



# **Instruction Manual For using the PATHWAYS CalSWEC Student Information System (CSIS)**

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## **Student/Graduate Tracking Database**

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# CSIS MSW INSTRUCTION MANUAL

## TABLE of CONTENTS

LIST OF CSIS LAYOUT SCREENS AND REPORTS .....	4
SCRIPTS USED IN CSIS.....	4
STEP-BY-STEP INSTRUCTIONS FOR COMPLETING THE DATA ENTRY LAYOUT.....	5
Automatically Calculated or Generated fields.....	5
DATA ENTRY - Personal Tab.....	7
IV-E Pathways Program.....	7
Personal Information.....	8
Current Home Address.....	8
Current Mailing Address (if different than above).....	8
Permanent Contact Information (preferably at a different address).....	9
Residency.....	9
Student's Languages (non-English) .....	10
DATA ENTRY Academic Tab.....	10
Pathways Academic Program .....	10
Temporary Leave from Pathways Program .....	11
Termination or Withdrawal from Pathways Program .....	11
Employment History.....	12
Years of Prior Experience.....	12
Current County/Tribe Child Welfare Employment while in school .....	12
DATA ENTRY – Work and Repayment Tab.....	13
Post-Graduate Employment.....	13
Temporary Leave from Work Requirement.....	14
Repayment of Cash in Lieu of Work.....	15
Notes.....	16
FILEMAKER TIPS.....	17
BRIEF CHECKLIST FOR USING THE CSIS DATABASE.....	18
<i>STARTING RECORDS FOR NEW STUDENTS</i> .....	18
<i>UPDATING INFORMATION ON EXISTING STUDENTS</i> .....	18
<i>ENTERING CHANGES</i> .....	19
<i>For Student Leaves</i> .....	19
<i>For New Graduates</i> .....	19
<i>For Graduates Who Begin Work Requirement</i> .....	19
<i>For Graduates Who Complete Work Requirement</i> .....	19
<i>For Terminations, Leaves, Reimbursements, Waiver, Delays, or Defaults</i> .....	20
BOARD DECISIONS.....	20
SCREENS SHOTS OF LAYOUTS FOR CSIS.....	21
DATA ENTRY - Personal Layout.....	21
DATA ENTRY - Academic Data Layout.....	22
DATA ENTRY – Work and Repayment Layout .....	23
Student Information Layout.....	24

#### TITLE IV-E EXPENSES LAYOUTS

Expenses - 2 semesters.....	26
Expenses - Quarterly.....	26
Expenses – Momthly.....	27
COURSEWORK LAYOUT.....	28
JOB SEARCH FORM.....	29
ALUMNI UPDATE INFORMATION.....	30
FIELD NAMES AND LABELS FOR THE PATHWAYS CSIS.....	31
NONCITIZEN ELIGIBILITY GUIDELINES.....	37
FEEDBACK FORM.....	38

## LIST OF CSIS LAYOUT SCREENS AND REPORTS

The Layouts and reports used in CSIS are as follows:

1. **DATA ENTRY** – Tabbed layout containing Personal, Academic, and Work and Repayment information
2. **Student Information** - form to hand out for gathering new student information and Unique ID.
3. **BASW Coursework**– a layout for recording students’ online courses in BASW programs.
4. **MSW Coursework**– a layout for recording students’ online courses in MSW programs.
5. **Leave/Work/Payback update** - condensed version of the “Data Entry” layout with data pertaining to Leave, Termination, Employment, Repayment, and Notes.
6. **Fields - Student Information** - Table format that contains student demographic, contact, and other background information.
7. **Fields - Academic Data** - Table format that contains fields from the Academic data layout.
8. **Fields – Leave/Work/Payback** - Table format that contains fields from Leave/Work/Payback layout.
9. **Avery 5160 Labels** -this layout generates address labels.
10. **Expenses Semester** - an optional layout for use in entry of specific expenses and calculates totals for part-time students on the 2-semester system.
11. **Expenses Quarterly** - an optional layout for use in entry of specific expenses and calculates totals for part-time students on the quarter system.
12. **Expenses Monthly** - an optional layout for use in entry of specific expenses and calculates totals for part-time students on a monthly basis.
13. **Count by Status** – a report of the number of students and grads by their status.
14. **Student/Grad Information** – Student/Grad contact info, work or repayment info, and notes.
15. **JOBSEARCH** –job search layout to be used to track Job searches.
16. **Alumni Update Information** – Layout used for tracking alumni information.
17. **Graduates by Current Agency of Employment** - Lists graduates who are working or have completed work obligation by their current Agency of employment.

**NOTES:** See page 30 for an alphabetical list of all the Field names and labels.  
Screen shots for some layouts begin on page 22.

## SCRIPTS USED IN CSIS

The following scripts are used to create new records, sort, and format, and produce reports. They are located in the Scripts Menu.

- **Add new student** - Adds a new record, and generates the next ID, school, and other default values. Use only this method for correctly adding a record.
- **Sort by Name** - Sorts the records showing by last name.
- **Sort all by Name** - Selects all records and sorts them by last name.
- **Sort by CalSWEC ID** - Sorts the records the records showing by CalSWEC ID.
- **Sort All by CalSWEC ID** - Selects all records and sorts them by CalSWEC ID.
- **Portrait** - Changes page orientation to portrait.
- **Landscape** Changes page orientation to landscape.
- **Count by Status** – Lists the number of records by Current Status.
- **Job Search** - Selects those grads who are searching for work and opens the Job Search layout

- **Current Enrollment** – Selects and filters data to include only currently enrolled students. It is used for Inventory Check.
- **Verification needed** - Lists working graduates who have not returned the initial Employment Verification Form, and those who have completed work but have not returned the Employment Completion Form.
- **Grad Counties**– Selects all graduates who are working or have worked by the first employment county listed and opens the Layout “Graduates by Current Agency of Employment”. The first few with no county listed, were employed by non-profits only.

## STEP BY STEP INSTRUCTIONS FOR COMPLETING THE CSIS

The following information is based on the “Data Entry” layout. All information is required unless noted.



Use this button add a new student to the database. (Do not use any other method to generate a new record) The button generates the following default information in the

record:

- |                                      |   |
|--------------------------------------|---|
| • School                             | • Months of W Requirement - default is 24 |
| • ID with school prefix              | • Expected Completion date                |
| • Year entered                       | Default is May 15 of grad year + 2        |
| • Grad date                          | • Work Status default (Still in School)   |
| Default is May 15 of Year entered +2 | • Total Grant                             |
| • Grad year                          | Default is \$7,500                        |

### Automatically Calculated or Generated Fields

**CalSWEC ID** at the top of each record is generated with the school’s initials and appears in in other places on the **DATA ENTRY** layout to identify each record at all times. This field can be changed or corrected.

**Student Name** (in green) at the top of each record is generated as a header fields and cannot be changed.

**School:** School is generated when record is added. If it is blank it can be selected from the drop-down menu.

**Current status** (in orange or peach) is also listed in the header. It is generated automatically from information in the record. The default is “**Still in school**”. Terms in this field are calculated as follows:

- **Check work Status**– student has graduated, but an error in the Work section.
- **Check work Status, should be done** – the number of hours worked exceeds the number necessary.
- **Check work Status, should be working** – the job search period has past but grad is not working.
- **County Layoff** –working grads who were laid off, and “Reason for Temporary Leave from Work Requirement” field has “County Layoff” checked.
- **DONE - DEFAULTED** – indicates that all means of collecting the money owed have been exhausted and Repayment status is “Sent to IRS” or “Defaulted (Exhausted all options to collect)” and Amount defaulted is not blank.
- **DONE - Waiver** –Waiver has been granted and Date Waiver was approved is filled in.
- **DONE with payment** –Repayment status has “Repayment completed(Paid in full)” and “Amt. Remaining” = “0”
- **DONE with work** – Is Work Requirement Done? field = “YES”, or Work Status = “Work requirement exempted”.

