**Assessments Dashboard**

The **Assessments Dashboard**is a report used by Success Programs teams across all regions. Its main purpose is to help us identify common student trends affecting key program outcomes.

The dashboard contains 5 main Navigation components:

1. [Quick Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#quick-slicer-menu)
2. [Expanded Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#expanded-slicer-menu)
3. [Fall & Spring Cards](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-spring-cards)
4. [Graph Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8Bgraph-views)
5. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#table-views)

The Data Elements featured are:

1. [Fall/Spring Enrollment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-spring-enrollment)
2. [Fall/Spring GPA](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-spring-gpa)
3. [Fall/Spring Credits Earned](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-spring-credits-earned)
4. [Fall/Spring SAP](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-spring-sap)
5. [Fall/Spring Engagement](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-spring-engagement)
6. [Fall/Spring Bills Paid](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-spring-bills-paid)
7. [E-Milestones completed this year](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#e-milestones-completed-this-year)​​​​​​​​​​​​​​

The dashboard features 7 different tabs :

1. [Degree](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#degree)
2. [Employability, Affordability, & Engagement](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#employability%2c-affordability%2c-engagement)
3. [Enrollment vs. Engagement](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#enrollment-vs.-engagement)
4. [E-Milestones by Region](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#e-milestones-by-region)
5. [Fall Bills vs. Spring Enrollment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#fall-bills-vs.-spring-enrollment)
6. [Loans vs. Enrollment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#loans-vs.-enrollment)
7. [Target College Engagement](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Assessments-Dashboard.aspx#target-college-engagement)

A video guide is available for you [here](https://web.microsoftstream.com/video/95404d3c-2bcd-463e-9ab8-dcc52c219b15?referrer=https://statics.teams.cdn.office.net/), or by scrolling to the end of this page.

Assessments Dashboard- Tab #1 "Degree"

**Navigation**

**Quick Slicer Menu**

* **Definition**: The Quick slicer menu is a report element that allows you to view all the different reporting options.
* **Purpose:**Allows us to filter (slice) the data by a variety of options, such as region, 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:​​​​​​​**​​​​​​​

**Expanded Slicer Menu**

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

**​​​​​​​**

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

**Fall & Spring Cards**

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

**​​​​​​​**

Fall cards are seen only when the "Fall" toggle is on

Spring cards are seen only when the "Spring" toggle is on

**​​​​​​​​​​​​​​Graph Views**

* **Definition**: The Graph Views are a visual representation of student distributions
* **Purpose:**Allows us to identify potential relationships between student groups, trends in student data, changes over time, etc. ​​​​​​​
* **Example:**​​​​​​​**​​​​​​​**​​​​​​​

Bar graph, available in the Assessments Dashboard, showing student engagement as it relates to their semester enrollment status

**Table Views**

* **Definition**: The Table View is a visual summary of student data by relevant categories. For dashboards where student-level data is presented, table views show a list of student data
* **Purpose:**Allows us to see summary statistics by category and/or show a by-name list of students and their relevant data​​​​​​​
* **Example:​​​​​​​**​​​​​​​

Table views for the Fall semester shown in Tab 1 (Degree) of Assessments dashboard. Other tabs show different table views containing various relevant data elements depending on the time of the year

**Data Elements**

**Fall/Spring Enrollment**

* **Definition**: Enrollment status indicates whether a student attended college or not during that academic term
* **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.

