**Salesforce Automations**

## rocess Builders Inventory:

**Academic History Record**

**Current Academic Semester is Updated**

* When a record is created or edited
* Stanza 1: When Is Current Semester (formula checkbox) = True and one of the following fields is Changed:
  + Semester Enrollment Status
  + Semester Reason Not Enrolled
  + College (on Academic History Record)
  + Cumulative Credits Attempted
  + Cumulative Credits Earned
  + Cumulative GPA
  + OR Update PR Current Semester Data = True
* Immediate Action: Update
  + Program Record fields with the following mapping from Academic History Record fields
    - College Attending = College
    - College Enrollment Status = Semester Enrollment Status
    - Cumulative College GPA = Cumulative GPA (only if Cumulative GPA is not blank or 0, checked by formula)
    - Reason Not Enrolled = Semester Reason Not Enrolled
    - Total College Credits Attempted = Cumulative Credits Attempted (only if Cumulative Credits Attempted is not blank or 0, checked by formula)
    - Total College Credits Earned = Cumulative Credits Earned (only if Cumulative Credits Earned is not blank or 0, checked by formula)
  + Uncheck Academic History Record Field
    - Update PR Current Semester Data = Boolean False
    - Evaluate Next criteria
* Stanza 2: Spring Assessment Data Needs Improvement
  + If the Spring Semester Academic History Record is the Current Spring Lookup on a Success Program Record and the Assessment Approval Status field is "Needs Improvement," then find the task related to the parent Program Record where the Program Required Task is Summer Service Plan Ready for Review and the Due Date is between 4/15 and 7/15 and change the status on that task to "In Progress."
  + Spring Semester criteria: Program Record is not blank, parent Program Record is a Success record, the Academic History Record is the one currently listed in Current Spring Lookup, Session or Term is "Spring Term" and Assessment Approval Status is Needs Improvement
  + This stanza added 4/22/2021
* Notes:
  + this is related to a separate process builder that fires when the Program Record Current Academic Semester is changed.
  + We could remove some of the fields from the criteria/if/when statement that are no longer visible in the UI
    - Semester Reason Not Enrolled
  + Last modified 4/22/2021 to add Spring Assessment Data Needs Improvement Stanza

**Current Fall Spring and Year Lookup for Year 1**

* Only when a record is created
* When all of the following are true:
  + Program Record (lookup) is not null
  + Academic\_Term\_\_c (Field Name is "Year") = Year 1
  + Session or Term = Fall Term
  + [Academic\_History\_\_c]Program\_Record\_\_r.Current\_Fall\_Lookup = null
    - the related Program Record's field "Current Fall Lookup" is blank
* Immediate Action: Update
  + Set Current Fall Lookup on the related Program Record to the ID of the Fall Academic History Record in this process.
  + If the related Program Record field Current Program Year is blank, set Current Program Year to the ID of the Program Year related to the Fall Academic History Record in this process
* Evaluate the next criteria
* When all of the following are true:
  + Program Record (lookup) is not null
  + Academic\_Term\_\_c (Field Name is "Year") = Year 1
  + Session or Term = Spring Term
  + [Academic\_History\_\_c].Program\_Record\_\_r.Current\_Spring\_Lookup = null
    - the related Program Record's field "Current Spring Lookup" is blank
* Immediate Action: Update
  + Set Current Spring Lookup on the related Program Record to the ID of the Spring Academic History Record in this process.
* Notes
  + This process should only fire for Year 1 Success students. The Year 1 Fall and Spring Academic History Records and the Year 1 Program Year are created by the Provision Year 1 trigger. This is triggered by the Success Student is Active process builder. This means that making a Success student Active for the first time will trigger the Success Student is Active PB, the Provision Year 1 trigger, AND this Current Fall Spring and Year Lookup for Year 1 PB.
  + Last modified 8/31/2020

**College on Year Update When Changed on Academic History---*CANDIDATE FOR DEACTIVATION***

* When a record is created or edited
* Criteria: When Fall College Changes
  + When all of the following are true
    - [Academic\_History\_\_c].College\_\_c (Semester College) is changed
    - Session or Term = Fall Term
* Immediate Action: Update
  + Related Program Year
    - Update School(Fall) with the [Academic\_History\_\_c].College\_\_c
      * i.e. copy the new college from the Fall semester into the School(Fall) field on the related Program Year
* Stop
* If the above criteria are False evaluate this set of criteria
* Criteria: Spring College Changed
  + When all of the following are true
    - [Academic\_History\_\_c].College\_\_c (Semester College) is changed
    - Session or Term = Spring Term
* Immediate Action: Update
  + Related Program Year
    - Update School(Spring) with the [Academic\_History\_\_c].College\_\_c
      * i.e. copy the new college from the Spring semester into the School(Spring) field on the related Program Year
* Notes:
  + As of the 2020-21 academic year we are moving away from the Program Year other than for structural reasons. We are no longer using the record for year over year financial data. We should be able to deactivate this Process Builder. Right now it will fire every time the school is changed on a fall or spring semester.
  + Last modified 12/21/2017

**Affiliation**

**Affiliation Create or Change--Development Automation**

* When a record is created or edited
* Criteria: Picklist is Board
  + When all of the following are true:
    - Affiliation Type starts with "BL Board"
    - Status = Current
  + Executes only when the specific changes are made to the record
* Immediate Action: Update
  + Update Contact Picklist
  + On the related Contact record set the Board Role field to match Affiliation Type from the Affiliation
* Evaluate the Next Criteria
* Criteria: Stage is Former
  + When all of the following are true:
    - Affiliation Type starts with "BL Board"
    - Status = Former
  + On the related Contact record Set the Board Role field to null
* Notes:
  + Affiliation Type on the Affiliation and Board Role on the Contact record are both picklist fields. Because Board Role is updated based on Affiliation Type the two picklists must have exactly the same picklist options.
  + Last modified 9/12/2019

**Attachment Detail**

**Update Student Photo**

* **​​​​​​​**When a record is created or edited
* Criteria: Student Photo Uploaded
  + When all of the following are true:
    - File Area = StuPhoto
    - Attachment != null
* Immediate Action: Update
  + Update Contact Record
    - Update Student Photo field on Contact record with Attachment from Attachment Detail
* Notes:
  + This is still useful for Access since they are in the older version of the UI
  + Not sure if this is still applicable for Success or if they have a place for student photos
  + Last modified 7/9/2018

**Check Log**

**Check Log is Updated--Development Automation**

* When a record is created or edited
* Criteria: Payment Field is not Blank
  + Check Log Payment field is not null
    - (Payment is null Boolean False)
* Immediate Action: Update
  + Update CL Record
    - Opportunity field copies value from the Opportunity that the Payment is attached to
      * [Check\_Log\_\_c].Payment\_\_r.npe01\_\_Opportunity\_\_c
* Immediate Action: Update
  + Update Payment Record
    - Deposit Date = Check Log Deposit Date
    - Check/Reference Number = Check Log Reference Number
    - Paid = True
    - Payment Date = Check Log Check Received Date
    - Payment Method = Check
* Notes:
  + This is a Development Process Builder. Be sure to check with Jenn and/or Harleen before making any changes.
  + Last modified 1/29/2020

