



# CASE MANAGEMENT CHECK-IN GUIDE

A CHRONOLOGICAL GUIDE TO ASSIST  
CASE MANAGERS WORKING WITH  
COLLEGE STUDENTS



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## CASE MANAGEMENT CHECK-IN GUIDE

# ABOUT THIS GUIDE

This guide is intended to be used by case managers working with current and former foster youth and homeless youth, to highlight what may be appropriate or important college-related topics to raise with college students at specific times during the academic term. Case managers should use their counseling skills, familiarity with the student, and own creativity to determine how to approach each topic or frame the discussion. Note that some dates and deadlines may vary by institution so ensure students are aware of the academic calendar at their school.

## SUGGESTED TOPICS TO CHECK IN ABOUT PRIOR TO FALL SEMESTER

**1** Does your college have a summer prep program (i.e. "Summer Bridge)? Do you know how you can you take advantage of that? Summer bridge programs are essential for assisting students in becoming prepared for college and familiarized with campus supports. All California State Universities (CSUs) and many community colleges and University of California (UC) campuses have bridge programs. Colleges without a summer bridge program may offer extended orientation sessions during the summer months.

**2** Have you logged in to your college e-mail account to check important dates and financial aid status?

**3** Have you logged in to WebGrants4Students<sup>1</sup> to check on the status of your Chafee Grant (if a Chafee-eligible<sup>2</sup> current or former foster youth) and/or Cal Grant? Is the right college listed for you on WebGrants4Students?

**4** Have you provided the school with any verification documents they are requesting for the purposes of financial aid or on-campus resources such as priority registration?

- a. Current and former foster youth should provide the school with a dependency letter from the county child welfare agency or the California Department of Social Services<sup>3</sup> until this process becomes automated for financial aid purposes in 2018-19,<sup>4</sup> or if requested from other departments.
- b. Homeless youth must provide verification that they were unaccompanied and homeless or self-supporting and at risk of being homeless as of July 1st the year prior to the award year to be considered an independent student for the purposes of financial aid. They must verify this status each year. Homeless youth must provide verification that they were homeless at any point within 24 months prior to college admission in order to be eligible for priority registration, however this verification lasts six years or until they reach age 25. Both definitions utilize the McKinney Vento<sup>5</sup> definition of homelessness which is "lacking fixed, regular and adequate nighttime residence." Certain homeless youth providers can provide letters of verification for homeless students<sup>6</sup> and should be prepared to do so using a standard letter on their organizational letterhead.<sup>7</sup>

**5** Does your college have the correct address on file for you? Financial aid checks are mailed to the address.

**6** Have you applied to the campus support program at your school, or connected with the appropriate support staff?

- a. For foster youth, search for foster youth campus support programs and/or foster youth contacts here: <http://www.cacollegepathways.org/find-campus-support-programs/>.
- b. For non-foster youth who are homeless, find the link to the Homeless Youth Liaison Directory on this webpage: <http://www.cccstudentmentalhealth.org/resources/>.
- c. If at a community college, students should apply for Extended Opportunity Programs & Services (EOPS), and any supplemental components of EOPS available at that college that the student may be eligible for (i.e. CAFYES/NextUp or CARE).<sup>8</sup> Students attending a CSU should apply to participate in Educational Opportunity Program (EOP), however note that students must apply for EOP when they submit their admissions application to the school.

**7** (If applicable) Have you seen a counselor in disabled student services/accessibility support center?

**8** Have you met with an academic counselor? Do you have the correct major selected for your college (certificates vs. degree) and have you ensured your major is financial aid-eligible?

**9** Do you have your class schedule accessible? Do you have a calendar with the schedule in it? Decide whether a paper or electronic calendar is best for you.

- a. Have you blocked off time for studying and homework? Make sure this is factored into your schedule.
- b. (If working) Have you ensured your work schedule does not conflict with your school schedule?
- c. (If parenting) Do you have your childcare worked out?
- d. Help student consider all of their commitments and needs, and how to find an appropriate balance between class, schoolwork, work, family, friends, significant others, rest, self-care, chores, extracurricular activities, etc.

