**Advisor Caseload Dashboard**

The [**Advisor Caseload dashboard**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/c31f59ce-1a9a-46f8-afd0-f426d30eb07b/ReportSection8feb699603b0a20b7576)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/Advisor-Caseload-Dashboard.aspx#quick-slicer-menu)
2. [Expanded Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#expanded-slicer-menu)
3. [Cards - including Fall/Spring toggle](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#cards)
4. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#table-view)

The Data Elements featured are:

1. [Student Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#student-name)
2. [Student Phone Number](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#student-phone-number)
3. [Fall/Spring Contact Attempts](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#fall-spring-contact-attempts)
4. [Fall/Spring # of Different Modes of Communication](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#fall-spring-of-different-modes-of-communication)
5. [Fall/Spring Tasks](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#fall-spring-tasks)
6. [Days Since Last Meeting](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#days-since-last-meeting)
7. [Date of Next Scheduled Meeting](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#date-of-next-scheduled-meeting)
8. [Fall/Spring Enrollment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Data-Quality.aspx#fall-spring-enrollment)
9. [Fall/Spring Balance Paid](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#fall-spring-balance-paid)
10. [Fall/Spring % Credits Attempted](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#fall-spring-credits-attempted)
11. [Fall/Spring % Credits Earned](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#fall-spring-credits-earned)
12. [FAFSA Processed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#fafsa-processed)
13. [Winter/Spring Reflective Conversations](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#winter-spring-reflective-conversations)
14. [E-Milestones Completed this Year](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#e-milestones-completed-this-year)
15. [Total E-Milestones completed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#total-e-milestones-completed)
16. [Advisor Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx#advisor-name)

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

Success 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 options featured in the Success Advisor Caseload 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:**

**​​​​​​​**

To access the Expanded slicer menu, click the "More" button located in the bottom-right corner of the Quick slicer menu. The Expanded menu includes additional filtering options beyond the Quick menu's offerings

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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 Success Advisor Caseload Dashboard shows the same three cards regardless of the semester. Displayed data is reflective of the current state.

**Table View**

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

This dashboard shows two table views depending on your semester choice in the toggle. This image shows an example of the Fall table view, which will feature all the data elements relevant to the current Fall semester

This dashboard shows two table views depending on your semester choice in the toggle. This image shows an example of the Spring table view, which will feature all the data elements relevant to the current Spring semester

**Data Elements**

**Student Name**

* **Definition**: The legal 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 Success Program. If you need to make changes to a student name, please make sure to check out the Salesforce Knowledge Base's section on [Contact Information](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx) **​​​​**​​​​​​​

**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 if there are relevant changes to the student's contact information. To learn more about making changes to phone numbers and emails, check out the Salesforce Knowledge Base's section on [Preferred Phones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#preferred-phone) and [Preferred Emails](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#preferred-email)**​​​​**

**Fall/Spring Contact Attempts**

* **Definition**: the number of times an advisor has attempted to reach a student through phone calls, text messages, emails, social media, or any other mode of communication
* **Why do we need it?**to ensure that we are doing everything we can to re-engage students we haven't heard from in a while. We know that sometimes students have something come up in their lives that makes them more hesitant to call us, and that our patience and persistence is key to re-engaging those students so they can continue making progress toward their degree.​​​​​​​​​​​​​​
* **Where do I enter this information?**a thorough description of how to log a Contact Attempt in Salesforce can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#contact-attempts)
* **Data Validations & Logic:** The color-coding for Contact Attempts depends on two other fields and is as follows:
  + If Completed Meetings is equal to 0, then check # Communication Mode
    - If Communication Mode is 3 or more
      * Contact Attempts will be red if the number of attempts is less than 6
      * Contact Attempts will be yellow if the number of attempts is between 6 and 14
      * Contact Attempts will be green if the number of attempts is 15 or more
    - If # Communication Mode is less than 3
      * Contact Attempts will be red if the number of attempts is less than 6
      * Contact Attempts will be yellow if the number of attempts is 6 or more
      * Contact Attempts will NOT turn green if the required number of Communication Modes (3) is not met
  + If Completed Meetings is greater than 0
    - Both Contact Attempts AND # Communication Mode fields will be green

Log in contact attempts by clicking your "Log Contact Attempt" tab and completing all the relevant information

**Fall/Spring # of Different Modes of Communication**

* **Definition**: a count of the different forms of communication through which an advisor has attempted to contact a student. Examples include: phone calls, text messages, emails, social media, etc.
* **Why do we need it?**to ensure that we are doing everything we can to re-engage students through whatever mode of communication they are most receptive to​​​​​​​
* **Where do I enter this information?**This data point is captured through the "Contact Attempt Method" drop-down menu when you log a new Contact Attempt
* **Data Validations & Logic:**The color-coding for Communication Mode depends on 1 other field and is as follows:
  + If Completed Meetings is equal to 0, then check # of Communication Mode
    - If # Communication Mode is 0, the field will be red
    - If # Communication Mode is 1 or 2, the field will be yellow
    - If # Communication Mode is 3 or more, the field will be green
  + If Completed Meetings is greater than 0
    - # Communication Mode will be green ​​​​