- **MONITOR - Repayment** – Repayment section has information in it but does not say “Repayment completed”.
- **MONITOR-Grad in Repayment** –Work Status says default, collections, financial payback, or “No response from student”.
- **MONITOR-Student on leave** – Student Status is “Gone on leave”, or information in the Temporary Leave from Program section is filled in and date for return is blank or some time in the future.
- **MONITOR-Student Term/withdrew** – Student Status is “Terminated” or “Withdrew” or the Termination or Withdrawal section has been filled in.
- **MONITOR-Work default** – The Work Section indicates that the graduate is in repayment.
- **Not working** –Student Status is “graduated” but no County employment or substitute work is entered.
- **Still in School** –Default status when none of the other situations exist.
- **Working** –Student Status is “graduated” and none of the other situations apply, or when graduate went back to work after Repayment has stopped.

## **DATA ENTRY - Personal Tab**

### **IV-E Pathways Program**

- **Last Contact:** Date field - insert date of the last contact with the student/grad following graduation or being placed into repayment.
- **Year Entered Pathways:** *Default is the year the record is generated.* Change this if different. The year might not be the same as the year of enrollment in the MSW program.
- **Student Status:** *Default is “not yet started”.* Change as student progresses through programs

<i>not yet started [default]</i>	<i>probation/suspension</i>
<i>enrolled - in Pre-BASW Courses</i>	<i>returned from leave - in good standing</i>
<i>enrolled - in BASW Courses</i>	<i>terminated</i>
<i>enrolled - in MSW Courses</i>	<i>terminated while on leave</i>
<i>graduated</i>	<i>withdrew</i>
<i>gone on leave</i>	<i>deceased</i>
<i>pending graduation</i>	<i>Other...</i>

**NOTE:** Use “*pending graduation*” when the student has reached graduation date but has not graduated (e.g. Coursework not completed). Indicate the reason for “*pending*” in the notes section at the end of the record.

**NOTE:** For “*Other...*” option: Select and enter as much text as needed in the box – it will all be recorded in the database, even if it doesn’t show on the screen. To delete an entry in “*Other...*”, click on it, then delete whatever is entered in the box.

- **Program Year:** Select form the following, and change as student progresses through programs.

<i>Pre-BASW-1</i>	<i>MSW-2</i>
<i>Pre-BASW-2</i>	<i>MSW-3</i>
<i>Pre-BASW-3</i>	<i>MSW-4</i>
<i>Pre-BASW-4</i>	<i>on leave</i>
<i>BASW-1</i>	<i>terminated</i>
<i>BASW-2</i>	<i>completed</i>
<i>MSW-1</i>	<i>Other...</i>
- Insert Start and End dates of:  
**Pre-BASW**  
**BASW**  
**MSW**

**NOTE: Date format:** For all dates, use the US standard “month / day / year” all-number date format, it is best to use the 4-digit year. For example, for May 22, 2005, enter 5/22/2005, or 05/22/2005. This format will prevent a 5/22/1905 entry from occurring. If the day is not known use 15 as in 5/15/2005 for 5/2005.

#### **Personal Information**

**First, Middle, Last Name:** Enter the name the student is currently using. If middle name is not known leave the field blank. Change the student name, if student notifies you of a change.

- **Date of Birth, Gender:** Student's gender and date of birth **using 4-digit year** format (See NOTE above).
- **Ethnicity:** Select from the following Pop-Up Menu:

*African/African American/Black  
American Indian/Native Am.  
Arab/Arab-American  
Armenian  
Cambodian  
Chinese/Chinese American  
East Indian/Pakistani  
Eurasian  
Filipino  
Hmong  
Japanese/Japanese American*

*Korean/Korean American  
Latino/Latin American  
Mexican American (Chicano)  
Polynesian/Pacific Islander  
Portuguese  
Puerto Rican  
Vietnamese/Thai/Other SE Asian  
West Indian  
White/Caucasian  
Multi-Cultural  
Other...*

If a student's ethnicity is not listed in menu, select "Other..." and enter the new ethnicity. For multi-ethnic students: select "Multi-Cultural", or enter details in "Other..."

- **Ethnic Group:** A calculated field of categories based on the ethnicity of the student/grad.
- **Previous Name:** If student's name changes (e.g. marriage or divorce), transfer old name to this field, and enter the new name in **Name** fields.
- 

Current Home Address

- **Date of Contact Information Change:** Enter the date of any change in the initial contact information.
- **Street Address, City, State and Zip:** Enter all elements of the student's current physical address.
- **Home Phone, Office/Work Phone, Cell Phone, and Fax:** Enter and identify as many of the student's phone numbers as you can ascertain, (e.g. home: 222-222-2222; office: 333-333-3333; cell phone: 444-444-4444; fax: 555-555-5555). **Pager** number is no longer listed in the data entry form, but the field still exists in the

**NOTE:** It is important that address and phone entries be kept up to date. If CalSWEC receives notice of a change of address, we will notify you.

**NOTE:** If the person has completed the program (i.e. finished working) and is now deceased enter **DECEASED** into the Street Address. That way we will not contact them or send out a survey to them.

- **Email1 and Email2:** Enter any email addresses for the student/grad --- school, home, other.

**NOTE:** Update emails when student graduates.

Current Mailing Address (if different than above)

- **Street / PO Box, City, State and Zip:** Enter the student's current mailing address if it is different from his or her physical address. Otherwise leave these fields blank. DO NOT ENTER "Same" in this section.



Permanent Contact Information (preferably at a different address)

Three people who will know how to contact the Student/Graduate. Fill in as much as possible.

- **Name and Relationship** Enter the name and relationship of three permanent contacts for the student. Insure that one of them lives at a different address. .
- **Street Address, City, State and Zip:** Enter all parts of the permanent contact's address.
- **Phones and Emails:** Enter numbers and emails of contact person.

## Residency

**NOTE:** Residency status **must** be entered. IV-E students must be US citizens or permanent resident aliens with green cards in order to participate in the program.

- **Country of Origin:** *Default is USA* Change the country if different than USA.
- **Citizenship:** *Default is USA* Change not US citizen.
- **If Foreign-Born US Citizen, Date of Naturalization:** If student was not born in the US, but is now a US citizen, Enter date student became US citizen. If date is not known, verify citizenship and enter Jan. 1 of year student entered. Program. Leave blank if the student is a US citizen.
- **If not US Citizen, a Permanent Resident Alien?:** Enter “YES” if the student is NOT a citizen but **has a Green Card**. Leave field blank if student is US citizen.
- **ERROR** message will appear if the Residency section is not filled out correctly.
- **State of Residence:** Enter state. *Default is “California”*.

The following examples explain the different scenarios for residency:

- Native-born US citizen -- the **Country of Origin** and **Citizenship** fields would both say “USA”;
- Naturalized US citizen -- the **Country of Origin** field would list “a country other than USA”; **Citizenship** field should be “USA”, and the **Date of Naturalization** field should have a date;
- Permanent resident alien -- the **Country of Origin** and **Citizenship** fields would both list “a country other than USA” and the **If not US Citizen, a Permanent Resident Alien? (Student has a valid Green Card)** field should be “yes”;
- Visiting students **should not** be in the IV-E program.

See page 36 for Federal Policy: NONCITIZEN ELIGIBILITY GUIDELINES.

Student's Languages - (For Bilingual students)

- **Languages:** Select the non-English language spoken by student. Check “Yes” or “No” for **Spoken?** and **Written?**. Enter second and third foreign language if appropriate.

**NOTE:** If languages not listed, **click twice** in the box and type the name of the language.

## **DATA ENTRY - Academic Tab**

### **Pathways Academic Program**

- **Academic Plan on record?** Check this box when the plan is filed.
- **Contract Date:** Enter each date that the student signs a contract
- **Campus:** From the dropdown menu select the college where the student is enrolled. If it is not listed select “Other” and type the college in the dialog box. The current options are listed here:

*College of the Redwoods (Del Norte)*  
*College of the Redwoods (Eureka)*  
*College of the Redwoods (Hoopa)*  
*CSU, Chico*  
*CSU, East Bay*  
*CSU, San Bernardino*  
*Heald College*  
*Humboldt State University*

*Mendocino College*  
*Merced College*  
*Palm Desert Campus – CSU-SB*  
*Shasta College*  
*Sierra College*  
*Spokane Falls CC*  
*Other*

- **Student ID:** - Enter each ID connected to the Campus attended.
- **Term Type:** Enter the type of academic term.

