**Access Advisor Caseload**

The **Advisor Caseload dashboard**is one of the core reports used by the Programs teams across all regions. Its main purpose is to provide advisors with a by-name list of students, and to highlight the corresponding Critical Data captured by our advisors in the students' Salesforce records.

The dashboard contains 4 main Navigation components:

1. [Quick Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#quick-slicer-menu)
2. [Expanded Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#expanded-slicer-menu)
3. [Cards - including Applications/Aid/Decision toggle](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#cards)
4. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#table-view)

The Data Elements featured are:

1. [Student Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#student-name)
2. [Student Phone Number & Email](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#preferred-phone-number-and-email)
3. [High School](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#high-school)
4. [Days Since Last Meeting](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#days-since-last-meeting)
5. [Next Meeting Date](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#next-meeting-date)
6. [List Status](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#list-status)
7. [Common App Essay Status](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#common-app-essay-status)
8. [All Essays Complete](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#all-essays-complete)
9. [% Apps Submitted](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#apps-submitted)
10. [Packaged By](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#packaged-by)
11. [Packaging Date](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#packaged-date)
12. [Advisor Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#advisor-name)
13. [List Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#list-scheduling-priorities)
14. [Essay Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#essay-scheduling-priorities)
15. [Packaging Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#packaging-scheduling-priorities)
16. [% Schools FAFSA Submitted](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#schools-fafsa-submitted)
17. [FAFSA Processed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#fafsa-processed)
18. [CSS Status](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#css-status)
19. [NCP Status](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#ncp-status)
20. [College Attending](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#college-attending)
21. [Alternative Admissions](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#alternative-admissions)
22. [Financial Aid Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#financial-aid-scheduling-priorities)
23. [FAFSA Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#fafsa-scheduling-priorities)
24. [CSS Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#css-scheduling-priorities)
25. [% Decisions Received](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#decisions-received)
26. [# Admitted Schools](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#admitted-schools)
27. [% Financial Aid Award Letters Received](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#financial-aid-award-letters-received)
28. [EFC](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#efc)
29. [Affordability Ranking](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#affordability-ranking)
30. [Commitment Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#commitment-scheduling-priorities)
31. [Affordability Scheduling Priorities](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#affordability-scheduling-priorities)
32. [% More Affordable Commitments](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Access-Advisor-Caseload.aspx#more-affordable-commitments)​​​​​​​

A video guide for this dashboard is available [here](https://web.microsoftstream.com/video/629042e4-53ea-40ba-959a-7b63516e4a6c)!

Access Advisor Caseload Dashboard

**Navigation**

**Quick Slicer Menu**

* **Definition**: The Quick slicer menu is a report element that allows you to view up to 9 different filtering options for navigation within the dashboard's main page
* **Purpose:**Allows us to filter (slice) the data by a variety of options, such as a student's name, enrollment status, etc. Unlike the Expanded slicer menu, the Quick slicer menu makes the most relevant/most frequently used slicers easier to access within the report​​​​​​​
* **Example:​​​​​​​**​​​​​​​

Example of Quick slicer menu in the Access Advisor Dashboard

**Expanded Slicer Menu**

* **Definition**: The Expanded slicer menu is a report element that allows you to view a complete list of all the different reporting options
* **Purpose:**Allows us to filter (slice) the data by a variety of options such as a student's name, enrollment status, etc. Unlike the Main slicer menu, the Expanded slicer menu offers more options for filtering the data and allows the user to further customize their report beyond the 9 slicers previewed in the Quick slicer menu​​​​​​​
* **Example:**

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To access the Expanded slicer menu, press the "More" button located on the right Bottom corner of the Quick slicer menu.

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**Cards**

* **Definition**: Cards are a report element that highlight summarized data
* **Purpose:**Allows us to quickly visualize key information (i.e. total # of students in a certain category) ​​​​​​​
* **Example:**

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The cards change on the basis of the Tab/Toggle selected

**Table View**

* **Definition**: The Table View is a tabular representation of student data
* **Purpose:**Allows us to see a by-name list of students and their relevant data​​​​​​​
* ​​​​​​​**Example:​​​​​​​**​​​​​​​

This table is from the Applications Toggle

This table is from the Aid Toggle

This table is from the Decision Toggle. The table fields change based on the toggle or the tab chosen.