Indicate the Contact Attempt Method by selecting the best choice from the drop down menu. Note: All contact attempts will show as a "call" on the student's timeline. Don't worry about this! As long as you indicate the contact method, your work has been saved correctly and you will see it reflected in the Advisor Caseload Dashboard

**Fall/Spring Tasks**

* **Definition**: Tasks are things a student and/or advisor can accomplish on the way to achieving a program outcome. These may happen during or outside of a meeting, with or without Bottom Line's support. The tasks list may include:
  + A service that is required of students at a particular time (e.g. 1st Year Sept Check-In, Senior Year Kick-Off)
  + A reminder to touch base on/log a critical data point (e.g. course registration)
  + A milestone that cannot be measured by other critical data being captured (e.g. E Milestones)
  + Other work/tasks you need to keep track of to help students meet milestones (e.g. submit verification paperwork, register for 2 more classes, review resume, etc.)
* **Why do we need it?**They allow us to track important parts of the services being delivered to our students, and give us a tangible way to track pieces of the work done by advisors ​
* **Where do I enter this information?**There are a few different types of tasks, and the way to enter them depends on the specific situation. Consult the Salesforce Knowledge Base to [learn more about Tasks](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx)**​​​​**

Advisor-generated tasks can be entered through the "New Task" tab

**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. A description of how to record a Meeting for your student in the database can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx)**​​**​​​​​​​

The dashboard will show the count of days that have gone by since the last meeting recorded in the student's record

**Date of Next Scheduled Meeting**

* **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​​​​​​​​​​​​​​
* **Where do I enter this information?**A description of how to record a Meeting for your student in the database can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx)**​​​​**

You can schedule a future meeting through your "Add a Meeting" tab

The future meeting will then appear under your "Upcoming & Overdue" items in the student record

**Fall/Spring Completed Meetings**

* **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​​​​​​​​​​​​​​
* **Where do I enter this information?**A description of how to record a Meeting for your student in the database can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx)
* Data Validations & Logic: The color-coding for Completed Meetings is as follows:
  + ​​​​​​​**​​​​​​​**If Completed Meetings is equal to 0, the field will be red
  + If Completed Meetings is greater than 0 but less than 3, the field will be yellow
  + If Completed Meetings is 3 or more, the field will be green**​​**

One way to add a meeting is to use your "Engagement" tab and selecting "Add a Meeting"

**Fall/Spring Enrollment**

* **Definition**: The enrollment status indicates whether a student is attending college or not
* **Why do we need it?**Allows us to track persistence and inform service planning​​​​​​​
* **Where do I enter this information?**Enrollment is captured under the Critical Data section of the Student Record
* **Data Validations & Logic:** The color-coding for Enrollment is as follows:
  + Field will be green if enrollment status is Full Time, Part Time, or Study Abroad
  + Field will be red if enrollment status is blank
  + Field will be yellow if enrollment status is NOT blank and NOT Full Time, Part Time, or Study Abroad

**Fall/Spring Balance Paid**

* **Definition**: The status of the student's bill during that term
* **Why do we need it?**Allows us to track progress towards the affordability goal​​​​​​​
* **Where do I enter this information?**Balance Pa​id is captured under the Critical Data section of the Student Record
* **Data Validations & Logic:** The color-coding for Balance Paid is as follows:
  + Field will be green if balance paid status is "Yes" or "Payment Plan"
  + Field will be red if balance paid status is blank
  + Field will be yellow if balance paid status is "No"

**Fall/Spring % Credits Attempted**

* **Definition**: The total amount of credits a student has tried to complete throughout their college tenure
* **Why do we need it?**Comparing cumulative credits attempted to cumulative credits earned can help inform an advisor if a student is off-track for Satisfactory Academic Progress​​​​​​​
* **Where do I enter this information?** Credits Attempted are captured under the Critical Data section of the Student Record
* **Data Validations & Logic:**The color-coding for Credits Attempted is as follows:
  + Field will be red if % Credits Attempted is blank
  + Field will be yellow if % Credits Attempted is more than 0 but less than 10% **OR** if % Credits Attempted is more than 15%
  + Field will be green if % Credits Attempted is between 10% and 15%
  + **NOTE:** Students taking more than 15% of the credits needed to graduate are highlighted in yellow because this represents a credit overload. Please verify that the number of credits is correct for your student

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**Fall/Spring % Credits Earned**

