**Transactional Data for Managers - PRE 2020. Reference ONLY**

This contains a curated list of historic reports for reference only. Please refer to the Program Sharepoint for an updated, curated version of this list.

The details of management reports.

[High School SAT](https://na88.salesforce.com/00O1Y000006pLgq)

* Used for: Listmaking
* Used by: Access
* Reason: Many Access students haven't yet taken their SATs when listmaking begins.  It's helpful to advisors to have an average by high school to use as a general guide.
* Data Included: the last 2 years of Access students who matriculated (e.g. Stage is Inactive or Completed) where we have a composite SAT score.
* Data displayed: Site, high school, # students at each high school, average highest composite SAT score

[2019-20 Colleges by Competitiveness Rank](https://na88.salesforce.com/00O1Y000006pLcn)

* Used for: Listmaking
* Used by: Access
* Reason: Some Access students don't have strong preferences or know where to start with list building. Making suggestions by matching the student's competitiveness with a school's competitiveness can be a helpful place to start.
* Data Included: the current year's college data record for any college where we have a competitiveness rating
* Data displayed: Competitiveness ranking, college name, college state

[NY EOP by SAT and GPA](https://na88.salesforce.com/00O1Y000006pLhJ)

* Used for: Listmaking
* Used by: Access in New York
* Reason: New York has an Opportunity Program that impacts admissions for certain students. Students from the prior academic year who were extended EOP offers can be a useful guide during listbuilding in the current academic year.
* Data Included: the prior year's college list record for any student where OP Program Status is "Academically Eligible" or "OP Docs Submitted"
* Data displayed: College Name in a matrix by GPA ranges and SAT ranges. Colleges may appear more than once - for example, for SAT in the 800s and GPA in the 2.5 - 3.0 rage and SAT in the 900s and GPA in the 2.0 - 2.5 range.

Recruitment - Contact Attempts ([Access report](https://na88.salesforce.com/00O1Y000006pLkI) | [Success report](https://na88.salesforce.com/00O1Y000006pLkX))

* Used for: Recruitment
* Used by: Access and Success
* Reason: Recruitment is aided by personal outreach to students. This report shows recruitment outreach ("remote contacts") so that mangers can help ensure students are getting contacted in a timely manner and those with several contacts but no progress on recruitment are being ushered out of the system.
* Data included: applicants for the current academic year whose stage is "Under Review"
* Data displayed: Success or Access, student's first and last name, intake advisor, # days since last remote contact, date of last remote contact, # remote contacts, created date (to see when the student applied)

Non-Matriculated Students ([Access report](https://na88.salesforce.com/00O1Y000006pLkN) | [Success report](https://na88.salesforce.com/00O1Y000006pLkS))

* Used for: Recruitment
* Used by: Access and Success
* Reason: This report assists in data quality and recruitment management - while we don't currently capture reasons for nonmatriculation, advisors and managers can use this list to investigate if needed.
* Data included: applicants for the current academic year whose stage is "Nonmatriculated"
* Data displayed: Success or Access, student's first and last name, summer advisor, high school, college attending, special initiatives, fee for service partner, partner program involvement

Past Engagements Not Closed ([Access report](https://na88.salesforce.com/00O1Y000006pM3A) | [Success report](https://na88.salesforce.com/00O1Y000006pM35))

* Used for: Ongoing data quality monitoring
* Used by: Access and Success
* Reason: This report assists in data quality for engagements. Advisors are supposed to either close or reschedule meetings as they occur, and this report helps find data that doesn't meet those requirements. Engagements that are not in stage = "Completed" do not count toward an advisor's KPIs.
* Data included: Engagements that are in the past and still showing a status of "Scheduled" for the current year's Active students
* Data displayed: Student's full name, advisor's full name, meeting status, engagement date, meeting method, related services

[Birthday Mailing List](https://na88.salesforce.com/00O1Y000006pM3F)

* Used for: Ongoing student engagement
* Used by: Success
* Reason: Students with a birthday in the current month are sent a birthday card.
* Data included: Students whose birthday falls in the current month and who are active in the current academic year.
* Data displayed: Student's birthdate, first name, last name, preferred name, advisor name, college attending, college address last updated, preferred mailing address,

[Final College List for Recruiters](https://na88.salesforce.com/00O1Y000006pMV4)

* Used for: Supporting student college choice
* Used by: Access
* Reason: Recruiters often ask for a list of students interested in a particular college.
* Data included: Active Access students' final college list records.
* Data displayed: Student's  first name, last name, college name from final list, NY OP Program Status, Max Composite SAT, email, alternate email, phone

[Success Fee for Service and SI List](https://na88.salesforce.com/00O1Y000006pMVE)

* Used for: Providing information for partners
* Used by: Success
* Reason: Advisors often need to identify students linked to a specific Fee for Service or Special Initiative partner.
* Data included:  Success students with any of: Fee for Service, Special Initiative, or Partner Program Involvement
* Data displayed: Student's  first name, last name, college attending, stage, fee for service partner, special initiative, partner program involvement

Early Application Students

* Used for: Supporting student college choice
* Used by: Access
* Reason: Recruiters often ask for a list of students interested in a particular college.
* Data included: Active Access students' final college list records where the student has an Alternative Admissions status of any sort, or a FAFSA Deadline of < 1/1
* Data displayed: Student's  first name, last name, alternate admissions, college name from final list, FAFSA deadline, Op Program Status, Aid Round 1 Complete