*2-Semester*  
*3-Trimester*

*4-Quarter*  
*Other*

- **Start Date:** and **End date:** [Repeated from Personal Tab. No need to reenter.]

**BASW**  
**MSW**

- **MSW Field of Practice:** (MSW Only) Enter field of practice. Select from the Drop-Down Menu:
  - Default is “*Child Welfare / Children & Families*”.

*Child Welfare/Children & Families*  
*Generalist*  
*Health/Mental Health/Chemical Dependency*

*School Social Work*  
*Info Not available*  
*Other...*

- **MSW Method of Practice:** (MSW Only) Enter method of practice. Select from the Drop-Down Menu:  
Default is “*Direct Services*”.

*Administration/Mgmt/Planning*  
*C.O.P.A. (USC only)*  
*Community Organization*  
*Direct Services*

*Generalist*  
*Info Not Available*  
*Other...*

### **Placements for BASW and MSW.**

Enter the information for each placement as they are completed. BASW, MSW-1, MSW-2

- **Placement Completed?:** Enter “YES” when student has completed the first field placement.

- **Agency:** Enter the Tribal or County Agency of the placement, or *Other* if it is not listed.

- **Type:** Enter the type of agency. Default is “*Public child welfare agency*”.

*Public child welfare agency*

*Child welfare agency not public*

*Community center*

*Education*

*Health/mental health/regional center*

*Other: Substance abuse, APS, probation, homeless shelter*

- **Area:** Enter the Service Area of the agency. Use *NA* for non public child welfare agencies or *Other*.

*NA*

*Adoptions*

*Concurrent Planning*

*Dependency Investigation/Court Services*

*Differential Response*

*Emergency Response*

*Family Maintenance*

*Family Preservation*

*Family Reunification*

*FF&FR*

*Foster Care*

*Independent Living Skills Program*

*Intake/Information/Referral*

*Integrated Continuing Services*

*Licensing*

*Mental Health*

*Permanency Planning*

*Placement*

*Program Support*

*Other*

- **Field Faculty:** Enter the name of the Field Faculty.

### **Temporary Leave from IV-E/MSW-BASW Program**

- **Program Affected:** If student goes on temporary leave, select the program affected: *IV-E only* OR *both MSW-BASW and IV-E*. In an unusual situation, select “*Other...*” and enter an explanation.

- **Reason for Leave:** Select from the following Drop-Down Menu:

*NA (or leave blank)*

*bereavement*

*family emergency*

*hardship*

*illness / disability*

*probation/suspension*

*Other...*

- **Leave Date:** Enter the date the student went on leave.
- **Expected/Actual Return Date:** Enter the date the student is expected to return or leave blank if not known. When student returns, change return date to the actual date of return. If student does not return fill out **Termination or Withdrawal** section. Use date terminated/withdrew for end of leave date.
- **Months of Leave** calculates automatically as an error check.

### **Termination or Withdrawal from IV-E/MSW-BASW Program**

- **Program Affected:** If the student is terminated or withdraws from school or the IV-E program, indicate which program is affected: *IV-E only* OR *both MSW-BASW and IV-E*. In an unusual situation, select “*Other...*” and enter an explanation.

- **Reason for Termination or Withdrawal:** Select from the Drop-Down Menu:

*NA (or leave blank)*  
*academic performance*  
*ethical / criminal*  
*failed background check*

*fieldwork performance*  
*student withdrew*  
*Other...*

- **Date of Termination or Withdrawal:** Enter the date the student was terminated or withdrew.

**NOTE:** Be sure that **Student Status** agrees with the information in the **Temporary Leave** or **Termination or Withdrawal**.

### **Employment History**

Years of Prior Experience

- **Public Child Welfare Years, Non-Profit Child and Family Years, and Other Public Social Service Years:** Enter this information in years. For partial years use decimals as follows:

1 month = .083	4 months = .33	7 months = .58	10 months = .83
2 months = .167	5 months = .42	8 months = .67	11 months = .92
3 months = .25	6 months = .50	9 months = .75	

Current County/Tribe Child Welfare Employee while in school

- **County or Tribe::** Enter *either* “County Agency” or “Tribal Agency”
- **Agency:** Enter the Agency where student is employed from the list:

*Butte*  
*Del Norte*  
*Eastern Riverside*  
*Glenn*  
*Inyo*  
*Lake*

*Lassen*  
*Modoc*  
*Tehama*  
*Yurok Tribe ICWA*  
*Yurok Indian Housing Authority*  
*Yurok Tribe Wellness Court*

*United Indian Health Services*  
*Klamath-Trinity Joint Unified*  
*School District*  
*Other...*

- **Agency Type:** Select the type of employment from the following Drop-Down Menu:

*NA (or leave blank)*  
*Adoptions*  
*Child Welfare*  
*Eligibility*

*Family & Children's Services*  
*Family Support/Preservation*  
*Foster Care*  
*Mental Health*

*Permanency Planning*  
*Shelter/Residential Treatment*  
*Other...*

- **Position:** Select the position from the list:

*Administrative Assistant*  
*Case Aid*  
*Receptionist*

*Social Services Assistant*  
*Social work Assistant*  
*Social Worker I*

*Other...*

## **DATA ENTRY – Work and Repayment Tab**

### **Post-Graduate Employment**

“**Send Letter**” (in green) A reminder to check on working grads. It will appear for one month every six months after work start date has been entered. This is a trigger for sending a follow-up letter for verification forms or new contact information. It is for your convenience. You need not do anything with it.

- **Months of Work Requirement:** Calculated fields based on the number of Credits earned divided by 15 for  
**Pre-BASW                      BASW                      MSW**
- **Expected Work Requirement Completion Date:** The default is 2 years from the actual or anticipated graduation date. Enter a new date that corresponds to 2 years after the actual date the graduate is hired. Update it as necessary.
- **Is Work Requirement Done?:** A Calculated field that says YES when the following fields occur:  
**Work Requirement Status = “Work requirement exempted”**  
**OR**  
**Work Requirement Status = “Work requirement completed”**  
**AND**  
**Total Months of Service equals or exceeds Months of Work Requirement**  
**AND**  
**Expected Completion Date** has occurred.
- **Grad Date:** Same field as in the Personal Tab
- **Still working as of:** Enter a date when a Graduate is definitely still employed in the agency of work obligation.
- **Work Requirement Status:** Select from the following Drop-Down Menu. Default is “*Still in school*”.

*Still in school* [default]

*Employment Search in Progress*

**WORK REQUIREMENT BEGUN, VERIFIED**

*Work requirement begun, needs verification*

**WORK REQUIREMENT COMPLETED**

*Work requirement completed, needs verification*

*Work requirement stopped (County Layoff)*

*Work requirement delayed*

*Work requirement waived*

*Work requirement exempted*

*No Response from Student/Graduate*

**MONETARY REPAYMENT**

*Monetary Repayment (worked but now in Repayment)*

*Deceased*

*Other...*

A red error message “**Check Work Status!**” or “**ERROR**” appears above Work Status when:

1. **Student Status** = “*graduated*”, **Work Status** = “*Still in school*”, and the **Job 1 County** is filled in;
2. **Work Status** = “*Work requirement completed*” but the **Total Months of Service** is less than the **Months of Work Requirement**;
3. **Work Status** does NOT = “*Work requirement completed*” but the **Total Months of Service** is greater than the **Months of Work Requirement**.

**NOTE:** If the error message does occur check the fields for entry errors. If they are all correct and there is still an error, contact and notify CalSWEC about the problem.

- **County:** or **Tribal Agency:** Enter the county or tribal agency that hired the graduate.
- **Volunteer?** – Check the box if graduate has elected the Volunteer Option for work obligation.
- **Work Phone:** Enter graduate’s most recent known work phone at this agency.
- **Work Email:** Enter graduate’s most recent known work email at this agency.
- **Start Date:** Enter the date the graduate began employment (use a 4-digit year format).
- **End Date** Enter the date the graduate stopped working for that county, or the work requirement was completed, or the date the work completion form was received.