* **Definition**: The total number of credits completed by the student during a semester term and counted towards completion of a degree
* **Why do we need it?**A​​​​​​​llows us to track progress towards degree completion​​​​​​​
* **Where do I enter this information?**Credits Earned are captured under the Critical Data section of the Student Record**​​​​​​​**
* **Data Validations & Logic:**The color-coding for Credits Earned is as follows:
  + Field will be red if % Credits Earned is blank
  + Field will be yellow if % Credits Earned is 0% or more but less than 10% **OR** if % Credits Earned is more than 15%
  + Field will be green if % Credits Earned is between 10% and 15%
  + **NOTE:** Students taking more than 15% of the credits needed to graduate are highlighted in yellow because this represents a credit overload. Please verify that the number of credits is correct for your student

**FAFSA Processed**

* **Definition**: The status of a student's "FAFSA Processed" task. A FAFSA Processed task entails verifying that a FAFSA was processed by FSA, received by the school(s) listed by the student, and confirming if additional requirements or verifications are needed to complete or renew financial aid
* **Why do we need it?**Allows us to track financial aid information that informs our program's[affordability goals](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/a-is-for-affordability.aspx) ​​​​​​​
* **Where do I enter this information?**some financial aid tasks are [automatically generated](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks), while others must be [created by advisors](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#advisor-created-tasks). The FAFSA Processed task will be automatically generated for you, only if your student is deemed FAFSA-eligible based on their citizenship status. Consult the Salesforce Knowledge Base to get a full overview of how to [manage financial aid tasks](https://tbl500amory-my.sharepoint.com/personal/mbarton_bottomline_org/_layouts/15/onedrive.aspx?id=/personal/mbarton_bottomline_org/Documents/1.%20Program%20Ops%20Documentation/Financial%20Aid%20Task%20Management.pdf&parent=/personal/mbarton_bottomline_org/Documents/1.%20Program%20Ops%20Documentation&ga=1) for your students, or to learn more about [tasks in general](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx)
* **Data Validations & Logic:**The color-coding for FAFSA Processed is as follows:
  + Field will be red if FAFSA Processed is "No"
  + Field will be green if FAFSA Processed is "Yes"

**Winter/Spring Reflective Conversations**

* **Definition**: The status of a students' reflective conversation during the Fall (Winter) or Spring (Summer). This field will show a "Yes" if the relevant reflective conversation has already happened, or "No" if it hasn't been completed.
* **Why do we need it?**Reflective conversations are vital to understanding our students' experiences and facilitating a collaborative goal-setting process. They are an important part of the [assessments period](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx) because they help strengthen the relationships between students and advisors, [encourage reflection](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#reflective-conversations), and allow us to improve our service planning via the [collection of crucial data](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessment-Data-Collection-Guide.aspx) that might have been missed throughout the semester.​​​​
* **Where do I enter this information?**some tasks are [automatically generated](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks), while others must be [created by advisors](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#advisor-created-tasks). The Reflective Conversations tasks will be automatically generated for you. Consult the Salesforce Knowledge Base to get a full overview of the [Assessments process](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx), or to learn more about [tasks in general](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx)
* **Data Validations & Logic:**The color-coding for Reflective Conversations is as follows:
  + Field will be red if Winter/Spring Reflective Conversation is "No"
  + Field will be green if Winter/Spring Reflective Conversation is "Yes"

**E-Milestones Completed this Year**

* **Definition**: The total number of employability milestones a student has completed during the current academic year
* **Why do we need it?**Allows us to track any progress made during the *current academic year* towards the overall completion of employability milestones​​​​​​​
* **Where do I enter this information?**Employability milestones are sequential and often build on each other. For this reason, an initial set of e-milestones will be automatically generated for your students when their Salesforce record is first created. To learn more about the E-milestones, their sequence, and how to enter them, consult the Salesforce Knowledge Base's section on [Employability Milestones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)​​​​​​​[​​​​​​​](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)
* **Data Validations & Logic:**The color-coding for E-Milestones Completed this Year is as follows:
  + Field will be red if E-Milestones Completed this Year is equal to 0
  + Field will be green if E-Milestones Completed this Year is between 1 and 2
  + Field will be green if E-Milestones Completed this Year is equal to 3 or more

**Total E-Milestones Completed**

* **Definition**: The total number of employability milestones a student has completed throughout their time as a Bottom Line student
* **Why do we need it?**Allows us to track *all* progress made towards the overall completion of employability milestones​​​​​​​
* **Where do I enter this information?**Employability milestones are sequential and often build on each other. For this reason, an initial set of e-milestones will be automatically generated for your students when their Salesforce record is first created. To learn more about the E-milestones, their sequence, and how to enter them, consult the Salesforce Knowledge Base's section on [Employability Milestones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)**​​​​**​​​​​​​

**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 students at the start of each academic year. If your caseload needs adjustments, please contact your Program Director