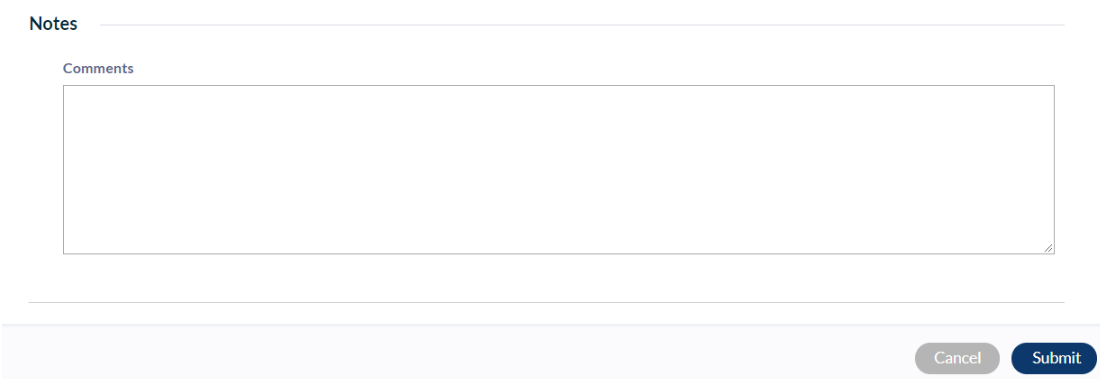
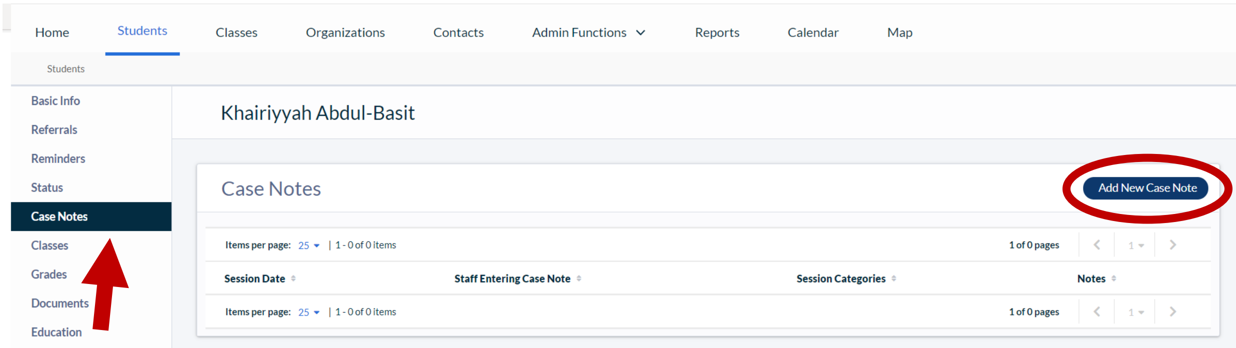
Measurable Skill Gain – Select the Measurable Skill Gains (MSG) as indicated by WIOA.

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



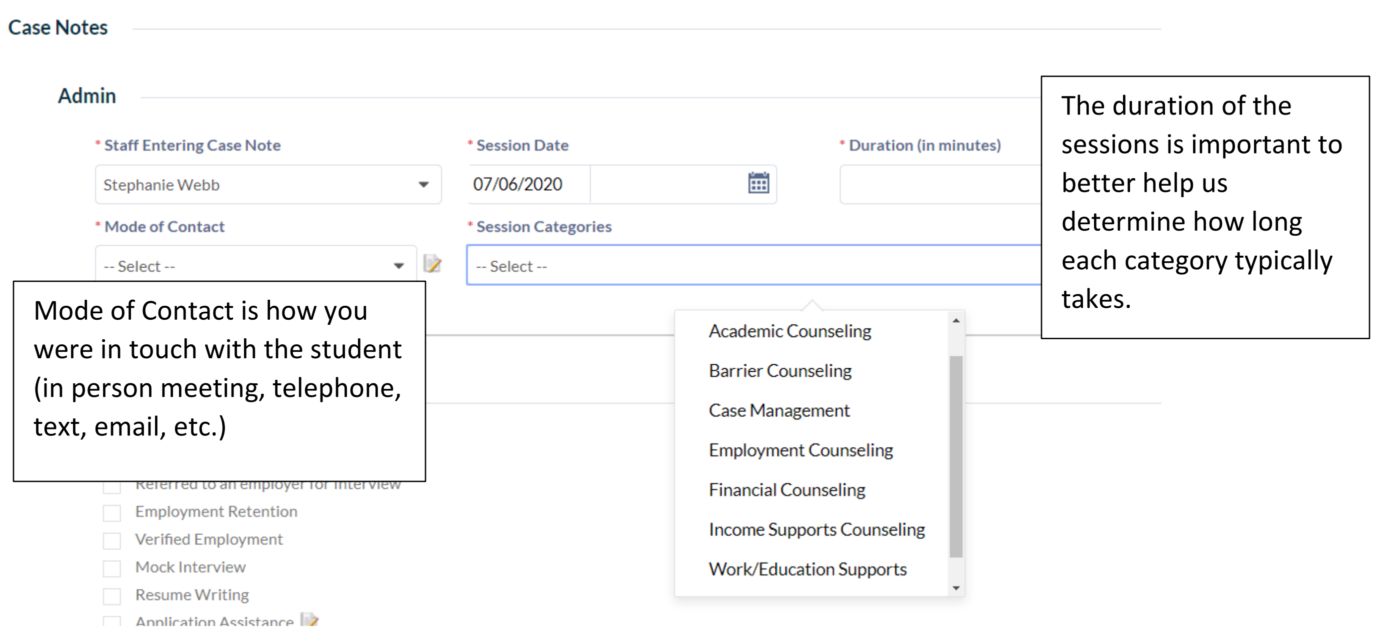
Students: Case Notes

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



1. Click “Case Notes”
2. Click “Add New Case Note”

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



Mode of Contact is how you were in touch with the student (in person meeting, telephone, text, email, etc.)

The duration of the sessions is important to better help us determine how long each category typically takes.

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.

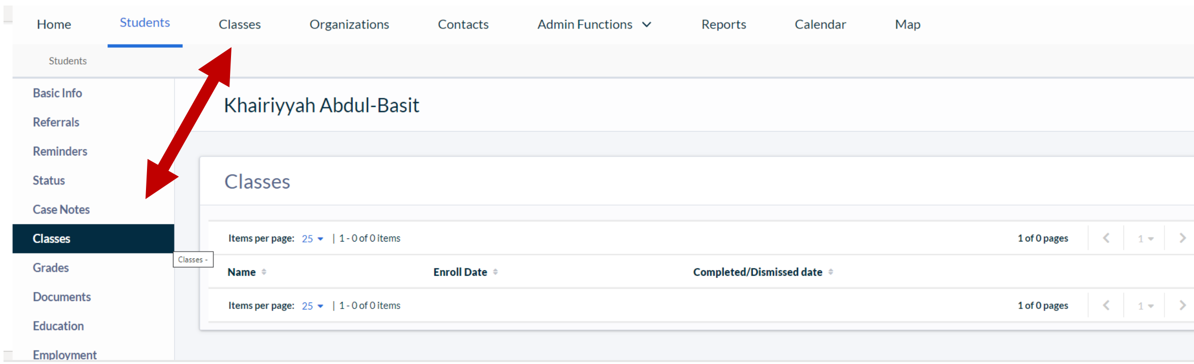
Make sure you **"Submit"**

Cancel | Submit & Add Referral | Submit

MY NOTES:

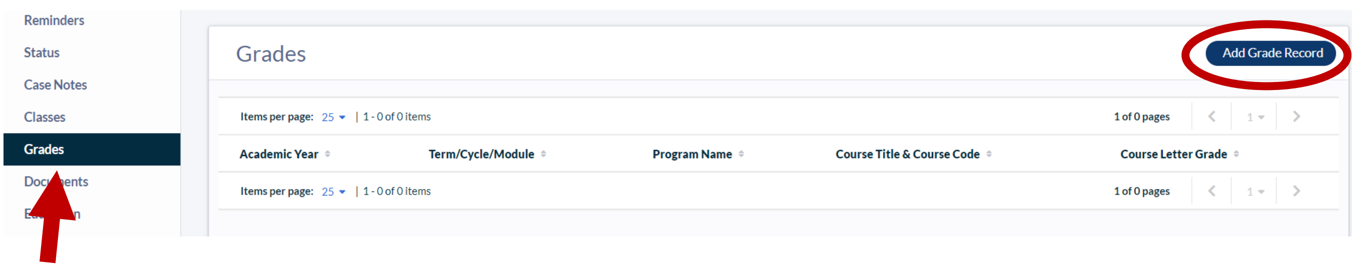
Students: Classes

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*.

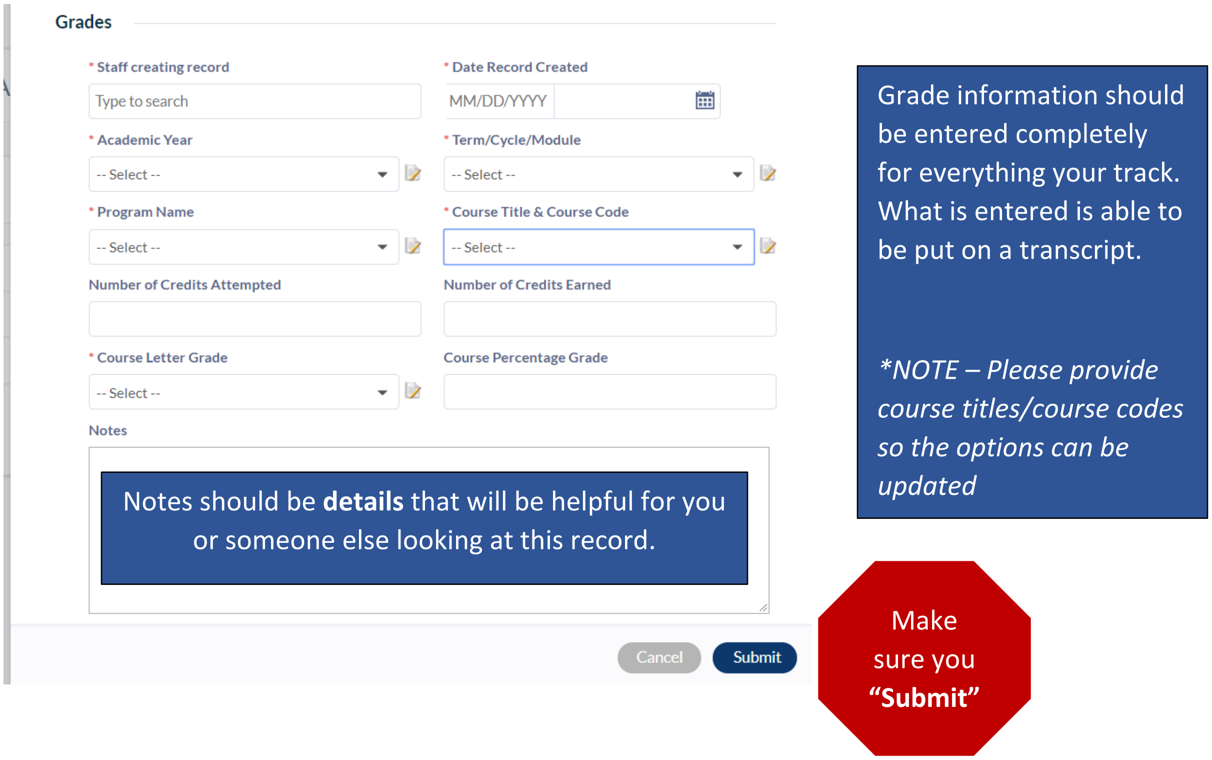


Students: Grades

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

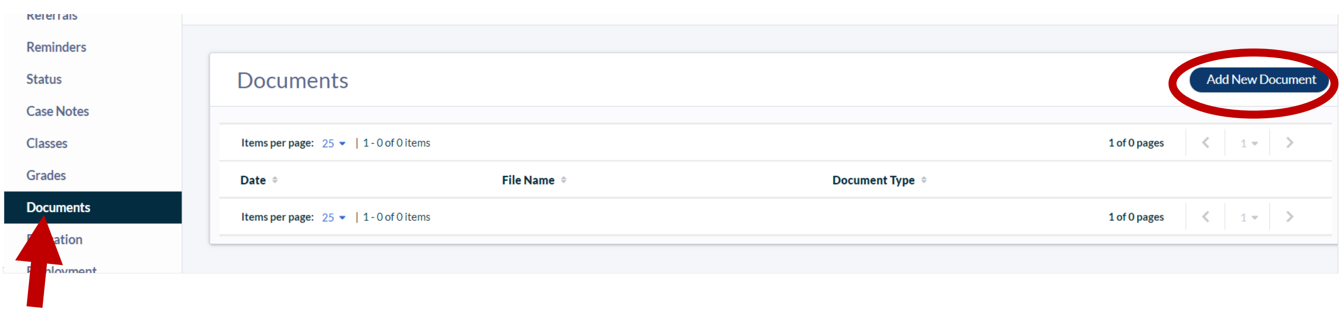


1. Click "Grades"
2. Click "Add New Grade"

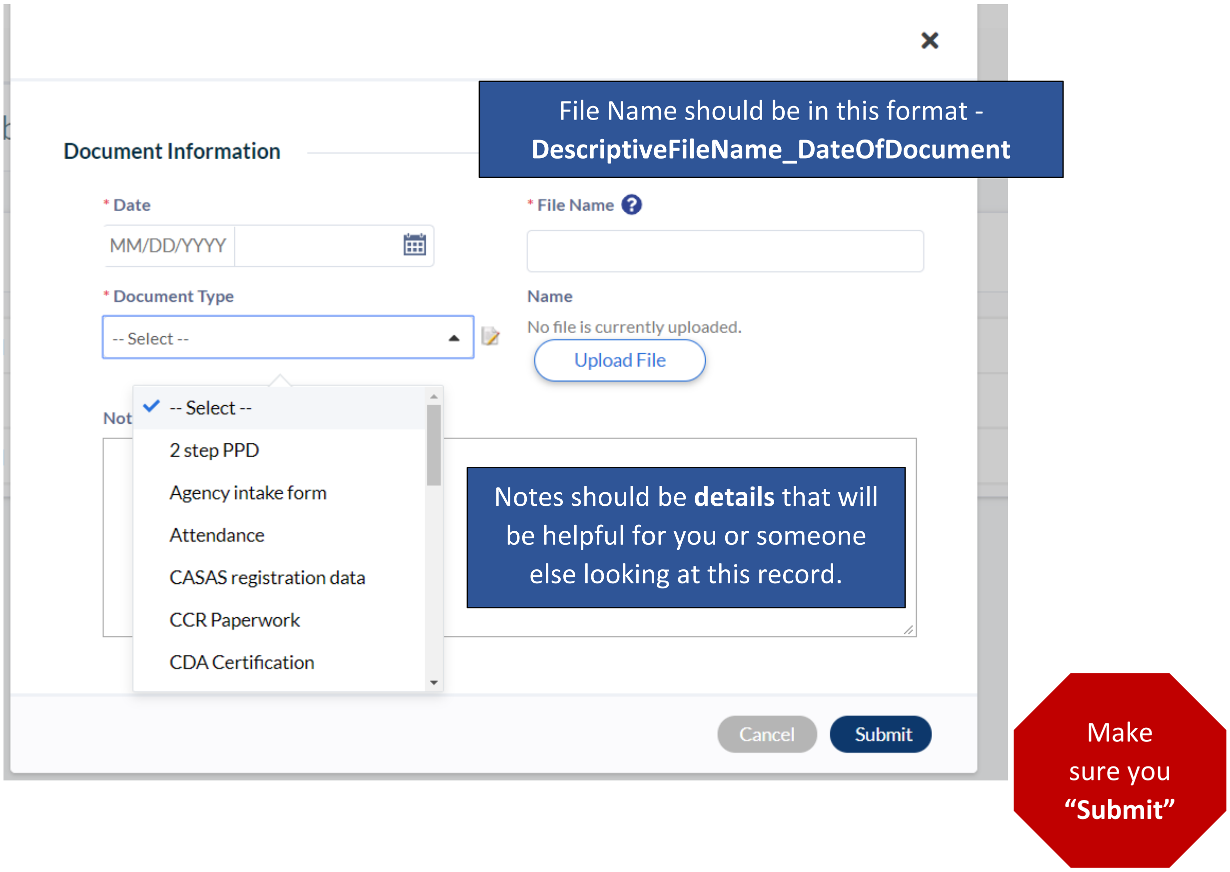


Students: Documents

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.*



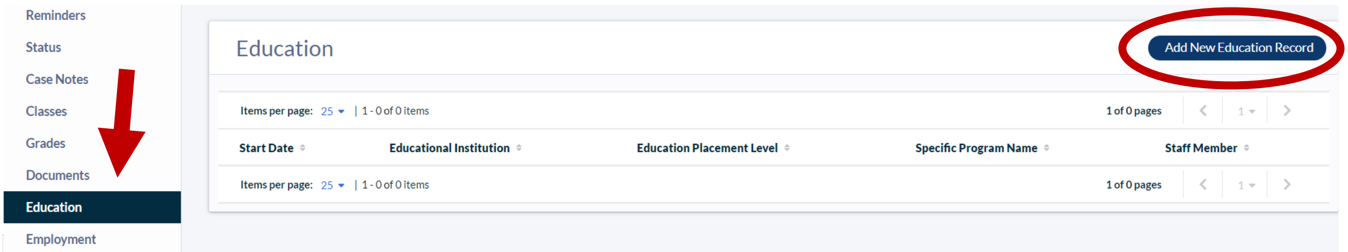
1. Click "Documents"
2. Click "Add New Document"


Document Information
File Name should be in this format -
DescriptiveFileName_DateOfDocument
* Date
MM/DD/YYYY
* File Name
* Document Type
-- Select --
Name
No file is currently uploaded.
Upload File
-- Select --
2 step PPD
Agency intake form
Attendance
CASAS registration data
CCR Paperwork
CDA Certification
Notes should be **details** that will be helpful for you or someone else looking at this record.
Cancel
Submit
Make sure you **"Submit"**

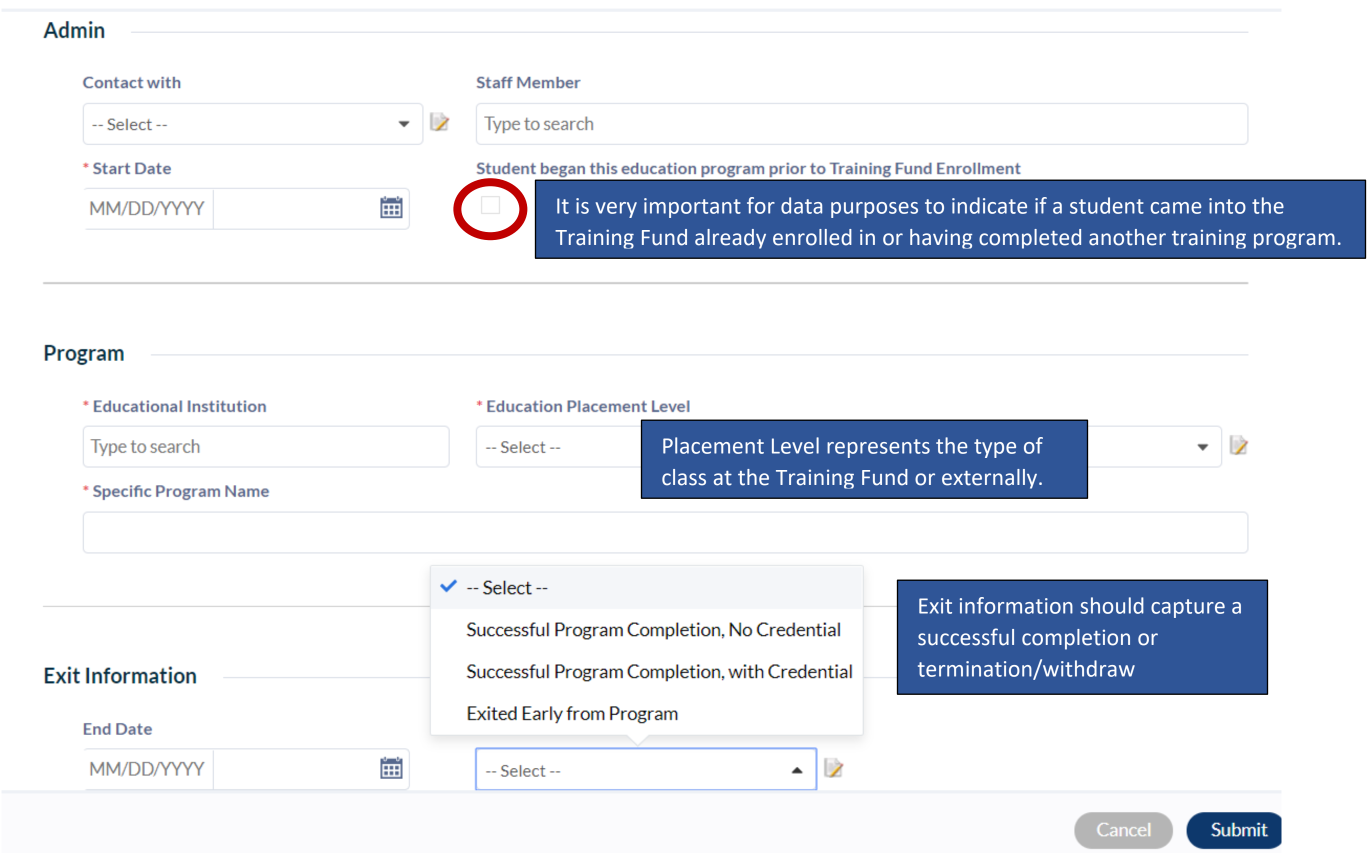
MY NOTES:

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.



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



MY NOTES:

Make sure you **"Submit"**

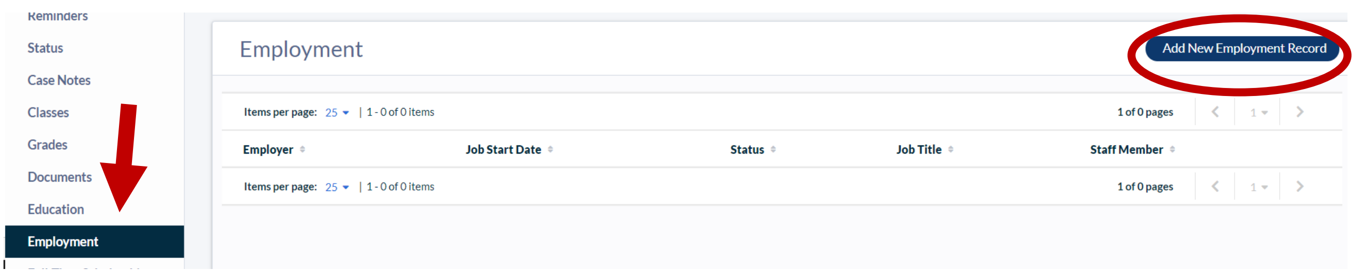
Last Update: October 1, 2021

Students: Employment

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

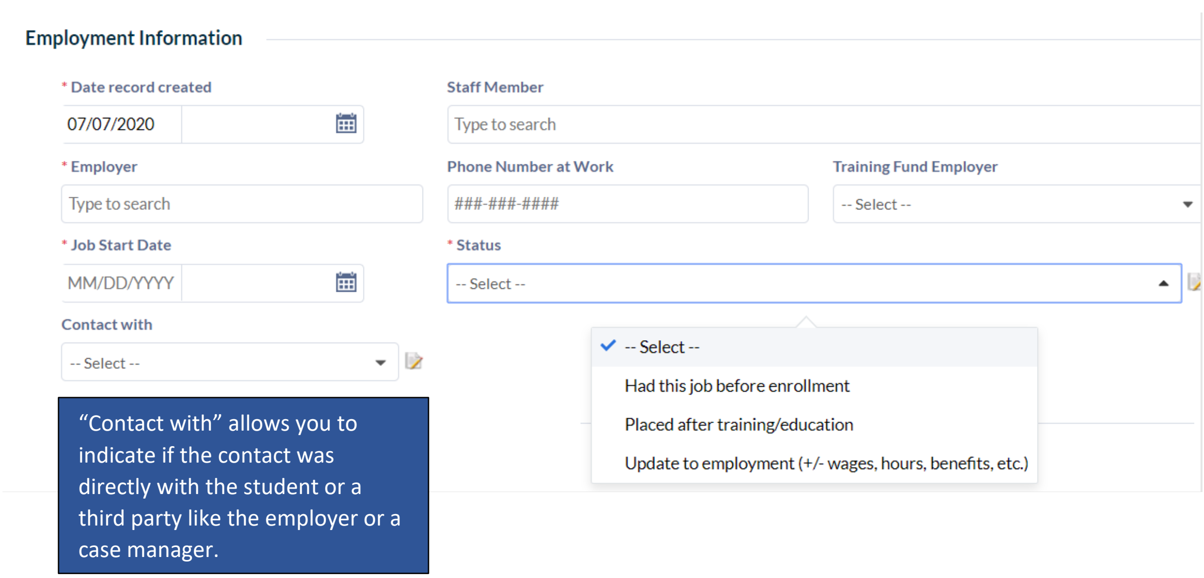
Data from this section can be used to answer questions such as:

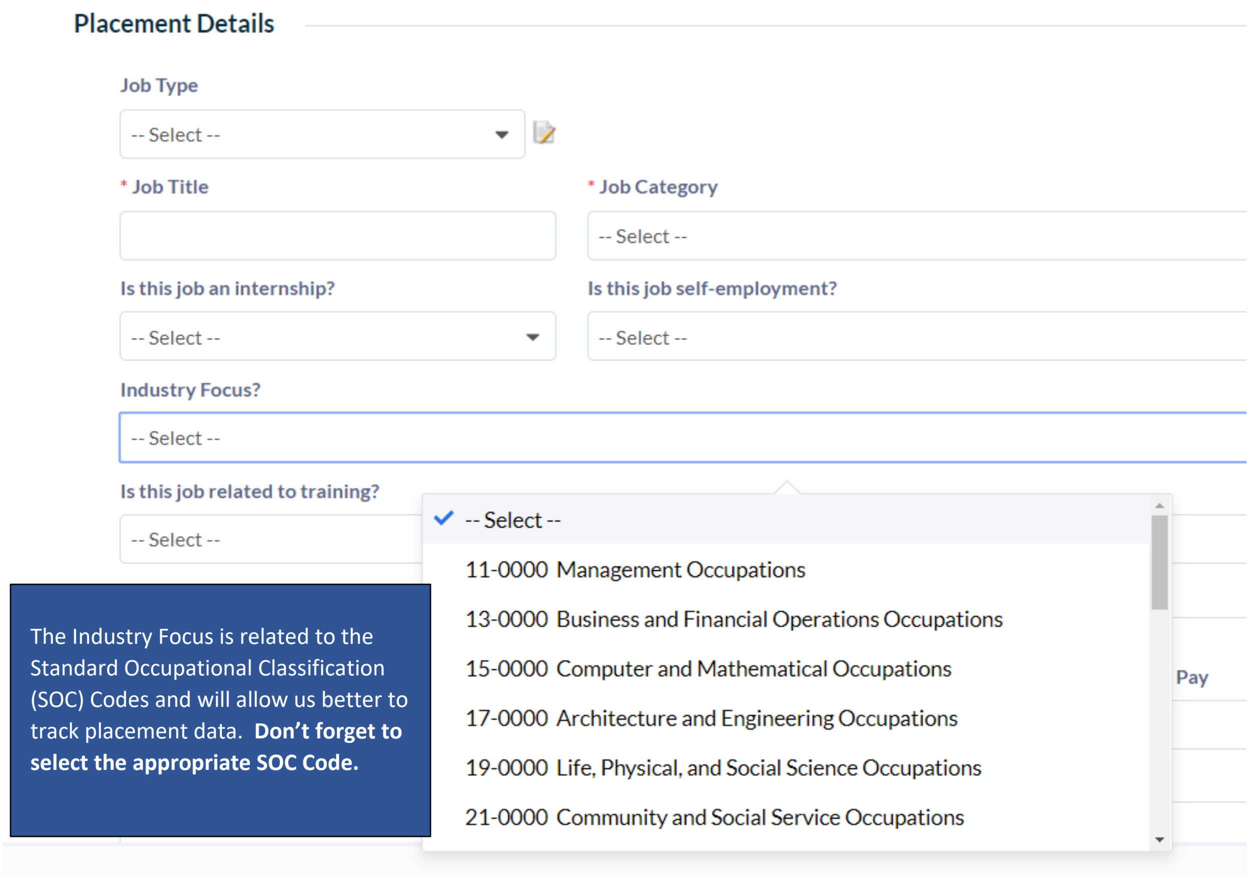
1. Did the student's wage increase after completing this training or class?
2. Is the student working in a job related to the training?
3. How long was the student able to keep the job after completing training?