**Fall/Spring GPA**

* **Definition**: The average numeric value (between 0 and 4) of the accumulated final grades earned in courses
* **Why do we need it?**Allows us to track and understand a student's academic progress over time​​​​​​​
* **Where do I enter this information?**GPA is captured under the Critical Data section of the Student Record​​​​​​​

**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 **​​​​​​​**

**Fall/Spring SAP**

* **Definition**: The successful completion of coursework toward an eligible certificate or degree- defined by colleges' Office of Financial Aid
* **Why do we need it?**Allows us to determine eligibility for federal aid and enables us to service plan around any potential barriers in affordability ​​​​​​​
* **Where do I enter this information?**Maintained SAP is captured under the Critical Data section of the Student Record​​​​​​​ **​​​​​​​**

**Fall/Spring Engagement**

* **Definition**: Engagement is the number of times a student has met with Bottom Line staff during the semester. A meeting is a synchronous voice-to-voice or face-to-face interaction where the advisor is providing value-add to the student.
* **Why do we need it?**Meetings have historically been the core of Bottom Line's program model. We believe there is value in real-time, voice-to-voice (and once it's safe again, face-to-face) connection with our students​​​​​​​
* **Where do I enter this information?**Meetings can be logged in two different ways, which are thoroughly described in the Salesforce Knowledge Base
  + [By connecting your Outlook account to Salesforce](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx#connect-to-outlook)**​​​​​​​**
  + [By adding a meeting manually](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#adding-a-meeting)

Log new meetings manually through the "Engagement" and "Add a Meeting" tabs in Salesforce

Example of captured meeting in Student Record

**Fall/Spring Bills 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**​​​​​​​**

**E-Milestones Completed this Year**

* **Definition**: The number of Employability Milestones a student has completed this year. This can include:
  + Any of the 12 Employability Milestones
  + Up to 3 Career Relevant Experiences, as long as <3 have been completed in previous years
* **Why do we need it?**Allows us to track progress towards career readiness through employability milestone completion​​​​​​​
* **Where do I enter this information?**Employability Milestones will be automatically assigned to your students when their Program Records are created. Completing an Employability Milestone, or changing its status to "Not Pursued" will also trigger the deployment of new Employability Milestones for your students.

Example of E-Milestones assigned to students

E-milestones screen. You can change their status by clicking "Mark Complete" or "Change Status" in the upper right-hand corner of your screen

**Dashboard Tabs**

**Degree**

**Description**

The Degree tab focuses our attention towards four main data points:

* **Enrollment**
  + As it was captured in Salesforce for the Fall/Spring semester(s)
* **GPA**
  + **​​​​​​​**Grouped into 8 distinct categories based on the value recorded- including "No Data" for any blank record
  + Categories are: "0-1", "1-1.49", "1.5-1.99", "2.00-2.49", "2.5-2.99", "3-3.49", "3.5-4"
* **% Credits Earned**
  + Transformed into a percentage by dividing the number of "Semester Credits Earned" by the "Total Credits needed to Graduate"
  + Grouped into 4 distinct categories - including "No Credit Data" for any blank records
  + Categories are: "<10%", ">12.5%", "10-12.5%"
* **SAP**
  + As it was captured in Salesforce for the Fall/Spring semester(s)

Both graph and table views can be toggled for the Fall or Spring semesters, and amount of students are shown both as whole numbers and as percentages.

**Page Filters**

Every data element shown in this tab is filtered to show students who are active or have graduated. The cards featured may have additional filters.

**Cards**

The Degree tab shows 3 sets of cards highlighting key metrics. Those metrics are:

* **Students Enrolling FT/PT/SA**
  + Shown in percentage form
  + Numerator: # Active or Graduated students with Fall/Spring enrollment = Full Time, Part Time, or Study Abroad
  + Denominator:   Total # of Active or Graduated students
* **Students Earning 10% Credits or more**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with Fall/Spring enrollment = Full Time, Part Time, or Study Abroad and who earned 10% or more of their total Credits Needed to Graduate
  + Denominator:   Total # of Active or Graduated students
* **Students Meeting SAP**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with Fall/Spring enrollment = Full Time, Part Time, or Study Abroad and with Fall/Spring SAP = "Yes"
  + Denominator:   Total # of Active or Graduated students

Degree Tab shown in Assessments Dashboard

**Employability, Affordability, & Engagement**

**Description**

The Employability, Affordability & Engagement tab focuses our attention towards three main data points:

* **Engagement**
  + **​​​​​​​**Grouped into 4 distinct categories based on the value recorded
  + Categories are: "0", "1", "2", and "3"
    - "3" counts all students who had 3 or more meetings
* **E-Milestones Completed this Year**
  + **​​​​​​​**Grouped into 4 distinct categories based on the value recorded
  + Categories are: "0", "1", "2", and "3+"
* **Bills Paid**
  + As it was captured in Salesforce for the Fall/Spring semester(s)

Both graph and table views can be toggled for the Fall or Spring semesters, and amount of students are shown both as whole numbers and as percentages.