**College Data**

**Update College Lists based on College Data Changes**

* When a record is created or edited
* Criteria: CSS Requirement is Changed
  + CSS Required field is changed
  + College Data Year != 2015 - 16
* Immediate Action: Update
  + Update College List Records
    - Where CSS Submitted != Submitted AND
    - Where CSS Submitted != Not Submitted
    - Update the related College List record field CSS Submitted evaluating the following formula:
      * If College Data field CSS Required = Yes, enter "Required" in the CSS Submitted field, otherwise enter "NA"
* Evaluate the Next Criteria
* Criteria: IDOC Requirement is Changed
  + College Data Year != 2015 - 16
  + IDOC Required field is changed
* Immediate Action: Update
  + Update IDOC on College List
    - Where IDOC Submitted != Submitted AND
    - Where IDOC Submitted != Not Submitted
    - Update the related College List record field IDOC Submitted evaluating the following formula:
      * If College Data field IDOC Submitted = Yes, enter "Required" in the IDOC Submitted field, otherwise enter "NA"
* Evaluate the Next Criteria
* Criteria: NCP Requirement is Changed
  + College Data Year != 2015 - 16
  + NCP Required field is changed
* Immediate Action: Update
  + Update College Lists
    - Where NCP Submitted != Submitted AND
    - Where NCP Submitted != Not Submitted
    - Update the related College List record field NCP Submitted evaluating the following case formula on the NCP Required field:
      * Required = Required
      * Online = Required - Online
      * Paper = Required - Paper
      * Else result (anything else) = NA
* Evaluate the Next Criteria
* Criteria: Tax Required is Changed
  + College Data Year != 2015 - 16
  + Tax Forms Required field is changed
* Immediate Action: Update
  + Update College Lists
    - Where Taxes/W2 != Submitted AND
    - Where Taxes/W2 != Not Submitted AND
    - **Entry Status != Removed from List**
    - Update the related College List record field Taxes/W2 evaluating the following case formula on the Tax Forms Required field:
      * Yes = Required
      * No = NA
      * Else result (anything else) = blank
* Evaluate the Next Criteria
* Criteria: Business/Farm is Changed
  + College Data Year != 2015 - 16
  + Business/Farm Required field is changed
* Immediate Action: Update
  + Update College Lists
    - Where Business or Farm Doc != Submitted AND
    - Where Business or Farm Doc != Not Submitted AND
    - Update the related College List record field Business or Farm Doc evaluating the following case formula on the Business/Farm Required field:
      * Yes = Required for Some
      * No = NA
      * Else result (anything else) = blank
* Evaluate the Next Criteria
* Criteria: Other Fin Aid Requirements? is Changed
  + - College Data Year != 2015 - 16
    - Other Fin Aid Requirements field is changed
  + Immediate Action: Update
    - Update College Lists
      * Where Other Finaid Requirements Submitted != Submitted AND
      * Where Other Finaid Requirements Submitted != Not Submitted AND
      * Update the related College List record field Other Finaid Requirements Submitted evaluating the following case formula on the Other Fin Aid Requirements field:
        + Required for All = Required
        + Required for Some = Required for Some
        + No = NA
        + Else result (anything else) = blank
  + STOP
* Notes:
  + This Process Builder takes up a lot of bandwidth when the College Data records are updated because it will update all of the related College List records across all sites. Can we reduce the strain by adding the filter on Entry Status in the "Tax Required is Changed" section? This criteria is excluding College Lists where advisors have removed them from the list, i.e. Entry Status is not "Removed from List." The potential drawback is that if advisors then try to re-add this College List record it will not have the most up to date information.
  + Last modified 11/14/2018

**College Competitiveness Updated**

* When a record is created or edited
* Criteria: Competitiveness Changed
  + Competitiveness field on College Data is changed
    - [College\_Data\_\_c].Competitiveness\_\_c Is changed Boolean True
* Immediate Action: Update College List
  + updates related College List Records
  + College List field "Recalculate Admission Chances" Boolean True
* Notes:
  + This is related to another PB that fires on the College List record to recalculate the comparison between the student's individual competitiveness and the college competitiveness. Can we reduce the burden from this PB by filtering for College Lists where they are not "Removed from List" in their Entry Status? See notes in **Update College Lists based on College Data Changes** above.
  + Last modified 6/6/2018

**College List**

**College List Affordability For Site**

* Only when a record is created
* Criteria: Program Record has Site
  + confirms that College list is the detail/child of a Program Record and that the Program Record has a value in Program Site
  + [College\_List\_\_c].Program\_Record\_\_c is not blank AND
  + [College\_List\_\_c].Program\_Record\_\_r.Program\_Site\_\_c is not blank
* Immediate Action: Update Affordability based on site
  + Sets the Affordability field on the College List that started the process evaluating the site on Program Record to assign affordability.
  + Affordability field on College List filled by the following Case formula:
  + If Program Site = Jamaica Plain or Dorchester, fill with data from Boston Affordability from related College Data record
  + If Program Site = Worcester, fill with data from Worcester Affordability from related College Data record
  + If Program Site = New York City, fill with data from NYC Affordability on related College Data record
  + If Program Site = Chicago, fill will data from Chicago Affordability on related College Data record
  + Else result, Null
* Stanza 2: Taxes Required on College Data
  + If Tax Forms Required is "Yes" on the related College Data record, then set Taxes/W2 to "Required" on the College List record.
* Stanza 3: Business/Farm Required on College Data
  + If Business Farm Required is "Yes" on the related College Data record, then set Business or Farm Doc to "Required for Some" on the College List record.
* Stanza 4: Other Fin Aid Requirements on College Data Required for All or Some
  + If Other Fin Aid Requirements? is "Required for **All**" on the related College Data record, then set Other Finaid Requirements Submitted to "**Required**" on the College List record.
  + If Other Fin Aid Requirements? is "Required for Some" on the related College Data record, then set Other Finaid Requirements Submitted to "Required for Some" on the College List record.
* Stanza 5: CSS Required on College Data
  + If CSS Required is "Yes" on the related College Data record, then set CSS Submitted to "Required" on the College List record.
* Stanza 6: IDOC Required on College Data
  + If IDOC Required is "Yes" on the related College Data record, then set IDOC Submitted to "Required" on the College List record.
* Stanza 7: NCP Required on College Data
  + Use NCP Required on College Data to fill the NCP Submitted field on College List using the following:
    - Required = Required
    - Online = Required - Online
    - Paper = Required - Paper
    - else result of NA
* Stanza 8: Other App Requirements on College Data
  + If Other Requirements on the College Data record is not blank, set Other Requirements Submitted on the College List record to "Required."
* Stanza 9: Other 1 OR 2 Recommenders Requirement on College Data
  + If Other Recommenders Required on the College Data record is **1 or 2**, set **Other 1 Recommendation Status** to Required on the College List record.
  + If Other Recommenders Required on the College Data record is **2**, set **Other 2 Recommendation Status** to Required on the College List record.
* Stanza 10: Guidance Counselor and Teacher Recommendations Required
  + The field Guidance Counselor Report Status on the College List is Required by default. If the field Recommendations Required on the College Data is set to NA, then set Guidance Counselor Report Status to NA, otherwise the value will be the default Required.
  + If Recommendations Required is set to 1 + GC, 2 + GC, or 3 + GC the field Teacher 1 Recommendation Status on the College List is set to Required. The default value is N/A otherwise.
  + If Recommendations Required is set to "2 + GC" or "3 + GC" the field Teacher 2 Recommendation Status on the College List is set to Required. The default value is N/A otherwise.
  + If Recommendations Required is set to "3 + GC" the field Teacher 3 Recommendation Status on the College List is set to Required. The default value is N/A otherwise.
* Notes
  + This PB has a lower burden because it is only firing when a College List record is created. It does mean that if the college affordability (on the College Data record) is changed after the College List is created, the changes will \*not\* be reflected on the College List record.
  + Last modified 1/17/2018
  + On 1/6/2021 consolidated old College List Workflow Rules into this Process Builder. See stanzas 2-16. These are all part of intake where the initial requirements are set on create of the individual student's college list record based on the requirements from the overall College Data record for that year. For example, Boston University 2020 - 21 (College Data Record) has Tax Forms Required, therefore all the related College List records will also need to have Taxes/W2 set to required. This helps inform what the students will need to complete when they apply to a specific school.

**Set Initial Combined Competitiveness Ranking**

* Only when a record is created
* Criteria: Set the Combined Competitiveness
  + No criteria--just execute the actions
* Immediate Action: Set Combined Comp.
  + On the College List record that triggered the PB, concatenate the Competitiveness abbreviated values from the Program Record and the College Data record and set value in Combined Competitiveness Ranking field.
  + [College\_List\_\_c].Program\_Record\_\_c.Competitiveness\_Ranking\_Abbrev\_\_c & ":" & [College\_List\_\_c].College\_\_c.College\_Competitiveness\_Abbrev\_\_c
* Notes:
  + This Process Builder is part of a larger process to determine a student's initial admission chances at a particular school. We have a preset definition of whether a student is "likely" to be accepted to a particular school based on an assessment of the student's competitiveness and the school's competitiveness. This Proccess Builder is creating an abbreviated text that contains the 2 competitiveness rankings. Another field (Admissions\_Chances\_COMPUTED\_\_c) reads this value and determines if the schools is a "reach" or "likely" to admit the student etc.
  + This PB works currently but is somewhat clunky. Is there a better way to determine the student's admission chances?
  + Related to College Competitiveness Updated PB on College Data record and Update Combined Competitiveness Ranking on College List
  + Last modified 6/6/2018