**Data Elements**

**Student Name**

* **Definition**: The preferred first and last name of a student, as it is captured during the intake process
* **Why do we need it?**to be able to identify our students and assign them to caseloads ​​​​​​​
* **Where do I enter this information?**This data point is captured during Intake and, generally speaking, should not change once the student is enrolled in the Access Program. If you need to make changes to a student name, you can do so in the Contact Information widget
* **Note:** if a student's legal first name differs from their preferred name, their legal name will be listed in a separate field on the Contact Information widget for reference during Financial Aid​​​​​​​​​​​

**Preferred Phone Number and Email**

* **Definition**: The preferred phone number and email for a student, as it is captured during the intake process
* **Why do we need it?**Allows us to communicate with our students through phone calls, text messages, or emails​​
* **Where do I enter this information?**These data points are captured during Intake and can be updated in the Contact Information widget if anything changes**​​​​**

**High School**

* **Definition**: The current high school the student is attending
* **Why do we need it?**Knowing a student's high school helps us understand their school hours/dismissal time, travel time to the office, and the school staff who may also be supporting them. Occasionally, we provide updates to high school staff/counselors about their students' progress through the Access program​​​​​​​​​​​​​​
* **Where do I enter this information?**This data point is captured during Intake and, generally speaking, does not change once the student is enrolled in the Access Program

**Days Since Last Meeting**

* **Definition**: The number of days that have passed since an advisor last met with a student
* **Why do we need it?**Helps us make sure that our students are ​​​​​​​receiving supporting services from Bottom Line on a regular basis
* **Where do I enter this information?**This is calculated automatically for you. We use the last meeting recorded in the student's Salesforce record as our reference point. **​​**​​​​​​​​​​​​​​

**Next Meeting Date**

* **Definition**: The day, month, and year when the student has scheduled their next meeting with a Bottom Line advisor
* **Why do we need it?**Helps us make sure that our students are ​​​​​​​receiving supporting services from Bottom Line on a regular basis​​​​​​​, and prioritize outreach to students who are not scheduled for a future meeting​​​​​​​
* **Where do I enter this information?**You can click the calendar icon to "Add an Engagement" from any tab on a student's profile in Salesforce. See screenshot, below.**​​​​​​​​​​​**

Enter the date of the meeting in the "Engagement Date" box.

**List Status**

* **Definition**: The approval status of the student's final list (the list of schools the student plans to apply to)
* **Why do we need it?**We believe a strong, balanced, and well-researched list is the best way we can set up our students to have multiple affordable, good-fit colleges to choose from at the end of the year​​​​​​​
* **Where do I enter this information?**When an advisor and student agree that the list is final, the advisor will click the "queue" button on the List tab to notify the manager that the list needs review. Managers will click the eyeball button to select a list rating for the student.

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**Common App Essay Status**

* **Definition**: The status of the student's primary essay, or personal statement
* **Why do we need it?**The college essay represents a significant portion of the work that goes into a college application. We track Common App Essay status in order to help advisors manage each student's progress toward completing and submitting all of their college applications​​​​​​​
* **Where do I enter this information?** Navigate to the Essays tab and click the "Update Common App" button at the top of the screen.

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**All Essays Complete**

* **Definition**: This field captures whether all of the essays the student needs to write (including supplemental writing for individual colleges) is complete
* **Why do we need it?**Essays represent a significant portion of the work that goes into a college application. We track the status of school-specific writing requirements in order to help advisors manage each student's progress toward completing and submitting all of their college applications​​​​​​​
* **Where do I enter this information?**On the Essays tab, select an "Essay Status" for each of the colleges a student is applying to
* **Data Validations & Logic:** "All Essays Complete" will display "Complete" when all of the colleges on a student's final list have an essay status of Final Draft, Approved, or N/A.