**Months of Service** and **Total Months of Service** calculate automatically based upon the dates entered. If graduate leaves employment with one county or agency and is hired by another within the payback period, enter new county info in next rows. **INCLUDE ALL DATES!**

- **County/Tribal Region** Calculated value based on the graduates Current County of employment.

#### Temporary Leave from Work Requirement

If the graduate takes a leave from work requirement that is not permanent use this section. There are now slots for two work leaves.

- **Reason for Temporary Leave from Work Requirement:** Enter the reason for the leave from the following options:

*NA*

*bereavement*

*County layoff*

*family emergency*

*hardship*

*illness / disability*

*maternity*

*probation/suspension*

- **From Date:** Indicate the date the leave began. Use a 4-digit year format.
- **To Date:** Enter the expected date of return. Update this date if necessary when the graduate returns to work.

**NOTE:** If the graduate takes a leave and then returns to the same agency, explain the leave in the “Temporary Leave from Work Requirement” section and show the employment on two different rows, with the first employment end date corresponding to the beginning leave date and the second employment start date at the end of the leave date.

## Repayment of Cash in Lieu of Work

If the student/graduate did not completing the program or the work requirement fill out this section.

**Repayment Status:** Select from the following scroll-box options:

NA (or leave blank)  
*Repayment pending (arrangements are being made)*  
*Repayment begun(making payments)*  
*Repayment completed(Paid in full)*  
*Repayment delayed(Until Graduation)*  
*Repayment delayed(Temporarily stopped making payments)*  
*Repayment stopped(No longer making payments)*  
*Repayment stopped(Back at work)*

*Repayment restarted(Delay ended, now making payments)*  
*Repayment waived(Need not pay)*  
*Delinquent(Can't locate, no response from student/grad)*  
*Sent to Collections agency*  
*Tax Intercept/Offset*  
*Defaulted (Exhausted all options to collect)*  
*Sent to IRS*  
*Other...*

- **Repayment Reason:** Indicate here the reason that that the student/graduate will not be completing the program/work requirement. Select from the following scroll-box options:

NA (or leave blank)  
*disability*  
*hardship*  
*unsuccessful job search*

*terminated from IV-E program*  
*withdrew from IV-E program*  
*Other...*

- **Start Date:** Enter date repayment agreement was signed and payment will begin. Use 4-digit year format.
- **End Date:** Enter date that this repayment will end.
- **Total Grant:** default is \$37,000 (*as of 2004*) Change the amount for part time students.
  - **Original Amt. Owed:** Enter amount to be repaid. It will be the same as **Total Grant** if no work was done.  
**Do not include interest.**
- **Amt. Remaining:** Enter amount of stipend that remains unpaid, and Update field as new information is received.
- **Monthly Amt:** Enter here the monthly amount that the student graduate is due to pay according to the payment agreement. **Do not include interest but if you must the next two fields will help.**
- **Monthly Int.:** Enter the monthly interest that the is paid (If it is known)
- **Estimated Monthly Amount:** A calculated on Original Amount Owed divided by 60 months, which will not include interest. Nothing need be done with this field.
- **Type of Collections:** Select:

*University*  
*Foundation*  
*External*

*Collections Agency*  
*Paid in Full*  
*Other*

- **If in Default:** Use this section only if student/graduate is in default, (that is: **ALL MEANS** of collecting repayment have been exhausted).
- **Campus Notified?:** Enter “yes” (if the Campus or foundation was notified) or “no” or “NA” as applicable.
- **CalSWEC Notified?:** Enter “yes” (if the PC, Dean, and CalSWEC Central have been notified) or “no” or “NA” as applicable.
- **Amount Defaulted:** Use this field **ONLY** when **all** means of collecting money are exhausted. Enter dollar value of any defaulted amount, that is, any amount that is due but was not collected.
- **Repayment DELAY Reason:** If a repayment agreement is reached, but then this person requests a delay in his or her plan, enter the reason for the delay. Select:

*NA (or leave blank)*

*Disability/ Medical problems*

*Hardship*

*Other...*

- Enter Repayment **Delay Start** and **Delay End** dates. Update the end date as necessary. Use 4-digit year dates.
- **Repayment WAIVER Reason:** If the school agrees to allow a waiver of repayment for this person for some or all of their stipend, enter the reason for that agreement. Select from:

*NA (or leave blank)*

*death*

*Disability/ Medical problems*

*Hardship*

*Other...*

- **Date Waiver Approved by CalSWEC:** Enter the date that Repayment Waiver agreement was approved by CalSWEC Central.

### **Notes**

**Notes Field** – Use this field at the end of each record for any pertinent, explanatory, or clarifying information on any of the fields or in adding general information about the student/graduate.

**Add date and initials to each entry.** Enter the most recent notes at the top of the notes section.



## FILEMAKER© TIPS

Maintain your latest **CSIS** file in secure folder on your hard drive. Keep the original for a backup, and back it up often by performing a “Save a copy as...”

**CAUTION: FileMaker© Pro is very interactive. Changes are saved automatically. Be careful not to inadvertently change entries. Always keep a backup copy in case of errors.**

For **ALL dates**, use the US standard “month / day / year” all-number date format. Use the 4-digit year, to avoid a miscalculation of the year. For example, for May 22, 2005, enter 5/22/2005, or 05/22/2005. This format will prevent a 5/22/1905 entry from occurring. If the day is not known use 15 as in 5/15/2005 for 5/2005.

Many fields in the current CSIS format have drop-down menus. Make a selection using the mouse. When using the “*Other...*” option, select it, then enter as much text as needed in the box provided. Even if all your text does not show on the screen, it will still be recorded in the database.

To delete entries from drop-down menus,

- Double click on the field and hite the DELETE key, or
- Select “*Other*” and delete whatever is entered in the window.

The screen (layout) for inputting data is called **DATA ENTRY** and is normally used in “View as Form” mode, which treats each record separately. “View as List” is a continuous scroll of all records.

In table view, the fields are organized as a spread sheet. The order and the width of the field columns can be changed.

Many drop-down menus or scroll boxes contain “*NA*”. If a field is not applicable for a given student, you can either leave it blank or choose “*NA*”.

Some fields in CSIS will have a “default value” when the record is created. The default values do not update automatically, but can easily be changed or deleted. If you need help changing or customizing the default values for your school, contact Susan Jacquet. Also please let Susan know whether you like the defaults and revisions, or if you would like them changed in any way.

**Please contact Susan Jacquet** if the calculation fields and error messages are not working correctly or are not helpful.

For help with FileMaker use the HELP Menu (F1 key) or use the FileMaker Pro Tutorial created for CSIS.  
(Contact Susan Jacquet at (510) 643-9846 or [sjacquet@berkeley.edu](mailto:sjacquet@berkeley.edu))

## BRIEF CHECKLIST FOR USING THE CSIS DATABASE

### **STARTING RECORDS FOR NEW STUDENTS**

Use information from the “Student Information” printout.



Click on the button:

This button is the only way to create a new record because it will automatically generate the next consecutive ID number, School, and a few other defaults. **DO NOT** use any other method for creating a new record.

Enter **all known information** on the new student. Check the defaults that are generated by the ADD NEW STUDENT button (listed on page 6) to make sure they fit the student’s information. As more information becomes available, update each student’s record (e.g. fieldwork agency, etc.).

### **UPDATING INFORMATION ON EXISTING STUDENTS**

The following fields are generally the ones that will need updating as students progress.

#### **Pathways IV-E Program**

Update **Student Status**, and **Expected/Actual Graduation Date** as the student status or situation changes.

#### **Student Information**

Update **Current**, and **Permanent contact information**. ***PLEASE KEEP FIELDS CURRENT!***

#### **Residency**

Update **Date of Naturalization** if this occurs during IV-E Program participation.

#### **Academic Program**

Update **Languages** in which a student may have become proficient. Update **Program Year (MSW) Field** and **Child Welfare Coursework Completed? Date Completed**, and **Current Contract Date**.

#### **Temporary Leave from IV-E/MSW Program** and **Termination or Withdrawal from IV-E/MSW Program**

Update **Program Affected**, **Reason**, and **Date** information, if student takes a leave or withdraws from program. When a student returns from leave, update the return date or the DONE field with continue to be “MONITOR – Student on leave”.