**Update Combined Competitiveness Ranking**

* When a record is created or edited
* Criteria: Recalculate Admissions Chances is True
  + [College\_List\_\_c].Recalculate\_Admission\_Chances\_\_c = True
* Immediate Actions:
  + Fill Combined Competitiveness
    - On the College List record that triggered the PB, concatenate the Competitiveness abbreviated values from the Program Record and the College Data record and set value in Combined Competitiveness Ranking field.
    - [College\_List\_\_c].Program\_Record\_\_c.Competitiveness\_Ranking\_Abbrev\_\_c & ":" & [College\_List\_\_c].College\_\_c.College\_Competitiveness\_Abbrev\_\_c
  + Uncheck Recalculate Admissions Chances
    - Recalculate Admission Chances = False
* Notes:
  + This PB is related most closely to **College Competitiveness Updated**based on the College Data record. When the College Competitiveness is updated, it checks the box on the College List record (Recalculate Admission Chances) which then triggers the **Update Combined Competitiveness Ranking** PB. The final action in this PB is to uncheck the box so that it is reset in case there is another update.
  + Keep an eye out for the Program Record version that is related to this PB. This one fires when the student competitiveness is updated and will also trigger this PB.
  + Last modified 6/6/2018

**College Attending on Program Record NEW**

* When a record is created or edited
* Criteria: Student Will Attend This College
  + Any of the following conditions are met (OR)
    - [College\_List\_\_c].College\_Attending\_Type\_\_c = Attending - Honors
    - [College\_List\_\_c].College\_Attending\_Type\_\_c = Attending - OP
    - [College\_List\_\_c].College\_Attending\_Type\_\_c = Attending
* Immediate Action:
  + Update Program Record
    - Update the parent Program Record and copy the college from College List into College Attending
    - College Attending field reference [College\_List\_\_c].College\_\_r.College\_\_r.Id
      * this walks up from College List to College Data to the College Organization record to grab the Id and copy into the College Attending lookup field on the Program Record
  + Copy College List to Attending College List Record on PR
    - Update the parent Program Record and copy the College List that started this process into the Attending College List Record field
    - Attending College List Record field reference [College\_List\_\_c].Id
    - This enables reports based on the Program Record to pull in specific affordability data from the College List record where the student is attending. This is used to determine if the schools in an affordable choice. This was the most recent addition to the PB in March 2020
* Notes:
  + Last modified 3/6/2020
  + The modifications in March 2020 were to copy the College List ID into the Attending College List Record on the Program Record
  + This should have a relatively small burden because it only fires when a College List is marked as Attending. However, there is no failsafe for when an advisor checks off \*multiple\* College Lists as attending. This PB will just use whichever was set to Attending most recently.

**Contact**

**Boston - Set Address Eligibility based on ZIP code ---ATTENTION/UPDATE NEEDED**

* When a record is created or edited
* Critieria: Zip Code is Eligible
  + Formula evaluates to true:
    - AND(CONTAINS("02283, 02284, 02301, 02302, 02368, 02421, 02445, 02446, 02447, 02451, 02452, 02453, 02454, 02455, 02471, 02472, 02477, 02703, 01760, 02021, 02026, 02032, 02108, 02109, 02110, 02111, 02113, 02114, 02115, 02116, 02117, 02118, 02119, 02120, 02121, 02122, 02123, 02124, 02125, 02126, 02127, 02128, 02129, 02130, 02131, 02132, 02133, 02134, 02135, 02136, 02137, 02138, 02139, 02140, 02141, 02142, 02143, 02144, 02145, 02148, 02149, 02150, 02151, 02153, 02155, 02163, 02169, 02170, 02171, 02186, 02199, 02203, 02210, 02215, 02222, 02238, 02269",[Contact].MailingPostalCode),[Contact].Run\_New\_Student\_PB\_\_c =TRUE,(OR(ISPICKVAL([Contact].Program\_Site\_\_c,"Jamaica Plain"),ISPICKVAL([Contact].Program\_Site\_\_c,"Dorchester"))))
    - The formula checks if the MailingPostalCode (Zip Code) field contains an eligible zip code listed out AND Run New Student PB = True and the Program Site on the Contact is either Jamaica Plain or Dorchester.
* Immediate Action Update: Update Zip Code Eligibility
  + update related Program Record Address Eligibility field if not already evaluated
  + All of the following must be true (AND)
    - Address Eligibility != Eligible
      * Address Eligibility != Ineligible
      * Address Eligibility != Lives in area
      * Address Eligibility != Doesn't live in area
      * Address Eligibility != Not sure
      * Address Eligibility != **Select One?**
  + Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Eligible
  + STOP
  + If criteria above was FALSE, evaluate next argument
* Criteria: Zip Code is Ineligible
  + Formula evaluates to true:
    - AND(NOT(CONTAINS("02122,02124,02125,02126,02127",[Contact].MailingPostalCode)),[Contact].Run\_New\_Student\_PB\_\_c =TRUE,(OR(ISPICKVAL([Contact].Program\_Site\_\_c,"Jamaica Plain"),ISPICKVAL([Contact].Program\_Site\_\_c,"Dorchester"))))
    - The formula checks that MailingPostalCode (Zip Code) does not contain several of the eligible zip codes. (It is not necessary to check \*all\* eligible zip codes because the earlier criteria has established that the zip code is \*not\* in the list of eligible zip codes--this criteria is only evaluated when the argument evaluates as False) The formula also checks that Run New Student PB is true and that the Contact Program Site = Jamaica Plain or Dorchester.
  + Immediate Action: Update Zip Code Ineligible
    - update related Program Record Address Eligibility field if not already evaluated
    - All of the following must be true (AND)
      * Address Eligibility != Eligible
      * Address Eligibility != Ineligible
      * Address Eligibility != Lives in area
      * Address Eligibility != Doesn't live in area
      * Address Eligibility != Not sure
      * Address Eligibility != **Select One?**
    - **​​​​​​​**Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Ineligible
* Notes:
  + This is the first of several Process Builders that checks Location Eligibility based on the zip code.
  + The Select One under both Immediate Action lists is likely caused by deactivating the Picklist option "Override: Eligible" on 1/28/2020. This should just be removed from the criteria.
  + Does it make sense to combine the zip code eligibility Process Builders
  + Last modified 2/8/2017

**Set Citizenship Eligibility---ATTENTION/UPDATE NEEDED**

* When a record is created or edited
* Criteria: US Citizenship is Eligible
  + Run New Student PB = TRUE  AND ONE of the following is TRUE
  + US Citizenship Status = US Citizen OR
  + US Citizenship Status = Permanent Resident OR
  + US Citizenship Status = Refugee or Asylee
* Immediate Action: Set Citizenship to Eligible
  + On the related Program Record
  + All of the following must be true (AND)
    - Citizenship Eligible != Eligible
      * Citizenship Eligible != Ineligible
      * Citizenship Eligible != Not Sure
      * Citizenship Eligible != **Select One?**
  + Set field Citizenship Eligible as Computed Decision: Eligible
* Criteria: US Citizenship is Ineligible
  + Run New Student PB = TRUE  AND ONE of the following is TRUE
  + US Citizenship Status = TPS OR
  + US Citizenship Status = DACA or Undocumented OR
  + US Citizenship Status = Other
* Immediate Action: Set Citizenship to Eligible
  + On the related Program Record
  + All of the following must be true (AND)
    - Citizenship Eligible != Eligible
      * Citizenship Eligible != Ineligible
      * Citizenship Eligible != Not Sure
      * Citizenship Eligible != **Select One?​​​​​​​​​​​​​​**
  + **​​​​​​​​​​​​​​**Set field Citizenship Eligible as Computed Decision: Ineligble
* Notes
  + The Select One under both Immediate Action lists is likely caused by deactivating the Picklist option "Override: Eligible" on 1/28/2020. This should just be removed from the criteria.
  + Last modified 2/7/2017

**Set College Bound Eligibility based on College Bound Status---ATTENTION/UPDATE NEEDED**

* When a record is created or edited
* Criteria Name: If College Bound Status is Eligible
  + Run New Student PB = TRUE  AND ONE of the following is TRUE
  + College Bound Status = First Person in Family OR
  + College Bound Status = First Generation
* Immediate Action: Update Application Eligibility
  + update related Program Records when the following is true
    - ​​​​​​​College Bound Status Eligibility != Eligible
    - College Bound Status Eligibility != Ineligible
    - College Bound Status Eligibility != Not Sure
    - College Bound Status Eligibility != **Select One?**
  + Set the field College Bound Status Eligibility to Computed Decision: Eligible
* Criteria Name: If College Bound Status is Ineligible
  + Run New Student PB = TRUE  AND ONE of the following is TRUE
  + College Bound Status != First Person in Family OR
  + College Bound Status != First Generation
* Immediate Action: Update Application Eligibility
  + update related Program Records when the following is true
    - ​​​​​​​College Bound Status Eligibility != Eligible
    - College Bound Status Eligibility != Ineligible
    - College Bound Status Eligibility != Not Sure
    - College Bound Status Eligibility != **Select One?**
  + Set the field College Bound Status Eligibility to Computed Decision: Ineligible
* Notes
  + The Select One under both Immediate Action lists is likely caused by deactivating the Picklist option "Override: Eligible" on 1/28/2020. This should just be removed from the criteria.
  + Last modified 2/7/2017