**10** Do you have the books or other required reading for your courses?

**11** Do you have a plan for how you will get to class?

- a. If using public transportation, do you know your route?
- b. If driving, do you know where you can park and how much it costs?
- c. Do you know how long the trip will take at the time of your classes?
- d. Do you have resources or money to pay for your transportation?
- e. Do you know where your classrooms are (building and room number)? Are you certain what time the classes start and end? Consider visiting the campus a week before classes start to identify the buildings and rooms your classes will be held in.

**12** Did you receive your financial aid disbursement? Have you signed up for Direct Deposit for Financial Aid? Do you have a plan for how to spend (or save) that money? Are you aware of how financial aid is awarded, (when you will get payments) and that if you drop classes you might have to pay it back?

**13** Have you paid all your school-related fees such as your health fee and parking permit?

**14** What are your strategies for studying? (i.e. active listening and note-taking, flash cards, study groups, etc.) Consider helping the student determine their learning style by way of a quick online quiz.

**15** What has been your experience with school? How would you describe yourself as a student? What are your strengths? What are your weaknesses? What subjects might you need tutoring in? This conversation will help the case manager better understand the student's relationship to school and create a plan to help them avoid any obstacles (i.e. did they have a bad experience in high school? Feel confident in their academic ability? Struggle with authority? Hard time staying motivated? Is math hard? Do tests cause them anxiety? Hard time making friends? Hard time saying no to social events with friends instead of studying?)

# SUGGESTED TOPICS TO CHECK IN ABOUT OVER THE COURSE OF THE ACADEMIC SEMESTER

(SCHOOLS THAT OPERATE ON A QUARTER SYSTEM WILL HAVE A DIFFERENT TIMEFRAME)

## Week 1

1. Have you reviewed the course syllabi for your classes and have copies of them / access to them online?
2. Have you put all the assignments into your personal master calendar?
3. (If not complete prior to the start of classes) Do you have the books or other required reading for your courses? If you can't get the books right away because you don't have your financial aid yet, do you know how to get access to the books in the library?
4. Have you introduced yourself to your professors?
5. Are there any on-campus clubs, groups or activities that you are interested in getting connected to?

## Week 2 (or whatever week falls immediately before the school's drop deadline)

1. Are there any classes you're having serious second thoughts about? Do you feel like your course load is realistic for you? Are there any particular classes you're struggling in? Generally, for a full semester course, the second or third week of classes is the deadline to drop without a "W" on the transcript.

NOTE: Dropping courses can have bigger consequences than students anticipate. Generally, colleges offer a narrow window for students to add and drop courses after the semester has started. Students should be aware of the add/drop deadline and make any changes to their schedule by that date. Make sure students know that simply not showing up for class will not result in the professor dropping them. It is up to the student to drop if that is their intention. However, students who drop courses should be advised that changing their enrollment status (i.e. from full-time course load to part-time course load) can impact the amount of financial aid they can receive. They may be required to pay back a portion of their financial aid if they have already received their disbursement. Make sure that students meet with a counselor on campus and the financial aid office BEFORE they make a decision to drop or remain in a class to ensure they fully understand how their decision may affect their academic progress and their financial aid. See page 5 for more information about managing financial aid.

## Week 3

1. Have you been attending all of your classes consistently? If not, what are the obstacles or reasons and what is the plan to address them?
2. Are you actively engaged in your classes (i.e. asking questions, participating in group exercises, turning in assignments)?
3. Are you accessing any tutoring or other support for any of your classes? If not, would you like tutoring? Do you know where/how to access it?
4. Are you getting the support you need on campus? Have you spent any time with [the FYSI Liaison] / [homeless youth liaison] / [coordinator of the campus support program at your school]?
5. Have you made a personal connection and traded contact information with at least one other student in each of your classes so you can help each other with assignments or to catch up if you have to miss a class?

## Week 4 or 5 (2 weeks prior to midterms)

1. Have you been attending all of your classes consistently? If not, what are the obstacles or reasons and what is the plan to address them?
2. Are you having any difficulties completing assignments or tests in any of your classes?

3. Have you been to your professors' office hours to ask questions and get more information about your current grades and how to succeed in the class?
4. Are you prepared for your midterm exam(s) or project(s) for your classes?
5. Are you accessing any tutoring or other support for any of your classes? If not, would you like tutoring? Do you know where/how to access it?
6. Are you participating in any study groups? Considered starting one if no-one else has?

