**Intake & Recruitment**

The [**I**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/c31f59ce-1a9a-46f8-afd0-f426d30eb07b/ReportSection8feb699603b0a20b7576)[**ntake & Recruitment Dashboard**](https://app.powerbi.com/groups/me/apps/d849f2ad-465f-419f-97ee-d69b2d2a5681/reports/d36ceea3-e80e-4bb7-af50-7589b7845a14/ReportSection6ef7b01837e498328022)is used by the Programs teams across all regions to track potential incoming students. Its main purpose is to track progress toward our recruitment and yield goals.

The dashboard contains 5 main Navigation components:

1. [Quick Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#quick-slicer-menu)
2. [Expanded](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#expanded-slicer-menu)[Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Data-Quality.aspx#slicer-menu)
3. [Cards](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Data-Quality.aspx#cards)
4. [Graph Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#graph-views)
5. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#table-views)

The Data Elements featured are:

1. [Stage](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#stage)
2. [Weekly Applications Submitted](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#weekly-applications-submitted)
3. [Gender](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#gender)
4. [Race](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#race)
5. [Ethnicity](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#ethnicity)
6. [High School GPA](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#high-school-gpa)
7. [Family Income](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#family-income)
8. [Referral Source](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#referral-source)
9. [Eligibility Rank](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#eligibility-rank)
10. [First Generation Status](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#first-generation-status)
11. [High Schools Represented](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#high-schools-represented)
12. [Intake & Summer Advisor Caseloads](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#intake-summer-advisor-caseloads)
13. [% Yield](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#yield)
14. [Average number of days to confirm](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#average-number-of-days-to-confirm)
15. [Student Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#student-name)
16. [Contact Attempts](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#contact-attempts)
17. [Last Activity Date](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#last-activity-date)
18. [Part 1 Completed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#part-1-completed)
19. [Part 2 Completed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#part-2-completed)
20. [Transcript Status](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#transcript-status)
21. [Income Documents Status](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#income-documents-status)​​​​​​​
22. [Number of Meetings](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#number-of-meetings)
23. [College Attending](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#college-attending)
24. [Program](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#program)
25. [Reason Not Eligible](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#reason-not-eligible)

The dashboard features 3 different tabs :

1. [Intake Pipeline](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#dashboard-tabs)
2. [Advisor Caseload Assignments](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#advisor-caseload-assignments)
3. [Intake Management](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#intake-management)

Watch the [Dashboard Walkthrough](https://web.microsoftstream.com/video/fd130f27-8aff-40b5-a77a-3e7e9793129d) to learn more about how to best use this tool.

Intake & Recruitment Tab #1: Intake Pipeline

**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​​​​​​​. The 3 tabs may have different expanded 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 slicer menu includes additional filtering options

**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:**

**​​​​​​​**

As slicer selections change, the numbers shown in the cards adjust to reflect your different selections

The Intake & Recruitment dashboard shows 6 cards in the "Intake Pipeline" and "Advisor Caseload Assignments" tabs

The "Manager" and "Partner" views of the Intake Management tab shows 3 cards

**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:**​​​​​​​**​​​​​​​**

The Intake & Recruitment dashboard features a combinations of bar graphs and line charts, as seen in this example

**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:**​​​​​​​​​​​​​​**​​​​​​​**

Example of a table visual featured in the Manager View of the Intake Management tab, representing a by-name list of students

Table visuals are also found in the Caseload Assignments tab, representing summary data for students and advisors

**Data Elements**

**Stage**

* **Definition**: A student's stage captures where they are in the process of applying to Bottom Line - they may be in the pipeline (e.g. New Applicant), ineligible (e.g. Not Eligible), awaiting information (e.g. Waitlist), or accepted (e.g. Confirmed). The student's stage also helps us track where accepted students are in the process of officially joining the program (Confirmed, Scheduled, or Active.) You can find exact definitions of each stage of the intake process [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Recruitment.aspx#student-stages).
* **Why do we need it?**A student's stage gives us a snapshot of where they are in the process and what action or process is next for them. We use Stage to track many of our goals for recruitment, for example, accepted students and overall yield. ​​​​​​​
* **Where do I enter this information?**A student's stage can be modified in the "Overview" section of the student's intake profile. You can find more information in the Knowledge Base [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Confirming-Eligibility.aspx#making-a-decision).