**Set Account Student Status based on Contact RT**

* When a record is created or edited
* Criteria: Record type is Student
  + Contact Record Type Name = Student AND
  + (Contact Record Type ID is not blank OR
  + Contact Record Type ID is changed boolean TRUE)
* Immediate Action: Update Account
  + On the related (parent) Organization record
  + Set Is Student field to TRUE
* Criteria: Record Type is Not Student
  + Contact Record Type Name != Student AND
  + (Contact Record Type ID is not blank OR
  + Contact Record Type ID is changed boolean TRUE)
* Immediate Action: Update Account
  + On the related (parent) Organization record
  + Set is Student field to FALSE
* Notes:
  + Last modified 7/4/2017

**Chicago - Set Address Eligibility based on ZIP code---ATTENTION/UPDATE NEEDED**

* When record is created or edited
* Critieria: Zip Code is Eligible
  + Formula evaluates to true:
    - AND(CONTAINS(" 60004,60005,60006,60007,60008,60009,60016,60017,60018,60019,60022,60025,60026,60029,60038,60043,60053,60055,60056,60062,60065,60067,60068,60070,60074,60076,60077,60078,60082,60090,60091,60093,60094,60095,60104,60107,60130,60131,60133,60141,60153,60154,60155,60159,60160,60161,60162,60163,60164,60165,60168,60169,60171,60173,60176,60179,60192,60193,60194,60195,60196,60201,60202,60203,60204,60208,60209,60296,60297,60301,60302,60303,60304,60305,60402,60406,60409,60411,60412,60415,60419,60422,60425,60426,60428,60429,60430,60438,60439,60443,60445,60452,60453,60454,60455,60456,60457,60458,60459,60461,60462,60463,60464,60465,60466,60467,60469,60471,60472,60473,60475,60476,60477,60478,60480,60482,60483,60487,60499,60501,60513,60525,60526,60534,60546,60558,60601,60602,60603,60604,60605,60606,60607,60608,60609,60610,60611,60612,60613,60614,60615,60616,60617,60618,60619,60620,60621,60622,60623,60624,60625,60626,60628,60629,60630,60631,60632,60633,60634,60636,60637,60638,60639,60640,60641,60642,60643,60644,60645,60646,60647,60649,60651,60652,60653,60654,60655,60656,60657,60659,60660,60661,60663,60664,60666,60668,60669,60670,60673,60674,60675,60677,60678,60679,60680,60681,60682,60684,60685,60686,60687,60688,60689,60690,60691,60693,60694,60695,60696,60697,60699,60701,60706,60707,60712,60714,60803,60804,60805,60827",[Contact].MailingPostalCode),[Contact].Run\_New\_Student\_PB\_\_c =TRUE,ISPICKVAL([Contact].Program\_Site\_\_c,"Chicago"))
    - The formula checks if the MailingPostalCode (Zip Code) field contains an eligible zip code listed out AND Run New Student PB = True and the Program Site on the Contact is Chicago.
* Immediate Action Update: Update Zip Code Eligibility
  + update related Program Record Address Eligibility field if not already evaluated
  + All of the following must be true (AND)
    - Address Eligibility != Eligible
    - Address Eligibility != Ineligible
    - Address Eligibility != Lives in area
    - Address Eligibility != Doesn't live in area
    - Address Eligibility != Not sure
    - Address Eligibility != **Select One?**
    - Program Site = Chicago
  + Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Eligible
  + STOP
  + If criteria above was FALSE, evaluate next argument
* Criteria: Zip Code is Ineligible
  + Formula evaluates to true:
    - AND(NOT(CONTAINS("60004,60005,60006,60007,60008,60009,60016,60017,60018,60019,60022,60025,60026",[Contact].MailingPostalCode)),ISPICKVAL([Contact].Program\_Site\_\_c,"Chicago"),[Contact].Run\_New\_Student\_PB\_\_c = TRUE)
    - The formula checks that MailingPostalCode (Zip Code) does not contain several of the eligible zip codes. (It is not necessary to check \*all\* eligible zip codes because the earlier criteria has established that the zip code is \*not\* in the list of eligible zip codes--this criteria is only evaluated when the argument evaluates as False) The formula also checks that Run New Student PB is true and that the Contact Program Site = Chicago.
  + Immediate Action: Update Zip Code Ineligible
    - update related Program Record Address Eligibility field if not already evaluated
    - All of the following must be true (AND)
      * Address Eligibility != Eligible
      * Address Eligibility != Ineligible
      * Address Eligibility != Lives in area
      * Address Eligibility != Doesn't live in area
      * Address Eligibility != Not sure
      * Address Eligibility != **Select One?**
      * Program Site = Chicago
    - **​​​​​​​**Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Ineligible
* Notes:
  + The Select One under both Immediate Action lists is likely caused by deactivating the Picklist option "Override: Eligible" on 1/28/2020. This should just be removed from the criteria.
  + Does it make sense to combine the zip code eligibility Process Builders
  + Last modified 3/31/2017

**NY - Set Address Eligibility based on ZIP Code---ATTENTION/UPDATE NEEDED**

* When a record is created or edited
* Critieria: Zip Code is Eligible
  + Formula evaluates to true:
    - AND(CONTAINS("10001, 10002, 10003, 10004, 10005, 10006, 10007, 10008, 10009, 10010, 10011, 10012, 10013, 10014, 10016, 10017, 10018, 10019, 10020, 10021, 10022, 10023, 10024, 10025, 10026, 10027, 10028, 10029, 10030, 10031, 10032, 10033, 10034, 10035, 10036, 10037, 10038, 10039, 10040, 10041, 10043, 10044, 10045, 10046, 10055, 10060, 10065, 10069, 10072, 10075, 10079, 10080, 10081, 10082, 10087, 10090, 10094, 10095, 10096, 10098, 10099, 10101, 10102, 10103, 10104, 10105, 10106, 10107, 10108, 10109, 10110, 10111, 10112, 10113, 10114, 10115, 10116, 10117, 10118, 10119, 10120, 10121, 10122, 10123, 10124, 10125, 10126, 10128, 10129, 10130, 10131, 10132, 10133, 10138, 10149, 10150, 10151, 11424, 11425, 11426, 11427, 11428, 11429, 11430, 11431, 11432, 11433, 11416, 11417, 11418, 11419, 11420, 11434, 11435, 11436, 11439, 11451, 11499, 11690, 11691, 11692, 11693, 11421, 11422, 11423, 11694, 11695, 11697, 11105, 11106, 11109, 11120, 11201, 11202, 11203, 11204, 11205, 11206, 11207, 11208, 11209, 11210, 11211, 11212, 11213, 11214, 11215, 11216, 11217, 11218, 11219, 11220, 11221, 11222, 11223, 11224, 11225, 11226, 11228, 11229, 11230, 11231, 11232, 11233, 11234, 11235, 11236, 11237, 11238, 11239, 11240, 11241, 11242, 11243, 11245, 11247, 11249, 11251, 10152, 10153, 10154, 10155, 10156, 10157, 10158, 10159, 10160, 10161, 11252, 11256, 11351, 11352, 11354, 11355, 11356, 11357, 11358, 11359, 10162, 10163, 10164, 10165, 10166, 10167, 10168, 10169, 10170, 10171, 11360, 11361, 11362, 11363, 11364, 11365, 11366, 11367, 11368, 11369, 10172, 10173, 10174, 10175, 10176, 10177, 10178, 10179, 10184, 10185, 11370, 11371, 11372, 11373, 11374, 11375, 11377, 11378, 11379, 11380, 10196, 10197, 10199, 10203, 10211, 10212, 10213, 10242, 10249, 10256, 11381, 11385, 11386, 11390, 11405, 11411, 11412, 11413, 11414, 11415, 10257, 10258, 10259, 10260, 10261, 10265, 10268, 10269, 10270, 10271, 10272, 10273, 10274, 10275, 10276, 10277, 10278, 10279, 10280, 10281, 10282, 10285, 10286, 10292, 10301, 10302, 10303, 10304, 10305, 10306, 10307, 10308, 10309, 10310, 10311, 10312, 10313, 10314, 10451, 10452, 10453, 10454, 10455, 10456, 10457, 10458, 10459, 10460, 10461, 10462, 10463, 10464, 10465, 10466, 10467, 10468, 10469, 10470, 10471, 10472, 10473, 10474, 10475, 10499, 11004, 11005, 11101, 11102, 11103, 11104, 11550",[Contact].MailingPostalCode),[Contact].Run\_New\_Student\_PB\_\_c=TRUE,ISPICKVAL([Contact].Program\_Site\_\_c,"New York City"))
    - The formula checks if the MailingPostalCode (Zip Code) field contains an eligible zip code listed out AND Run New Student PB = True and the Program Site on the Contact is New York City.
* Immediate Action Update: Update Zip Code Eligibility
  + update related Program Record Address Eligibility field if not already evaluated
  + All of the following must be true (AND)
    - Address Eligibility != Eligible
    - Address Eligibility != Ineligible
    - Address Eligibility != Lives in area
    - Address Eligibility != Doesn't live in area
    - Address Eligibility != Not sure
    - Address Eligibility != **Select One?**
    - Program Site = New York City
  + Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Eligible
  + STOP
  + If criteria above was FALSE, evaluate next argument
* Criteria: Zip Code is Ineligible
  + Formula evaluates to true:
    - AND(NOT(CONTAINS("10001, 10002, 10003, 10004, 10005, 10006, 10007, 10008, 10009, 10010",[Contact].MailingPostalCode)),[Contact].Run\_New\_Student\_PB\_\_c=TRUE,ISPICKVAL([Contact].Program\_Site\_\_c,"New York City"))
    - The formula checks that MailingPostalCode (Zip Code) does not contain several of the eligible zip codes. (It is not necessary to check \*all\* eligible zip codes because the earlier criteria has established that the zip code is \*not\* in the list of eligible zip codes--this criteria is only evaluated when the argument evaluates as False) The formula also checks that Run New Student PB is true and that the Contact Program Site = New York City.
  + Immediate Action: Update Zip Code Ineligible
    - update related Program Record Address Eligibility field if not already evaluated
    - All of the following must be true (AND)
      * Address Eligibility != Eligible
      * Address Eligibility != Ineligible
      * Address Eligibility != Lives in area
      * Address Eligibility != Doesn't live in area
      * Address Eligibility != Not sure
      * Address Eligibility != **Select One?**
      * Program Site = New York City
    - **​​​​​​​**Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Ineligible
* Notes:
  + The Select One under both Immediate Action lists is likely caused by deactivating the Picklist option "Override: Eligible" on 1/28/2020. This should just be removed from the criteria.
  + Does it make sense to combine the zip code eligibility Process Builders
  + Last modified 4/18/2017

