### DLRSAccess

**Access Accepted Priority Schools**

* Count the number of related College List records where Application Status includes 'Accepted','Provisional Accept','OP Accepted','Attending' AND Entry Status = Final List AND College Priority includes 'BL','BL+S','Bottom Line'
* Aggregate the results in Accepted\_Priority\_Schools\_\_c (# Accepted Priority Schools) on the Program Record.
* Counts the number of Bottom Line priority schools on the final list where the student has been accepted.

**Access Awards Accepted Priority Schools**

* ​​​​​​​Count the number of related College List records where Application Status includes 'Accepted','Provisional Accept','OP Accepted','Attending' AND Entry Status = Final List AND College Priority includes 'BL','BL+S','Bottom Line' AND Financial Aid Award Status includes 'Tentative','Final'
* Aggregate the results in Award\_Letters\_Accepted\_Priority\_School\_\_c (# Award Letters Accepted Priority School) on the Program Record.
* Counts the number of Bottom Line priority schools on the final list where the student has been accepted and has a tentative or final award letter.

**Concat Related Services Meeting**

* ​​​​​​​Concatenate the Services from the related Program Tasks and add these to the field "Related Services" on the Program Meeting.
* This uses the "Service Name for Concat" formula field. This was formerly used by both Access and Success. As of the 2020 - 21 academic year, Success is no longer using the Program Task so only for Access at this point.

**Access CSS REQUIRED Priority Schools**

* Count the number of related College List records where CSS\_Submitted\_\_c includes 'Required','Submitted' AND College\_Priority\_\_c includes 'BL','BL+S','Bottom Line' AND Entry\_Status\_\_c='Final List'
* Counts the number of related Bottom Line priority Final List schools where CSS Submitted is either Required or Submitted. I.E. counts the number of priority schools (on the Final List) that require the CSS Profile.
* Aggregate the results in the Program Record field # CSS Required - Priority Schools  (CSS\_Required\_Priority\_Schools\_\_c)

**Access CSS SUBMITTED Priority Schools**

* Count the number of related College List records where CSS\_Submitted\_\_c ='Submitted' AND College\_Priority\_\_c includes 'BL','BL+S','Bottom Line' AND Entry\_Status\_\_c='Final List'
* Counts the number of related Bottom Line priority Final List Schools where CSS Submitted = Submitted. I.E. counts the number of priority schools (on the Final List) where the required CSS has been Submitted.
* Aggregate the results in the Program Record field # CSS Submitted - Priority Schools (CSS\_Submitted\_Priority\_Schools\_\_c)

**Access Roll Up Aid Round 2 Complete**

* Count the number of related College List records where Aid\_Round\_2\_Complete\_\_c=TRUE AND Entry\_Status\_\_c='Final List'
* Counts the number of related College List Records final list colleges have completed round 2 of financial aid.
* Aggregate the results in the Program Record field # Aid 2 Completed (Aid\_2\_Completed\_\_c)

Success

**Success Next Engagement Date**

* Find the MIN Event based on StartDateTime and copy StartDateTime into Program Record field Next\_Engagement\_Date\_Success\_\_c
* This is meant to help Success advisors determine when the next/upcoming meeting will be for their students.
* Created on 11/9/2020

**Success Last Engagement Date**

* Find the MAX Event based on StartDateTime where Updage Aggregation = TRUE (Set by separate Process Builder) and copy StartDateTime into Program Record field Last\_Engagement\_Date\_Success\_\_c
* This is meant to help Success advisors determine how much time has passed since the last engagement with their students.
* The Last\_Engagement\_Date\_Success\_\_c field is used by the Days Since Last Engagement Success formula field to find the difference between today and the last engagement date.
* Created on 11/9/2020