#### **Repayment of Cash in Lieu of Work**

Update **Total Grant Amount** if necessary (especially for part-timers). **INCLUDE DATES**.

**NOTE:** Pay attention to the peach-colored (STATUS/DONE) box at the top of the DATA ENTRY layout. Keep track of those records with “Check Work Status” or any with “Monitor ...” in that field. These are the students or graduates that need to be tracked.

Also look for error messages in **Pathways IV-E Program**, **Residency**, and **Post Graduate Employment** sections. If the problem isn’t evident, contact Susan Jacquet for help.

## **ENTERING CHANGES**

### **➤ For Student Leaves**

When a student goes on temporary leave from the MSW program the following fields should be updated.

#### **Pathways IV-E Program**

Update **Student Status**, **Expected/Actual Graduation Date**.

#### **Academic Program**

Update **Program Year** (MSW).

#### **Temporary Leave from IV-E/MSW Program**

Fill in **Temporary Leave from IV-E/MSW Program** fields.

### **➤ For New Graduates**

Check and update these fields when students graduate:

#### **Pathways IV-E Program**

Update **Student Status**, **Expected/Actual Graduation Date**.

#### **Academic Program**

Update **Program Year**, **Child Welfare Coursework Completed? Date Completed**, and **Entered IV-E BASW or MSW Program**.

#### **Post-Graduate Public Child Welfare Employment**

**Expected Completion Date**, **Work Requirement Status** and all **Employment** information (including County, Email, Phone, and Start date).

#### **Repayment of Cash in Lieu of Work**

Update **Total Grant Amount** from the expenses layout.

### **➤ For Graduates Who Begin Work Requirement**

When a student has been employed fill in ALL the appropriate fields for employment under the following categories:

**Post-Graduate Employment** Update **Expected Completion Date**, **Work Requirement Status** and all **Employment** information.

### **➤ For Graduates Who Complete Work Requirement**

When a graduate completes work requirement and verification has been received check and update these fields:

**Post-Graduate Employment**.

Update **Expected Completion Date**, **Work Requirement Status** and all **Employment** information. Be sure that the **Work Requirement Done?** field says "yes". If this field does not say yes contact Susan Jacquet (510) 643-9846 to work through the problem.

➤ **For Student Terminations, Employment Leaves, Repayment Agreements, Waivers, Or Delays, Defaults**

If a student/graduate leaves the program or work requirement permanently check and thoroughly update any of the following fields that apply.

**Pathways IV-E Program** - Update **Student Status** as appropriate.

**Termination or Withdrawal from Pathways Program** - Complete **Termination or Withdrawal from Pathways Program** fields as appropriate.

**Post-Graduate Employment** -Update **Work Requirement Status** and/or **Temporary Leave from Work Requirement** as appropriate.

**Repayment of Cash in Lieu of Work** Complete **ALL** fields as appropriate, and be sure to include dates.

## **BOARD DECISIONS**

### **Board Decision September 22, 1995**

The Board passed the motion that CalSWEC will inform the IV-E schools that they have 30 days to complete and submit information pertaining to curriculum snapshot and information for the student tracking system. If not received within 30 days, invoices cannot be processed until these deadlines have been met. A 30-day extension may be requested. A notice of warning will be issued with copies to deans and directors of the schools with an opportunity to appeal. Failure to comply will result in withholding of funds for program support. This withholding of money does not apply to stipends.

### **Board Decision January 29, 1998**

The report of the Student Information System update includes the number of students who have graduated and been placed in counties to date. The Board members want breakdowns by race and second language. In reference to employment payback, CalSWEC is mandated to maintain student addresses throughout their employment payback. Updates are due to CalSWEC every six months. A survey questionnaire has been developed to cover every child welfare worker and supervisor in the state.

### **Board Decision February 5, 2010**

A motion was approved by the CalSWEC Board on February 5, 2010 permitting graduates from the 2008, 2009 and 2010 cohorts to move automatically to a private non profit employment search if the graduate demonstrates a satisfactory documented statewide search for employment in Public Child Welfare and CDSS Adoptions. This Board action is subject to annual review and is approved *for the above cohorts only*. Any consideration to future cohorts will be part of an annual review process. The next review will occur in February 2011.

Given the unusual circumstances of this Action, it is crucial that the Project keep accurate and up to date records of all graduates search activities. Therefore, each time a graduate's search activities are reviewed a corresponding entry into the CSIS database will be required and data drops to CalSWEC's central database will be accelerated to every 2 months.

## SCREENS SHOTS OF LAYOUTS FOR CSIS

### DATA ENTRY - Personal

<b>Personal</b>	<b>Academic</b>	<b>Work and Repayment</b>		
-----------------	-----------------	---------------------------	--	--

  

Last Contact:

  

**Pathway IV-E Program**

**Find Student**

**ADD NEW STUDENT**

  

CalSWEC ID <input type="text"/>	Year Entered Pathways <input type="text"/>	Start Date <input type="text"/>	End Date <input type="text"/>
Student Status <input type="text"/>	BASW: <input type="text"/>	<input type="text"/>	
Program Year <input type="text"/>	MSW: <input type="text"/>	<input type="text"/>	

  

**Personal Information**

Date of Contact/Change:

  

First name <input type="text"/>	Middle <input type="text"/>	Last Name <input type="text"/>
Date of Birth <input type="text"/>	Gender <input type="text"/>	Ethnicity <input type="text"/>
Previous Name <input type="text"/>	Ethnic Group <input type="text"/>	

  

**Current Home Address**

Street address

City, State, Zip

County of Residence

Home Phone

Cell Phone

Work Phone

Fax

  

**Current Mailing Address (if different than above)**

Street / PO Box

City, State, Zip

Email1

Email2

  

**Permanent Contact Information (preferably at a different address)**

Region or Residence:

  

	Contact 1	Contact 2	Contact 3
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Relat.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>	<input type="text"/>
City-Zip	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phones	<input type="text"/>	<input type="text"/>	<input type="text"/>
Emails	<input type="text"/>	<input type="text"/>	<input type="text"/>

  

**Residency**

Country of Origin:

Citizenship:

State of Residence:

If Foreign-Born US Citizen, Date of Naturalization:

If not US Citizen, a Permanent Resident Alien? (Student has a valid Green Card)

  

**Student's Languages (other than English)**

Language 1

Language 2

Language 3

Spoken 1

Spoken 2

Spoken 3

Written 1

Written 2

Written 3

## DATA ENTRY - Academic

<b>Personal</b>	<b>Academic</b>	<b>Work and Repayment</b>	
-----------------	-----------------	---------------------------	--

  

<b>Pathways Academic Program</b>	<b>Academic Plan on record?</b> <input type="checkbox"/>
----------------------------------	--

  

Contract Date	Campus	Student ID	Term Type

  

<b>Start Date</b> BASW: <input style="width: 100%;" type="text"/> MSW: <input style="width: 100%;" type="text"/>	<b>End Date</b> <input style="width: 100%;" type="text"/> <input style="width: 100%;" type="text"/>	<b>MSW-1 Placement Completed?</b> <input type="checkbox"/> <b>Agency:</b> <input style="width: 100%;" type="text"/> <b>Type:</b> <input style="width: 100%;" type="text"/> <b>Area:</b> <input style="width: 100%;" type="text"/> <b>Field Faculty:</b> <input style="width: 100%;" type="text"/>
<b>BASW Placement Completed?</b> <input type="checkbox"/> <b>Agency:</b> <input style="width: 100%;" type="text"/> <b>Type:</b> <input style="width: 100%;" type="text"/> <b>Area:</b> <input style="width: 100%;" type="text"/> <b>Field Faculty:</b> <input style="width: 100%;" type="text"/>		<b>MSW-2 Placement Completed?</b> <input type="checkbox"/> <b>Agency:</b> <input style="width: 100%;" type="text"/> <b>Type:</b> <input style="width: 100%;" type="text"/> <b>Area:</b> <input style="width: 100%;" type="text"/> <b>Field Faculty:</b> <input style="width: 100%;" type="text"/>