**Worcester - Set Address Eligibility based on Zip Code---ATTENTION/UPDATE NEEDED**

* When a record is created or edited
* Critieria: Zip Code is Eligible
  + Formula evaluates to true:
    - AND(CONTAINS("01453, 01501, 01504, 01524, 01527, 01540, 01545, 01546, 01550, 01570, 01588, 01601, 01602, 01603, 01604, 01605, 01606, 01607, 01608, 01609, 01610, 01611, 01612, 01613, 01655, 01752",[Contact].MailingPostalCode),[Contact].Run\_New\_Student\_PB\_\_c=TRUE,ISPICKVAL([Contact].Program\_Site\_\_c,"Worcester"))
    - The formula checks if the MailingPostalCode (Zip Code) field contains an eligible zip code listed out AND Run New Student PB = True and the Program Site on the Contact is Worcester.
* Immediate Action Update: Update Zip Code Eligibility
  + update related Program Record Address Eligibility field if not already evaluated
  + All of the following must be true (AND)
    - Address Eligibility != Eligible
    - Address Eligibility != Ineligible
    - Address Eligibility != Lives in area
    - Address Eligibility != Doesn't live in area
    - Address Eligibility != Not sure
    - Address Eligibility != **Select One?**
    - Program Site = Worcester
  + Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Eligible
  + STOP
  + If criteria above was FALSE, evaluate next argument
* Criteria: Zip Code is Ineligible
  + Formula evaluates to true:
    - AND(NOT(CONTAINS("01453, 01501, 01504, 01524, 01527, 01540, 01545, 01546, 01550, 01570, 01588",[Contact].MailingPostalCode)),[Contact].Run\_New\_Student\_PB\_\_c=TRUE,ISPICKVAL([Contact].Program\_Site\_\_c,"Worcester"))
    - The formula checks that MailingPostalCode (Zip Code) does not contain several of the eligible zip codes. (It is not necessary to check \*all\* eligible zip codes because the earlier criteria has established that the zip code is \*not\* in the list of eligible zip codes--this criteria is only evaluated when the argument evaluates as False) The formula also checks that Run New Student PB is true and that the Contact Program Site = Worcester.
  + Immediate Action: Update Zip Code Ineligible
    - update related Program Record Address Eligibility field if not already evaluated
    - All of the following must be true (AND)
      * Address Eligibility != Eligible
      * Address Eligibility != Ineligible
      * Address Eligibility != Lives in area
      * Address Eligibility != Doesn't live in area
      * Address Eligibility != Not sure
      * Address Eligibility != **Select One?**
      * Program Site = Worcester
    - **​​​​​​​**Set field Address Eligibility (renamed Location Eligibility, but API name is Address\_Eligbility\_\_c) as Computed Decision: Ineligible
* Notes:
  + The Select One under both Immediate Action lists is likely caused by deactivating the Picklist option "Override: Eligible" on 1/28/2020. This should just be removed from the criteria.
  + Does it make sense to combine the zip code eligibility Process Builders
  + Last modified 2/7/2017

**Add BL Site to Org--Development Automation**

* Only when a record is created
* Criteria Name: Contact is Created
  + Contact Record Type Name = C&P Online AND
  + Primary Contact = boolean TRUE
* Immediate Action: Update Household
  + Update the household related to (parent of) the Contact
  + BL Site\_Org filled by case formula:
    - Evaluate [Contact].BL\_Site\_\_c and fill BL Site\_Org
    - Boston = Boston
    - Worcester = Boston
    - New York = New York
    - Chicago = Chicago
    - National = National
    - Expansion = Expansion
    - Else result = blank " "
* ​​​​​​​​​​​​​​Notes:
  + Is this still necessary? Are we still entering Worcester Contacts or Expansion Contacts?
  + Check with Jenn and Harleen before updating
  + Last updated 4/27/2017

**Donation**

**Opportunity is Updated--Development Automation**

* **​​​​​​​**When a record is created or edited
* Criteria Name: Is C&P Donation
  + Record Type Name = Donation
  + CnP\_PaaS\_\_SKU\_\_c = DON
  + BL\_Site\_\_c != Blank
* Action Name: Update Campaign
  + On the opportunity that started the PB, set the campaign
  + Campaign ID = 7012A000001N2Tm
* Criteria Name: Have key fields changed on Intacct sync
  + Intacct Order Number is not null AND at least 1 of the following Donation (Opportunity) fields is changed
  + Amount
  + Close Date
  + Stage
  + BL Site
  + Revenue Type
* Immediate Action: Send Email Alert
  + Email Alert: Donation\_Key\_Data\_has\_Changed
* Notes:
  + Last Modified 1/24/2020

**Employment (Experience) Record**

**Employment is Updated--Needs to be revisited with changes to Employment/Experience FD**

* When record is created or edited
* Stanza 1: Is FD
  + When the First Destination field is not null, if the First Destination Record on the parent Program Record is blank, copy the ID of the Employment Record that started the PB into the First Destination Record lookup field. And set FD reporting date fields with today's date if critical FD fields are not blank and the FD record is not "No, Still Looking" or "No, Not Looking"
* Notes:
  + This PB will need to be revisited if we move away from using the record to report on the \*absence\* of a First Destination. We will need to rework the Date setting in the 2nd action. Last modified 1/25/2020.

**Event**

**New Event -- Run Completed Events This Year DLRS**

* **​​​​​​​**Only when a record is created
* Stanza 1: Event has Start Date Time
  + If StartDateTime is not blank, then 0 Days after StartDateTime check off "Update Aggregation"
* Notes:
  + The Update Aggregation field is part of the criteria for the Completed Events DLRS. This scheduled action on the PB helps us get around the issues with the Scheduled DLRS timing out and the Real Time without the PB not counting correctly. Last modified 10/5/2020.