**Weekly Applications Submitted**

* **Definition**: The number of new student records created in a given calendar week. A new record is created when a student fills out Part 1 of the student application in Form Assembly via the Bottom Line website.
* **Why do we need it?**This information is helpful to see in order to track trends in a given recruitment cycle or over time.​​​​​​​
* **Where do I enter this information?**These numbers can only be impacted by new students filling out the application, so there is no data entry required of Bottom Line staff.**​​​​**

**Gender**

* **Definition:**  Sex refers to a person's biological status, it's typically assigned at birth, and is generally categorized as male, female, or other/intersex. Gender Identity refers to an internal sense of self and their gender.
* Total count are given for students' Sex distributions [​​​​​​​[\*]](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Demogr.aspx#3-in-2021%2c-the-%E2%80%9Cgender-identity%E2%80%9D-field-replaced-the-%E2%80%9Csex%E2%80%9D-field-to-align-more-closely-with-our-foundations.) for each of the main categories captured:
  + Female
  + Male
  + Other
  + Prefer not to say/Unknown
* Total counts are given for students' Gender Identity for each of the main categories captured:
  + Woman
  + Man
  + Transgender Female/Transgender Woman
  + Transgender Male/Transgender Man
  + Gender Queer/Gender Non-conforming/Gender Non-binary/Third Gender
  + Not Listed
* **[\*] In 2021, the “Gender Identity” field replaced the “Sex” field to align more closely with our foundations.**
* **Why do we need it?**R​​​​​​​
* **Where do I enter this information?**T**​​​​**

**Race / Ethnicity**

* **Definition**: Racial and ethnic distribution of our student population. Total counts will be given for each of the main categories captured:
  + American Indian, Alaska Native, Pacific Islander
  + Asian; Black or African American
  + Hispanic or Latino
  + White
  + Other
  + Multiple Races [​​​​​​​[1]](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Demogr.aspx#1-at-intake%2c-students-are-given-the-option-to-select-as-many-racial-ethnic-identities-as-they-want.-any-student-selecting-more-t)
  + No Data
* **Note**: The definition of the “Race” field was changed in 2021. Specifically, the field was divided into “Race” and “Ethnicity.” This change will not be accounted for in the outcomes for prior years; it will affect the incoming Access class (2021-22) and will be reflected in future reports. [[2]](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Demogr.aspx#2-these-fields-are-not-yet-populated-for-current-students%2c-thus-there-is-not-enough-data-of-good-enough-quality-to-justify-creat)  
  ​​​​​​​
* **Report Views:**
  + Student Race (Exclusive)
    - Table shows the number of students who selected a single racial identity; all other students are grouped into "Multiple Races". Therefore, students are counted only once.
    - Student counts adds up to the total number of students served
  + Student Race (Inclusive)
    - Shown for both Access & Success
    - Table shows the number of students who selected ANY given racial identity; students selecting more than one race are counted more than once depending on the number of racial identities they selected
* **[1] At intake, students are given the option to select as many racial/ethnic identities as they want. Any student selecting more than one identity is automatically classified under “Multiple races”.**

**[2] These fields are not yet populated for current students, thus there is not enough data of good enough quality to justify creating a view.**

* **Why do we need it?**R​​​​​​​
* **Where do I enter this information?**T**​​​​**

**Ethnicity**

* **Definition**: See Race / Ethnicity above
* **Why do we need it?**R​​​​​​​
* **Where do I enter this information?**T**​​​​**

**High School GPA**

* **Definition**: The student's cumulative, unweighted high school GPA, according to their High School transcript.
* **Why do we need it?**Bottom Line aims to serve students who are academically prepared for a four-year college. GPA is one of the main measures we use to determine academic preparedness. ​​​​​​​
* **Where do I enter this information?**Students will have entered a High School GPA on their online application to Bottom Line, but intake staff are expected to update the field to reflect the actual GPA listed on the student's transcript. This information can be found in the "Academic Preparedness" section of the student's intake profile. More information on confirming GPAs can be found [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Confirming-Eligibility.aspx#academic-preparedness).**​​​​**

**Family Income**

* **Definition**: The family's annual income, according to their federal taxes or, if the family does not file taxes, a W-2 or other estimate of annual income.
* **Why do we need it?**Bottom Line aims to serve students who are from low-income families. Comparing the student's family income to the family size is what allows Bottom Line to determine whether the family qualifies as low-income. ​​​​​​​
* **Where do I enter this information?**This information can be entered in the "Family Income" section of the student's intake profile. For more information on locating and entering this information, click [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Confirming-Eligibility.aspx#family-income).**​​​​**​​​​​​​

**Referral Source**

* **Definition**: The option(s) the student checked off for the question "Who referred you to Bottom Line?" on our student application.
* **Why do we need it?**We keep track of who referred students to Bottom Line in order to analyze the effectiveness of our outreach efforts, pipelines, and partnerships.​​​​​​​
* **Where do I enter this information?**This information is entered by the student and does not need to be modified by Bottom Line staff.**​​​​**​​​​​​​