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**% Apps Submitted**

* **Definition**: The percentage of schools on the student's final list where they have submitted their college application
* **Why do we need it?**We track application status in order to help advisors manage each student's progress toward completing and submitting all of their college applications ahead of their deadlines. This field provides an at-a-glance view of how close the student is to completing all applications.​​​​​​​
* **Where do I enter this information?** On the Applications tab, choose a value from the dropdown in the "App Form Complete" column for each college.
* **Data Validations & Logic:** A college will count as an application submitted if the value of the "App Form Complete" field for that college says "Submitted - Bottom Line," "Submitted - On Own," or "Submitted - Other."​​​​​​​**​​​​​​​**

**Packaged By**

* **Definition**: A student is considered "Packaged" when they have submitted all of the college applications that are on their Bottom Line-approved final list. "Packaged By" refers to how the student submitted the bulk of their applications - with Bottom Line, On Own, or Other. Entering a value in this field indicates that we consider our responsibility in helping the student with application submission complete.
* **Why do we need it?**To track on a student-by-student and caseload basis who still has outstanding application work to do, vs. who will not need Bottom Line support until they are ready for the next piece of the process​​​​​​​
* **Where do I enter this information?**Choose a value in the College Application Packaged By field, which is near the bottom right in the Academic Information widget**​​​​​​​**

**Packaged Date**

* **Definition**: The date that the student submitted (or finished submitting) all of the college applications on their Bottom Line-approved final list
* **Why do we need it?** This allows us to track who may be ready for post-application follow-up. Additionally, many advisors use this field to enter these dates pre-emptively as packaging meetings are scheduled, in order to get a better picture of how their entire caseload is progressing toward packaging goals ​​​​​​​
* **Where do I enter this information?**Choose a date in the College App Packaged Date field, which is near the bottom left of the Academic Information widget

**Advisor Name**

* **Definition**: The name of the advisor currently assigned to the student's Salesforce record
* **Why do we need it?**Allows us to assign and track caseloads​​​​​​​. Helps ensure accountability for the services provided to our students
* **Where do I enter this information?**Advisor Name is entered in the system when an advisor is first hired. Advisors are assigned to students by a manager or director at the start of each academic year. If your caseload needs adjustments, please contact your Program Director**​**​​​​​​​

**List Scheduling Priorities**

* **Definition**: Students whose final lists are not marked as Approved and are not scheduled for a future meeting
* **Why do we need it?**  To help advisors prioritize their outreach to students who do not have approved lists and are not already on the calendar for an upcoming meeting​​​​​​​
* **Where do I enter this information?**This field is calculated by looking at whether the student has a final list approved and a scheduled meeting with a date in the future

**Essay Scheduling Priorities**

* **Definition**: Students who do not have a final Common App essay and are not scheduled for a future meeting
* **Why do we need it?**To help advisors prioritize their outreach to students who have not finished their essay and are not already on the calendar for an upcoming meeting
* **Where do I enter this information?** This field is calculated by looking students who have an essay status of blank, Brainstorming Complete, Working Draft, or Needs Improvement and no scheduled meeting with a date in the future**​**​​​​​​​

**Packaging Scheduling Priorities**

* **Definition**: Students who have not completed their college applications and are not scheduled for a future meeting
* **Why do we need it?**  To help advisors prioritize their outreach to students who still need to apply to college and are not already on the calendar for an upcoming meeting​​​​​​​
* **Where do I enter this information?**This field is calculated by looking at whether the student has a value in "Packaged By" and a scheduled meeting with a date in the future

**% Schools FAFSA Submitted**

* **Definition**: The % of schools on the student's final list to which the student has submitted a FAFSA application
* **Why do we need it?** Students can submit the FAFSA to up to 10 colleges at a time. There are often instances where the student needs to submit FAFSA to 10 of their schools, wait for the FAFSA to process, and then go in an add the remaining schools on their list. This metric allows us to confirm whether all of the schools the student is applying to have received their FAFSA​​​​​​​
* **Where do I enter this information?**On the aid tab, choose a FAFSA Submitted Date for each college that has received the student's FAFSA​​​​​​​

**FAFSA Processed**

* **Definition**: The student's FAFSA was accepted by Federal Student Aid and has been processed. You will know the student's FAFSA has been processed because a) the student will receive an email stating that their FAFSA has processed and/or the student can access their Student Aid Report when logging into their FAFSA.
* **Why do we need it?**Submitting the FAFSA does not guarantee it will be processed; students need a processed FAFSA ahead of their college's financial aid deadlines.
* **Where do I enter this information?**On the Financial Information widget, choose "Yes" for the FAFSA Processed field.