[Success FAFSA Filing Date](https://na88.salesforce.com/00O1Y000006pMVT)

* Used for: Supporting student financial aid applications
* Used by: Success
* Reason: Success advisors need to assist students with filing their FAFSA on time
* Data included: Active Success students
* Data displayed: Student's  first name, last name, college name, FAFSA filing date (note: this is the date that the student filed their FAFSA, not the date it's due)

[School Counselor Report](https://na88.salesforce.com/00O1Y000006pNL0)

* Used for: Sharing student progress with high schools/school (guidance) counselors
* Used by: Access
* Reason: Promoting 2 way data sharing and communication to ensure consistent messaging to students. School partners can be integral in re-engaging students throughout the year.
* Data Included: Active Access students
* Data Displayed: ProgramRecordID18, Program Site, Student's First Name, Last Name, High School, Guidance Counselor: Full Name, Final List Rating, Common App Essay Status, All Essays Complete, College Application Packaged By, College App Packaged Date, FAFSA Filing Date, FAFSA Processed, CSS Filing Date, College, Last Meeting, Next Meeting

[School Counselor College List Report](https://na88.salesforce.com/00O1Y000006pNLA)

* Used for: Sharing student college lists with high schools/school (guidance) counselors
* Used by: Access
* Reason: Promoting 2 way data sharing and communication to ensure consistent messaging to students. School partners will occasionally know the application status of a school or schools and we can update the database accordingly.
* Data Included: Active Access students' final list College List records
* Data Displayed: ProgramRecordID18, Program Site, Student's First Name, Last Name, High School, Guidance Counselor: Full Name, College Name, Admissions Chances Computed, Alternative Admissions, Date Application Sent, Application Status, Financial Aid Award Status

Engagements for Managers ([Access report](https://na88.salesforce.com/00O1Y000006pO90) | [Success report](https://na88.salesforce.com/00O1Y000006pLhi))

* Used for: How many engagements (meetings) have advisors provided this year?
* Used by: Access and Success
* Reason: Track the number of engagements (meetings) that each program has provided.
* Data Included: Active Access and Success students, respectively, for the current year. Display engagements that have been been completed this academic year. Starting 6/1 for Access and 8/26 for Success.
* Data Displayed: ProgramRecordID18, Student Full Name, Summer Advisor, Advisor, Meeting Status, Engage Date, Meeting Method, Related Services.

Completed Services ([Access report](https://na88.salesforce.com/00O1Y000006pNUM) | [Success report](https://na88.salesforce.com/00O1Y000006pNRI))

* Used for: What Services have advisors provided this year? Are we providing a particular service more frequently?
* Used by: Access and Success
* Reason: Uncover trends in the services advisors use so that we can assess if some services are used more because of need or advisor preference.
* Data Included: Active Access and Success for the current year. Display Services tied to Engagements completed this academic year. Starting 6/1 for Access and 8/26 for Success.
* Data Displayed: ProgramRecordID18, Program State, Program Year, College Attending for Display (Success Only), College Enrollment Status (Success Only), Program Meeting: Engage Date, High School for Display (Access exclusively).

Success Boston TBF CCI Process (MA Only):

[TBF CCI Year 1 Candidates](https://na88.salesforce.com/00O1Y000006pNkP)

* Used for: Which students are candidates for the Success Boston partnership supported by the Boston Foundation.
* Used by: MA Success
* Reason: We need to identify students who are eligible for the Success Boston initiative and mark their records with the TBF CCI checkbox for reporting and the CCI ID. The CCI ID is the external ID used by the Success Boston Salesforce instance.
* Data Included: Active Year 1 Success students for the current year in MA (Jamaica Plain, Dorchester, Worcester). Where they attended a high school in MA that is in the Boston Public School (BPS) system or the Massachusetts Charter Public School Association (MCPSA) in Boston. The TBF CCI Year 1 Candidates report excludes specific high schools that are part of MCPSA, but not located in Boston.
* Data Displayed: ContactID18, ProgramRecordID18, Student Full Name, College Attending, Advisor, High School, High School: MCPSA, High School: BPS, Stage, College Progression Year, Program College Year, TBF Cci, CCI ID

[TBF CCI Year 1 Students Who Need CCI ID](https://na88.salesforce.com/00O1Y000006pNlS))

* Used for: Which Year 1 Students have we identified as participating in Success Boston (TBF CCI = True)
* Used by: MA Success
* Reason: We need to identify students who are participating in the Success Boston initiative coordinate with The Boston Foundation to add their CCI ID (Success Boston external ID) to the corresponding student record (Contact) in our Salesforce instance.
* Data Included: Active Year 1 Success students for the current year in MA (Jamaica Plain, Dorchester, Worcester) where TBF CCI = True.
* Data Displayed: ContactID18, ProgramRecordID18, Student Full Name, College Attending, High School, Stage, Program Site, CCI ID.

Engagements Scheduled Next Week ([Access report](https://na88.salesforce.com/00O1Y000006pOBk) | [Success report](https://na88.salesforce.com/00O1Y000006pOBf))

* Used for: What engagements are scheduled for next week?
* Used by: Access and Success
* Reason: To keep track of who advisors are meeting with next week and what will happen in those meetings.
* Data Included: Active students for the current year with a meeting with an Engage Date in the next week where the Meeting Status is Scheduled.
* Data Displayed: Student Name, College for Success, High School for Access, Meeting Status, Engage Date, Meeting Method, Related Services, Program State