## Week 6 (or whenever mid-term grades come out)

1. How has the first half of the semester been for you?
2. How do your midterm grades look? (For any low grades discuss helping student getting assistance).

**Between midterms and finals it is important to continue to inquire about students' classes, management of their financial aid, and general experience in college. In addition, there are a couple of items to check in about, however their timing depends on the school and the semester:**

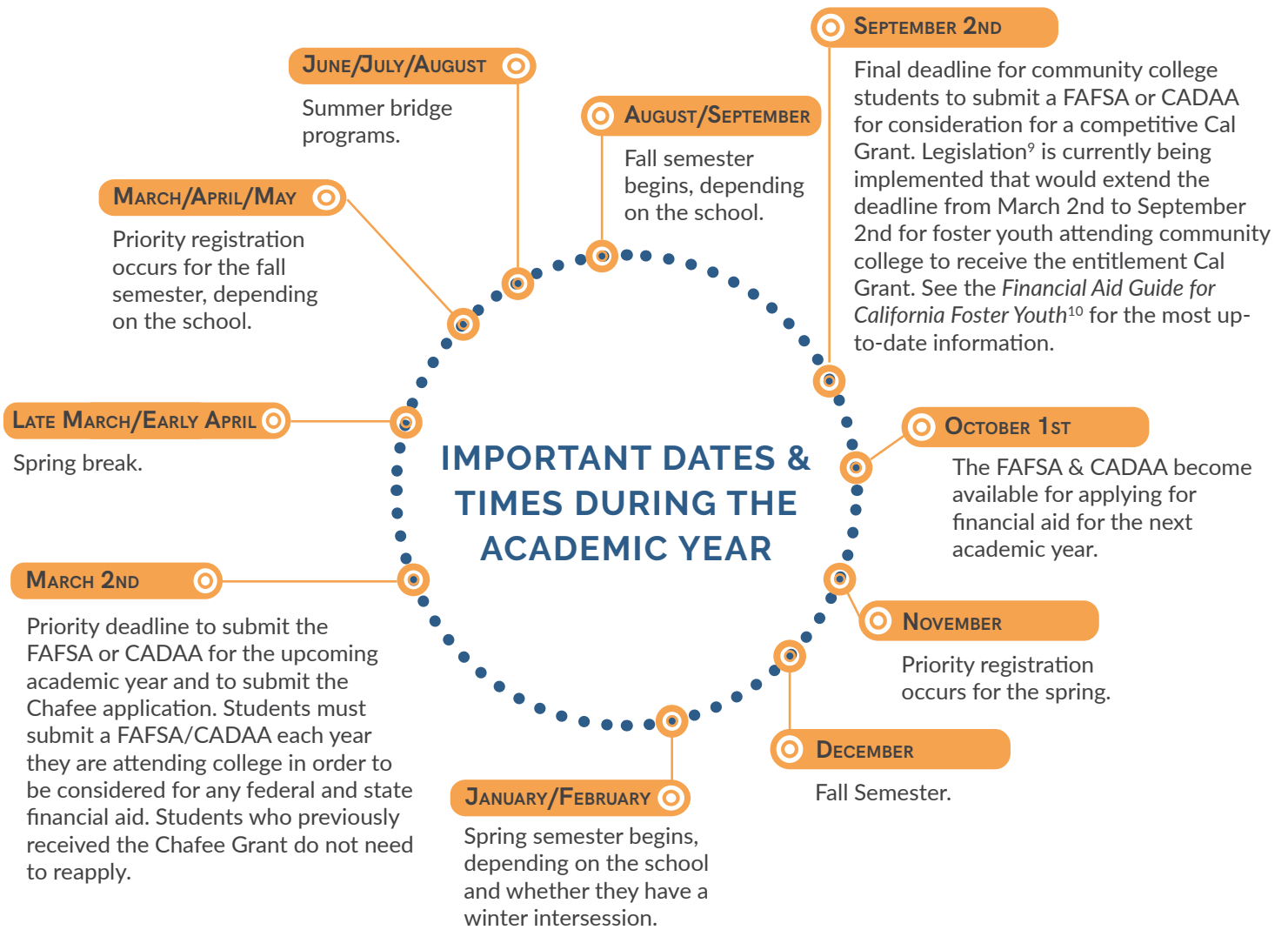
1. **During spring semester, students need to make sure they have submitted their Free Application for Federal Student Aid (FAFSA) or California Dream Act Application (CADAA) for the following academic year before the priority deadline of March 2nd.** Students can complete their FAFSA/CADAA as early as October 1st of the year prior. If they miss the March 2nd deadline, they should still submit their FAFSA/CADAA as they can technically do so throughout the academic year.
2. **During fall semester, priority enrollment for the spring occurs in November. During spring semester, priority enrollment for the fall occurs in March, April or May, depending on the school.** Current and former foster youth under age 26 and homeless youth under age 25 are eligible for priority registration, however it is important to note that they must complete the matriculation process (application, assessment, orientation, and Student Ed Plan) at the community colleges and California State University campuses in order to access priority registration. Make sure you find out your student's enrollment date and help remind them to select classes ahead of time with help from a counselor, and to enroll during their assigned time.