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

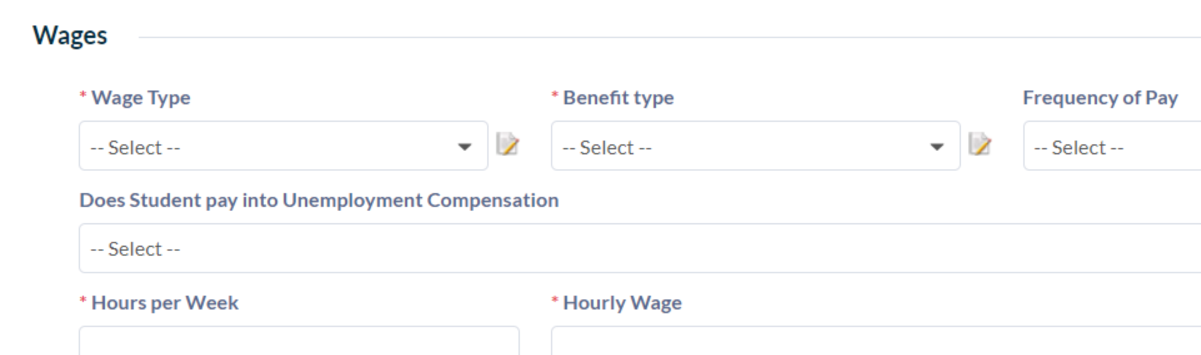
The Employment information should be as complete as possible. It is extremely important to indicate if the student had the employment before enrollment (incumbent worker), were placed after training (regardless if it is within a specific career pathway), or if it is an update to the employment record. 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.



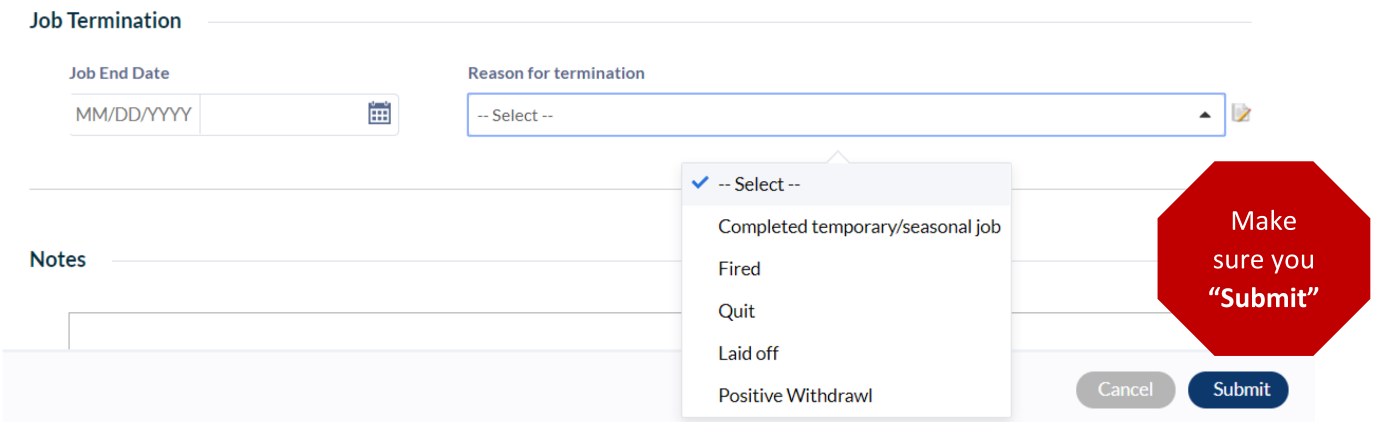


The Industry Focus is related to the Standard Occupational Classification (SOC) Codes and will allow us better to track placement data. **Don't forget to select the appropriate SOC Code.**

Wage Information is important to input correctly and completely.



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



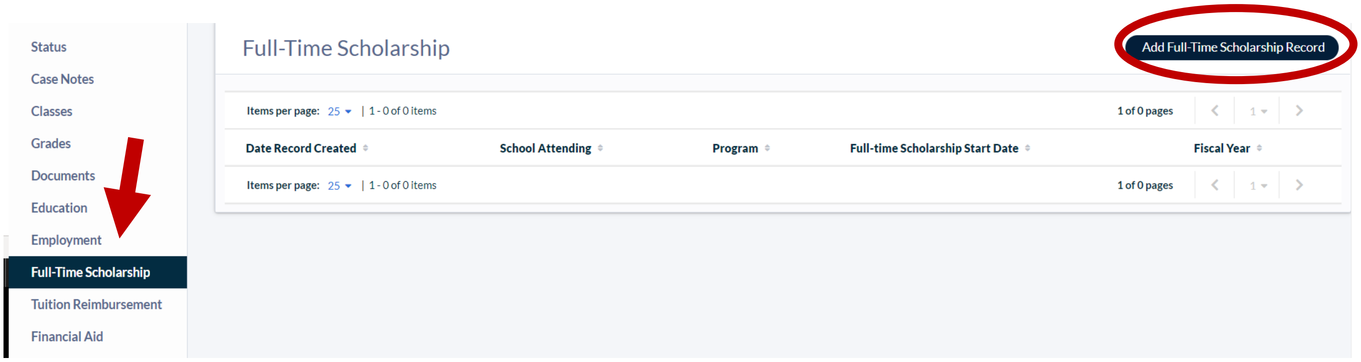
You should add "Notes" to explain any update or termination for information that is not captured elsewhere.

MY NOTES:

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

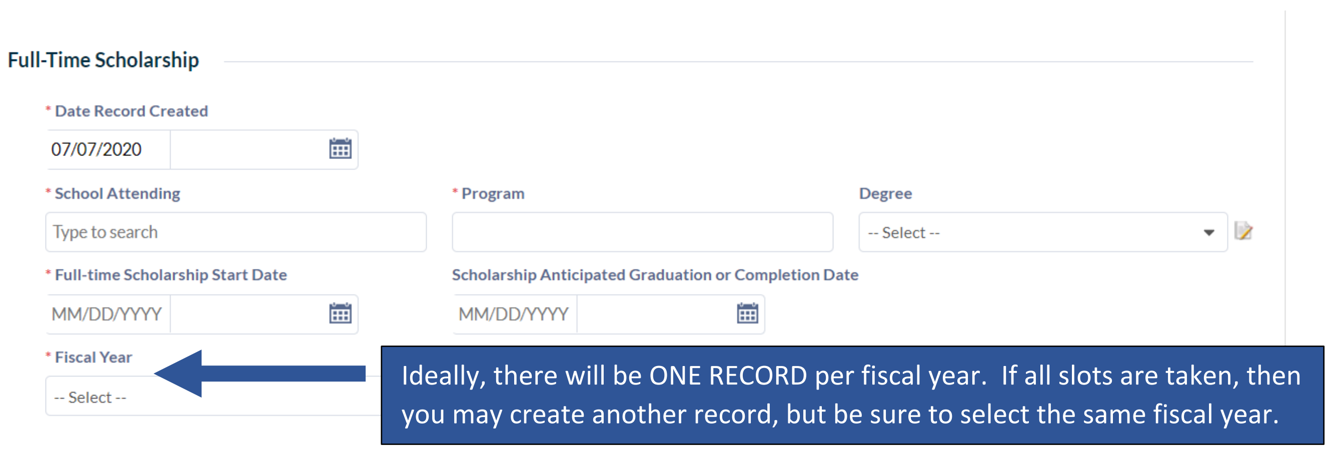
To access Tuition Reimbursement/Full-Time Scholarship/Financial Aid child's tables, you will have to be given special access and work in those departments. These options are available under the STUDENTS Section.

Full-Time Scholarship –



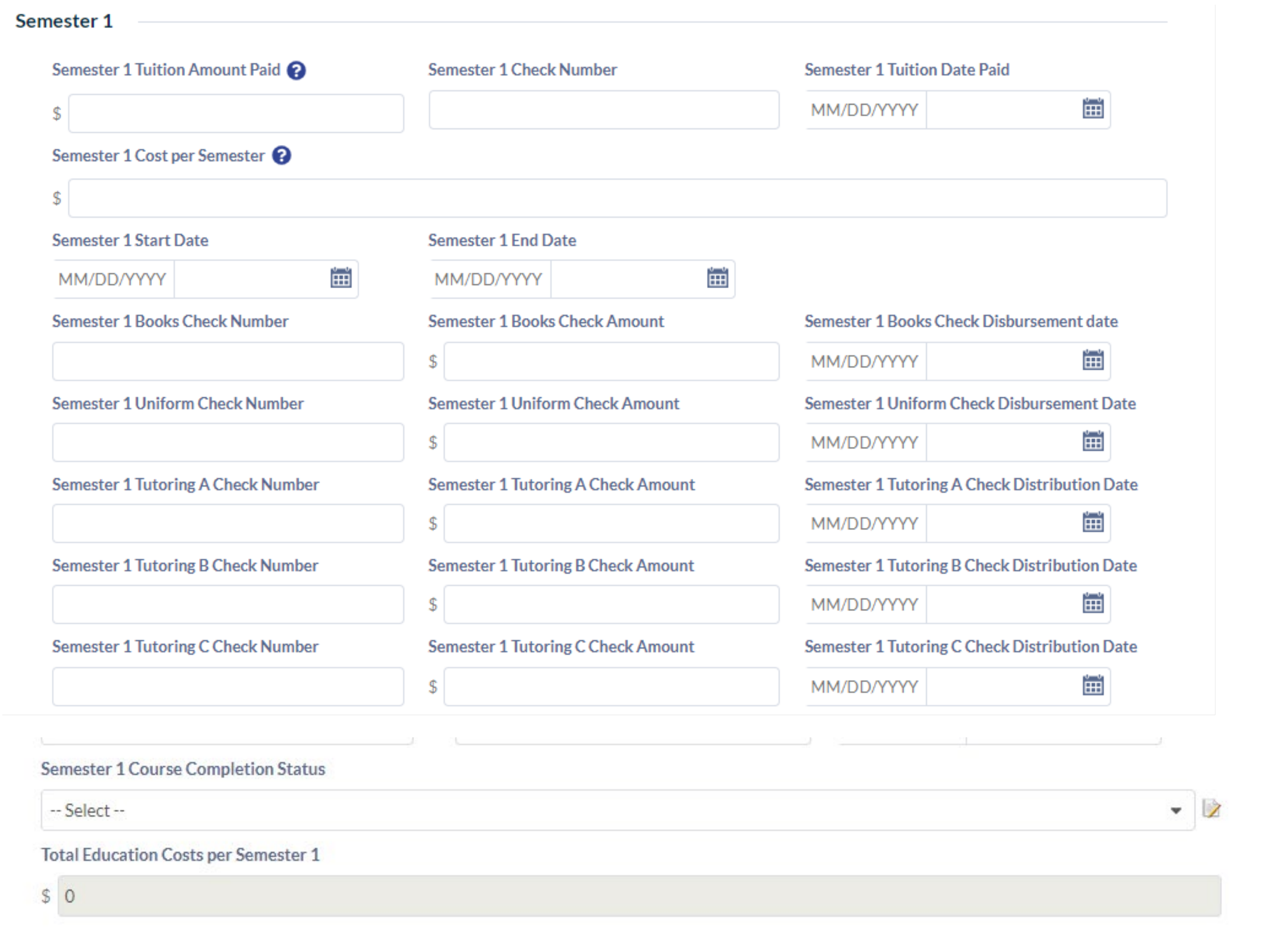
1. Click "Full-Time Scholarship"
2. Click "Add New Full-Time Scholarship Record"

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.



MY NOTES:

Adding Semesters



Semester 1

Semester 1 Tuition Amount Paid
$
Semester 1 Check Number
Semester 1 Tuition Date Paid
MM/DD/YYYY

Semester 1 Cost per Semester
$

Semester 1 Start Date
MM/DD/YYYY
Semester 1 End Date
MM/DD/YYYY

Semester 1 Books Check Number
Semester 1 Books Check Amount
$
Semester 1 Books Check Disbursement date
MM/DD/YYYY

Semester 1 Uniform Check Number
Semester 1 Uniform Check Amount
$
Semester 1 Uniform Check Disbursement Date
MM/DD/YYYY

Semester 1 Tutoring A Check Number
Semester 1 Tutoring A Check Amount
$
Semester 1 Tutoring A Check Distribution Date
MM/DD/YYYY

Semester 1 Tutoring B Check Number
Semester 1 Tutoring B Check Amount
$
Semester 1 Tutoring B Check Distribution Date
MM/DD/YYYY

Semester 1 Tutoring C Check Number
Semester 1 Tutoring C Check Amount
$
Semester 1 Tutoring C Check Distribution Date
MM/DD/YYYY

Semester 1 Course Completion Status
-- Select --

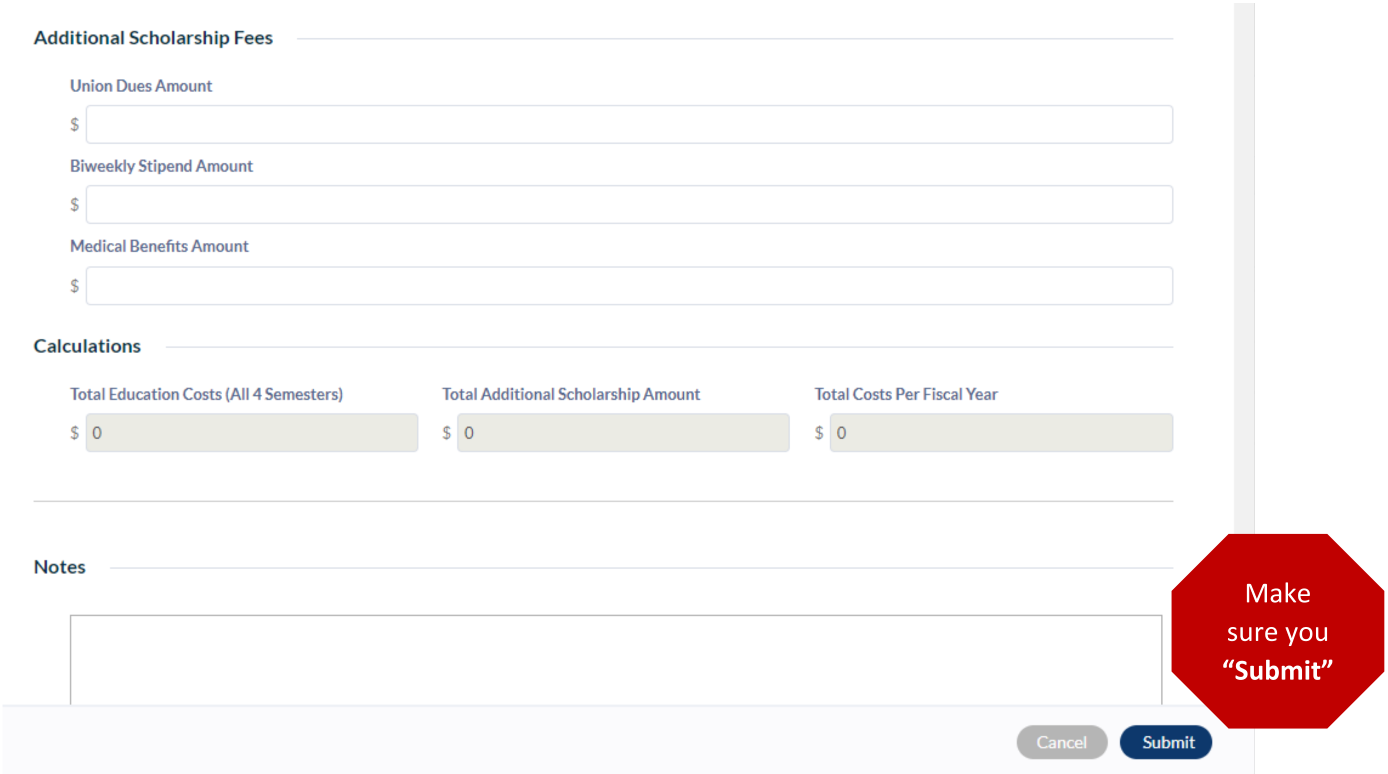
Total Education Costs per Semester 1
$ 0

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:

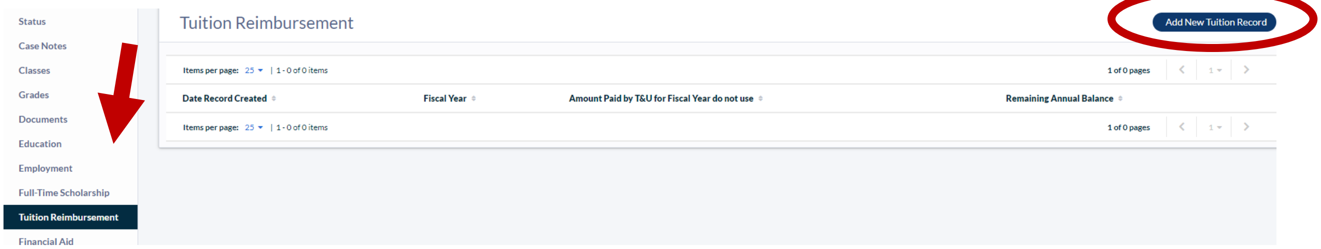
FTS has additional costs that are covered for each student on an annual basis. The amounts should be entered here.

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



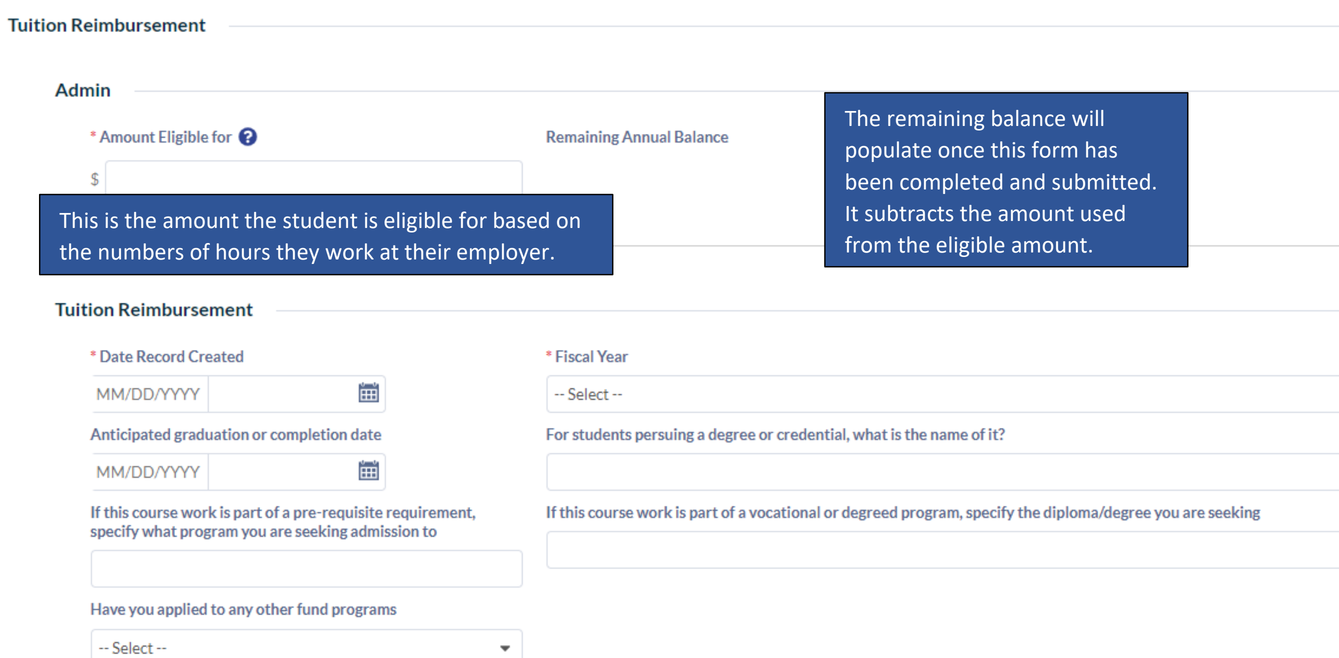
MY NOTES:

Tuition Reimbursement –



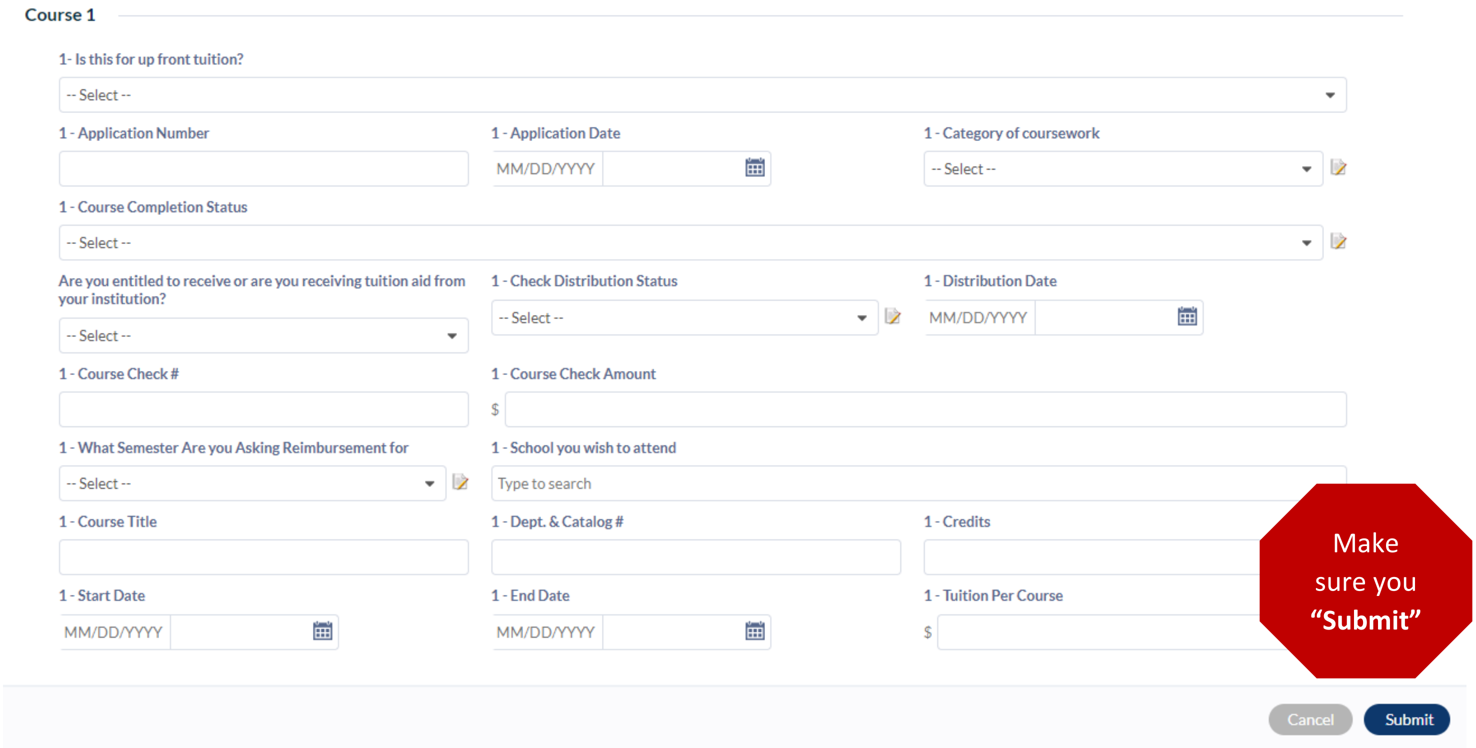
1. Click "Tuition Reimbursement"
2. Click "Add New Tuition Record"

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.