  

<b>MSW - Field of Practice</b> <input style="width: 100%;" type="text"/>	<b>MSW - Method of Practice</b> <input style="width: 100%;" type="text"/>
---	--

  

### Temporary Leave from Pathways Program

Program affected	Reason for Leave	
Leave Date	Expected / Actual Return Date	Months of Leave: <input style="width: 50%;" type="text"/>

  

### Termination or Withdrawal from Pathways Program

Program Affected	Date of Termination or Withdrawal
Reason for leave	

  

### Employment History

Years of Prior Experience	Current County/Tribe Child Welfare Employment while in school
Public Child Welfare Years <input style="width: 50%;" type="text"/>	County or Tribe: <input style="width: 30%;" type="text"/> Agency: <input style="width: 30%;" type="text"/>
Non-Profit Child & Family Years <input style="width: 50%;" type="text"/>	Agency Type: <input style="width: 100%;" type="text"/>
Other Public Social Service Years <input style="width: 50%;" type="text"/>	Position/Title: <input style="width: 100%;" type="text"/>

Personal	Academic	Work and Repayment	
<b>Post-Graduate Employment</b>			
Months of Work Requirement Pre-BASW:      BASW:      MSW:		Is Work Requirement Done?	Grad Date:
Expected Completion Date		Still working as of:	
Work Requirement Status		TOTAL MONTHS OF SERVICE:	
County	Volunteer?	Work Phone	Work Email
Start Date	End Date	Months of Service:	
1.			
2.			
3.			
Tribal Agency	IVE Verif'd	Phone	Email
Start Date	End Date		
1.			
2.			
County Tribal Region			
<b>Temporary Leave from Work Requirement</b>			
Reason for Temporary Leave from Work Requirement		Start Date	End Date
<b>Repayment of Cash in Lieu of Work</b>			
Repayment Status:		Start Date	End Date
Repayment Reason:			
Total Grant	Original Amt. Owed	Amt. Remaining	Actual Monthly Amt.
Monthly Int.	If in Default		Campus Notified?
		CalSWEC Notified?	Amount Defaulted
Collections Type:	Estimated Monthly Amount: <small>(No Interest included)</small>		
Repayment DELAY Reason:	Delay Start	Delay End	Date Waiver
Repayment WAIVER Reason:	Approved by CalSWEC		
<b>Notes:</b>			

## STUDENT INFORMATION LAYOUT

### Student Information

Complete both pages of form

First Name  Middle  Last Name   
Gender  Date of Birth  Ethnicity   
Previous/Maiden Name:

#### Current Home Address and other contact information

Street address   
City, State, Zip     
Home Phone  Fax   
Cell Phone  Work Phone   
Email1  Email2

#### Current Mailing Address (if different than above)

Street / PO Box   
City, State, Zip

Please list 3 people who will always know how to contact you.

	Contact 1	Contact 2	Contact 3
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Relation to you	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>	<input type="text"/>
City, State, Zip	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
Phones	<input type="text"/>	<input type="text"/>	<input type="text"/>
Emails	<input type="text"/>	<input type="text"/>	<input type="text"/>

Country of Birth:  If Foreign-Born US Citizen,   
Country of Citizenship:  Date of Naturalization  mm/dd/yy  
State of Residence:  If not a US Citizen, what is the expiration date   
County of Residence:  of your green card?  mm/dd/yy

Languages other than English	Spoken?	Written?
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Years of Prior Work Experience

Public Child Welfare Years:   
Non-Profit Child & Family Years:   
Other Public Social Service Years:

#### Current County Child Welfare Employee while in school

County or Tribe:  Agency:   
Agency Type:   
Position/Title:



## CalsWEC Self-Generated ID Code

We are interested in linking data from CalsWEC surveys that are given to MSW students and graduates.

It is hoped that this linkage will advance our understanding of the influences of students' views about the profession, child welfare, and public social services on job retention.

Using the codes below helps to ensure confidentiality and anonymity in all our surveys.

To set up YOUR CODE NUMBER, please fill out the following fields.

1. What are the first three letters of your mother's maiden name?  
(example: If her name is/was Alice Smith, the letters are SMI )

\_\_\_ \_ \_

2. What are the first three letters of your mother's first name?  
(example: If her name is/was Alice Smith, the letters are ALI )

\_\_\_ \_ \_

Note: If the name has fewer than three letters, fill in the letters from the left and add 0 (zero) in the remaining space(s) on the right].

[example: If her name is/was Lu We, the codes would be LU0 and WE0 .)

## TITLE IV-E EXPENSES LAYOUTS

[illegible][illegible]

### Monthly Title IV-E Student Expenses Calculations

[illegible]

## COURSEWORK LAYOUT (BASW and MSW are the same)

## BASW Course Work

**Term Type:**

Total Credits Earned

[illegible]

CSIS ID	Date	Status of Search	Search Forms	Other Docs
<div style="border: 1px solid black; height: 20px;"></div>				
<div style="border: 1px solid black; height: 20px;"></div>				
<div style="border: 1px solid black; height: 20px;"></div>				
Full/Part Status <div style="border: 1px solid black; padding: 2px; width: 50px; margin-top: 5px;">full</div>				
Grad Date <div style="border: 1px solid black; padding: 2px; width: 80px; margin-top: 5px;">5/15/2013</div>				
Search End Date <div style="border: 1px solid black; height: 25px; margin-top: 5px;"></div>				
Addendum Signed <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>				
<b>Job Search Activities</b>				

  

Initial	2nd	3rd	4th	5th	6th
---------	-----	-----	-----	-----	-----

Job Verification Forms:

--	--	--	--	--	--

Supporting Documentation for Nonprofit Agency:


Job Completion Form:

Notes for Search:

Additional Docs


9/30/2011
1

## ALUMNI UPDATE INFORMATION

### Alumni Update

Date of Contact Information Change:

First Name:  Middle:  Last Name:

Previous Name:   
If applicable

#### NEW CONTACT INFO:

Street address:   
City, State, Zip:     
Home Phone:   
Cell Phone:   
Email:

#### NEW WORK INFO:

Current Employer:   
Agency Name:   
Position:   
Work Address:   
Work Phone:   
Work Email2:

Comments:

## **FIELD NAMES AND LABELS FOR THE PATHWAYS CSIS**

This is an alphabetical list of all the fields that are used in CSIS. The left Column lists the names of the fields, and the right lists the labels as they are written in the “Data Entry” Layout Form.

The **HIGHLIGHTED FIELDS** are calculated fields generated automatically and not used for inputting data.

<b>Field Name</b>	<b>Field Label</b>
Academic Plan Signed	Academic Plan on record?
Additional Docs	Additional Docs (Container Field)
Agency	Agency: (while in School)
Agency Type	Agency Type:
Alumni Agency	Agency Name
Alumni Comments	Alumni Comments
Alumni employer	Current Employer
Alumni position	Position
Alumni work address	Work Address
Amount Defaulted	Amount Defaulted
BASW Completed	End Date (for BASW Coursework)
BASW Course Completed	Done
BASW Course Name	Course
<b>BASW Credit total</b>	<b>Total Credits Earned</b>
BASW Credits	# Credits
BASW Semester	Semester
BASW Term Type	Term Type:
BASW Year	Year
BASWPlacement1	
BASWPlacement1 Area	Area: (of BASW placement)
BASWPlacement1 Cty	Cty: (of BASW placement)
BASWPlacement1 Faculty	Field Faculty: (of BASW placement)
BASWPlacement1 Type	Type: (of BASW placement)
BASWPlacement1Completed	BASW Placement Completed?
<b>Best city</b>	<b>Mailing address or current address for Labels</b>
<b>Best state</b>	<b>Mailing address or current address for Labels</b>
<b>Best street</b>	<b>Mailing address or current address for Labels</b>
<b>Best Zip</b>	<b>Mailing address or current address for Labels</b>
<b>BIRTHDATE</b>	<b>Date of Birth</b>
<b>Books Tot</b>	<b>Sum of Book fees for 2-Semester Expenses</b>
<b>Books Tot Monthly</b>	<b>Sum of Book fees for Monthly Expenses</b>
<b>Books Tot quarterly</b>	<b>Sum of Book fees for quarterly Expenses</b>
<b>calc cws1 months of service</b>	<b>Months of Service (for Work County #1)</b>
<b>calc cws2 months of service</b>	<b>Months of Service (for Work County #2)</b>
<b>calc cws3 months of service</b>	<b>Months of Service )for Work County #3)</b>
<b>calc done with work requirement</b>	<b>Is Work Requirement Done?</b>
<b>calc full name</b>	<b>Full name</b>
<b>calc months of student leave</b>	<b>Months of Leave (for school leave)</b>
<b>calc total months of service</b>	<b>TOTAL MONTHS OF SERVICE (for work)</b>
<b>calc Tribal1 job months of service</b>	<b>Months of Service (for Tribal Work #1)</b>
<b>calc Tribal2 job months of service</b>	<b>Months of Service (for Tribal Work #2)</b>