**Page Filters**

Every data element shown in this tab is filtered to show students who are active or have graduated. The cards featured may have additional filters.

**Cards**

The Employability, Affordability & Engagement tab shows 3 sets of cards highlighting key metrics. Those metrics are:

* **Average # of E-Milestones Completed This Year**
  + Shown as an average
  + Filtered to include only Active or Graduated Students
* **Bills Paid**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with Fall/Spring enrollment = Full Time, Part Time, or Study Abroad and with Fall/Spring Balance paid = "Yes" or "Payment Plan"
  + Denominator:   Total # of Active or Graduated students
* **Average # of Meetings**
  + Shown as an average
  + Filtered to include only Active or Graduated Students

Employability, Affordability, & Engagement tab shown in Assessments Dashboard

**Enrollment vs. Engagement**

**Description**

The Enrollment vs. Engagement tab tries to answer the question: "Does enrollment affect student engagement?"

The graph shows the different enrollment options in the x-axis and the number of students in the y-axis. Hovering over any of the data points will show a tooltip featuring enrollment status, # of students,  % of students, and level of engagement.

**Page Filters**

Every data element shown in this tab is filtered to show students who are active or have graduated. The cards featured may have additional filters.

**Cards**

The Enrollment vs. Engagement tab shows 3 sets of cards highlighting key metrics. Those metrics are:

* **FT/PT/SA students with 0 meetings**
  + Shown in percentage form
  + Numerator: # Active or Graduated students with Fall/Spring enrollment = Full Time, Part Time, or Study Abroad and with zero caseload meetings
  + Denominator:   Total # of Active or Graduated students with Fall/Spring enrollment = Full Time, Part Time, or Study Abroad
* **Missing Enrollment but had @ least 1 meeting**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with Fall/Spring enrollment = "No Data" and who had at least 1 meeting during the Fall semester
  + Denominator:   Total # of Active or Graduated students
* **Students Meeting SAP**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with Fall/Spring enrollment = "Not Enrolled, Returning", "No Data", "Co-Op/Internship", "Mid-Semester Withdrawal", "Dropped out", or "Registered" and who had at least 1 meeting during the Fall semester
  + Denominator:   Total # of Active or Graduated students

Enrollment vs. Engagement tab shown in Assessments Dashboard

**E-Milestones by Region**

**Description**

The E-Milestones by Region tab tries to answer the question: "Are there difference in E-Milestones completion across the Regions?"

The graph shows the number of completed milestones in the x-axis and the number of students in the y-axis. Each category shown in the x-axis is also shown by region. Hovering over any of the data points will show a tooltip featuring the EMs category label, region, # of students,  % of Total Students.

**Page Filters**

Every data element shown in this tab is filtered to show students who are active or have graduated. The cards featured may have additional filters.

**Cards**

The E-Milestones by Region tab shows 3 sets of cards highlighting key metrics. Those metrics are:

* **Students Completing at least 1 EM this year**
  + Shown in percentage form
  + Numerator: # Active or Graduated students with "E-Milestones Completed this Year"≠ "0"
  + Denominator:   Total # of Active or Graduated students
* **Students Completing 2+ EMs this year**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with "E-Milestones Completed this Year" = "2" or "3+"
  + Denominator:   Total # of Active or Graduated students
* **Students Meeting SAP**
  + Shown in percentage form
  + Numerator: # Active or Graduated students with "E-Milestones Completed this Year" = "0"
  + Denominator:   Total # of Active or Graduated students

Employability Milestones by Region as shown in Assessments Dashboard

**Fall Bills vs. Spring Enrollment**

**Description**

The Fall Bills vs. Spring Enrollment tab tries to answer the question: "Do Fall Bill payments affect Spring Enrollment?"