MY NOTES:

Adding Courses


Course 1

1- Is this for up front tuition?

-- Select --

1 - Application Number

1 - Application Date

MM/DD/YYYY

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

1 - Course Check #

1 - Course Check Amount

$

1 - What Semester Are you Asking Reimbursement for

-- Select --

1 - School you wish to attend

Type to search

1 - Course Title

1 - Dept. & Catalog #

1 - Credits

1 - Start Date

MM/DD/YYYY

1 - End Date

MM/DD/YYYY

1 - Tuition Per Course

$

Make sure you "Submit"

Cancel

Submit

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

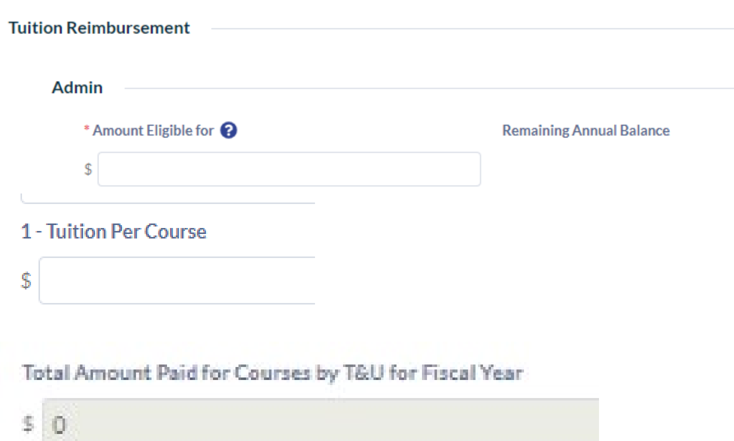
Application numbers: come from the paper or electronic applications

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 <u>must</u> be added to Organizations section first.


Tuition Reimbursement

Admin

* Amount Eligible for

$

Remaining Annual Balance

1 - Tuition Per Course

$

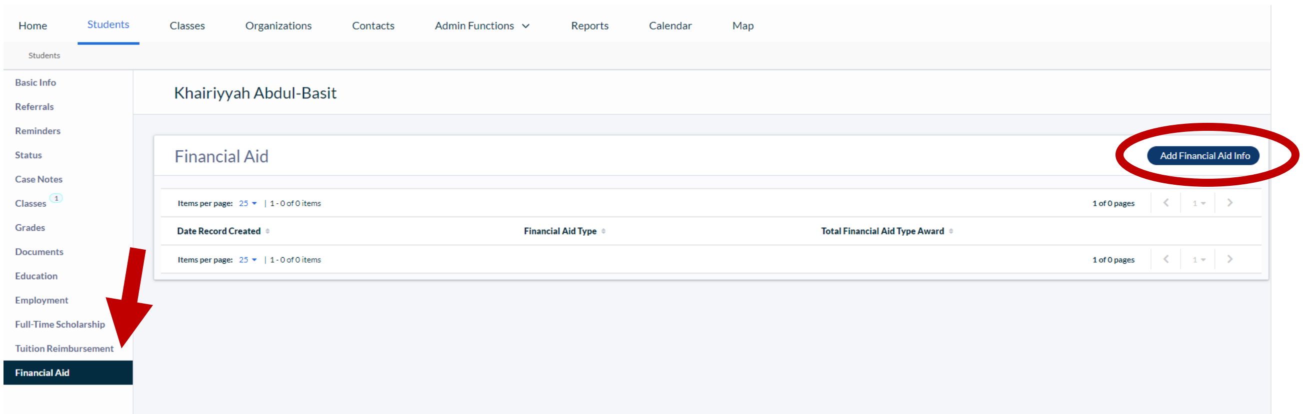
Total Amount Paid for Courses by T&U for Fiscal Year

$ 0

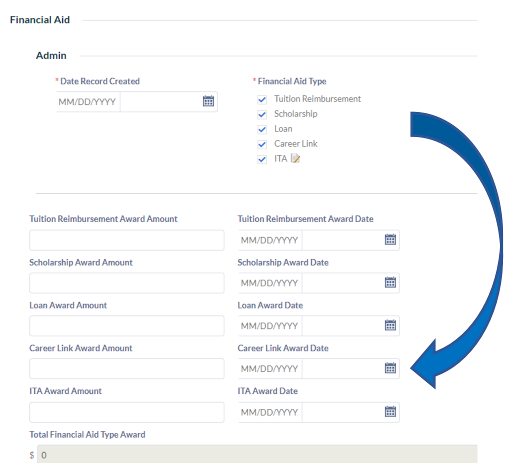
It is very important to fill in the amounts in these boxes. This amount for each semester will total together and be subtracted from the amount for which the student is eligible. The system will automatically total the total amount of Tuition Paid for all courses and will use that calculate a student's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

Last Update: October 1, 2021

Financial Aid –



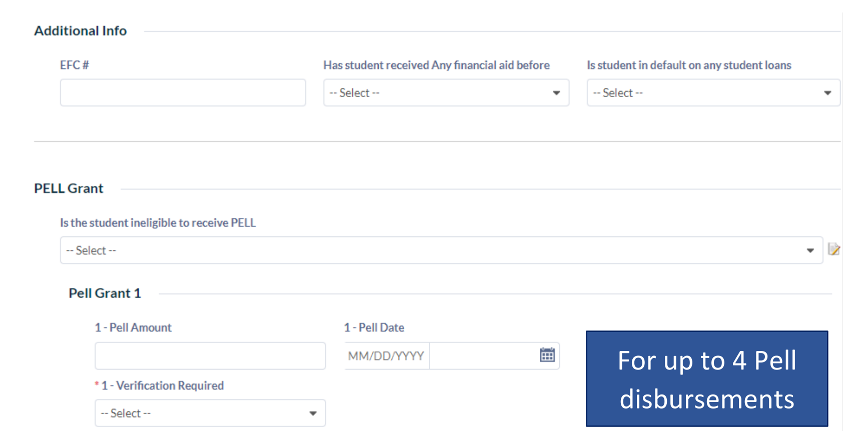
1. Click “Financial Aid”
2. Click “Add New Financial Aid Record”



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:

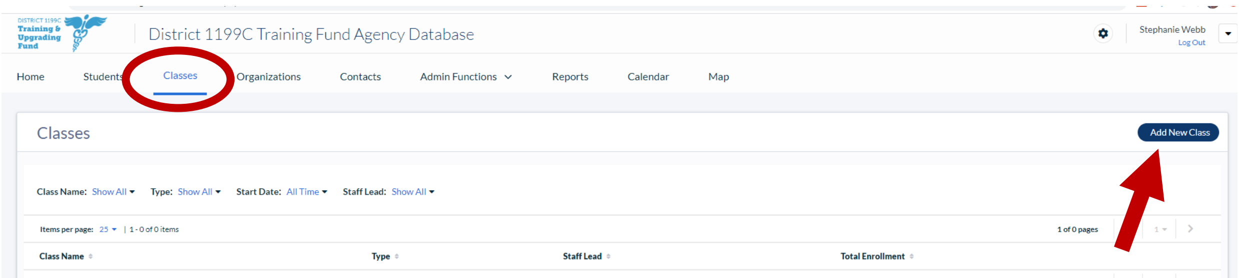


For up to 4 Pell disbursements

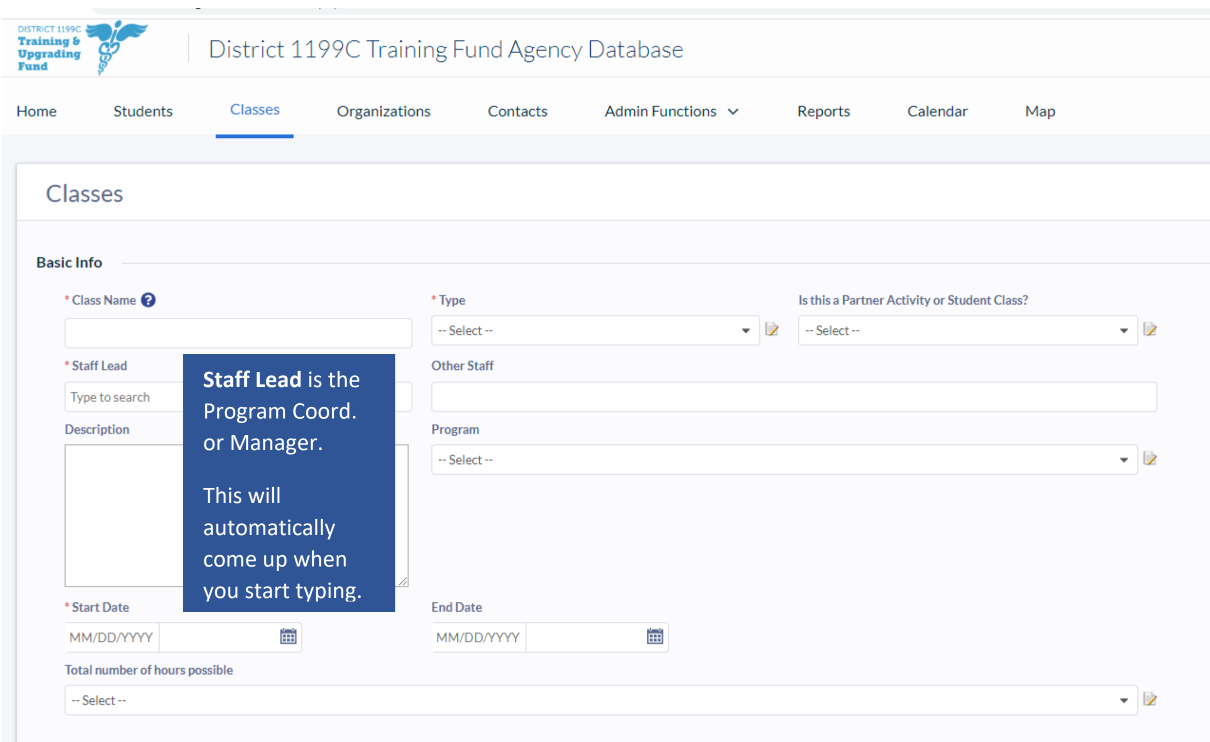
CiviCore will automatically total the Total Award.

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"



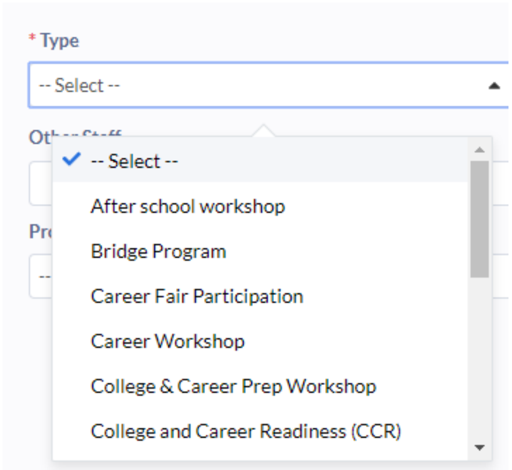
The first part of the Classes section is entering basic information.

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



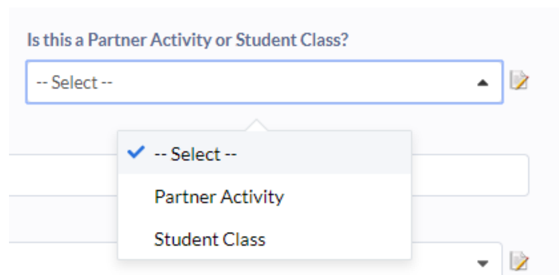
Be sure to select the correct class type. This will help you and other users distinguish this class from other types of classes in which one group of students may participate.

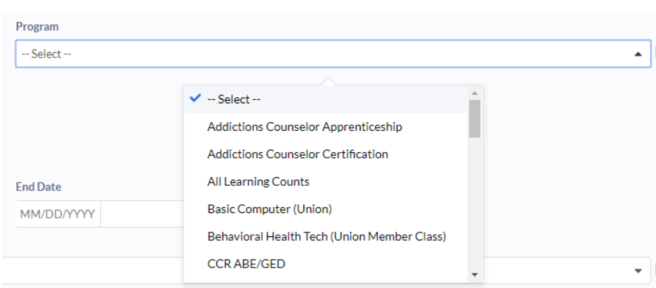
This is also important from a data perspective when we will run reports on the types of classes being offered at the Training Fund.

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.

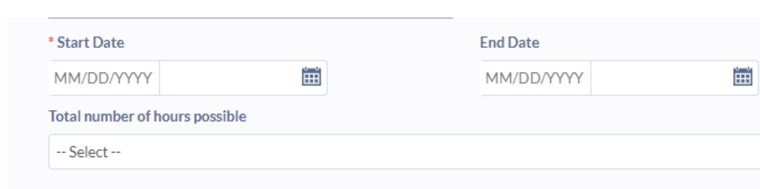




Select your specific program. This will help us run reports based on all the classes you are running throughout the year.

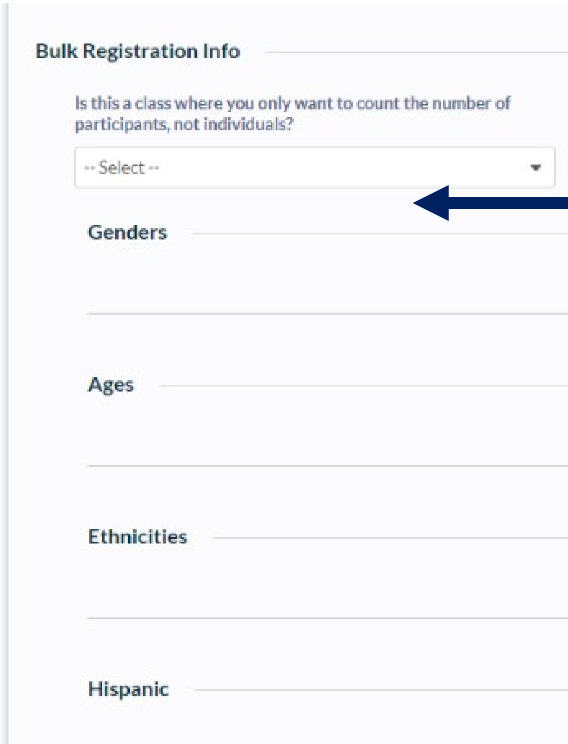
The specific start date is required. Ideally, you will also add the end date and total number of hours possible.

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



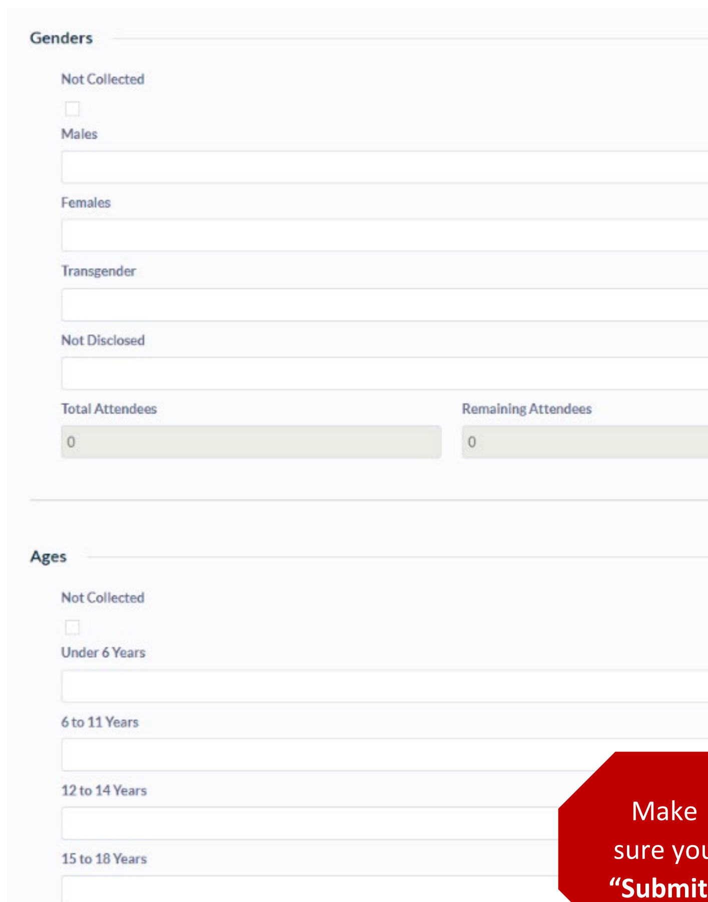
Last Update: October 1, 2021

Bulk Registration



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.



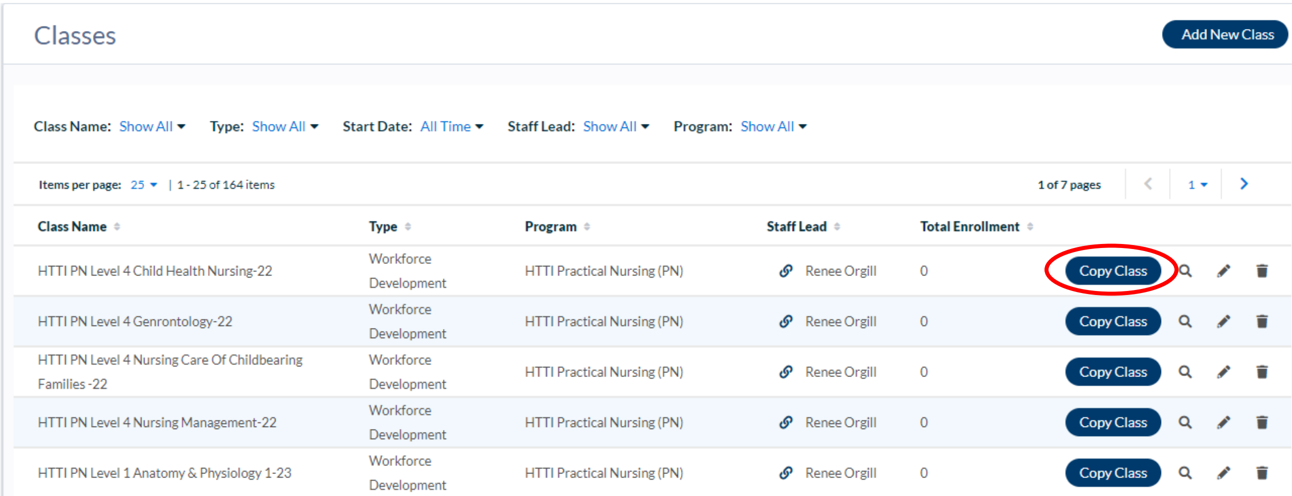
Make sure you **"Submit"**

MY NOTES:

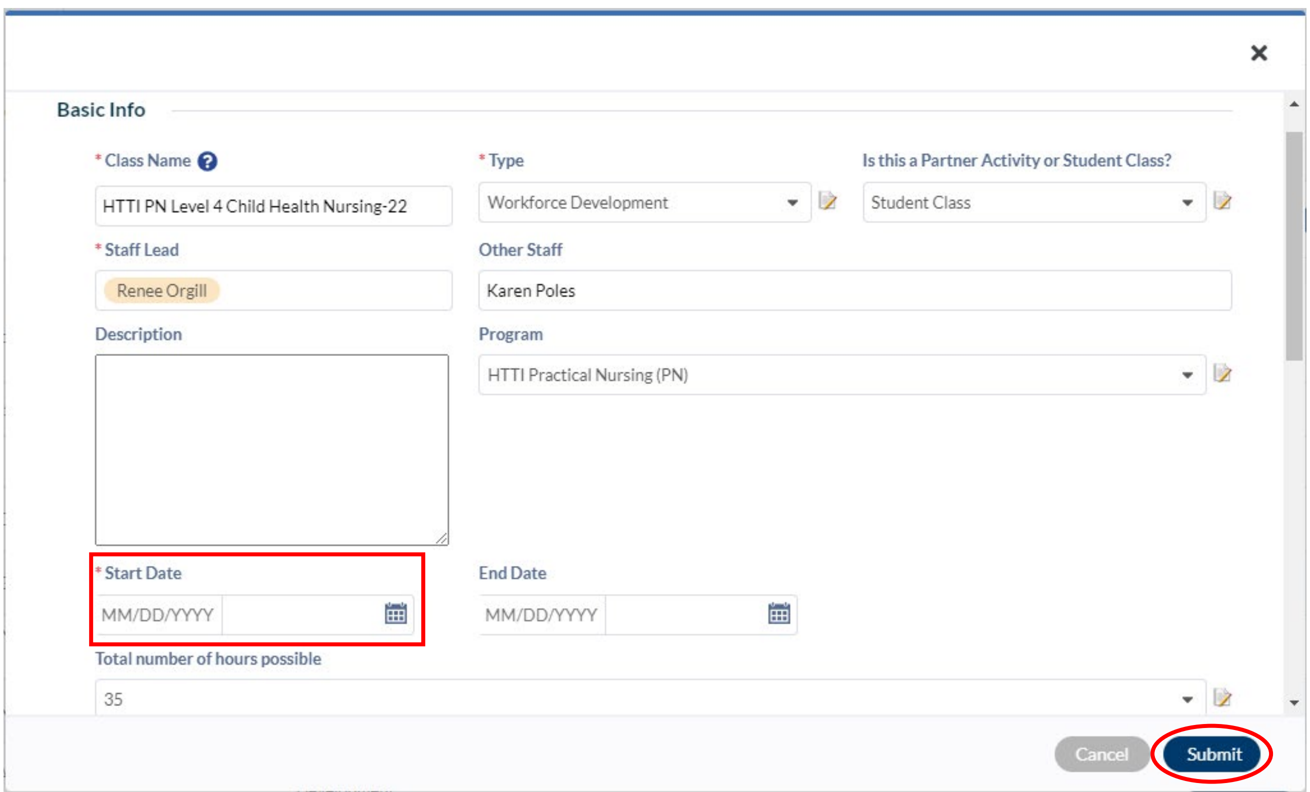
Last Update: October 1, 2021

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.

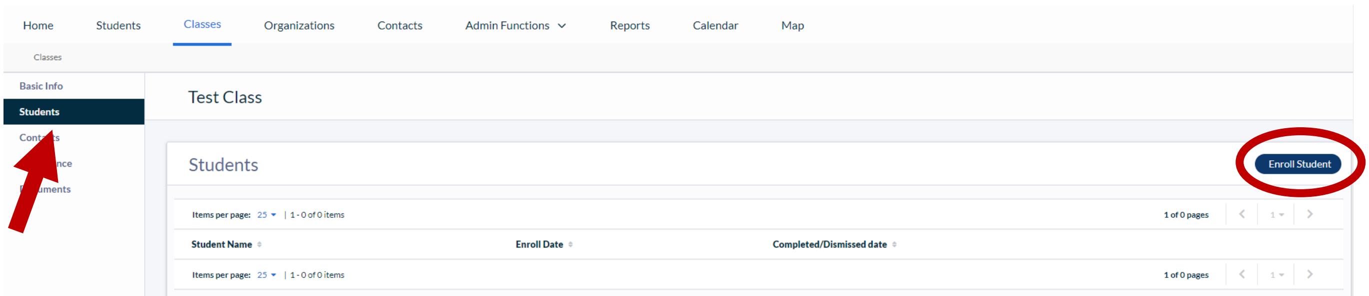


This will bring up a new window:

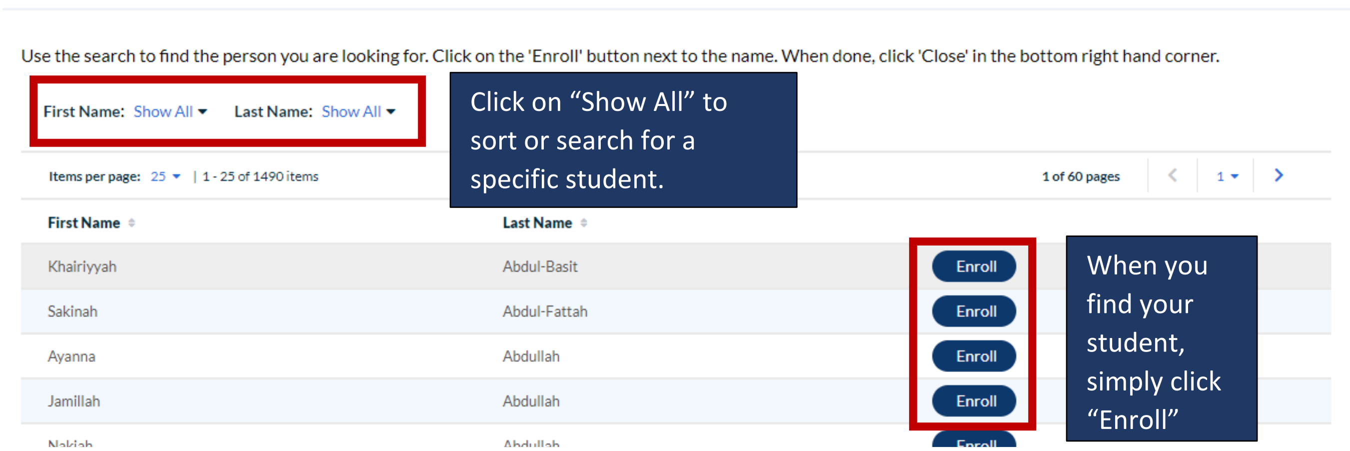


You can review and edit any information, or leave it as is. You MUST enter in a Start Data. Once complete, hit submit. The new class will appear in the list of Classes.