**CSS Status**

* **Definition**: This field captures who the student submitted their CSS Profile with. The options are "Bottom Line," "On Own," and "Other." A blank entry means the CSS Profile has not been submitted
* **Why do we need it?**  The CSS Profile is a critical piece of the financial aid application process for any students applying to schools that require CSS. They will not be eligible for institutional financial aid without submitting this application​​​​​​​
* **Where do I enter this information?**Choose a value in the "CSS Filed With" field on the Financial Information widget​​​​​​​

**NCP Status**

* **Definition**: This field shows whether or not the student needs to complete NCP requirements as part of their financial aid applications. If a student is applying to at least one CSS School and they are in touch with their non-custodial parent, the field will indicate that they need to complete an NCP Profile. If they are not in touch with their non-custodial parent, the field will indicate that an NCP Waiver is required
* **Why do we need it?**For students who do not live with both parents and are applying to schools that require financial information from non-custodial parents, this requirement is critical to the student receiving a financial aid award letter
* **Where do I enter this information?** On the Household Information tab, indicate in the "NCP Status" field whether or not the student is in touch with their non-custodial parent, if applicable. If the student lives with both parents, you can leave this field blank

**College Attending**

* **Definition**: The college the student will be attending in the fall
* **Why do we need it?**  We need to know the college each student is attending in order to evaluate whether they made a More Affordable college commitment, and to know whether to refer them to the Success or Bluprint program once the Access program is over. Additionally, seeing who has not yet committed to a college helps Access teams prioritize outreach to students who still need support making a decision​​​​​​​
* **Where do I enter this information?**On the decisions tab, choose a value in the College Attending Type for the school the student will be attending. This will automatically update the student's College Attending​​​​​​​**​**​​​​​​​

**Alternative Admissions**

* **Definition**: This field shows whether the student has any schools on their final list where they are applying via an Alternative Admissions program. For example, if a student is applying to two schools via Early Action, the Alternative Admissions field will show "Early Action."
* **Why do we need it?**Alternative admissions applications are generally due earlier than regular decision applications, and many schools also require financial aid applications to be completed earlier in the fall. Knowing who is applying via alternative admissions helps Access Advisors prioritize their service to students to ensure those application and financial aid deadlines are met
* **Where do I enter this information?** On the Applications tab, use the Alternative Admissions dropdown to indicate any schools where the student is applying EA, ED, or via Posse or QuestBridge

**Financial Aid Scheduling Priorities**

* **Definition**: Students who have an earliest financial aid deadline in the next 30 days and the student is not scheduled for a meeting in the future
* **Why do we need it?**  To help advisors prioritize their outreach to students who have financial aid deadlines approaching and are not already on the calendar for an upcoming meeting​​​​​​​
* **Where do I enter this information?**This field is calculated by looking the student's earliest financial aid deadline and checking to see if they have a scheduled meeting with a date in the future​​​​​​​

**FAFSA Scheduling Priorities**

* **Definition**: Students who have not have a processed FAFSA and are not scheduled for a future meeting
* **Why do we need it?**  To help advisors prioritize their outreach to students who still need to finish the FAFSA and are not already on the calendar for an upcoming meeting​​​​​​​
* **Where do I enter this information?**This field is calculated by looking at whether the student has a blank or No in the "FAFSA Processed" field and no scheduled meeting with a date in the future

**CSS Scheduling Priorities**

* **Definition**: Students who have not have a submitted CSS Profile and are not scheduled for a future meeting
* **Why do we need it?**  To help advisors prioritize their outreach to students who still need to submit the CSS and are not already on the calendar for an upcoming meeting​​​​​​​
* **Where do I enter this information?**This field is calculated by looking at whether the students applying to at least 1 school that requires CSS Profile have a value in the "CSS Filed With" field and a scheduled meeting with a date in the future​​​​​​​