Field Name	Field Label
CALSWEC_ID	CalSWEC ID
Campus	Community College:
CAMPUS_Notified	Campus Notified?
Cell	Cell Phone
CITIZENSHIP	Citizenship
CITY	City (contact info)
Collections Type	Collections Type
Count of students	Count of CALSWEC_ID (Not visible)
Country of Origin	Country of Origin
County of Residence	County of Residence
County Tribe Name	Agency
Course Completed	Done
Course Name	Course
Coursework Completion Date	Date Completed
Coursework Done	Coursework Completed?
Credit total	Total Credits Earned
Credits	Credits
Current Contract Date	Current Contract Date
Date of Contact Information Change	Date of Contact Information Change
DEMO ID	ID generated from Self-generated form
DONE	(Done, Monitor, Working, Still at School status)
Driver's License	Driver's License (in contact info)
Email1	Email1 (contact info)
Email2	Email2 (contact info)
EMCITY	City (Permanent contact info1)
EMCITY2	City (Permanent contact info2)
EMCITY3	City (Permanent contact info3)
Emergency Email	Emails (Permanent contact info1)
Emergency Email2	Emails (Permanent contact info2)
Emergency Email3	Emails (Permanent contact info3)
Emergency Name	Name (Permanent contact info1)
Emergency Name2	Name (Permanent contact info2)
Emergency Name3	Name (Permanent contact info3)
Emergency Relationship	Relationship (Permanent contact info1)
Emergency Relationship2	Relationship (Permanent contact info2)
Emergency Relationship3	Relationship (Permanent contact info3)
EMPHONE	Phones (Permanent contact info1)
EMPHONE2	Phones (Permanent contact info2)
EMPHONE3	Phones (Permanent contact info3)
EMSTATE	State (Permanent contact info1)
EMSTATE2	State (Permanent contact info2)
EMSTATE3	State (Permanent contact info3)
EMSTREET1	Street Address (Permanent contact info1)
EMSTREET2	Street Address (Permanent contact info2)
EMSTREET3	Street Address (Permanent contact info3)
EMZIP	Zip (Permanent contact info1)
EMZIP2	Zip (Permanent contact info2)



Field Name	Field Label
EMZIP3	Zip (Permanent contact info3)
ETHNICITY	Ethnicity
Fax	Fax (contact info)
Fees tot	Total Fees for 2 Semester Expenses layout
Fees tot Monthly	Total Fees for Monthly Expenses layout
Fees tot quarterly	Total Fees for Quarterly Expenses layout
find error in grad date	(Red error message)
find error in perm res	(Red error message)
find error in Work Status	(Red error message)
FIRST_NAME	First Name
GENDER	Gender
Graduation Date	Expected / Actual Completion Date
Grand Total	Grand Total (2-Semester Expenses Layout)
Grand Total Monthly	Grand Total (Monthly Expenses Layout)
Grand Total Quarterly	Grand Total (Quarterly Expenses Layout)
Green Card	If not US Citizen, a Permanent Resident Alien?
Home Phone	Home Phone (contact info)
IVE Notified	CalSWEC Notified? (repayment section)
Language1	Languages
Language2	Languages
Language3	Languages
Last Contact	Last Contact (date)
LAST_NAME	Last Name
Leave which Program	Program Affected (for student leave)
Mail City	City (for mailing address)
Mail State	State (for mailing address)
Mail Street	Street / PO Box (for mailing address)
Mail Zip	Zip (for mailing address)
MID_NAME	Middle
Miles tot	(Total miles for semester Part-time expenses)
Miles tot Monthly	(Total miles for monthly Part-time expenses)
Miles tot quarterly	(Total miles for quarterly Part-time expenses)
modification date	record modified
MomsFirst	What are the first three letters of your mother's maiden name? (self-generated ID Code)
MomsMaiden	What are the first three letters of your mother's first name? (self-generated ID Code)
Month	Month (Expenses - Monthly layout)
Monthly Amount	Actual Monthly Amt. (Monthly amount for repayment)
Monthly Estimated Amount	Estimated Monthly Amount: (No Interest included)
Monthly Interest	Monthly Int. (Use if known)
Months of Work Pathways Requirement	Months of Work Requirement (default is 24)
BASW Course Completed	Done
BASW Course Name	Course
BASW Credit total	Total Credits Earned
BASW Credits	# Credits
BASW Semester	Semester

Field Name	Field Label
BASW Term Type	Term Type:
BASW URL	URL
BASW Year	Year
MSWPlacement1 Area	Area: (of MSW placement1)
MSWPlacement1 Cty	Cty: (of MSW placement1)
MSWPlacement1 Faculty	Field Faculty: (of MSW placement1)
MSWPlacement1 Type	Type: (of MSW placement1)
MSWPlacement1Completed	MSW Placement1 Completed?
MSWPlacement2 Area	Area: (of MSW placement2)
MSWPlacement2 Cty	Cty: (of MSW placement2)
MSWPlacement2 Faculty	Field Faculty: (of MSW placement2)
MSWPlacement2 Type	Type: (of MSW placement2)
MSWPlacement2Completed	MSW Placement2 Completed?
Number part of csid	(School initials prefix for CalSWEC ID) not visible
Original Reimbursement Amount	Original Amt. Owed
PI_PRG_YR	Program Year
Position	Position/Title:
Previous Name	Previous Name
Prior CW Years	Public Child Welfare Years
Prior NonProfit Child_ Family Years	Non-Profit Child & Family Years
Prior Other Social Services Years	Other Social Service Years
PT Monthly total	Monthly Total (Monthly Expenses Layout)
PT quarterly	Quarter (quarterly expenses Layout)
PT quarterly total	Quarter total (quarterly expenses Layout)
PTBooks	Books (2-semester expenses Layout)
PTBooks Monthly	Books (Monthly expenses Layout)
PTBooks quarterly	Books (quarterly expenses Layout)
PTFees	Fees (2-semester expenses Layout)
PTFees Monthly	Fees (Monthly expenses Layout)
PTFees quarterly	Fees (quarterly expenses Layout)
PTMiles	Miles or Mileage (2-semester expenses Layout)
PTMiles Monthly	Miles or Mileage (Monthly expenses Layout)
PTMiles quarterly	Miles or Mileage (quarterly expenses Layout)
PTSemester	Semester (2-semester expenses Layout)
PTSemester total	Semester total (2-semester expenses Layout)
PTTravel	Travel (2-semester expenses Layout)
PTTravel Monthly	Travel (Monthly expenses Layout)
PTTravel quarterly	Travel (quarterly expenses Layout)
PTTuition	Tuition (2-semester expenses Layout)
PTTuition Monthly	Tuition (Monthly expenses Layout)
PTTuition quarterly	Tuition (quarterly expenses Layout)
PTYear	Year (2-semester expenses Layout)
PTYear Monthly	Year (Monthly expenses Layout)
PTYear quarterly	Year (quarterly expenses Layout)
Reimbursement Delay To Date	End Date (for repayment)
Reimbursement Reason	Repayment Reason