**Payment**

**Copy BL Site from Opp and paste into BL Site on Payment Record--Dev Automation**

* Only when a record is created
* Stanza 1: BL Site and Fund are not blank
  + If BL Site and Fund on the Opportunity (Donation) are not blank, (and BL Site on the payment is blank) then copy the value from BL Site on the Donation to BL Site on the Payment, (and Fund on the payment is blank) then copy the value from Fund on the Donation to Fund on the Payment. BL Site and Fund are considered separately. EVALUATE NEXT CRITERIA
* Stanza 2: Payment is from C&P
  + If Order Number (on Opp) is not blank, set Distribution Fiscal Year, Check/Reference Number, and Payment Method on the Payment.
* Notes:
  + This is a Development automation designed by Jenn. DO NOT TOUCH. Last modified 9/2/2020.

**Program Meeting**

**Program Meeting Engage Date is Changed**

* When a record is created or edited
* Stanza 1: Meeting Date Time is Empty
  + If Program Meeting DateTime field is blank and Engage Date is changed, then enter a placeholder time on the date of the Engage Date in Program Meeting DateTime. EVALUATE NEXT CRITERIA
* Stanza 2: If Eligible Engagement Set Last Meeting
  + If Program Meeting Engage Date is not blank and Meeting Status is Completed and All Services Attached to Meeting is greater or equal to 1, then update Last Meeting Date (Access) with Meeting DateTime. (Make sure that the new Engage Date is not "earlier" than the current date first).
* Notes:
  + The Last Meeting Date (Access) field is a date time field so we need to use the Program Meeting DateTime field. Stanza 1 confirms that there is a value in that field. As of FY 21, only Access is using the Program Meeting object (Success is using Events). Deactivate this if Access also switched to Events. Last modified 3/23/2020.

**Meeting Reschedule**

* When a record is created or edited
* Stanza 1: Meeting is Scheduled or Completed
  + When Program Meeting Status is either Scheduled or Completed, copy the Engage Date into Date Before Reschedule.
* Stanza 2: Meeting is Rescheduled
  + When the Meeting Status is Changed and the value is Rescheduled, create a \*copy\* of the original Program Meeting and set the Status to "Rescheduled" using "Date Before Reschedule" to populate Engage Date. Then change the Meeting Status on the original Program Meeting back to "Scheduled."
* Stanza 3: Meeting Missed Not Rescheduled
  + When the Meeting Status is Changed and the value is Missed - Not Rescheduled, then on the related Program Tasks, find the Program Meeting field and insert a blank value.
* Notes:
  + This is a very clever PB but only applies to Access records as of FY 21. Stanza 2 allows for a record that the Program Meeting was rescheduled without needing to re-parent the Program Tasks (Services) to a new meeting. Stanza 3 "frees" the attached Program Tasks (Services) so they can be attached to another Program Meeting. Last modified 5/9/2019.

**Set Program Record to Scheduled When 1st or Checklist Meeting Scheduled--Revisit with the redesign of the Intake Process and Student Facing App**

* When a record is created or edited
* Stanza 1: 1st Mtg or Checklist Mtg is Created
  + When Program Meeting Status is Scheduled and the related Program Record Stage is Confirmed and the Meeting Type is either 1st Meeting or Checklist Meeting, change the Stage on the related Program Record to Scheduled.
* Notes:
  + This PB no longer applies to Success, just to Access. We can remove the Checklist Meeting option from the PB, but we will need to revisit this when we revisit the Intake Process and the redesign the student facing application. This is meant to show that the student is scheduled for an initial meeting and changes the Stage. Last modified 6/6/2019.

**Program Note**

**Program Note Update--Revisit with the redesign of the Intake Process and Student Facing App**

* When a record is created or edited
* Stanza 1: Intake Contact Attempt
  + When the Program Note Category is Intake Contact Attempt, update the Last Remote Contact field on the parent Program Record with Note Date from the Program Note.
* Notes:
  + This is an older PB that only applies to Access as of FY 21. Success is now using the Task object to record Contact Attempts. Will need to revisit as part of the redesign of the Student facing application. Last Modified 8/28/2020.

**Program Record**

**Access Only Checkbox-----DEACTIVATE THIS ONE**

* When record is created or edited
* Stanza 1: Access Record Marked as Completed
  + When an Access Record is marked as Completed, and the "Create Success Record" checkbox is \*unchecked,\* check off the "Access Only" checkbox.
* Stanza 2: Success Standard Record Marked Nonmatriculated
  + When an Access 2 Success (formerly Success Standard) is marked as Nonmatriculated, check off the "Access Only" checkbox
* Notes: Last modified 3/6/2019. This PB is made redundant by the Student Progressions field Student Type that uses the actual Program Record to determine if a student is Access Only or Success Direct or Access to Success. Candidate for deactivation.

**Current Academic Term is Changed---Revision Needed**

* When a record is created or edited
* Stanza 1: Current Academic Term is Changed
  + When the Current Academic Year or Current Academic Term on a Success record is changed, find the new "Current Semester" (Academic History Record) and update 2 fields: Update PR Current Semester Data = TRUE and **Recalculate Timeline = TRUE**
  + Update PR Current Semester Data on the AHR will trigger the "Current Academic Semester is Updated" Process Builder and pull the data from the current semester onto the Program Record (enrollment status, college attending, credits data etc.)
* Stanza 2: College Credits to Graduate is Changed
  + When College Credits to Graduate is Changed, check off Recalculate Timeline on the Current Semester.
* Notes: Needs revision. The Is Current Semester field on the AHR is a formula field. This has worked so far but would be better to not depend on a formula field. Also, will need to remove the **Recalculate Timeline**portion from Stanza 1 and completely remove Stanza 2. This is a trigger for a deprecated Process Builder. Last modified 12/6/2018.

**Update Task Owner when Advisor is Changed**

* When a record is created or edited
* Stanza 1: Program Record Reassigned to new Advisor
  + When the advisor on a Success record is not blank and is changed, reassign all the open tasks to the new advisor.
* Stanza 2: Assessment Date No SMS
  + When a Success Record has a value in "Date to Send Assessment" but the SMS Email Address field is blank,
    - 12 hours after the Date to Send Assessment, send the Winter assessment email (link to Assessment survey). This will send around noon on that day.
    - 60 days after Date to Send Assessment, null out Date to Send Assessment.
* Stanza 3: Assessment Date w SMS - MA
  + When a Success record has a value in Date to Send Assessment and a value in SMS Email Address and is from Program Site Jamaica Plain, Worcester, or Dorchester:
    - 12 hours after the Date to Send Assessment, send the Winter assessment email (link to Assessment survey). This will send around noon on that day.
    - 12 hours after Date to Send Assessment, send MA\_2020\_Winter\_Assessment\_Success\_Text\_1 (shortened, text-friendly version of the email)
* Stanza 4: Assessment Date w SMS - NY
  + When a Success record has a value in Date to Send Assessment and a value in SMS Email Address and is from Program Site New York City:
    - 12 hours after the Date to Send Assessment, send the Winter assessment email (link to Assessment survey). This will send around noon on that day.
    - 12 hours after Date to Send Assessment, send NY\_2020\_Winter\_Assessment\_Success\_Text\_1 (shortened, text-friendly version of the email)
* Stanza 5: Assessment Date w SMS - CHI
  + When a Success record has a value in Date to Send Assessment and a value in SMS Email Address and is from Program Site Chicago:
    - 12 hours after the Date to Send Assessment, send the Winter assessment email (link to Assessment survey). This will send around noon on that day.
    - 12 hours after Date to Send Assessment, send CHI\_2020\_Winter\_Assessment\_Success\_Text\_1 (shortened, text-friendly version of the email)
* Stanza 6: Access Survey CHI
  + When an Access Record has a value in Date to Send Access Survey and is from Program Site Chicago:
    - 12 hours after Date to Send Access Survey, send CHI\_Send\_Access\_2020\_21\_Survey email alert.
* Stanza 7: Access Survey MA
  + When an Access Record has a value in Date to Send Access Survey and is from Program Site Jamaica Plain, Worcester, or Dorchester:
    - 12 hours after Date to Send Access Survey, send MA\_Send\_Access\_2020\_21\_Survey  
      email alert.
* Stanza 8: Acess Survey NY
  + When an Access Record has a value in Date to Send Access Survey and is from Program Site New York City:
    - 12 hours after Date to Send Access Survey, send NY\_Send\_Access\_2020\_21\_Survey  
      email alert.
* Stanza 9: New Applicant is Under Review-Create Portal User
  + When a Program Record with Program Year 2021 - 22, Student is not blank (has a parent Contact record), Stage = Under Review, and the Linked Intake User on the parent Contact record \*IS\* blank, create a portal user for the Apply community (Digital Experience).
* Notes: this is meant to allow the new advisor the ability to see and edit the tasks assigned to their new students. We previously had reports of advisors not able to edit the tasks for their students when the advisors was changed (because the tasks were assigned to previous advisors). The email and SMS alerts for each site/program should be mutually exclusive. The Linked Intake User is blank parameter for stanza 9 is a new addition in March 2021 to avoid "duplicate username" error messages when records were changed to Under Review \*after\* a user account already existed. See **Add Linked Intake User to Contact on Create of User**Process builder below for how this is set. Last modified 3/19/2021.