**% Decisions Received**

* **Definition**: The % of schools on the student's final list from which they have received an admissions decision (accepted, denied, etc.)
* **Why do we need it?**  This metric gives us a sense of how close a student may be to being able to make a decision. Students who have only heard back from a couple of schools (or haven't heard back from any school) may need additional advocacy from an advisor to help troubleshoot their application status with each school​​​​​​​
* **Where do I enter this information?**On the list or decisions tab, choose a value in the Admission Status field for each school the student has heard back from

**# Admitted Schools**

* **Definition**: The number of schools to which the student has been accepted
* **Why do we need it?**This metric gives us a sense of how close a student may be to being able to make a decision. Students who have not been admitted to any schools late in the spring may need additional advocacy from an advisor to help troubleshoot their application status with each school
* **Where do I enter this information?** On the list or decisions tab, choose a value in the Admission Status field for each school the student has heard back from​​​​​​​**​**​​​​​​​

**% Financial Aid Award Letters Received**

* **Definition**: The % of schools the student has been accepted to from which they have received a financial aid award letter
* **Why do we need it?**  This metric gives us a sense of how close a student may be to being able to make a decision. Students who only have awards from a couple of schools (or haven't heard back from any school) may need additional advocacy from an advisor to help troubleshoot their financial aid status with each school​​​​​​​
* **Where do I enter this information?**On the decisions tab, choose a value in the Financial Aid Award Status field

**EFC**

* **Definition**: The student's Expected Family Contribution, as determined by the FAFSA
* **Why do we need it?**The EFC determines how much need-based aid a student qualifies for. Comparing a student's award letter to their EFC helps us determine if the student received all the aid they are eligible for
* **Where do I enter this information?** Enter the number in the "EFC" field on the Financial Information widget**​**​​​​​​​

**Affordability Ranking**

* **Definition**: Shows of whether the student's financial award letter for the college they will be attending is More, Less, or Least Affordable. This determination is made by the following equation: Cost of Attendance - Scholarships & Grants - EFC = Gap Before Loans, and the ranges are:
  + More Affordable: <$8,500
  + Less Affordable: $8,500-$11,499
  + Least Affordable: $11,500+
* **Why do we need it?**  Our primary outcome for the Access Program is that a certain percentage of our students are making a college commitment that will be financially sustainable and this field is what we use to determine how many students have achieved this outcome​​​​​​​
* **Where do I enter this information?**This information will be generated automatically if the student has an EFC in Salesforce, if the college attending has a Cost of Attendance on file, and if the student's financial aid award has been entered on the award calculator. Note: we know that this means students who are not FAFSA-eligible will not have an Affordability Ranking, because they will not have an EFC

**Commitment Scheduling Priorities**

* **Definition**: Students who do not have a college commitment on file and are not scheduled for a future meeting
* **Why do we need it?**To help advisors prioritize their outreach to students who have not chosen a college and are not already on the calendar for an upcoming meeting
* **Where do I enter this information?** This field is calculated by looking at whether the student has a college with any value in the Attending Status field and a scheduled meeting with a date in the future**​**​​​​​​​

**Affordability Scheduling Priorities**

* **Definition**: Students who do not have an Affordability Ranking on file and are not scheduled for a future meeting
* **Why do we need it?**  To help advisors prioritize their outreach to students who have not submitted the award letter for the college they are attending and are not already on the calendar for an upcoming meeting​​​​​​​
* **Where do I enter this information?**This field is calculated by looking at whether the student has a college with any value in the Attending Status field, an award letter has been entered for that school, and a scheduled meeting with a date in the future

**% More Affordable Commitments**

* **Definition**: The % of students who have received a financial aid award letter from the college they will be attending whose awards have been determined to be More Affordable. This determination is made by the following equation: Cost of Attendance - Scholarships & Grants - EFC = Gap Before Loans, and the ranges are:
  + More Affordable: <$8,500
  + Less Affordable: $8,500-$11,499
  + Least Affordable: $11,500+
* **Why do we need it?**Our primary outcome for the Access Program is that a certain percentage of our students are making a college commitment that will be financially sustainable and this field is what we use to determine what % of students have achieved this outcome
* **Where do I enter this information?** This information will be generated automatically if the student has an EFC in Salesforce, if the college attending has a Cost of Attendance on file, and if the student's financial aid award has been entered on the award calculator. Note: students who are not FAFSA-eligible are not included in the denominator for this percentage