Field Name	Field Label
Remaining Reimbursement Amount	Amt. Remaining
Repayment Delay Date	Delay Start (date of repayment delay)
Repayment Delay Reason	<u>Repayment DELAY</u> Reason
Repayment Due Date	End Date (for repayment)
Repayment Start Date	Start date (for repayment)
Repayment STATUS	Repayment Status
SCHOOL	School
school part of csid	(School initials in ID – Not visible)
Semester	Semester
Send letter	(Reminder to send letter to grad for work update)
Spoken1	Spoken?
Spoken2	Spoken?
Spoken3	Spoken?
STATE	State
State of Residence	State of Residence
Still working date	Still working as of: (date field)
STREET1	Street Address
Student Leave Date	Leave Date (for student leave)
Student Leave Reason	Reason for Leave (for student leave)
Student Return Date	Expected / Actual Return Date (for student leave)
Student Status	Student Status
STUDENT_ID	Student ID (Not SSN)
Sum of Amount Defaulted	Total Defaulted
Sum of Monthly Amount	Total Monthly repayment (All in Repayment layout)
Sum of Monthly Estimate	Total Monthly Estimate (All in Repayment layout)
Sum of Original Amount Due	Total Original Repayment Amount (Monitored students layout)
Sum of Remaining amount	Total Remaining Repayment Amount (Monitored students layout)
Sum of Total Grant	Total Grant amount (All in Repayment layout)
summary highest # part	(ID calculation – not visible)
Term Type	Term Type
Terminate which Program	Program Affected: (termination or withdrawal)
Termination Date	Date of Termination or Withdrawal
Termination Reason	Reason for Termination or Withdrawal
Today	Auto entry of Today's date (not visible)
TOTL_GRANT	Total Grant
Travel tot	Total Travel for 2 Semester Expenses layout
Travel tot Monthly	Total Travel for Monthly Expenses layout
Travel tot quarterly	Total Travel for Quarterly Expenses layout
Tribal1 Job	Tribal Agency (for Post-Graduate Employment)
Tribal1 Job Email	Work Email (for Post-Graduate Employment)
Tribal1 Job End date	End Date (for Post-Graduate Employment)
Tribal1 Job Phone	Work Phone (for Post-Graduate Employment)
Tribal1 Job start date	Start Date (for Post-Graduate Employment)
Tribal2 Job	Tribal Agency 2 (for Post-Graduate Employment - 2)
Tribal2 Job Email	Work Email (for Post-Graduate Employment - 2)
Tribal2 Job End date	End Date (for Post-Graduate Employment - 2)

Field Name	Field Label
Tribal2 Job Phone	Work Phone (for Post-Graduate Employment - 2)
Tribal2 Job start date	Start Date (for Post-Graduate Employment - 2)
Tuition tot	Total Tuition for 2 Semester Expenses layout
Tuition tot Monthly	Total Tuition for Monthly Expenses layout
Tuition tot quarterly	Total Tuition for Quarterly Expenses layout
URL	URL (for coursework)
Volunteer1	Volunteer? (in Work Sections)
Volunteer2	Volunteer? (in Work Sections)
Volunteer3	Volunteer? (in Work Sections)
Waiver Date	Date Waiver Approved by CalSWEC
Waiver Reason	<u>Repayment WAIVER</u> : Reason
Work Completion Date	Expected Completion Date (academic progress)
Work Phone	Office/Work Phone (in contact info)
Work Req't Leave From Date	From Date (1 <sup>st</sup> work leave)
Work Req't Leave Reason	Reason for Temporary Leave from Work Requirement (1 <sup>st</sup> work leave)
Work Req't Leave To Date	To Date (1 <sup>st</sup> work leave)
WORK STATUS	Work Requirement Status
Work1 County	County (for County1 Post-Graduate Employment)
Work1 Email	Email (for County1 Post-Graduate Employment)
Work1 End date	End Date (for County1 Post-Graduate Employment)
Work1 Phone	Phone (for County1 Post-Graduate Employment)
Work1 start date	Start Date (for County1 Post-Graduate Employment)
Work2 County	County (for County2 Post-Graduate Employment)
Work2 Email	Email (for County2 Post-Graduate Employment)
Work2 End date	End Date (for County2 Post-Graduate Employment)
Work2 Phone	Phone (for County2 Post-Graduate Employment)
Work2 Req't Leave From Date	From Date (2 <sup>nd</sup> work leave)
Work2 Req't Leave Reason	Reason for Temporary Leave from Work Requirement (2 <sup>nd</sup> work leave)
Work2 Req't Leave To Date	To Date (2 <sup>nd</sup> work leave)
Work2 start date	Start Date (for County2 Post-Graduate Employment)
Work3 County	County (for County3 Post-Graduate Employment)
Work3 Email	Email (for County3 Post-Graduate Employment)
Work3 End date	End Date (for County3 Post-Graduate Employment)
Work3 Phone	Phone (for County3 Post-Graduate Employment)
Work3 start date	Start Date (for County3 Post-Graduate Employment)
Written1	Written?
Written2	Written?
Written3	Written?
Year	Year (for Coursework)
Year Began	Year Entered CalSWEC
year of graduation	Grad Year
ZIP	Zip

## NONCITIZEN ELIGIBILITY GUIDELINES

The following are eligibility guidelines for noncitizens from:

**“Funding Education Beyond High School: The Guide to Federal Student Aid (2008-09)”**  
US Department of Education Federal Student Aid. p.37.

[http://studentaid.ed.gov/students/attachments/siteresources/FundingEduBeyondHighSchool\\_0809.pdf](http://studentaid.ed.gov/students/attachments/siteresources/FundingEduBeyondHighSchool_0809.pdf)

### **Eligible Noncitizen**

You must be one of the following to receive federal student aid:

- U.S. citizen
- U.S. national (includes natives of American Samoa or Swain’s Island)
- U.S. permanent resident who has an I-151, I-551, or I-551C (Permanent Resident Card)

If you’re not in one of these categories, you must have an Arrival-Departure Record (I-94) from U.S. Citizenship and Immigration Services (USCIS) showing one of the following designations:

- “Refugee”
- “Asylum Granted”
- “Cuban-Haitian Entrant, Status Pending”
- “Conditional Entrant” (valid only if issued before April 1, 1980)
- Victims of human trafficking, T-visa (T-2, T-3, or T-4, etc.) holder
- “Parolee” (You must be paroled into the United States for at least one year and you must be able to provide evidence from the USCIS that you are in the United States for other than a temporary purpose and that you intend to become a U.S. citizen or permanent resident.)

If you have only a Notice of Approval to Apply for Permanent Residence (I-171 or I-464), you’re not eligible for federal student financial aid.

If you’re in the United States on certain visas, including an F1 or F2 student visa, or a J1 or J2 exchange visitor visa, you’re not eligible for federal student financial aid.

Also, people with G series visas (pertaining to international organizations) are not eligible for federal student financial aid. For more information about other types of visas that are not acceptable, check with your school’s financial aid office. Citizens and eligible noncitizens may receive loans from the FFEL Program at participating foreign schools. Citizens of the Federated States of Micronesia, the Republic of the Marshall Islands, and the Republic of Palau are eligible only for certain types of federal student aid. These applicants should check with their schools’ financial aid office for more information.

## FEEDBACK FORM

To All Users of CSIS:

Thank you all for your ideas for improving the Student Information System. Many of them have been incorporated into the FileMaker version that you now use. We will continue to improve the system and will also continue to features, such as Reports, so we welcome your valuable suggestions.

Please email your comments to: [sjacquet@berkeley.edu](mailto:sjacquet@berkeley.edu)

Or, you can fill out this form (feel free to write on the back or include extra sheets) and mail it to:

Susan E. Jacquet, Ph.D.  
California Social Work Education Center (CalSWEC)  
UC Berkeley, School of Social Welfare  
Marchant Building, Suite 420  
6701 San Pablo  
Berkeley, CA 94720-7420

or fax it to 510-642-8573. You can also call at 510-643-9846. Thank you!

**Are you having any problems with, or do you have any suggestions for, using the FileMaker program itself?**

**Are you having any problems with, or do you have any suggestions for, the CSIS screens or fields, entering data into the fields, etc.?**

**Are you having any problems with, or do you have any suggestions for, these CSIS instructions?**

**Are you having any other problems, or do you have any other suggestions or comments?**