## Week 14 or 15 (2 weeks prior to finals)

1. Have you been attending your classes consistently? If not, what are the obstacles or reasons and what is the plan to address them?
2. Are you actively engaged in your classes (i.e. asking questions, participating in group exercises, turning in assignments)?
3. Are you prepared for your final exam(s) or project(s) for your classes?
4. Are you accessing any tutoring or other support for any of your classes? If not, would you like tutoring? Do you know where/how to access it?
5. Are you participating in any study groups?

## Week when final grades are posted

1. How did the semester go for you? Are there things you would do differently next semester?
2. Do you think your final grade accurately reflects your ability and understanding of the material? If not, what did you learn about how to succeed in your classes that you want to apply next semester?
3. Students who earn a D/F course grade, who receive an "Incomplete," or who drop/withdraw from one or more courses should meet with a counselor to discuss academic progress and make appropriate adjustments to their spring semester course schedule.



## HELPING STUDENTS MANAGE THEIR FINANCIAL AID

- 1** Assist students in developing a budget that incorporates the financial aid they will be receiving, and any school tuition, fees and other school-related expenses. Most service providers have an existing template for helping youth develop a monthly budget. Consider amending a version of this template for youth enrolled in college.
- 2** Dates for financial aid disbursements vary. Be aware and help students plan. Inquire with the individual school(s) about their disbursement dates and consider scheduling a check-in with the students on your caseload on the day (or soon after) they get their disbursement to help them stick to or revise their budget. Help students establish checking accounts (if they do not already have one) for receiving financial aid. It is important to remind students to think carefully about how and when they spend their disbursement.
- 3** If a student drops classes, they may end up owing financial aid back. If a student drops enough units to change their status (i.e. full-time, ¾-time, ½-time) after the add/drop deadline for their school, they may end up owing financial aid back. If they withdraw entirely from school (drop all classes) before 60 percent of the term is completed, they will likely owe financial aid back. If they owe back financial aid and they have already spent their disbursement, they will incur financial aid debt.
- 4** If a student incurs financial aid debt, assist them in addressing the problem immediately. If a student should incur financial aid debt they need to meet with the financial aid office immediately to see if they are able to make satisfactory arrangements (i.e. a payment plan or other arrangements to alleviate the debt) with the school before the debt is transferred to the Department of Education for collection. Most schools will make arrangements directly. Attend this meeting with the student, and help brainstorm potential sources of funding to help the student pay the debt. Once satisfactory arrangements have been made, any hold placed on the student's enrollment can be lifted.