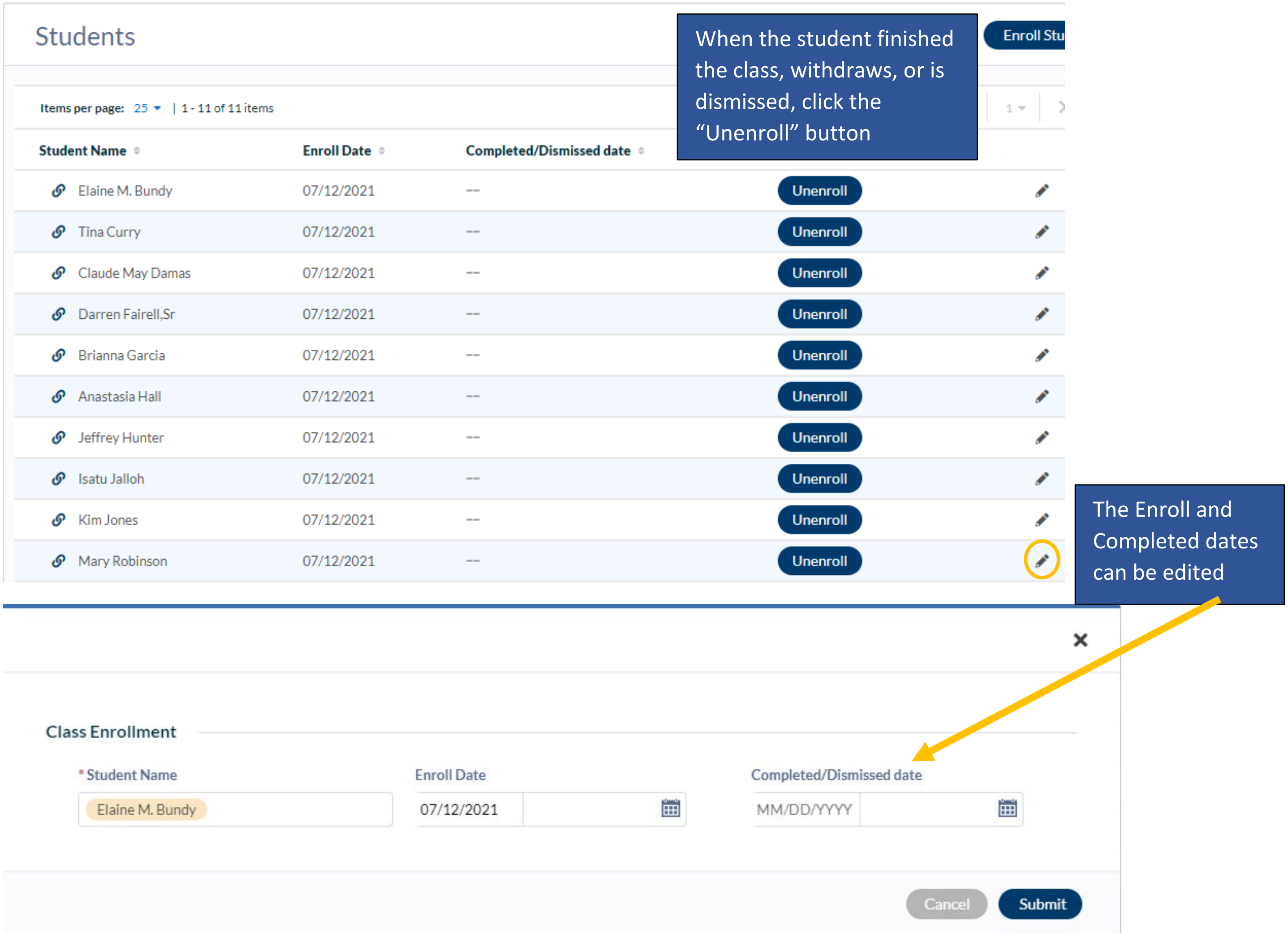
Classes: Students



1. Click on a class name, from the Classes display page
2. Click “Students”
3. Click “Enroll Student” - <u>NOTE:</u> 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.

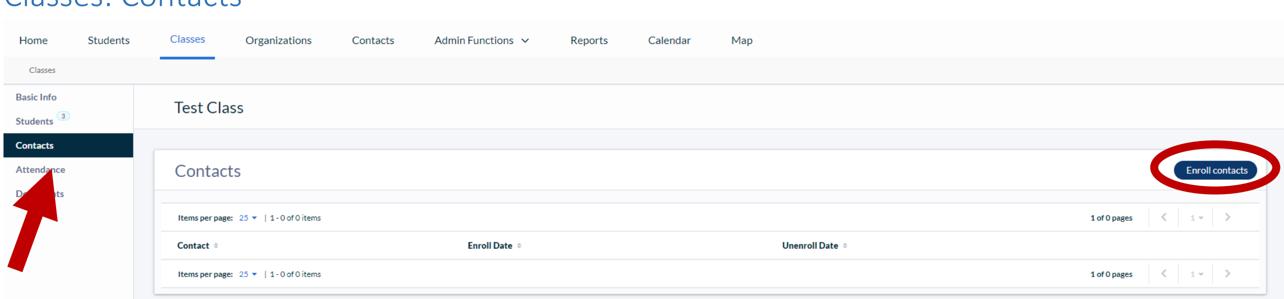


<u>Note</u>: the student must already be entered into the Students section in order to enroll them in a class



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



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.

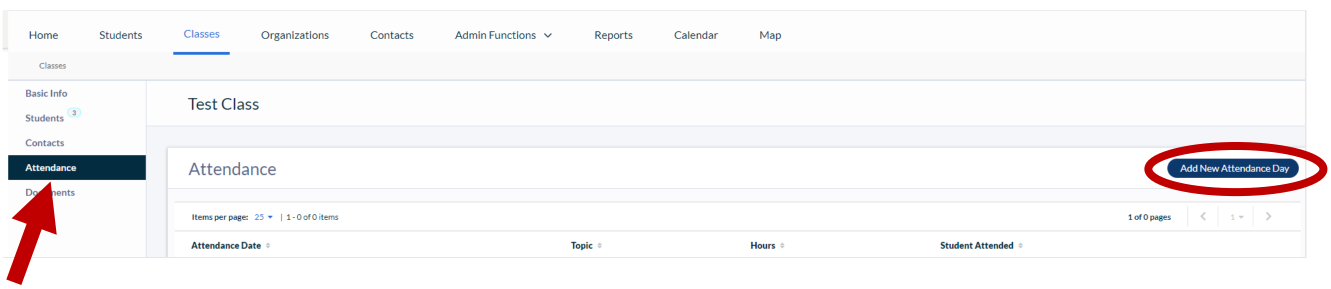
The process is the same as enrolling a student. You must make sure that the Contact is first entered under the Contact section of CiviCore.

Classes: Adding Attendance

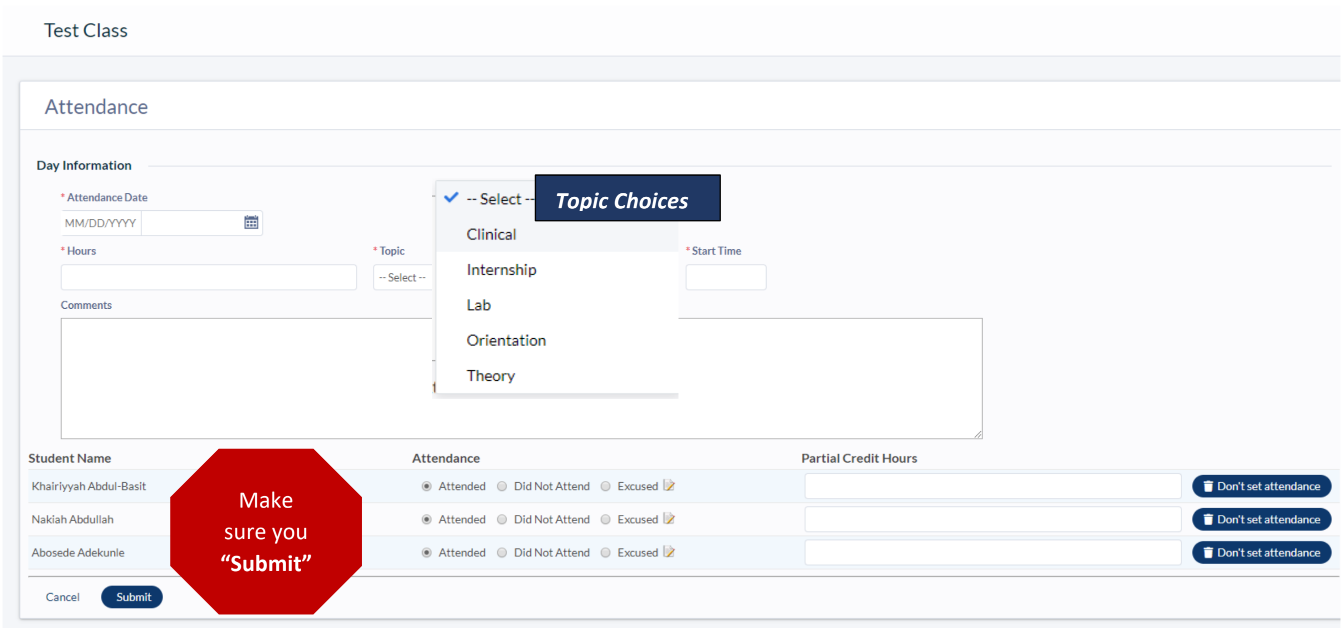
This section is most conviently used by the instructors on the day of the class, or immediately following. It is cumbersome to retroactively enter many days of attendance. Alternatively, this section could be used to indicate the total number of hours a class is, and in total how many hours a student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

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

1. Of the students who passed the credentialling 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?



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



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.

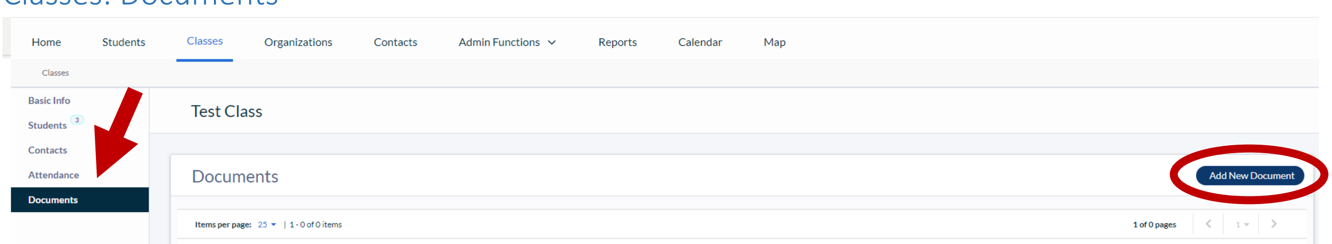
Attended: If a student earns all possible hours (no absences, not tardy, didn't leave early).

Did Not Attend: If a student was absent.

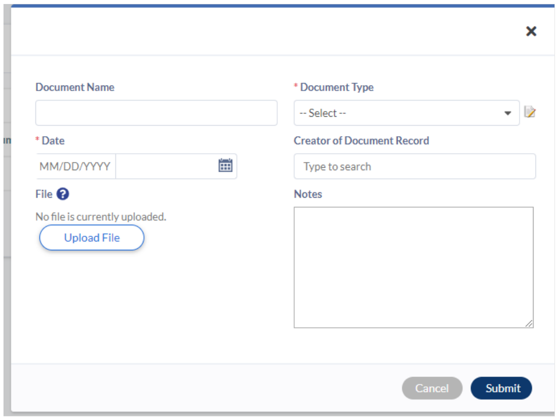
Excused: The student was absent, but it was an excused absence.

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

Classes: Documents



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



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

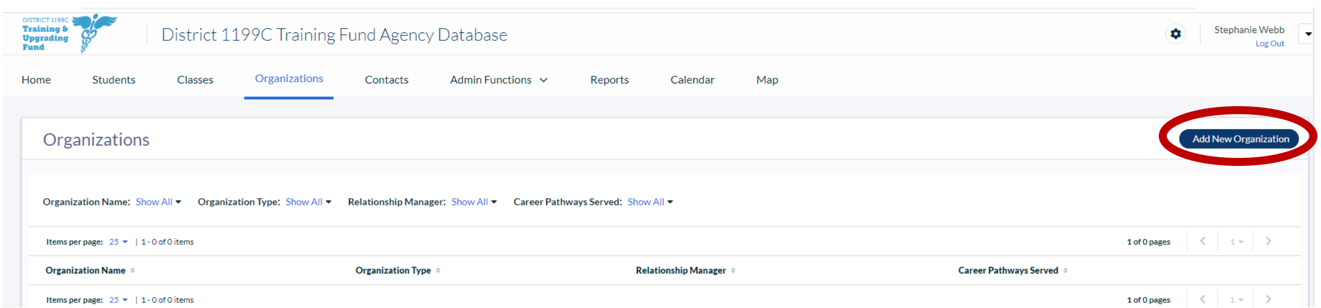
Funders

Post-secondary institutions

Training Provider

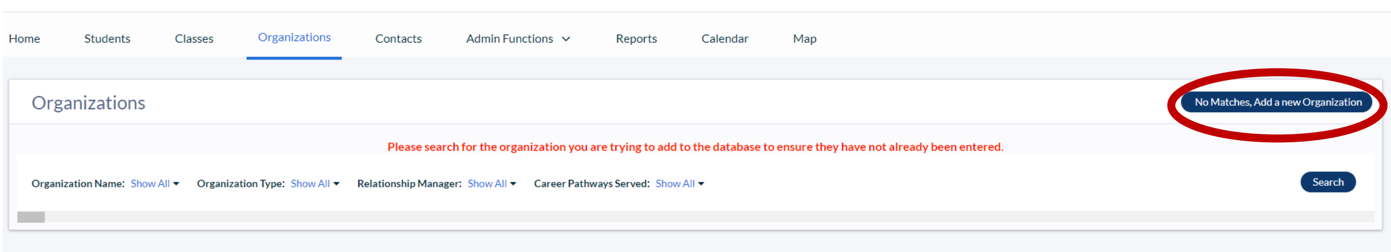
Clinical Site

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 <u>check for different spellings or abbreviations</u>. 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

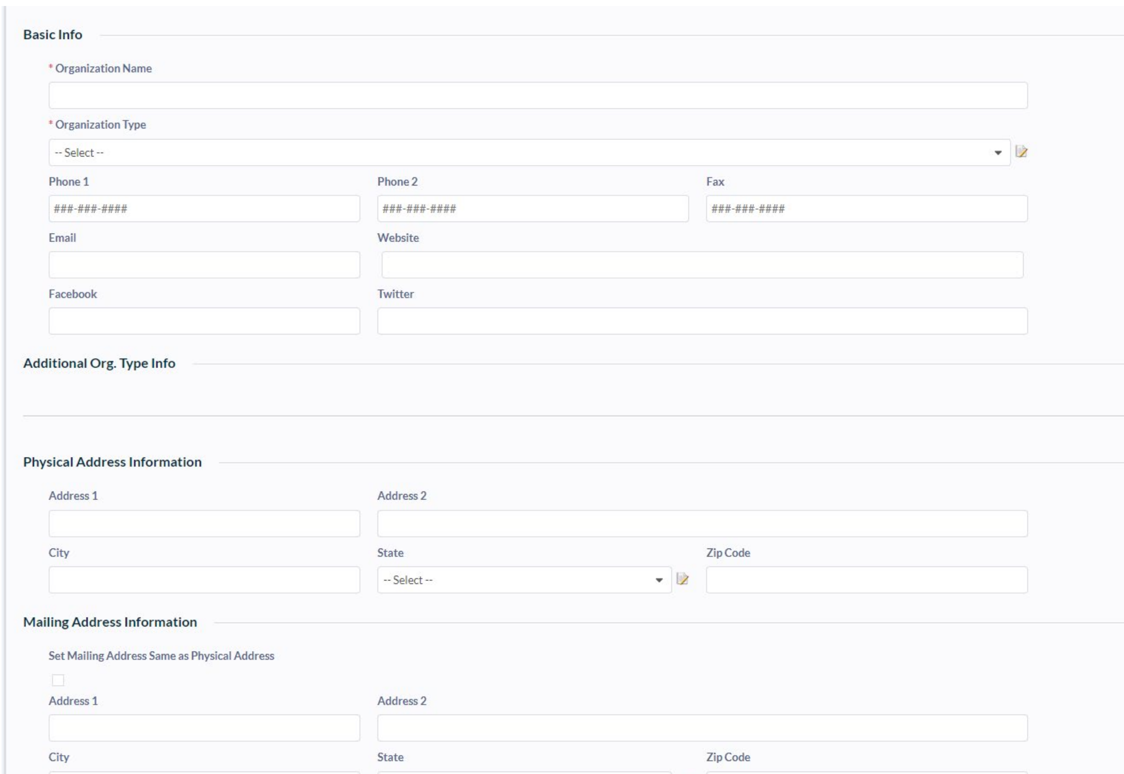
Please fill out as completely and as accurately as possible. The more information we have, the less likely we are to have duplicates.

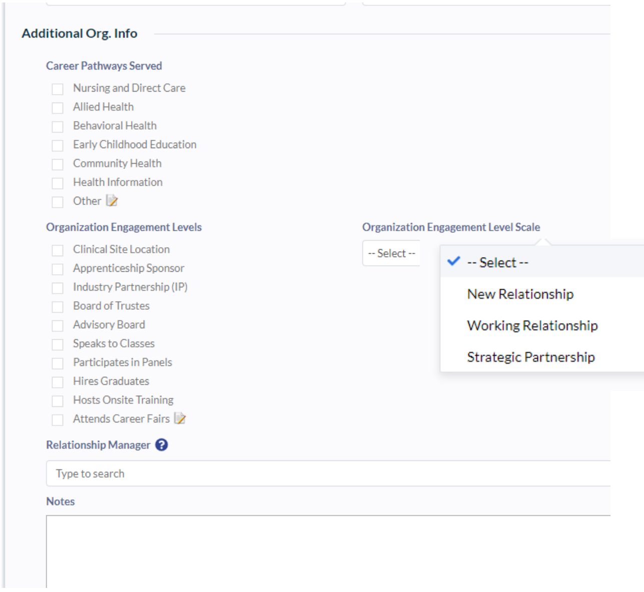
For the Organization Name, put in the full name with any abbreviations in parenthesis.

Example:

Temple University Health System (TUHS)

Community College of Philadelphia (CCP)





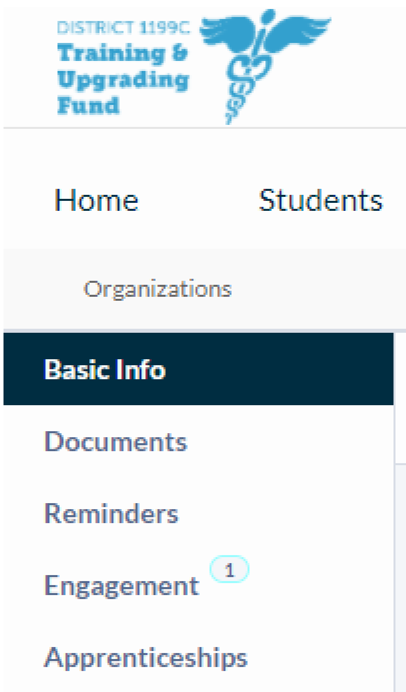
Be sure to select the:

Career Pathways Served

Organizational Engagement Levels

Organizational Engagement Levels Scale

Relationship Manager – this is the Training Fund member who will 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.

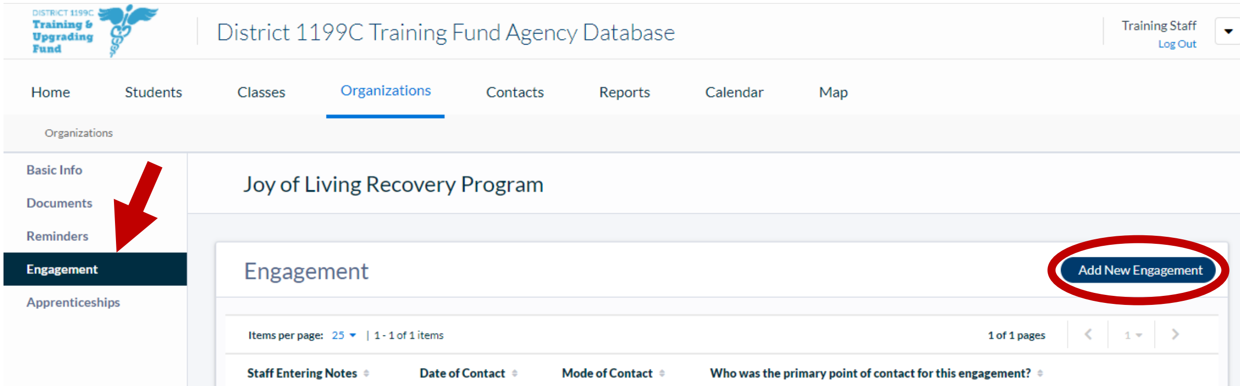
Engagement and Apprenticeships are different and will be explored in more details below.

Organizations: Engagement

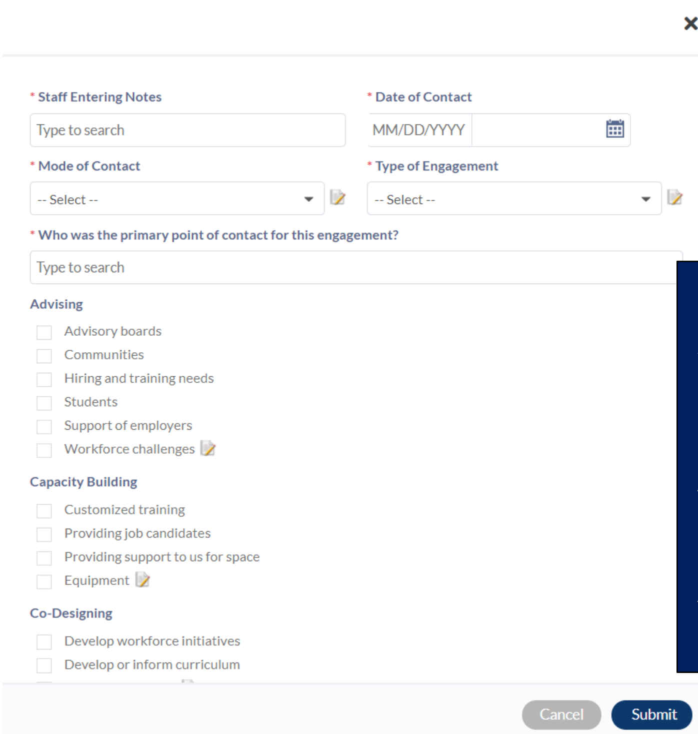
We are working on improving the tracking of our relationships with various partner organizations. Often, different people within the agency are talking to the same organization, but each person has a different contact or different relationship. Ideally, there will be one "lead" contact at the Training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



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



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.