**Deploy Tasks for Success---Revision Needed (Employability Check-Ins can be removed?)**

* When a record is created or edited
* Stanza 1: Deploy Tasks is checked
  + When Deploy Tasks is checked and Advisor is not blank, create the following 10 open tasks related to the Program Record and assigned to the Advisor:
    - September Check-In, Fall Bill Paid, Enrollment for Next Semester, End of Fall Semester, Reflective Conversation, Confirm Spring Bill Paid, Plan for Fall Registration, Spring Wrap Up, Fall Employability Check-In, Spring Employability Check-In
* Stanza 2: Add to Program Event Is Not Blank  
  + When the Add to Program Event lookup field on the Program Record is not blank (has a Program Event in the field), create a Program Event Participant record. Add lookup to Program Record and to Program Event, populate First Name, Last Name (from Contact via lookup relationship), copy Event Date and Event Type from the Program Event.  
    ​​​​​​​
* Notes: Advisor must be filled in for this to fire because Assigned To on the tasks cannot be blank. This is meant to create tasks in advance for advisors and ensure that they are reportable. The reportable field is Program Required Task. This field is \*not\* filled for the 2 Employability Check-Ins and these will likely be removed/replaced. Last modified 8/15/2020.

**Check Success Direct box on Create--Revision Needed Along with New Student-Facing Application--DEACTIVATED**

* When a record is created or edited
* Stanza 1: Record Type is Success
  + When the Program Record is Success and is created by the Guest Site User, check off the Success Direct checkbox
* Notes: This is meant to indicate that a Success record is Sucess Direct when the student fills out the student application. It does not account for Access students who mistakenly fill out a new SD application (they should actually be A2S and do not need to complete another application after the Access one). Is this still necessary with the Student Type field in the Student Progressions? Could we find a better workaround with the new version of the student-facing application e.g. set in FormAssembly? Last modified on8/14/2017

**Access to Success Record Clone**

* When a record is created or edited
* Stanza 1: Create Success is Checked
  + When the "Create Success Record" is checked on an Active or Completed Access record, create an Access to Success record copying multiple fields from Access to fill on the Success record.
* Notes: This is meant to allow the Access advisor to create a Success record for an Access student who will be continuing on to Success. It needs to be updated each year to move the Program Year forward e.g. from 2019 - 20 to 2020 - 21. Last modified 5/27/2020.

**Progress Toward Degree Changes---Will be updated soon for "stricter" percentages**

* When a record is created or edited
* Stanza 1: Progress Changes
  + When Progress Toward Degree is changed, update the College Progression Year field using the following values from Progress Toward Degree:
    - Greater or equal to .70 = Senior
    - Greater or equal to .45 = Junior
    - Greater or equal to .20 = Sophomore
* Notes: This PB is setting the College Progression Year (Academic Standing) based on the credit accumulation out of the college credits to graduate (Progress Toward Degree = College Credits Earned / College Credits to Graduate). The more "generous" percentages are a holdover from when these would also create Employability Milestones (old style Program Milestones custom object) specific to Freshman, Sophomore etc. Last modified 12/6/2018.

**Success Student is Active**

* When a record is created or edited
* Stanza 1: Success Student is made Active
  + When a Success student is made Active for the first time, set critical fields on the Success Program Record like Program College Year = Year 1, Current Academic Term/Year = Fall 2020 - 21 etc and triggers "Provision Year 1" trigger that creates the Year 1 Program Year and Fall/Spring Academic History Records for Year 1. Also copies College Attending into Starting College field and creates the 3 "seed" Employability tasks: Identified values, interests & skills; Establish min 1 new connection related to career path of interest; and Understand mechanics of a resume and has initial resume drafted.
* Notes:
  + This is a key PB for Success and needs to be updated each year to move forward Current Academic Year e.g. from 2019 - 20 to 2020 - 21. Advisor \*does not\* need to be set for this PB to fire and if it is blank the 3 seed tasks will be assigned to BLAdmin Robot as a placeholder until a new advisor is set. This triggers the **Update Task Owner when Advisor is Changed** PB above. Last modified 10/12/2020.

**Set College Eligibility based on Target School--Revision Needed as Part of Student App revamp?**

* When record is created or edited
* Stanza 1: Update if College is Null
  + If College Attending is null, set College Attending Eligible field to null
* Stanza 2: College is Target School
  + If College Attending is not null and College Attending Eligible is not already set and the College Attending is a Target School then set College Attending Eligible to "Computed Decision: Eligible"
* Stanza 3: College is Not Target School
  + If College Attending is not null and College Attending Eligible is not already set and the College Attending is NOT a Target School then set College Attending Eligible to "Computed Decision: Ineligible"
* Notes:
  + Stanza 2 has 2 different Immediate Actions for the same thing? Also a "Select One" that is probably a deactivated Picklist value for the field in both Stanza 2 and 3 criteria. We will need to revisit this PB as part of the revamp of the student facing application. Do we still need to set these? The PB is meant to make an educated guess about whether the Success student is attending a target college. This is really only used as part of SD intake but will apply to A2S records as well. Last modified 3/22/2018.

**ACCESS High School Eligibility--Revision Needed as Part of Student App revamp?**

* When a record is created or edited
* Stanza 1: Update if High School is Null
  + If the High School lookup field is blank, set High School Eligible? to blank.
* Stanza 2: High School is Eligible
  + If the record is an Access record and high school is not blank, and the High School org record does not have "Ineligible for Program" checked and High School Eligible? is not already filled in, set High School Eligible? to Computed Decision: Eligible
* Stanza 3: High School is Not Eligible
  + If the record is an Access record and high school in not blank, and the High School org record \*does\* have "Ineligible for Program" checked and High School Eligible? is not already filled in, set High school Eligible? to Computed Decision: Ineligible
* Notes:
  + Only stanzas 2 and 3 check that the record is an Access record. Also a "Select One" that is probably a deactivated Picklist value for the field in both Stanza 2 and 3 criteria. This PB is making an educated guess if a student is eligible or ineligible for the program based on the High School they attended. This is meant for Access records only but Stanza 1 will fire for Success records too. Can we revisit or deactivate this with the revamp of the student facing application? Last modified 7/4/2017.

**SUCCESS High School Eligibility--Revision Needed as Part of Student App revamp?**

* When a record is created or edited
* Stanza 1: Update if High School is Null
  + If High School is blank, set High School Eligible? field to blank.
* Stanza 2: High School is Eligible
  + If the record is a Success record and High School is not blank, and High School Eligible? is not already set, set it to Computed Decision: Eligible
* Notes:
  + Stanza 1 does not check if the record is a Success record and will fire for both Access and Success. This PB is essentially saying that if there is a High School listed, it is eligible. Do we still need this PB? Confirm with Programs. Also, Also a "Select One" that is probably a deactivated Picklist value for the field in Stanza 2. Last modified 7/4/2017.

**Student Competitiveness Updated**

* When a record is created or edited
* Stanza 1: Competitiveness Changed
  + When the Competitiveness Ranking field is changed, set Recalculate Admission Chances to True on related College List records.
* Notes: This PB works with the **Update Combined Competitiveness Ranking** PB on the College List record to recalculate the student's admission chances at a particular school. This PB is focused on a change to the student's competitiveness (as opposed to the school) that would impact their admission chances. It will check the box on all related college list records since a change to the student's competitiveness would change their admission chances at all their schools. We could reduce the overall burden by setting the **Update Combined Competitiveness Ranking**to only update specific College List records, but I don't think there's much we can change on this particular PB to make it more efficient. Last modified 6/6/2018.

**Set College Attending to Not Attending--Needs Programs Review for Relevancy**

* When a record is created or edited
* Stanza 1: Not Attending College box is checked
  + When the Not Attending College checkbox is checked, set the College Attending lookup to the "Not Attending" organization record.
* Notes: Is this still a useful PB for programs? We could reduce the burden by focusing on Access records rather than Success records. Access advisors can't set the College Attending manually since this is controlled by the "Attending" College List record for most students. This is only used in the case where a student is not attending a college. The alternative would be creating a College List record for "Not Attending." Last modified 7/4/2017.