# ENDNOTES

- 1 Students can log on to WebGrants for Students at <https://mygrantinfo.csac.ca.gov/logon.asp> to view the status of their Cal Grant or Chafee Grant application, update their address, submit corrections, view their payment history, update their college of attendance, or satisfy outstanding requirements.
- 2 Youth who were in foster care between the ages of 16 and 18 as a dependent or ward of the court and have financial need are eligible for a Chafee Grant, which provides up to \$5,000 per year for career and technical training or college. Eligible youth have not reached age 22 by July 1st of the award year. With the passage of the 2018-19 California State Budget bill, California adopted new, expanded eligibility for the Chafee Grant, changing the upper age limit from 22 to 26. This policy change went into effect July 1, 2018, however the California Student Aid Commission is currently working on implementing this change, with an expectation that students who apply for a Chafee Grant during the 2018-19 FAFSA cycle will be considered based on the new eligibility criteria. This document will be updated once the changes have been implemented. Learn more about the Chafee Grant here: <https://www.chafee.csac.ca.gov/>
- 3 See All County Information Notice I-27-16 for more information about foster youth verification letters: [http://www.cdss.ca.gov/lettersnotices/EntRes/getinfo/acin/2016/I-27\\_16.pdf](http://www.cdss.ca.gov/lettersnotices/EntRes/getinfo/acin/2016/I-27_16.pdf)
- 4 Senate Bill 12 (Beall) (Chapter 722, Statutes of 2017), among other provisions, required the California Student Aid Commission to work cooperatively with the California Department of Social Services to develop an automated system to verify a student's status as a foster youth to aid in the processing of applications for federal financial aid. Read the bill's text here: [https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill\\_id=201720180SB12](https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201720180SB12)
- 5 The McKinney Vento Homeless Assistance Act defines homelessness as "lacking fixed, regular and adequate nighttime residence" (42 U.S.C. Sec. 11434a(2))
- 6 Homeless youth verification for purposes of financial aid can be made by:
  1. A financial aid administrator.
  2. A local homeless education liaison (K-12).
  3. A director/designee of a Runaway & Homeless Youth Act (RHYA)-funded shelter or transitional living program.
  4. A director/designee of a U.S. Department of Housing & Urban Development (HUD)-funded shelter or transitional housing program.

Homeless youth verification for purposes of priority registration eligibility and other benefits provided under Assembly Bill 801 can be made by:

1. A financial aid administrator.
2. A director/designee of federal TRIO or GEAR programs.
3. A homeless youth services provider which includes a governmental or non-profit agency receiving government funding to provide services to homeless persons; an attorney; a McKinney homeless liaison; a human services provider funded by the state to provide homeless services, health services, behavioral health services, public assistance or employment services; or a law enforcement liaison.
4. For more information about these two different homeless student definitions and verification process, download the Homeless Definition Crosswalk: <http://www.jbaforyouth.org/wp-content/uploads/2018/04/HomelessCrosswalk-4.4.18.pdf>

- 7 SchoolHouse Connection provides a template for homeless youth providers authorized to make homeless youth determinations for the purpose of being considered an independent student on the FAFSA: <https://www.schoolhouseconnection.org/sample-form-letter-to-determine-the-independent-student-status-of-unaccompanied-homeless-youth/>

- 8 The Cooperative Agencies Foster Youth Educational Support (CAFYES)/NextUp program provides eligible current and former foster youth with support and services that may include help with books and supplies, transportation, tutoring, food and emergency housing. A select number of community colleges have NextUp programs. Students eligible for NextUp are under age 26, were in foster care on or after their 16th birthday, and are enrolled in at least nine units. Learn more about NextUp here: <http://nextup.cccco.edu/>. Cooperating Agencies Resources for Education (CARE) program assists EOPS students, who are single heads of welfare households with young children, by offering supportive services so they are able to acquire the education, training and marketable skills needed to transition from welfare-dependency to employment and eventual self-sufficiency for their families. There is a CARE program at all 114 community colleges in California. Learn more about CARE here: <http://extranet.cccco.edu/Divisions/StudentServices/EOPSCARE.aspx>



## ENDNOTES CONTINUED

9 With the passage of the 2018-19 California State Budget bill, California adopted new, expanded eligibility requirements for the Cal Grant to make the program more accessible to foster youth. These policy changes went into effect July 1, 2018 however the California Student Aid Commission is currently working on implementing these changes, with an expectation that students who apply for a Cal Grant during the 2018-19 FAFSA cycle will be considered based on the new eligibility criteria. This document will be updated once the changes have been implemented.

10 John Burton Advocates for Youth. *California Foster Youth Financial Aid Guide* (2017). <http://www.jbaforyouth.org/ca-fy-financial-aid-guide/>