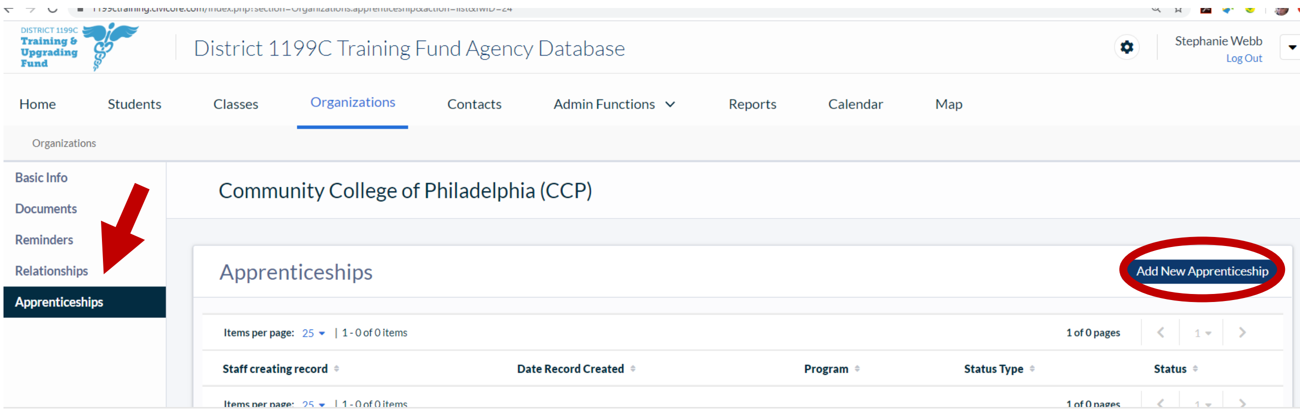
Ladder of Employer Engagement

	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:

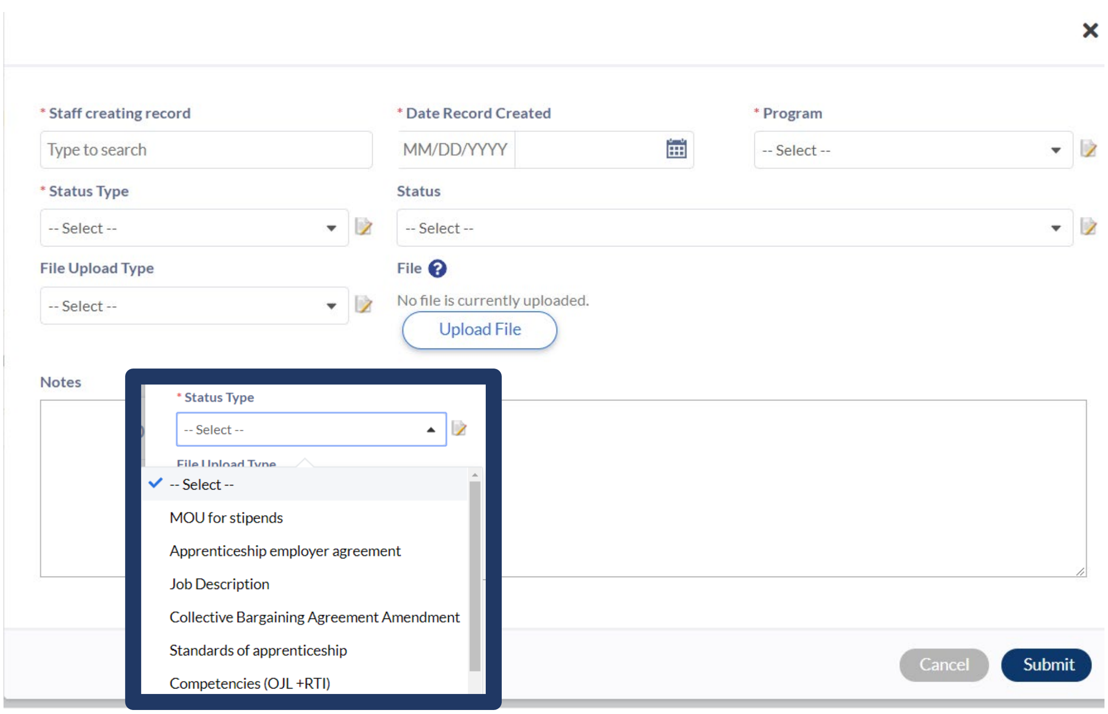
Organizations: Apprenticeships

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.*



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.



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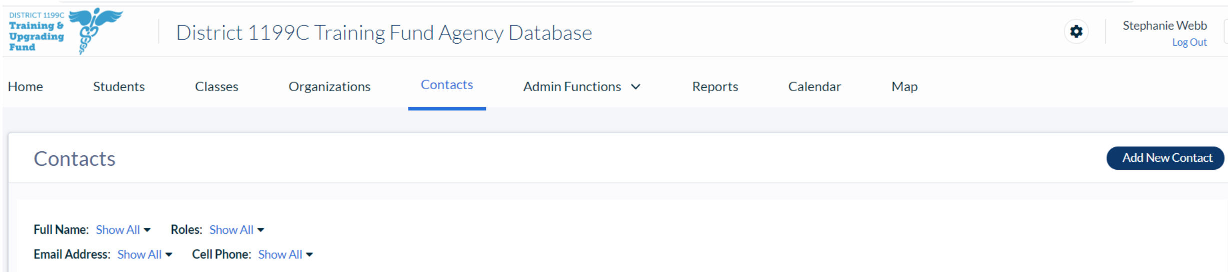
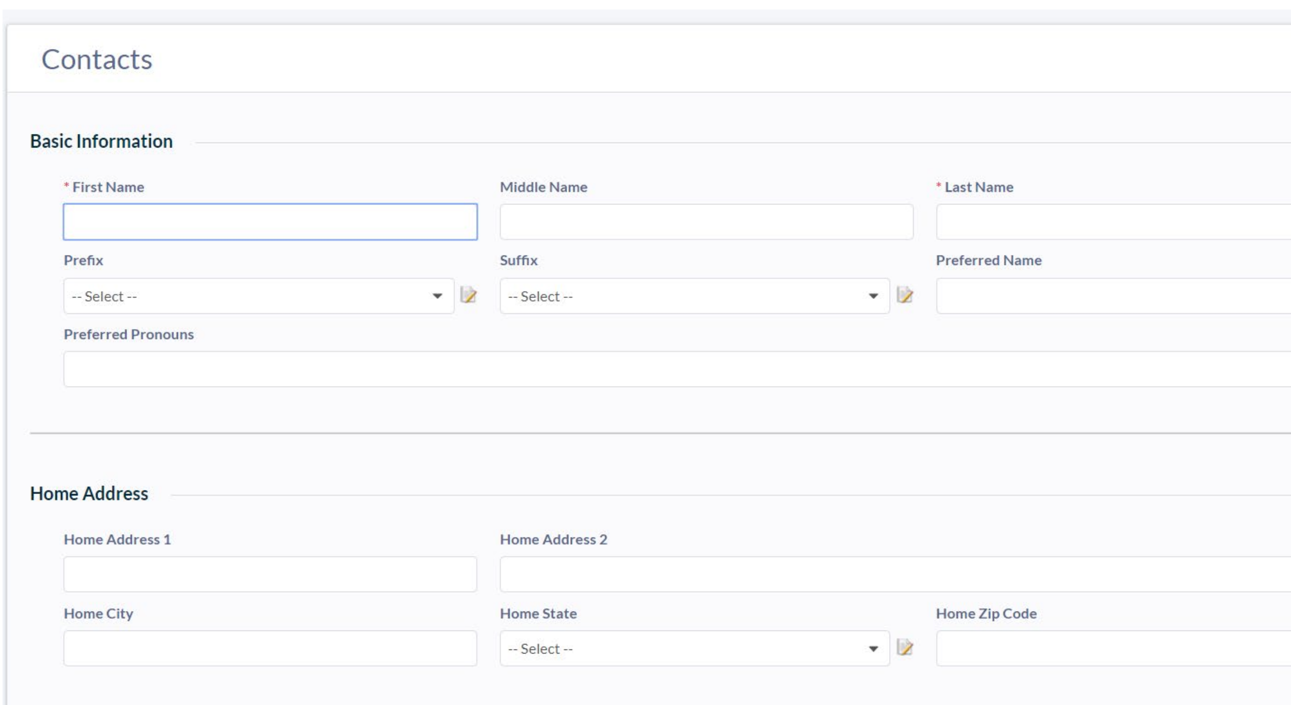
CONTACTS SECTION



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.



MY NOTES:

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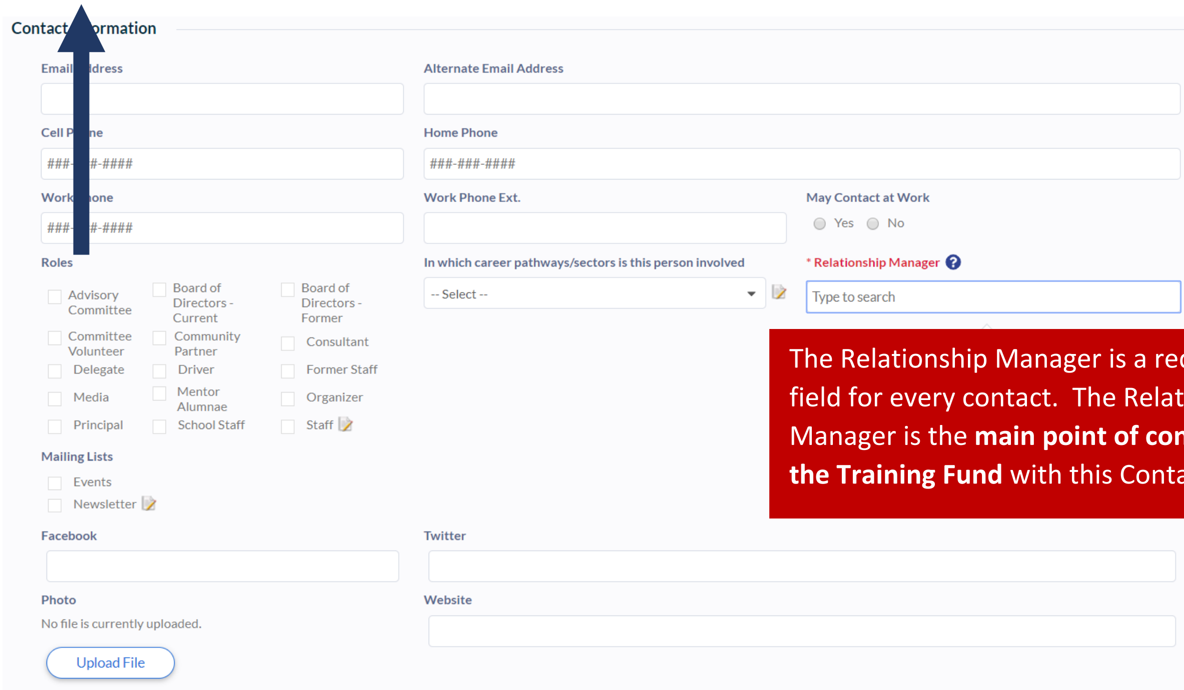
Basic Info cont.

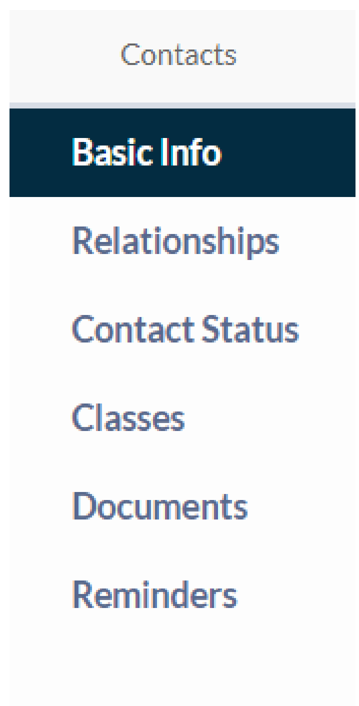
Roles: explains the type of relationship this contact has with the Training Fund or within their organization.



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.

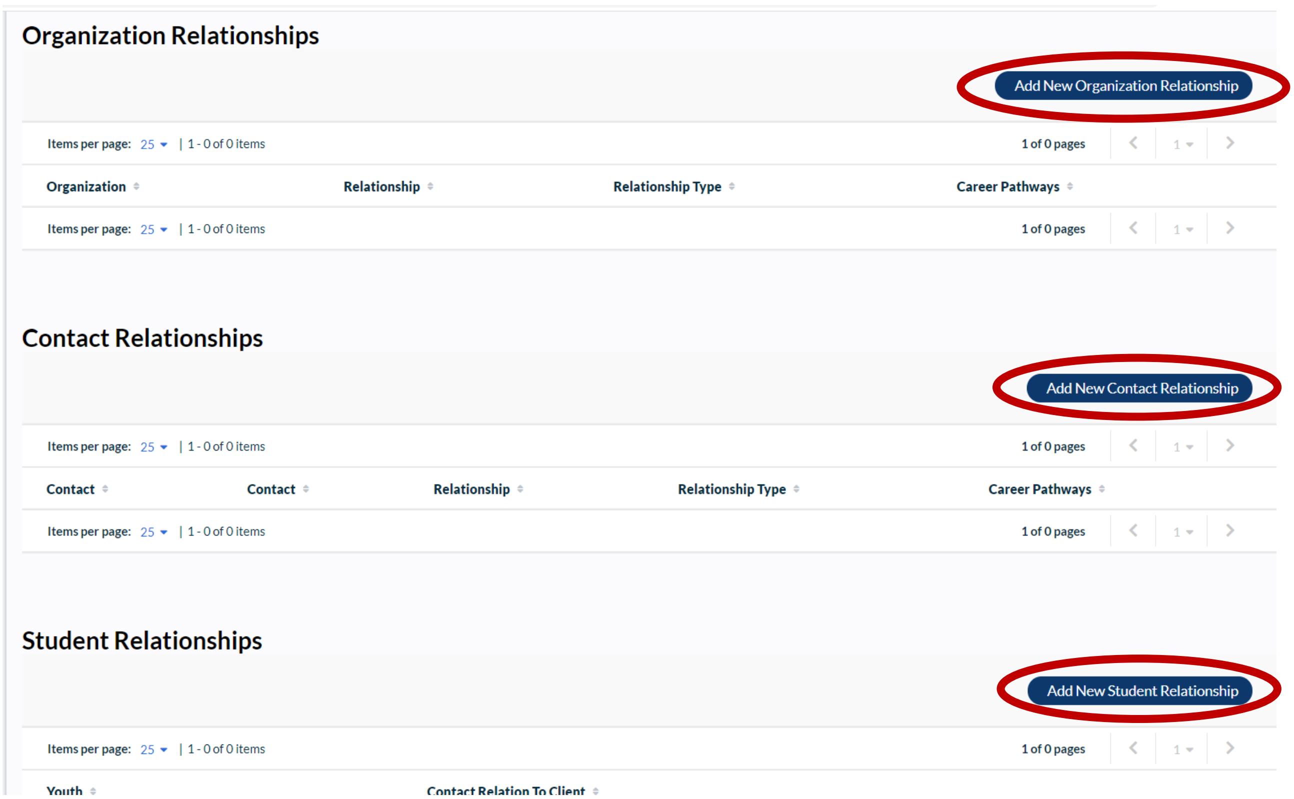
Relationships, Contact Status, and Classes will be explored below.



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

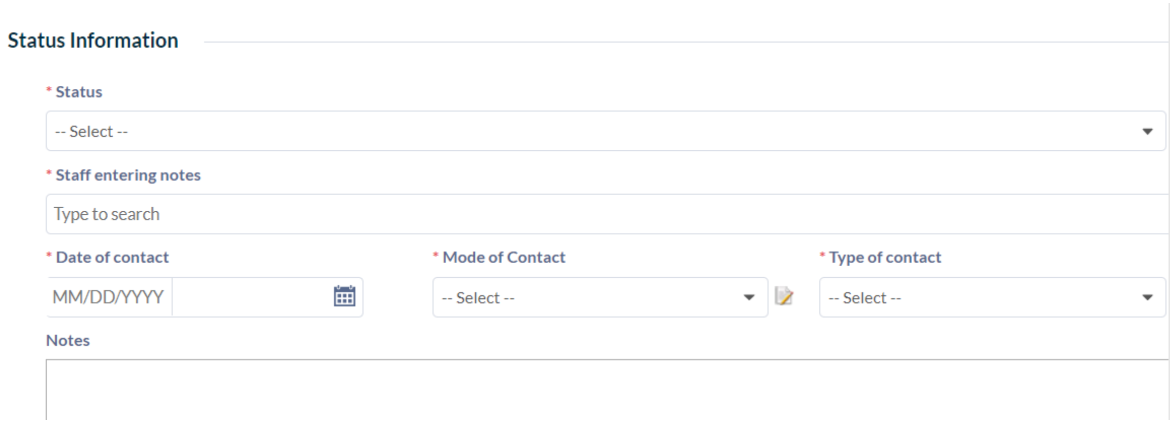


If the contact you are entering is a faculty at the Community College of Philadelphia, then this would be an Organizational Relationship the contact has.

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



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

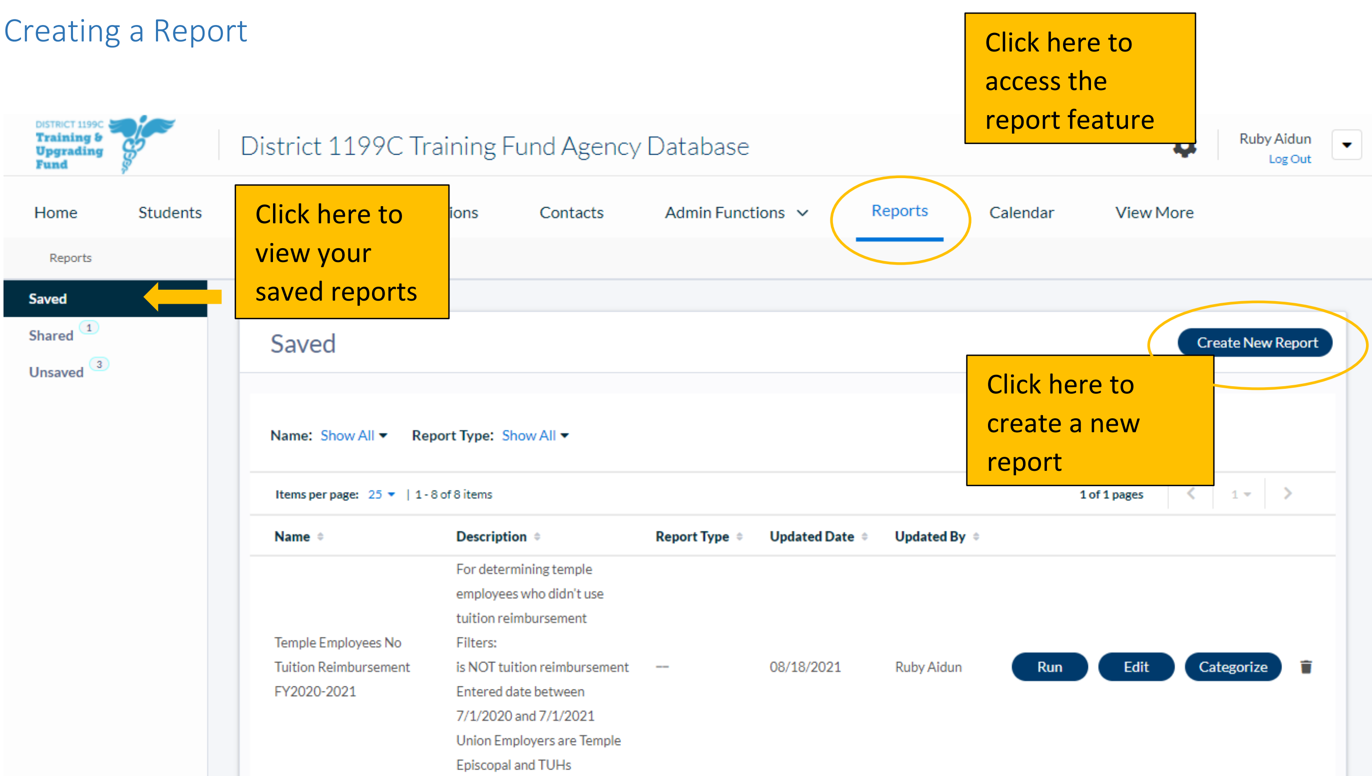
CiviCore is a powerful tool to help you to effectively monitor your programs.

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



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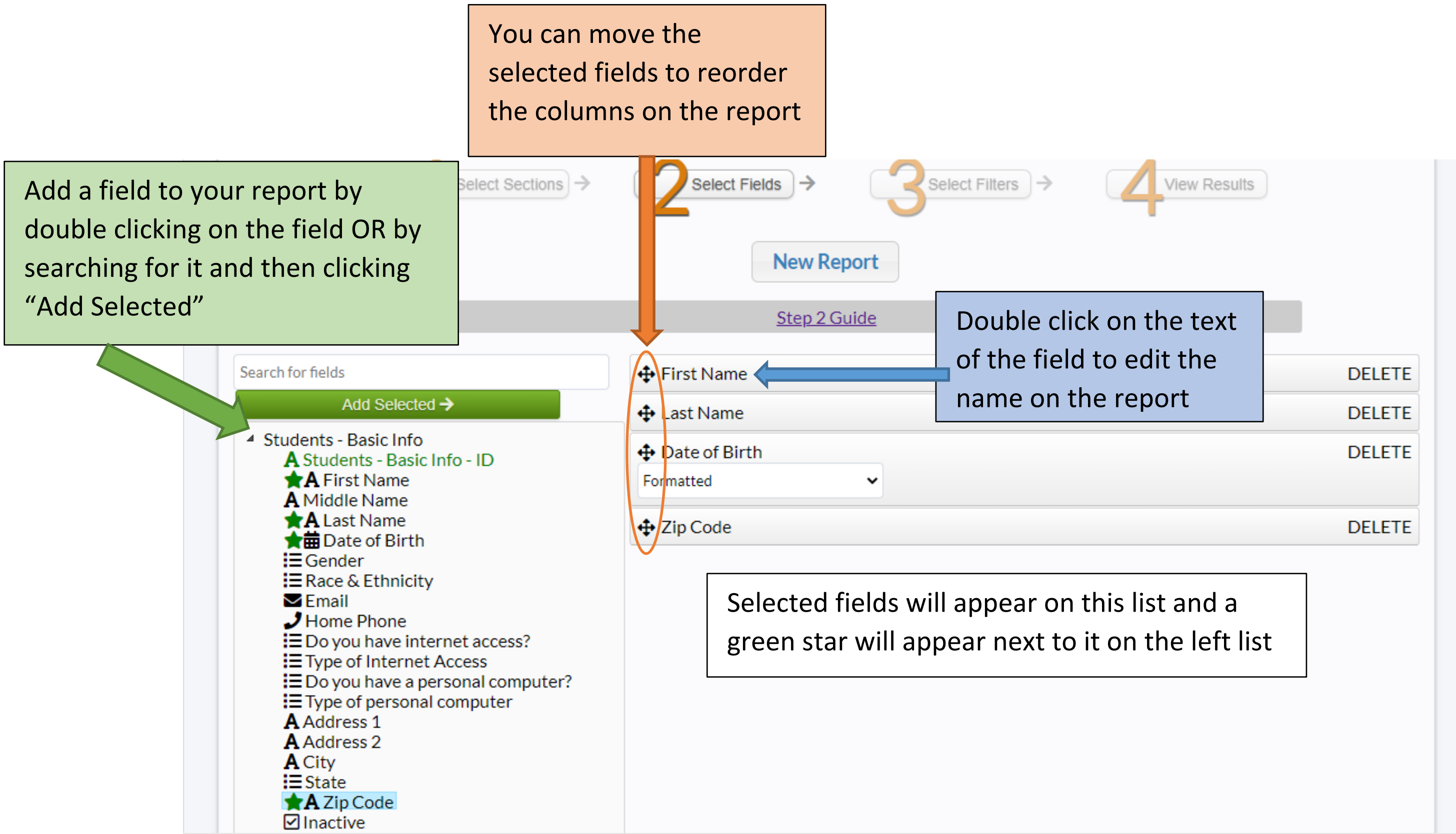
Step 1 (of creating a report): Selecting Sections

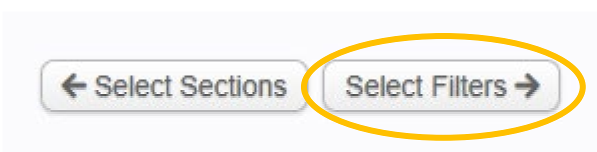
Once you click on “Create New Report” you will be taken to this screen:

Step 2: Selecting Fields



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.

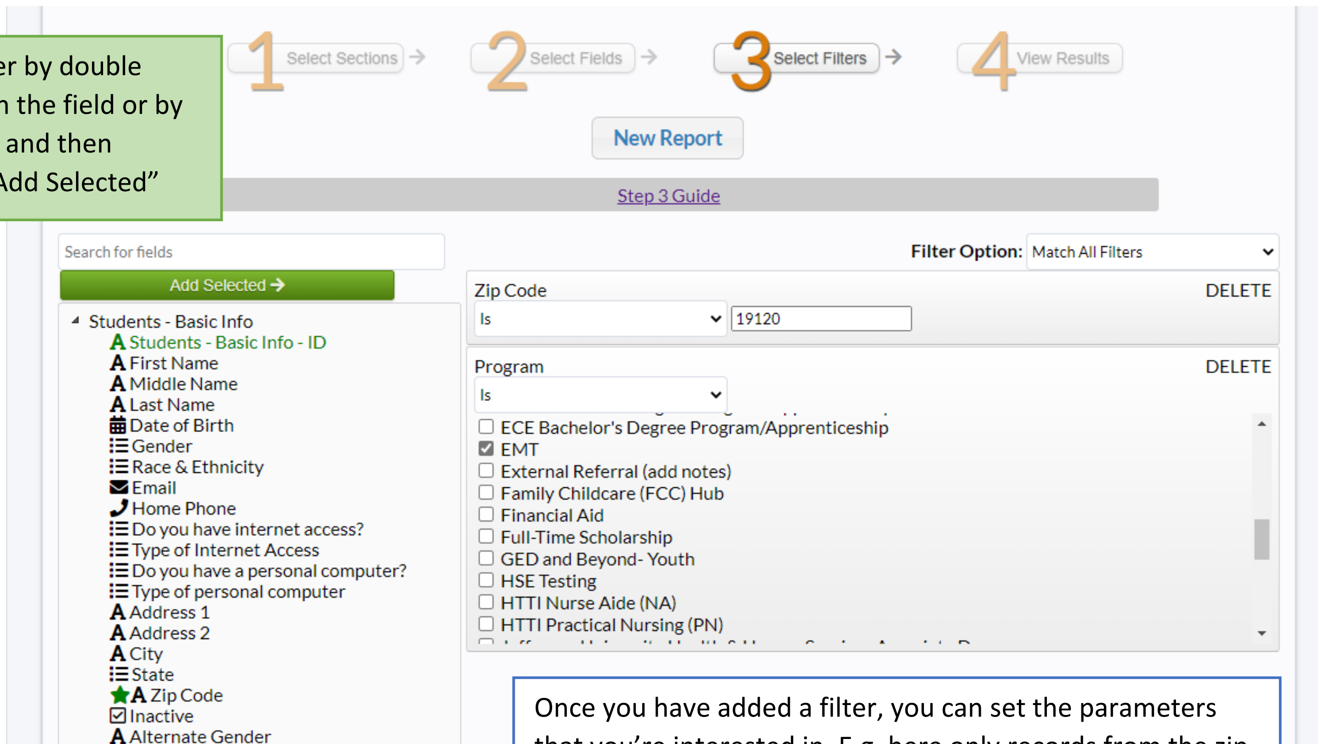


Step 3: Filtering Data

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.

