

SAMPLE INTAKE FORM

Student Name: _____ Date of initial outreach: _____ Peer mentor: _____

Phone attempts to reach student (use check marks for each attempt):

Email attempts to reach student (use check marks for each attempt):

Text/social media attempts to reach student (use check marks for each attempt):

Date(s) of actual meeting(s) with student: _____

Notes from initial outreach conversation

	Yes or No	Notes	Follow Up Action Needed
Has student completed the FAFSA?			
Has student logged on to the college web portal?			
Has student received a financial aid award letter?			
Has student completed or been exempted from placement tests?			
Has student registered for orientation?			
Has student received her tuition bill?			

Notes from Assessment Meeting

****Begin by logging on to the student's web portal, or if they do not have log-in info, help them get their user name/password. See briefing documents for guidelines on how to retrieve usernames and passwords****

The next two rows indicate important financial-aid related topics to discuss with students during the meeting

Help student complete/fix FAFSA	N/A		
Help student interpret award letter	N/A		
Identify tuition bill release and due dates	N/A		
Help student interpret tuition bill, including health insurance charges and account credits, if any	N/A		
Discuss tuition payment plan options if the student is facing a financial gap	N/A		

The following are important tasks students need to complete in order to enroll in the fall. If students have not completed these tasks, refer to the briefing documents for college-specific information on how to complete each task.

Have you taken any placement exams required by your intended college?	Y	N		
Have you signed up for or attended new student orientation?	Y	N		
Have you scheduled an academic advising meeting/registered for courses?	Y	N		
Will you be living on campus?	Y	N		
If yes, have you submitted all required housing forms?	Y	N		