**Program Task**

**Update Meeting Type from Attached Service--Revisit with the redesign of the Intake Process and Student Facing App**

* When a record is created or edited
* Stanza 1: Success Orientation Service Created
  + Defunct as of FY 21
* Stanza 2: Checklist Meeting Service Created
  + Defunct as of FY 21
* Stanza 3: First Meeting Service Created
  + If Access Services on the Program Task is 1st Meeting and the Program Task is tied to a Program Meeting and Program on the Program Task is Access, set Meeting Type on the Program Meeting to 1st Meeting.
* Stanza 4: Packaging Service Created
  + If Access Services on the Program Task is Packaging and the Program Task is tied to a Program Meeting and Program on the Program Task is Access, set Meeting Type on the Program Meeting to App Packaging.
* Stanza 5: Engagement Call/Phone Interview Service Created
  + If the Program Task is tied to a Program Meeting and the Program Task is an Engagement Call for either Access or Success, set Meeting Type to Phone Interview.
* Stanza 6: Success Send-Off
  + Defunct as of FY 21.
* Notes:
  + This PB will need some untangling to remove the Success Stanzas and to remove Success from Stanza 5. Will need to be revisited as part of the updates to the Intake Process and the redesign of the student-facing app. Checklist Meeting and 1st Meeting Stanzas will also trigger **Set Program Record to Scheduled When 1st or Checklist Meeting Scheduled** PB above. Last modified  6/6/2019.

**Task**

**Copy Contact Attempt Method to Contact Method**

* Only when a record is created
* Stanza 1: Contact Attempt is Created
  + When the Subject contains Contact Attempt and Contact Attempt Method is NOT blank and Contact Method IS blank, copy the value from Contact Attempt Method into Contact Method.
* Notes:
  + This is meant to avoid confusion for advisors when they are adding a Contact Attempt, but to make for easier reporting (using Contact Method). Last modified 9/18/2020.

**Employability Milestone Task Sequence**

* When a record is created or edited
* Stanza 1: **Identified values, interests & skills is Completed**
  + When the Task for Identified values, interests & skills is Completed or marked as Not Pursued, create the next task in the sequence: **Narrow career interests to 3 career clusters or less**
  + When the Task for Identified values, interests & skills is Completed only, check off the Program Record checkbox field *EM: Identified values interests skills*.
* Stanza 2: **Narrow career interests to 3 career clusters or less is Completed**
  + When the Task for Narrow career interests to 3 career clusters or less is Completed or marked as Not Pursued, create the next task in the sequence: **Individualized career plan complete (have a goal post graduation and an action plan)**
  + When the Task for Narrow career interests to 3 career clusters or less is Completed only, check off the Program Record checkbox *EM:Narrow career interests to 3 clusters*
* Stanza 3: **Establish min 1 new connection related to career path of interest is Completed**
  + When Establish min 1 new connection related to career path of interest is Completed or marked as Not Pursued, create the next task in the sequence: **Establish min 2 new connections related to career path of interest**
  + **​​​​​​​**When Establish min 1 new connection related to career path of interest is Completed only, check off the Program Record checkbox field *EM: Establish min 1 new connection.***​​​​​​​**
* Stanza 4: **Establish min 2 new connections related to career path of interest is Completed**
  + When Establish min 2 new connections related to career path of interest is Completed or marked as Not Pursued, create the next task in the sequence: **Establish min 3 new connections related to career path of interest**
  + **​​​​​​​**When Establish min 2 new connections related to career path of interest is Completed only, check off the Program Record checkbox field *EM: Establish min 2 new connections.*
* Stanza 5: **Understand mechanics of a resume and has initial resume drafted is Completed**
  + When Understand mechanics of a resume and has initial resume drafted is Completed or marked as Not Pursued, create the next task in the sequence: **Update resume tailored for career opportunities, meets BL standards**
  + When Understand mechanics of a resume and has initial resume drafted is Completed only, check off the Program Record checkbox field *EM: Understand mechanics of & has resume.*
* Stanza 6: **Update resume tailored for career opportunities, meets BL standards is Completed**
  + When Update resume tailored for career opportunities, meets BL standards is Completed or marked as Not Pursued, create the next task in the sequence: **Create LinkedIn Profile, meets BL standards**
  + When Update resume tailored for career opportunities, meets BL standards is Completed only, check off the Program Record checkbox field *EM: Update resume tailored for career op.*
* Stanza 7: **Create LinkedIn Profile, meets BL standards is Completed**
  + When Create LinkedIn Profile, meets BL standards is Completed or marked as Not Pursued, create the next task in the sequence: **Understand key elements of job search process**
  + When Create LinkedIn Profile, meets BL standards is Completed only, check off the Program Record checkbox field *EM: Create LinkedIn Profile meets BL.*
* Stanza 8: **Understand key elements of job search process is Completed**
  + When Understand key elements of job search process is Completed or marked as Not Pursued, creat the next task in the sequence:  **Demonstrate interviewing skills & understand interview processes for field(s)**
  + When Understand key elements of job search process is Completed only, check off the Program Record checkbox field *EM:Understand key elements of job search.*
* **​​​​​​​**Stanza 9: **Demonstrate interviewing skills & understand interview processes for field(s) is Completed**
  + When Demonstrate interviewing skills & understand interview processes for field(s) is Completed or marked as Not Pursued, create the next task in the sequence: **Apply & interview for min 3 career related opportunities**
  + When Demonstrate interviewing skills & understand interview processes for field(s) is Completed only, check off the Program Record checkbox field *EM: Demo interview skills gets process.*
* ​​​​​​​Stanza 10: **Individualized career plan complete (have a goal post graduation and an action plan) is Completed**
  + When ​​​​​​​Individualized career plan complete (have a goal post graduation and an action plan) is Completed only, check off the Program Record checkbox field *EM:Individualized career plan complete.*
* *​​​​​​​*Stanza 11: **Establish min 3 new connections related to career path of interest is Completed**
  + When Establish min 3 new connections related to career path of interest is Completed only, check off the Program Record checkbox field *EM: Establish min 3 new connections*.
* Stanza 12: **Apply interview for min 3 career related opportunities is Completed**
  + **​​​​​​​**When Apply interview for min 3 career related opportunities is Completed only, check off the Program Record checkbox field*EM: Apply interview for min 3 career opp*
* Notes:
  + This PB is meant to create the next task in the Employability (Experience?) task sequence when the prior one is completed or marked as not pursued. The 3 seed E Tasks are created as part of the Success Student is Active PB when a Success student becomes Active for the first time. Last modified 10/14/2020. Updated 2/24/2021 to include actions/stanzas 10-12 to also check off corresponding checkboxes on Program Record.

**Copy FAFSA Submitted Date to Program Record**

* When a record is created or edited
* Stanza 1: Submit FAFSA Task is Completed
  + When the Submit FAFSA Task has an Activity Date and is attached to a Program Record and is marked as Completed or Not Pursued, copy the Activity Date from the Task into the Program Record field Success Date FAFSA Submitted.
* Stanza 2: Reflective Conversation is Completed
  + When the Reflective Conversation Task has an Activity Date and is attached to a Program Record and is marked as Completed, copy the Activity Date from Task into the Program Record field. Added to the Process Builder on 11/25/2020.
* Notes:
  + The Success Date FAFSA Submitted field is then read by the formula field FAFSA Filing Date Captured which assesses if the FAFSA was submitted in the current academic year. This is then shown on the PBI dashboards. Last modified 11/6/2020

**Add Program Record Lookup to Task on Create or Edit**

* Only when a record is created
* Stanza 1: Task is Related to Program Record
  + When the Related To field (WhatId) on the Task is a Program Record (starts with a2q), copy the related ID (WhatId) into the Program Record lookup field on the Task
* Notes:
  + This PB is meant to make reporting easier by making the Program Record fields accessible via lookup. The Related To field does not support this. Last modified 7/28/2020.

**User**

**Add Linked Intake User to Contact on Create of User**

* Only when a record is created
* Stanza 1: Portal User Account is Created
  + ​​When a user account record is created and Contact ID is not blank and Profile = Applicant Community User, copy the user ID (from the newly created user account record) onto the field "Linked Intake User" on the related Contact.
* Notes:
  + Created on 3/19/2021. Needed to check that user does not already exist when a Program Record is changed to Under Review, triggering the "Create New User Account" stanza.