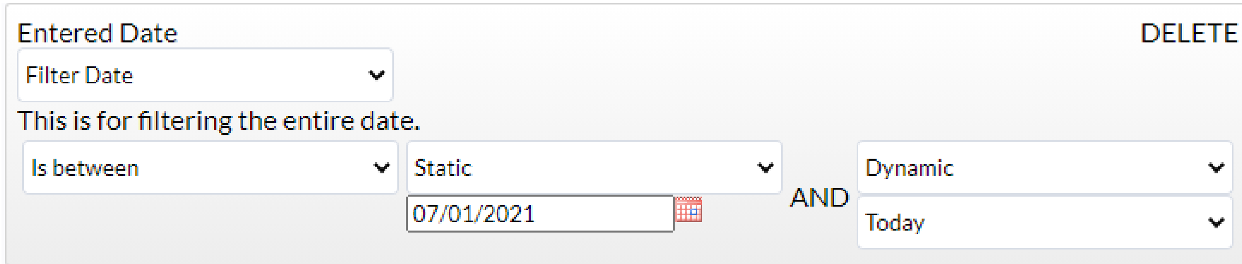
Add a filter by double clicking on the field or by searching and then clicking "Add Selected"



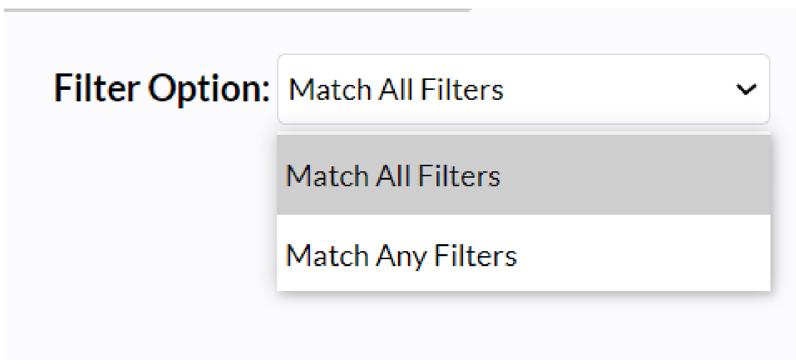
Once you have added a filter, you can set the parameters that you're interested in. E.g. here only records from the zip code 19120 and in the EMT class will appear in the report

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.



Filter Option:

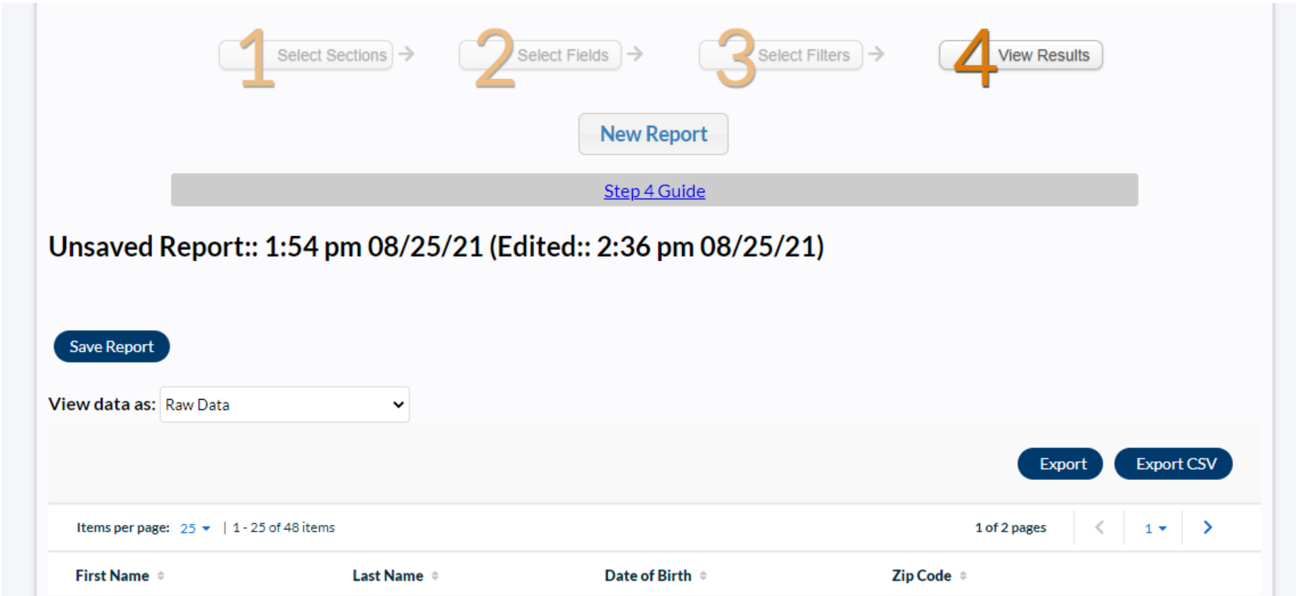


At the top right of the filter page there is a drop-down menu. There are two options:

(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.

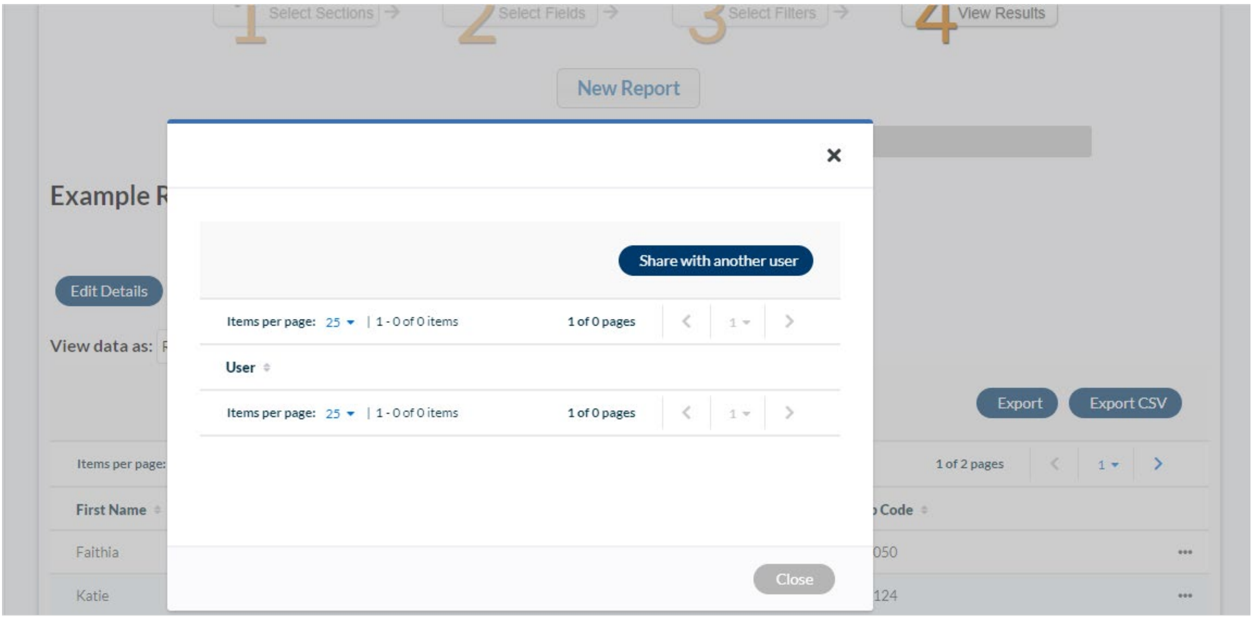
Step 4: View Results



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

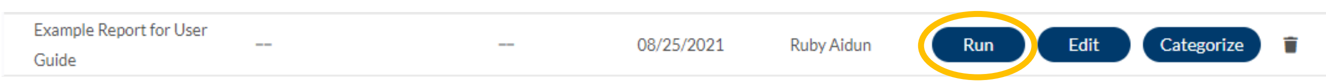
Edit Details: This button will allow you to rename a report, or add a description of the report.

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.



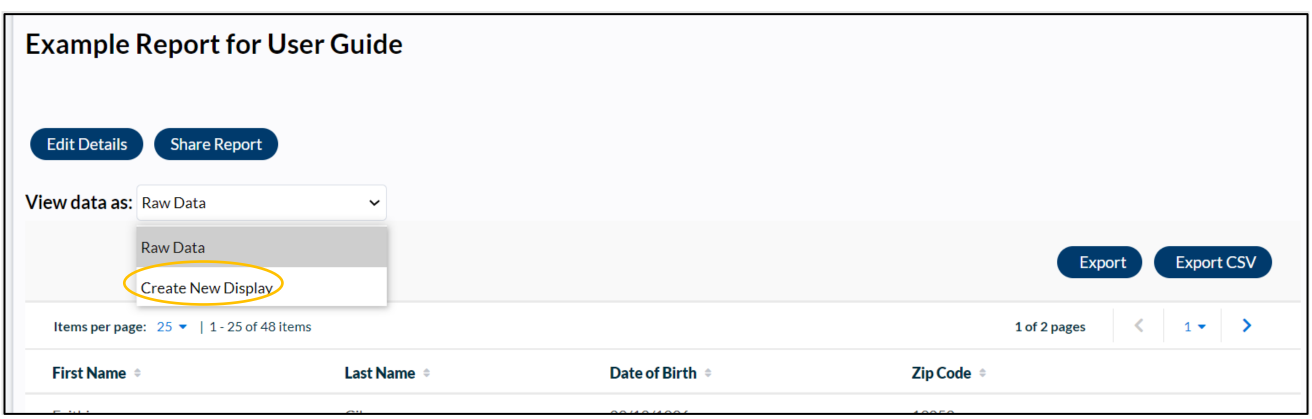
The “View Data as” drop down menu and the Export options will be discussed in the next section, Analyzing the Data.

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.



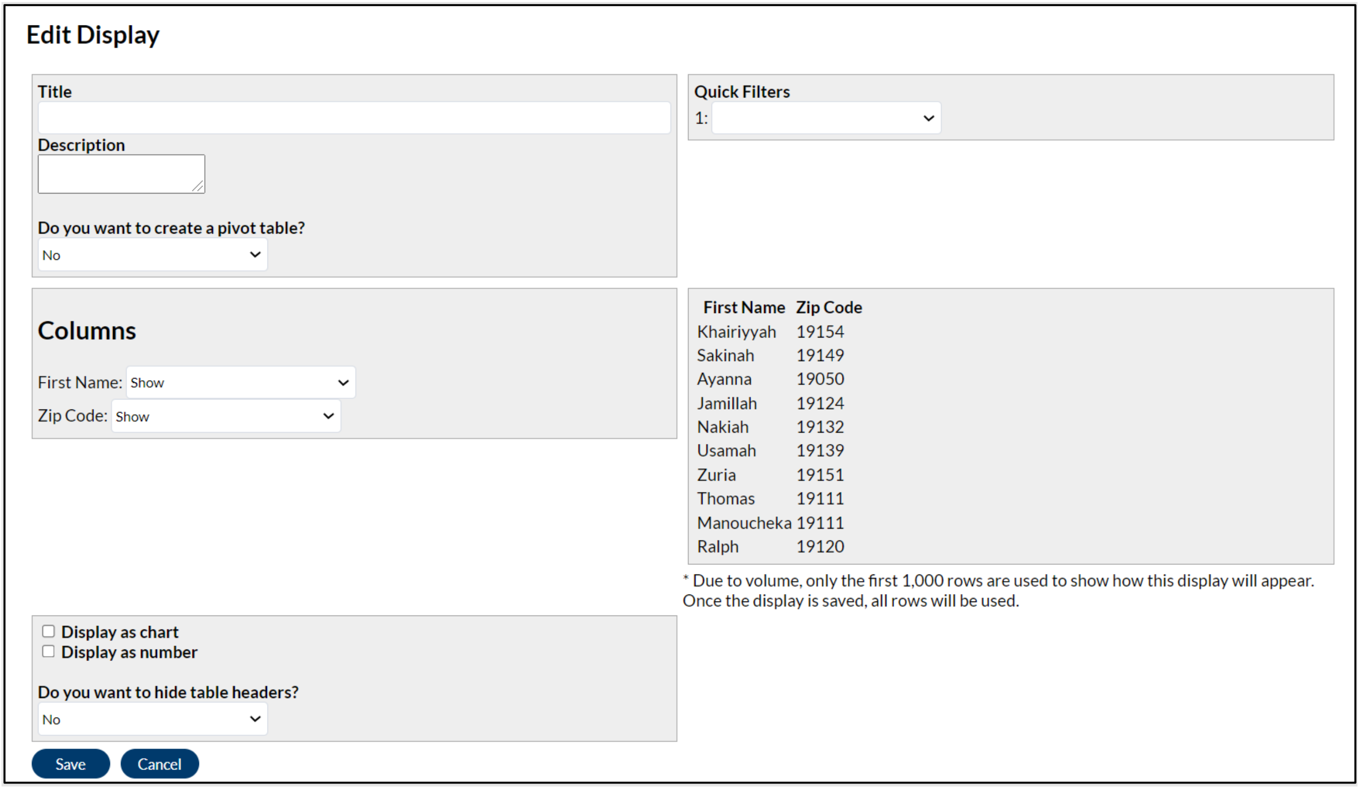
Visualizing and Analyzing the Data

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

Quick Filters
1:

Columns

First Name: Show
Zip Code: Show

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

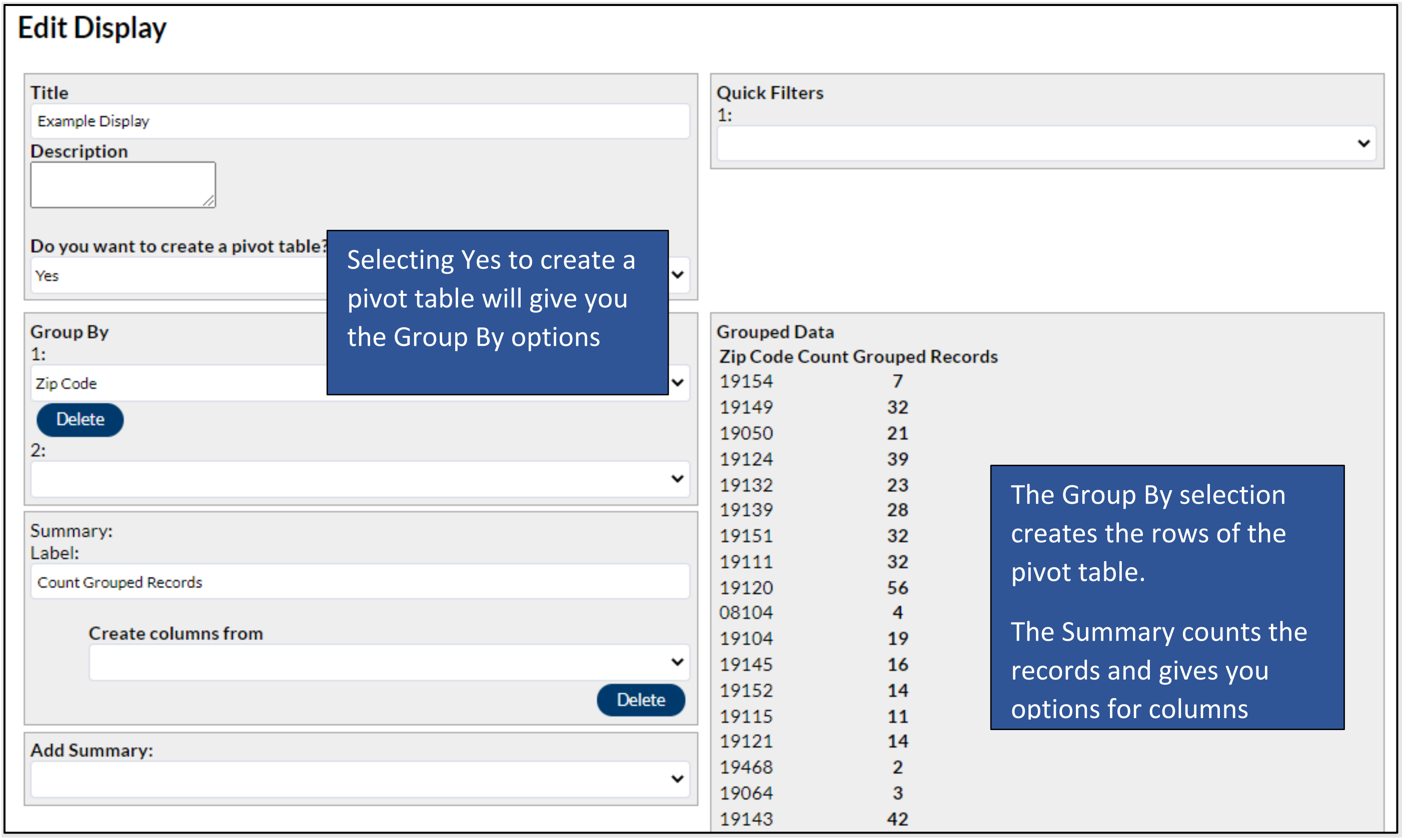
* Due to volume, only the first 1,000 rows are used to show how this display will appear. Once the display is saved, all rows will be used.

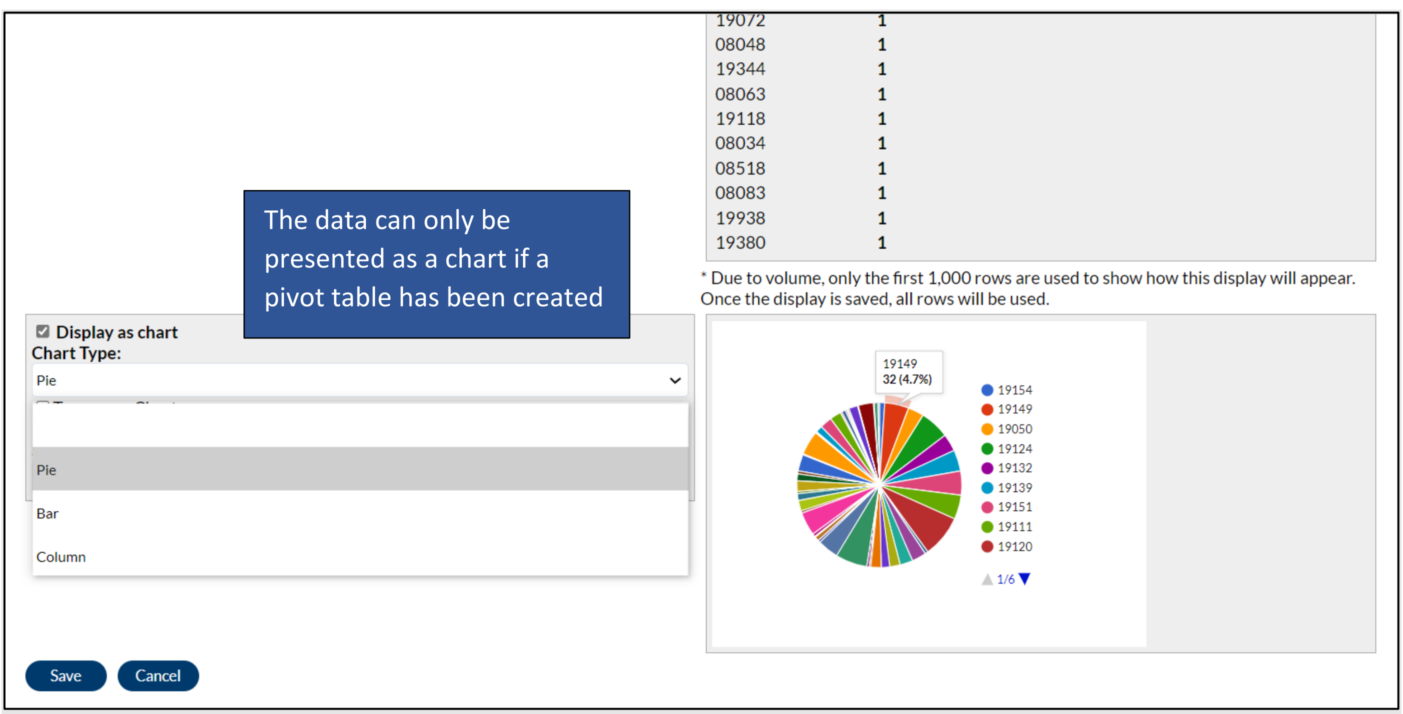
Display as chart
Display as number

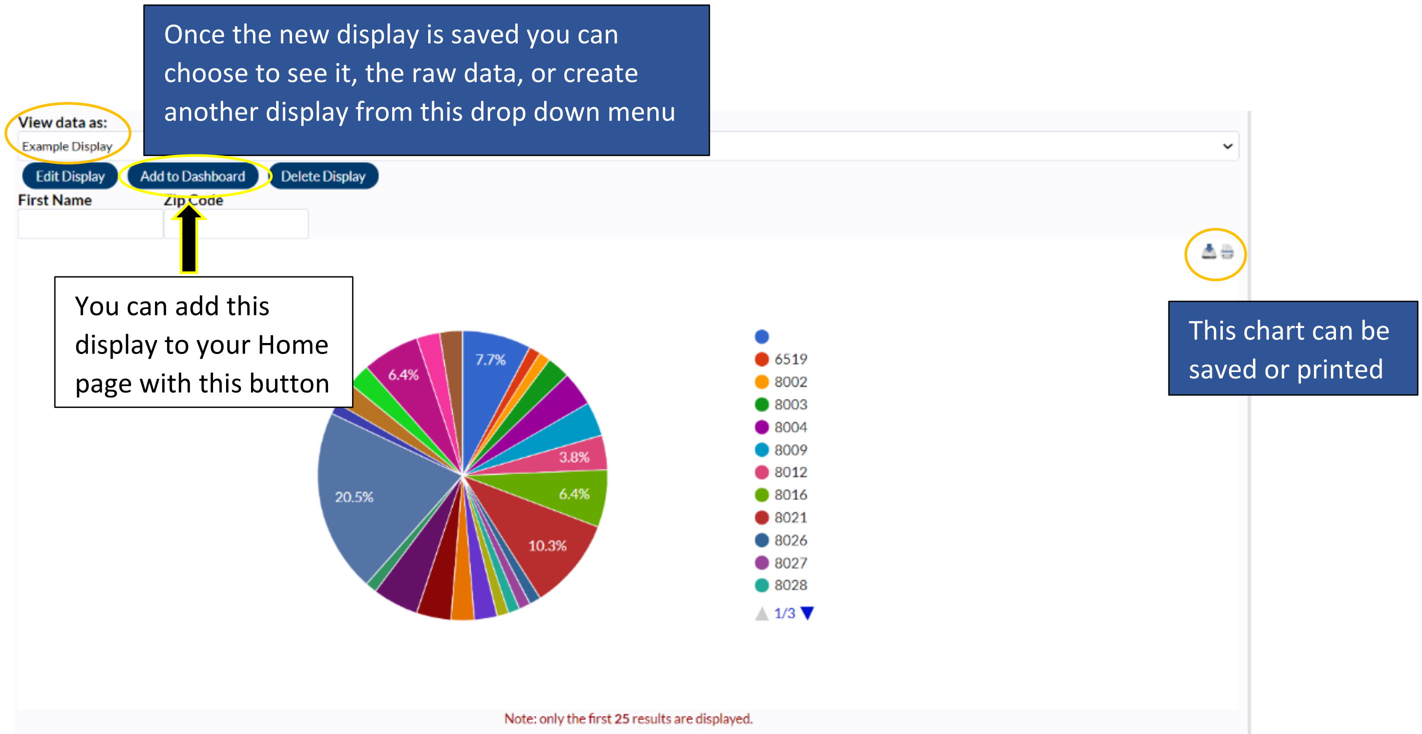
Do you want to hide table headers?
No

Save Cancel

Creating a Pivot Table and Chart:

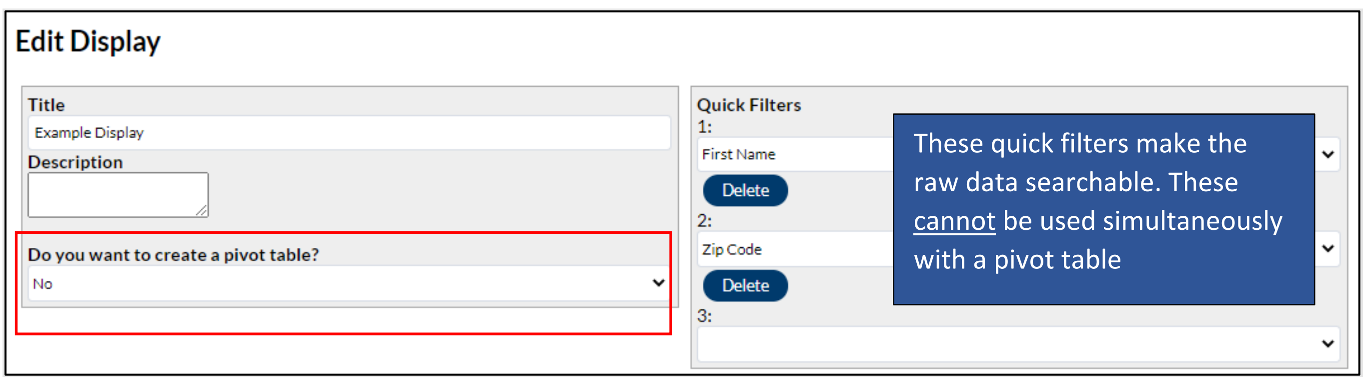






To find you Dashboard, go to your Home page, scroll to the bottom, and you will see the chart from the report.