The graph shows the different Spring enrollment options in the x-axis and the number of students in the y-axis. Each bar is color-coded to show the status of the students' Fall Bill. Hovering over any of the data points will show a tooltip featuring Spring enrollment status, # of students,  % of Total Students, and Fall Bill Status

**Page Filters**

Every data element shown in this tab is filtered to show students who are active or have graduated. The cards featured may have additional filters.

**Cards**

The Fall Bills vs. Spring Enrollment tab shows 3 sets of cards highlighting key metrics. Those metrics are:

* **Enrolled in the Fall but not in the Spring Semester**
  + Shown in percentage form
  + Numerator: # Active or Graduated students with Fall Enrollment = Full Time, Part Time, or Study Abroad  
    AND Spring Enrollment ≠ Full Time, Part Time, or Study Abroad
  + Denominator:   Total # of Active or Graduated students
* **Did not pay Fall Bill but enrolled in the Spring**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with Spring enrollment = Full Time, Part Time, or Study Abroad   
    AND with Fall Bill Status ≠ "Yes"
  + Denominator:   Total # of Active or Graduated students
* **Did not pay Fall Bill and did not enroll in the Spring**
  + Shown in percentage form
  + Numerator: #  Active or Graduated students with Spring enrollment = "Not Enrolled, Returning", "No Data", "Co-Op/Internship", "Mid-Semester Withdrawal", "Dropped out", or "Registered" AND with Fall Bill Status ≠ "Yes"
  + Denominator:   Total # of Active or Graduated students

Fall Bills vs. Spring Enrollment tab shown in Assessments Dashboard

**Loans vs. Enrollment**

**Description**

The Loans vs. Enrollment tab tries to answer the question: "How does enrollment affect student debt?"

The graph shows the different enrollment options in the x-axis and the amount of debt in US dollars in the y-axis. Hovering over any of the data points will show a tooltip featuring enrollment status, # of students,  % of Total Students, and Average Loan Total.

**Page Filters**

Every data element shown in this tab is filtered to show students who are active or have graduated. The cards featured may have additional filters.

**Cards**

The Loans vs. Enrollment tab shows 3 sets of cards highlighting key metrics. Those metrics are:

* **Students Missing Loan Data**
  + Shown in percentage form
  + Numerator: # Active or Graduated students with Loans Total = Blank
  + Denominator:   Total # of Active or Graduated students
* **Average Debt of all Active Students**
  + Shown as an average in USD
  + Filtered to include only Active or Graduated Students
* **Average debt of Students who didn't enroll in the Fall**
  + Shown as an average in USD
  + Filtered to include only Active or Graduated Students with Enrollment Status ≠ Full Time, Part Time, or Study Abroad

Loans vs. Enrollment tab shown in Assessments Dashboard

**Target College Engagement**

**Description**

The Target College Engagement tab tries to answer the question: "Are engagement trends different for students attending target colleges?"

The 3 table views presented show the target colleges in IL, MA, and NY respectively. Engagement averages are shown for both the Fall and the Spring semester. The number of students being counted are also shown for each table.

\*\*MA shows a single instance of a non-target college: Bunker Hill Community College, which can be filtered out by using the College Attending slicer

**Page Filters**

Every data element shown in this tab is filtered to show students who are active or have graduated. The cards featured may have additional filters.

**Cards**

No cards are featured in this tab

Target College Engagement tab shown in Assessments Dashboard

**Video Guide**

**Assessment Dashboard Tutorial**

Stream (Classic) videos

How to effectively use the Assessments Dashboard