<u>Quick Filters:</u>



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

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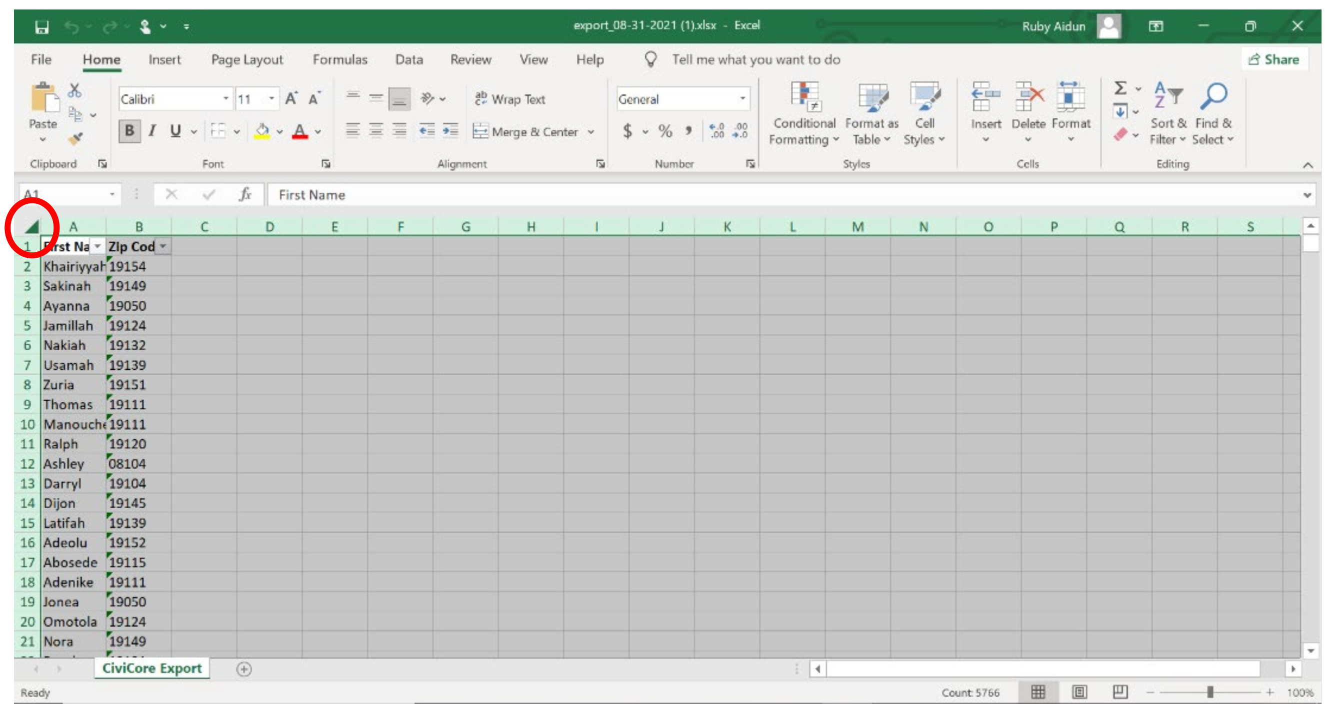
Exporting Data to Excel:

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.

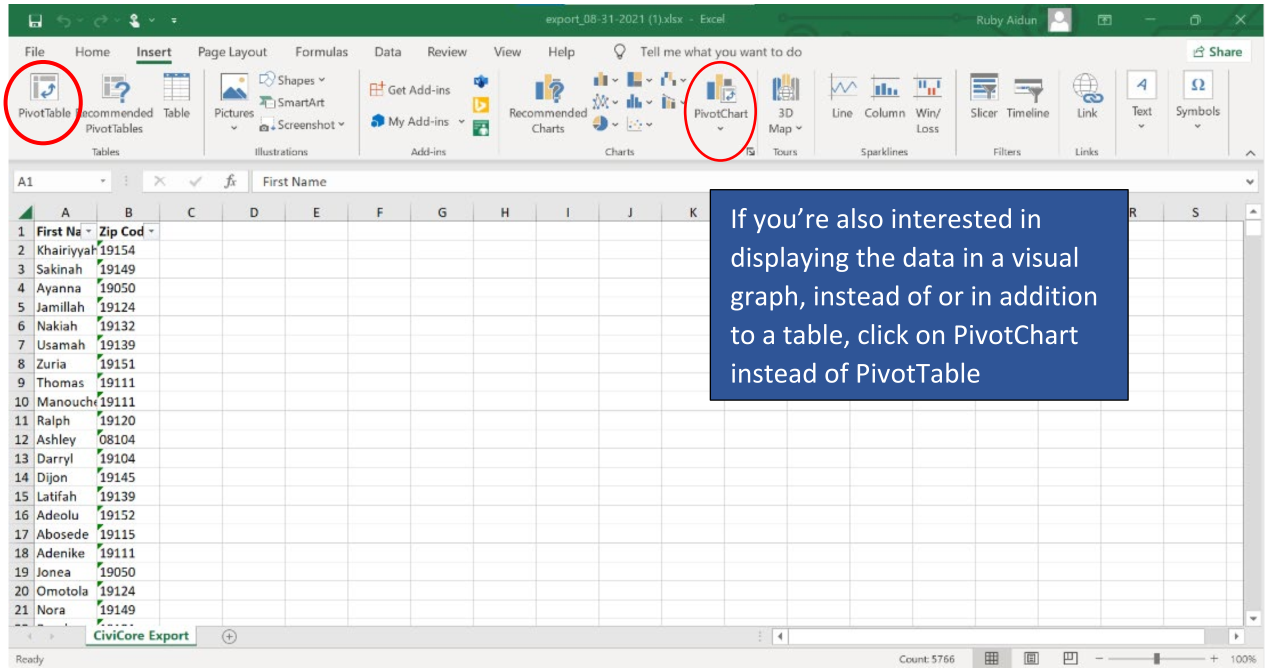
It is possible to sort in Excel, but it is not as convenient.

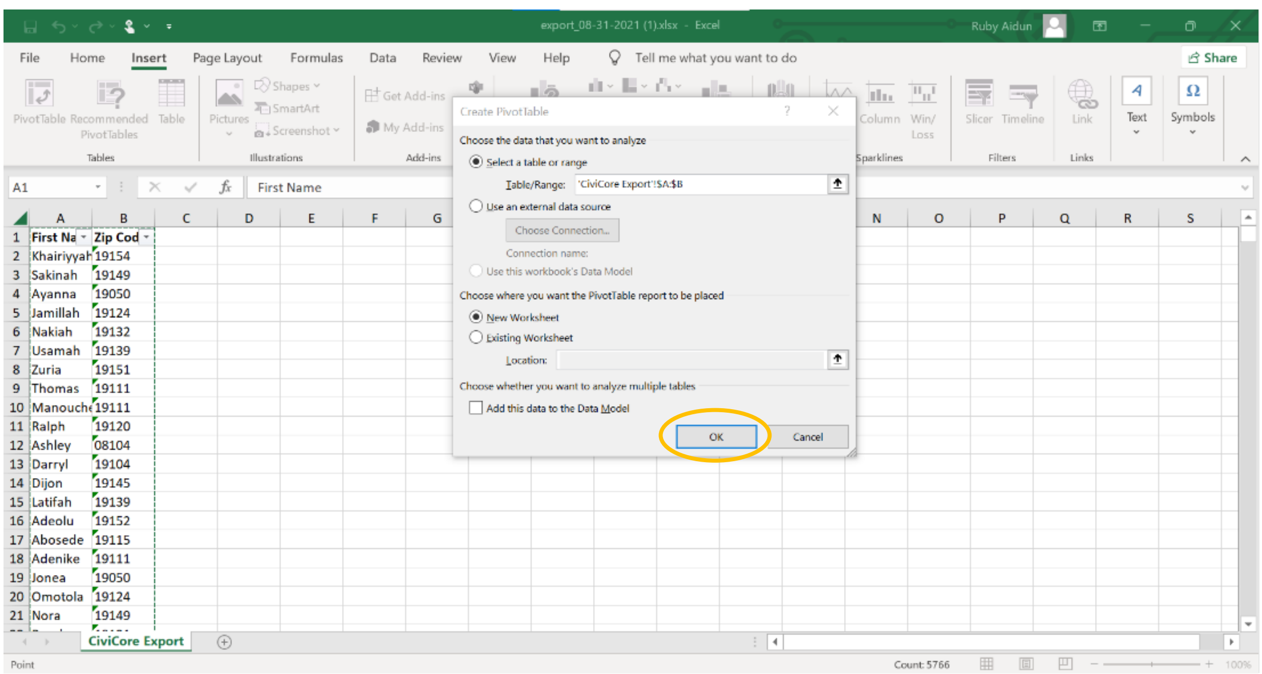
Pivot Tables in Excel:

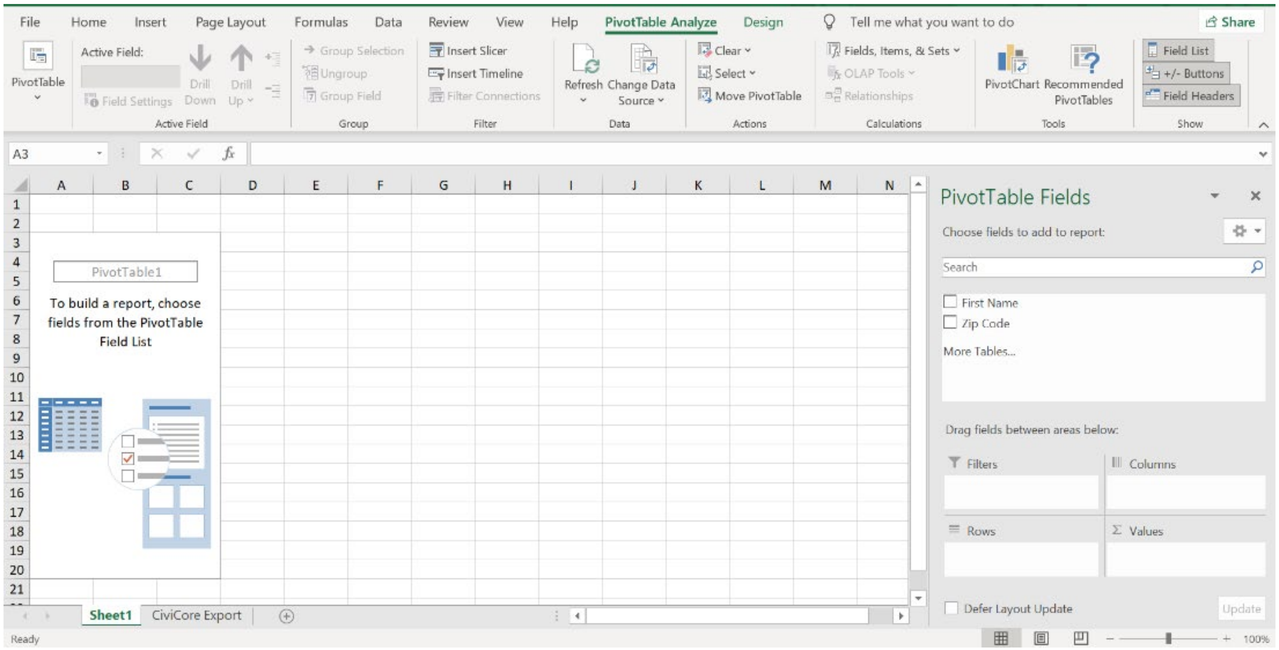
Select all of the data in the Excel workbook by clicking on the triangle between row 1 and column A (circled in red)



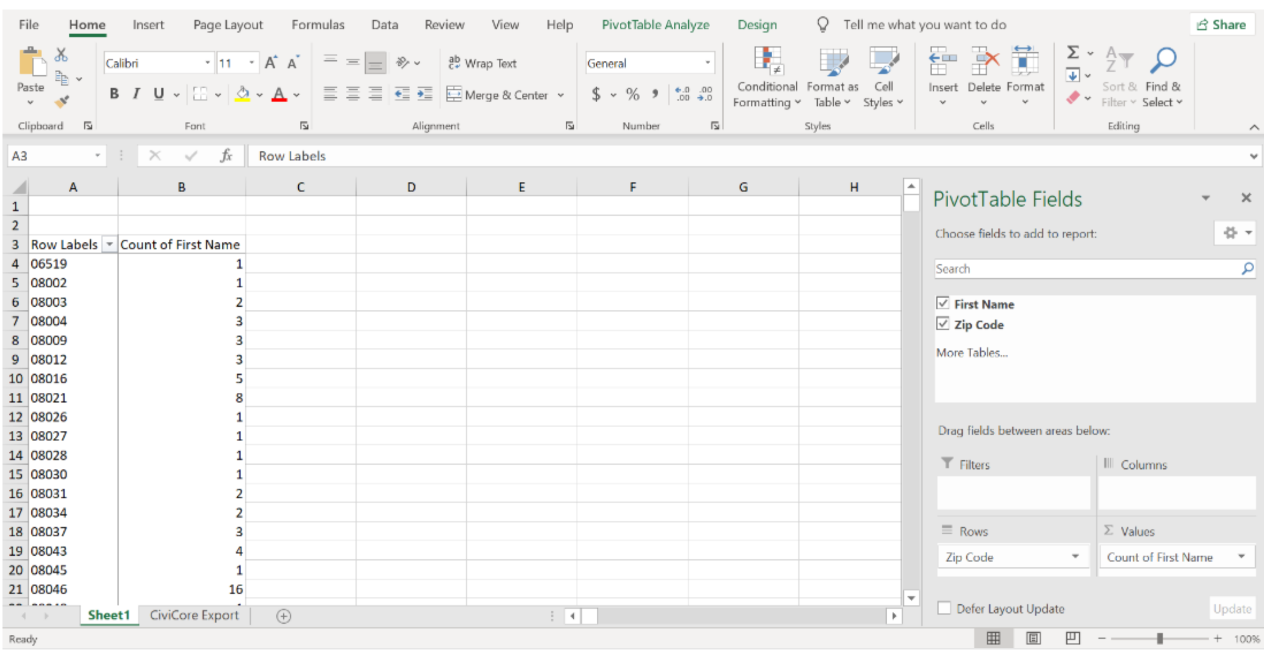
Then click on the Insert tab and click on Pivot Table







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**

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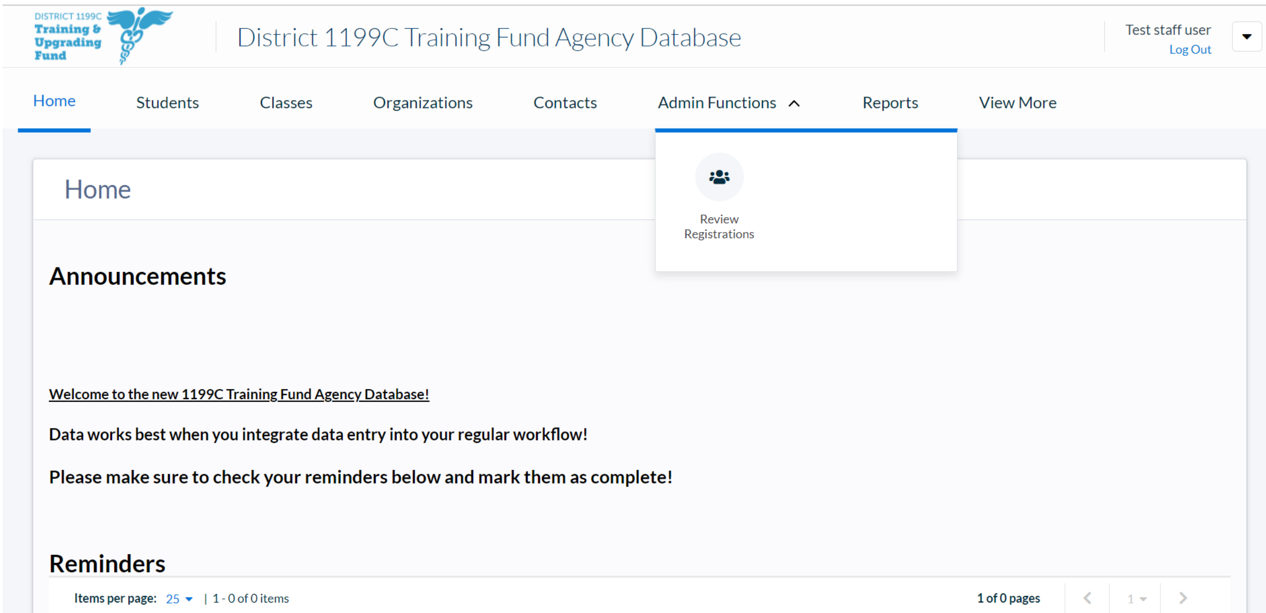
STAFF ADMIN INSTRUCTIONS

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



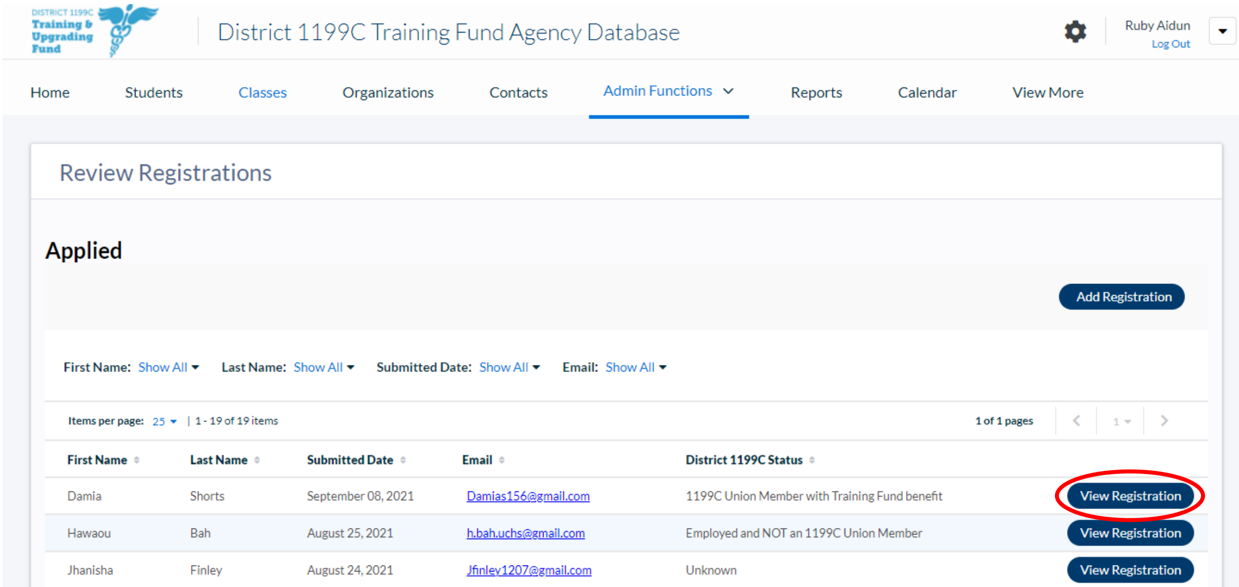
Under the "Admin Functions" section, a CiviCore admin can approve or deny registrations.

Review Registrations -

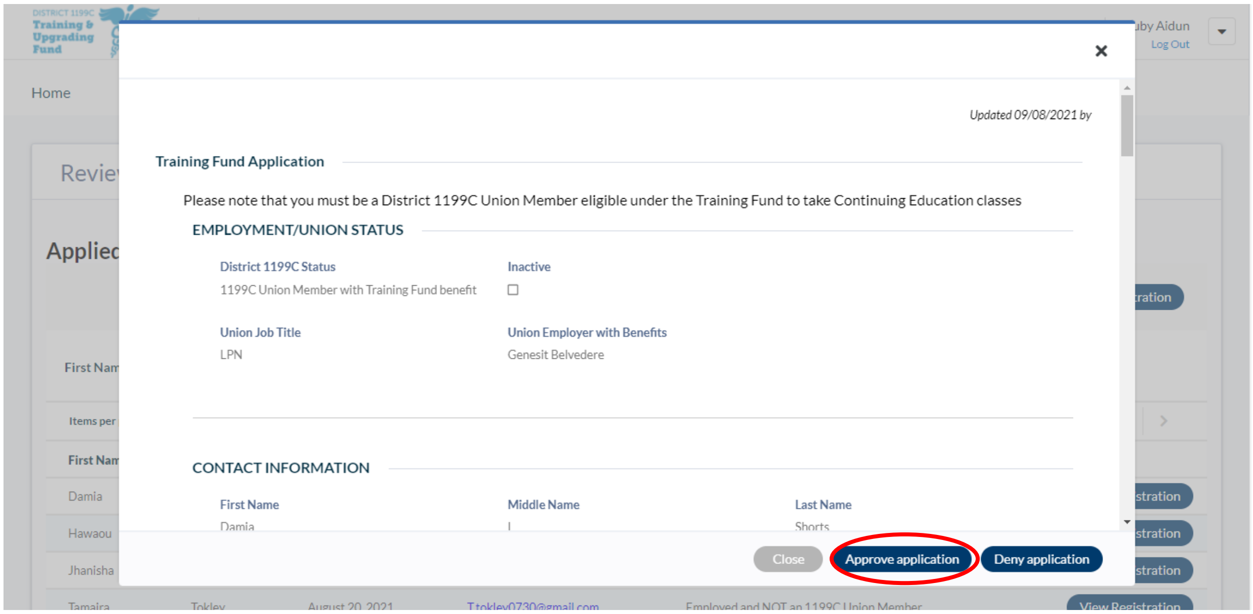
If a student has used the self-registration link, you must go in and approve their registration in order to find their record in the "Students" section.

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

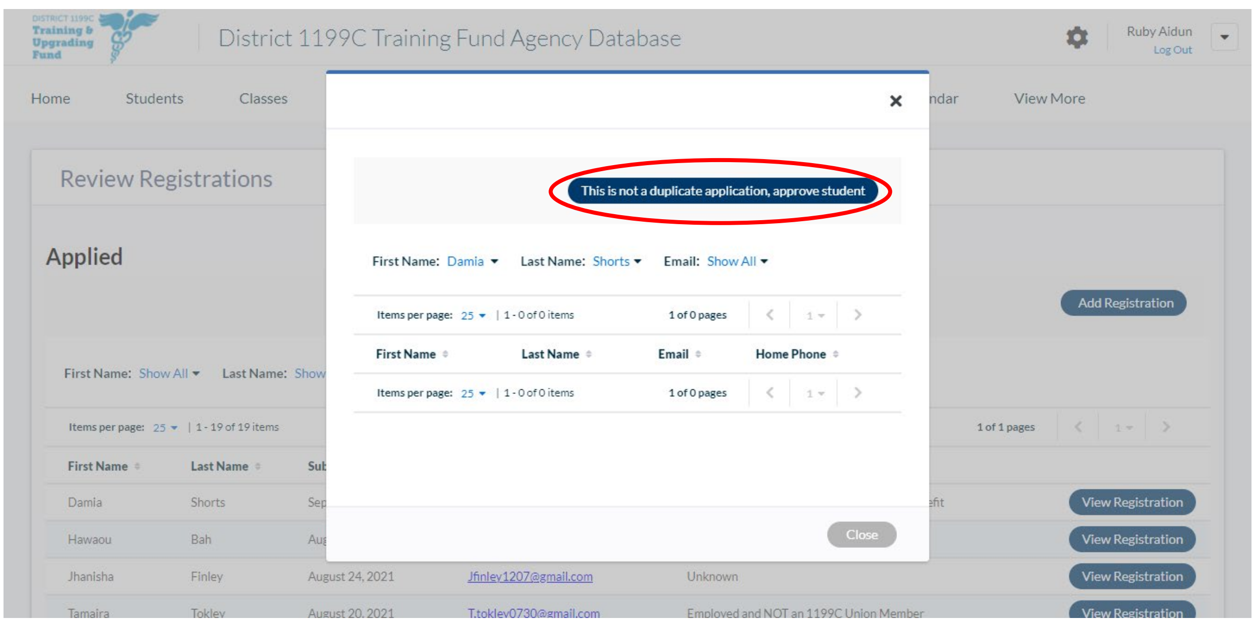
If a training fund employee enters a student in the Students section with the long form, no registration needs to be approved.


District 1199C Training & Upgrading Fund
District 1199C Training Fund Agency Database
Ruby Aidun
Log Out
Home
Students
Classes
Organizations
Contacts
Admin Functions
Reports
Calendar
View More
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
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”:

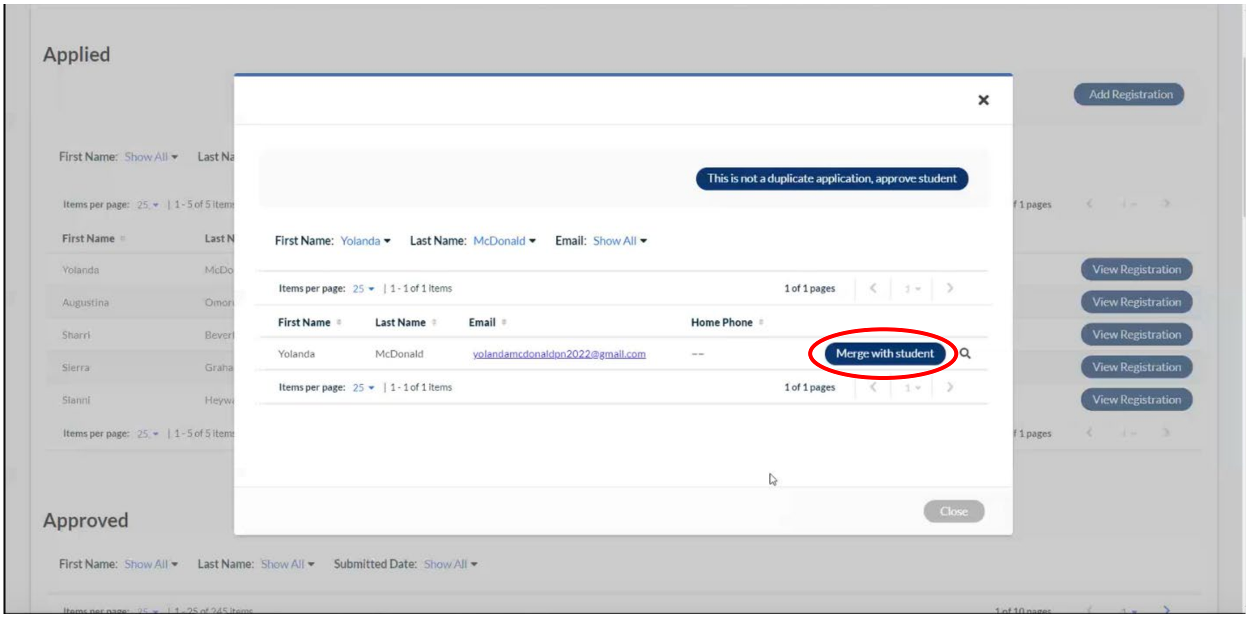


After clicking on ‘Approve application’, if this is NOT a duplicate record this window will appear:

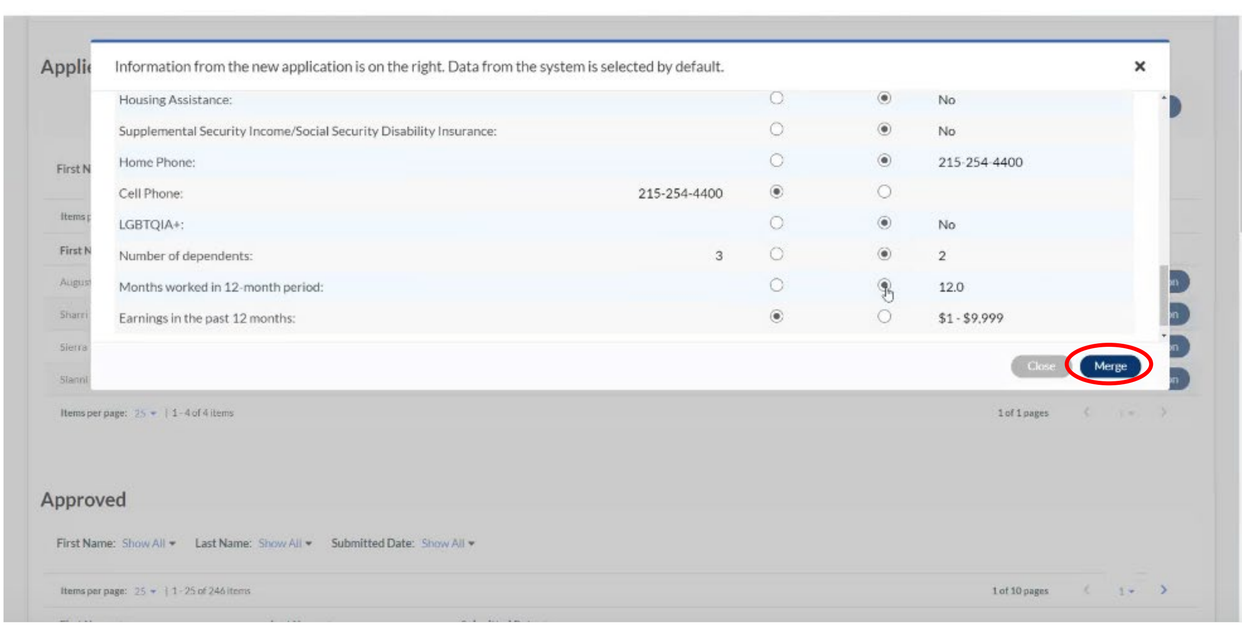


In order to approve this registration, you must click on “This is not a duplicate application, approve student’

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.

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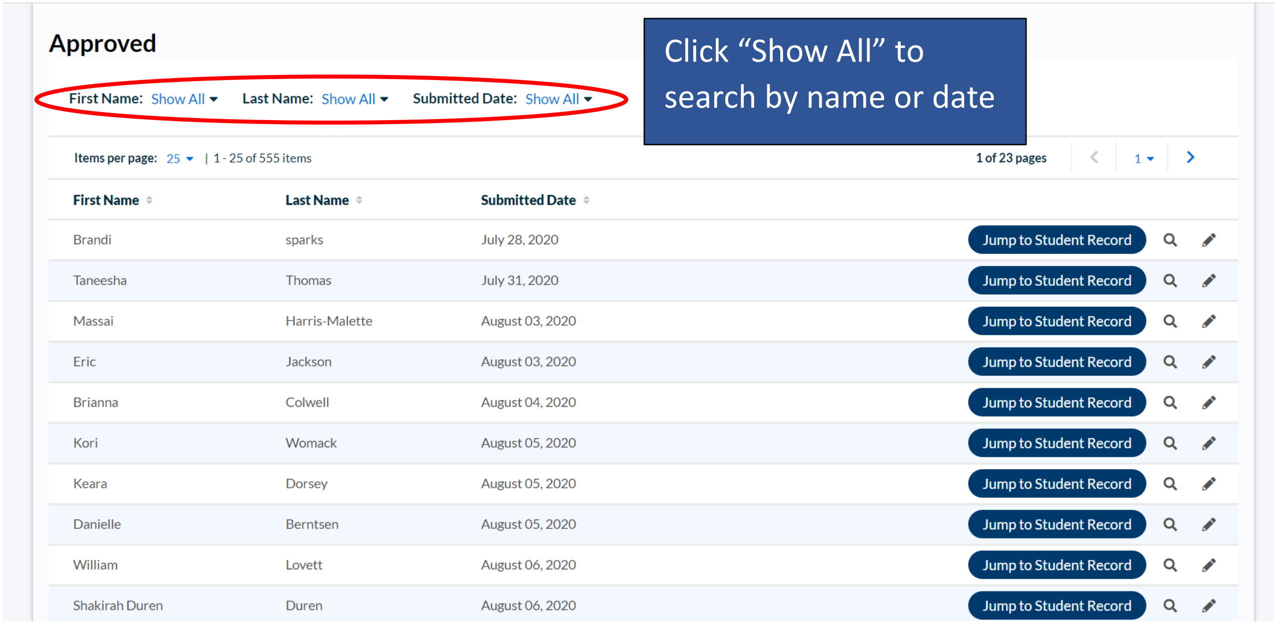


Approved

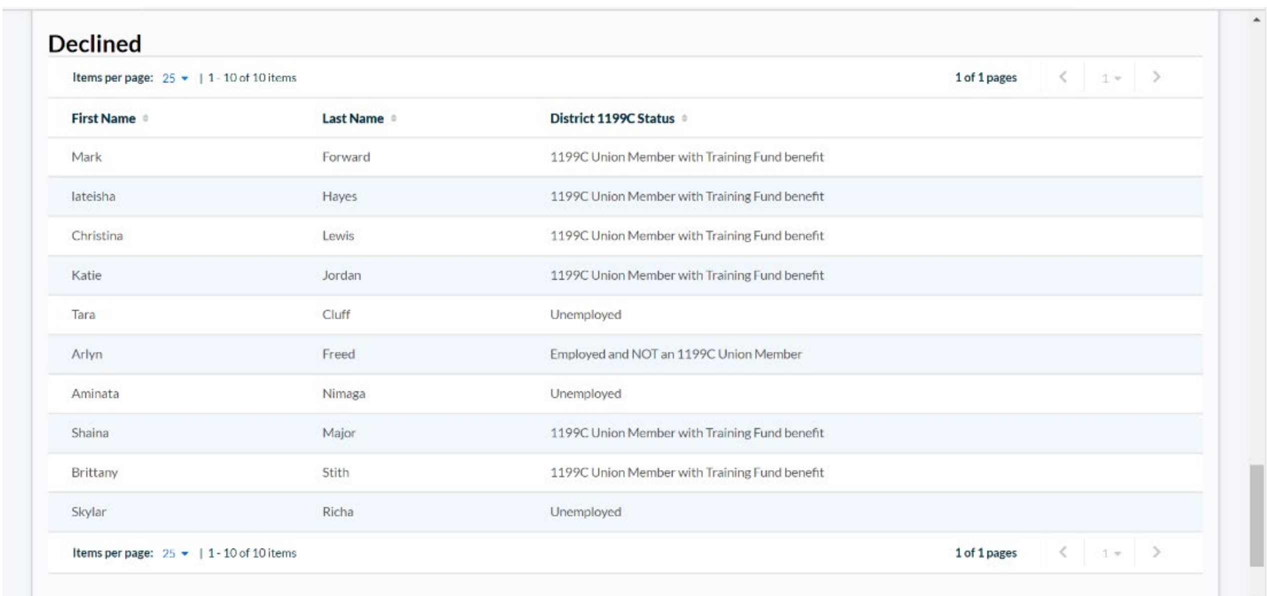
Click “Show All” to search by name or date

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

Items per page: 25 | 1 - 10 of 10 items 1 of 1 pages 1

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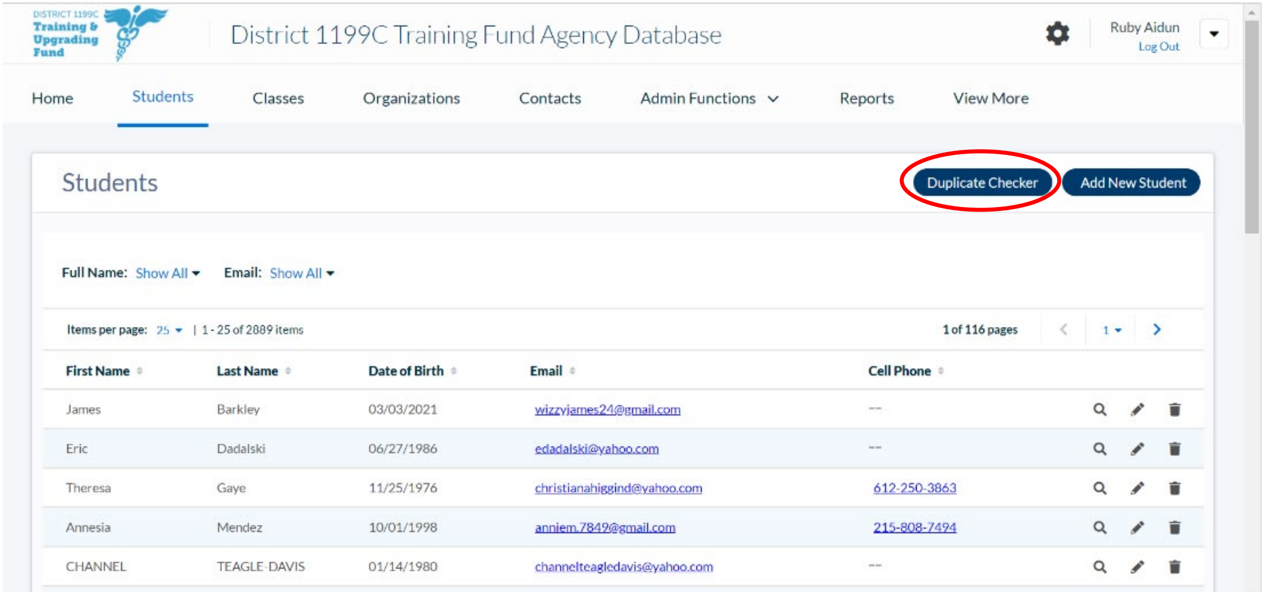
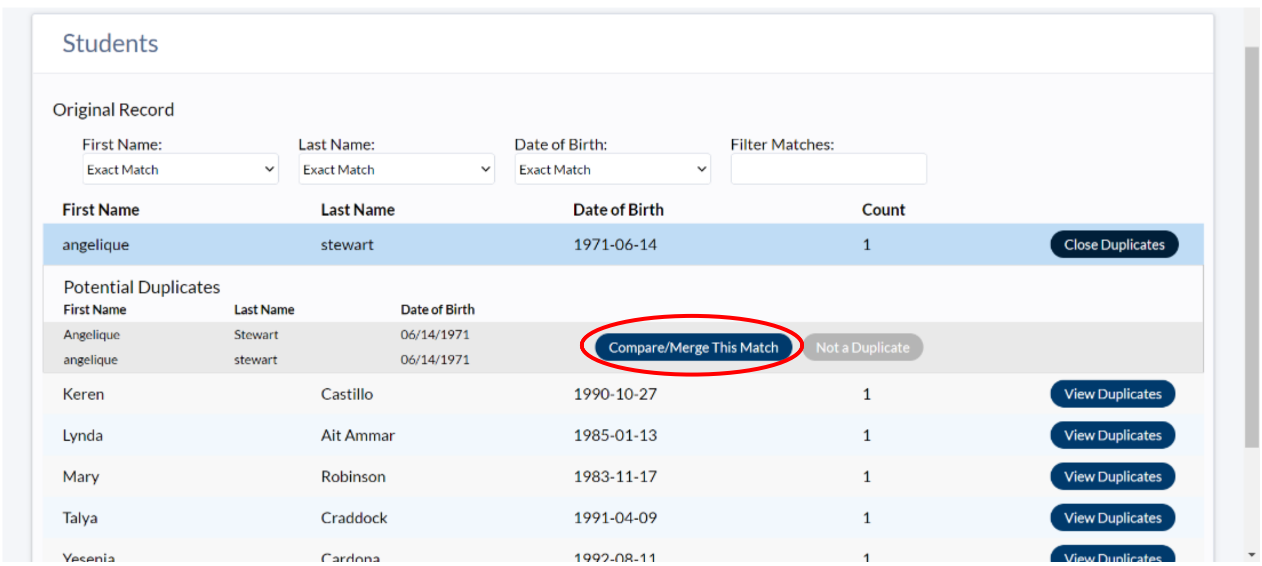
These registrations were declined because their records were already in the system, and their new records couldn’t be merged. It is rare for a registration to be declined.

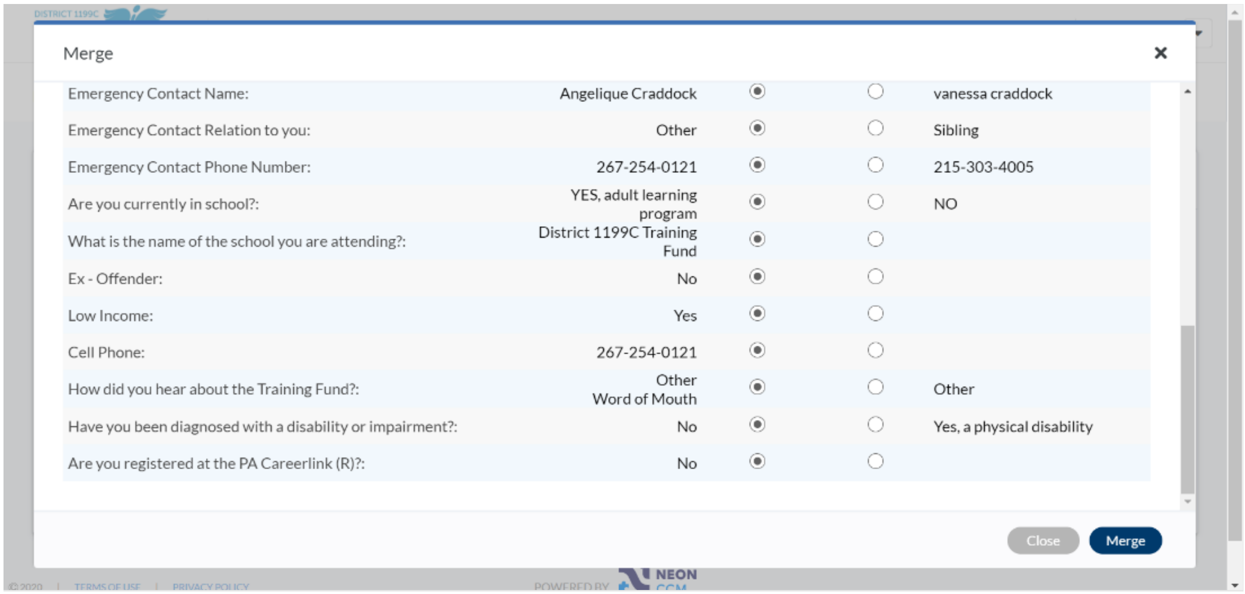
Students Section: Duplicate Checker

Under the ‘Students’ section there is an option for Duplicate Checker





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



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

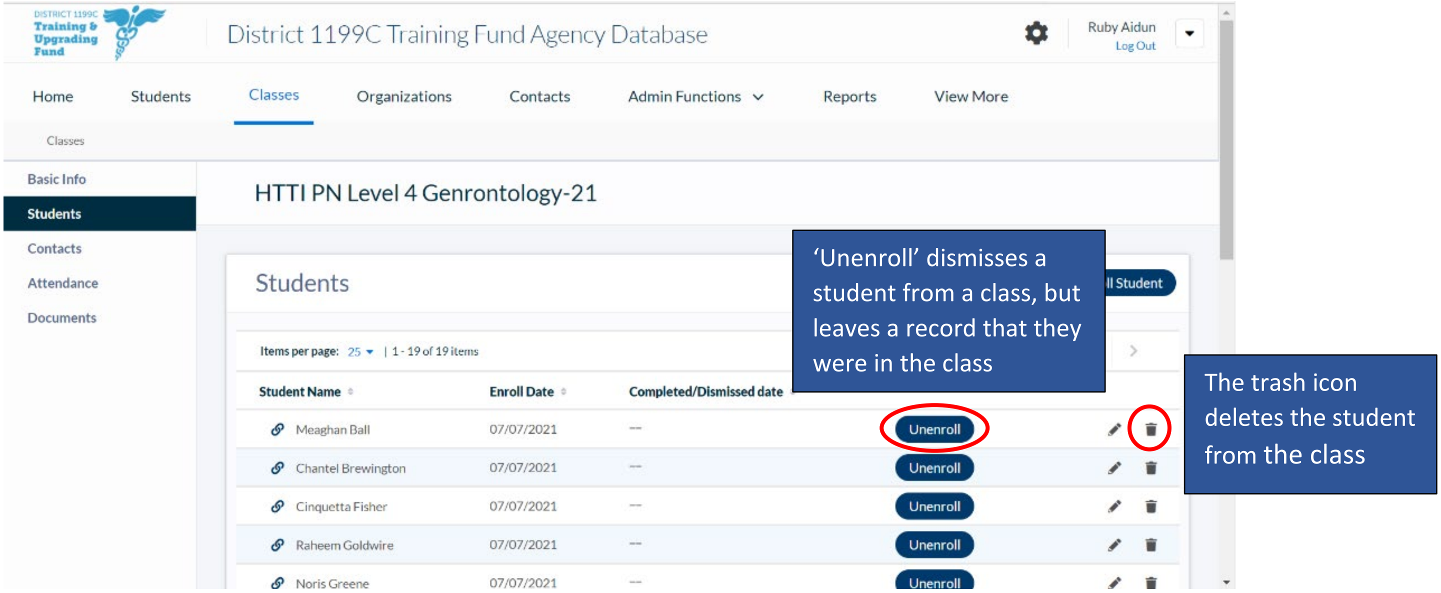
Check in with your team to make sure that it is best to delete the enrollment instead of dismissing the student from the class. **This should be a program policy**

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*

Last Update: October 1, 2021

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

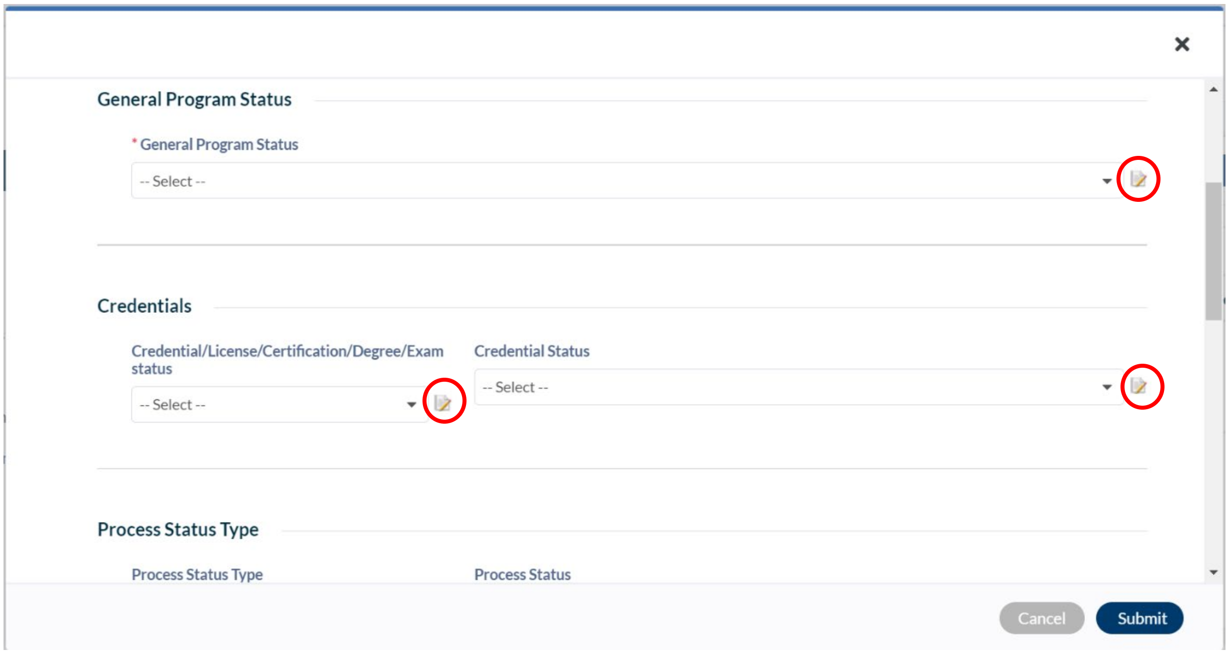


Only full Administrators (rather than Staff Admins) can delete a student's entire record or delete a class. If you need this done, please contact Ruby Aidun (raidun@1199ctraining.org).

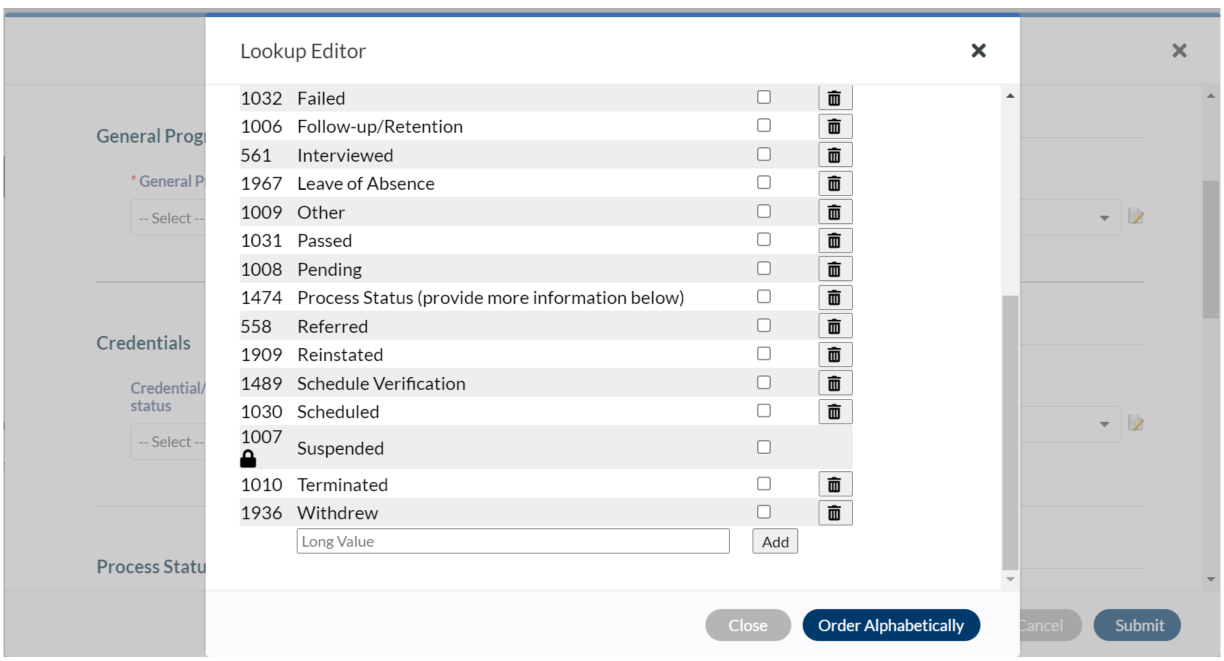
Editing Drop-down Menus:

- 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.



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



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.

<u>**In order to see the changes you made you must refresh the page**</u>

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)