**Eligibility Rank**

* **Definition**: While Bottom Line has a set of student eligibility criteria we expect most students to meet, we do reserve a small portion of each class for students who do not meet all of those criteria. A student's eligibility rank indicates whether they met all eligibility criteria (Target), met all but one (Discretion), or in rare cases, were technically ineligible for Bottom Line, but were accepted anyway (Exception.)
* **Why do we need it?**Tracking eligibility ranking helps us remain accountable to ensuring that a certain percentage (95%) of students in each incoming class are in the "Target" category.​​​​​​​
* **Where do I enter this information?**A student's eligibility ranking can be modified in the "Overview" section of the student's intake profile. You can find more information in the Knowledge Base [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Recruitment.aspx#eligibility-rankings).**​​​​**​​​​​​​

**First Generation Status**

* **Definition**: We define a first-generation college student as a students whose parents have not received a 4-year degree from a college in the United States.
* **Why do we need it?**Bottom Line aims to serve students who are in the first generation of their family to graduate from college.​​​​​​​
* **Where do I enter this information?**This information can be entered in the "College Generation Status" section of the student's intake profile. For more information on locating and entering this information, click [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Confirming-Eligibility.aspx#college-generation-status).**​​​​**​​​​​​​

**High Schools Represented**

* **Definition**: A list of high schools attended by students who have applied to Bottom Line.
* **Why do we need it?**To help us track trends in applications and confirmations by high school.​​​​​​​
* **Where do I enter this information?**Though students self-report their high school on the student application, a BL staff member needs to confirm the school from our picklist using the "High School" field in the "Academic Preparedness" section of the student's intake profile. Application reviewers can also edit this field from the Review page.**​​​​**​​​​​​​

**Intake & Summer Advisor Caseloads**

* **Definition**: The number of students assigned to each advisor for intake (the process of applying to Bottom Line) and the summer (either the student's First Meeting for Access or their Checklist Meeting for Success).
* **Why do we need it?**Application reviewers use this information to ensure that staff members in their region have equitable caseloads based on their role and other responsibilities.​​​​​​​
* **Where do I enter this information?**Intake Advisors are assigned by Application Reviewers on the Review page. Summer Advisors can be assigned by program leadership using the "Assign Summer Advisor" list view.**​​​​**​​​​​​​

**% Yield**

* **Definition**: The % of students who are accepted to Bottom Line out of the total number of student applications.
* **Why do we need it?**Assessing yield each year allows us to evaluate whether our outreach efforts are efficient and effective. Assessing yield for specific schools and partner programs also allows us to ensure we are coaching our recruitment partners to refer students who are likely to be accepted to the program.​​​​​​
* **Where do I enter this information?**This information will be updated automatically as students' stages change.**​​​​**​​​​​​​

**Average Number of Days to Confirm**

* **Definition**: The average number of days between the student's initial application and when their stage is changed to "Confirmed." Essentially, the number of days it took for the student to complete the application process and be accepted to Bottom Line.
* **Why do we need it?**Assessing time to confirmation allows us to evaluate whether our intake efforts are efficient and effective. This can also be used as a coaching tool for Intake Advisors.​​​​​​​
* **Where do I enter this information?**This information will be updated automatically as students apply and stages are changed to Confirmed.**​​​​**​​​​​​​

**Student Name**

* **Definition**: The first and last name of a student, as it is captured on the student application. If the student has a different legal first name, that will appear in a separate field.
* **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, special cases aside, it should not change. If your student entered the wrong name on the application, or if your student has legally changed their name since submitting an application and you need to make changes to their name in Salesforce, you can do so in the Overview section of the student's intake profile.​​​​​​​

**Contact Attempts**

* **Definition**: The number of times an intake advisor has attempted to reach a student through any mode of communication.
* **Why do we need it?**To help advisors track their outreach efforts, and to ensure that we are doing everything we can to engage students and help them get through our intake pipeline. ​​​​​​​
* **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/Completing.aspx#outreach-to-your-caseload).

**​​​​**​​​​​​​

**Last Activity Date**

* **Definition**: The date of the most recent task completed or meeting attended by a student. Karla is this right? This doesn't include contact attempts? Or did we change that?
* **Why do we need it?**This field allows Intake Advisors to keep track of the students they have worked with most recently and focus outreach on students who are less engaged.​​​​​​​
* **Where do I enter this information?**This information will be updated automatically as tasks and meetings are completed.**​​​​**​​​​​​​

**Part 1 Completed**

* **Definition**: The date the student completed the initial application to Bottom Line.
* **Why do we need it?**To track new student applications and identify trends for when new applications come in over the course of a recruitment cycle.​​​​​​​
* **Where do I enter this information?**This information will be updated automatically as students complete the application.**​​​​**​​​​​​​

**Part 2 Completed**

* **Definition**: The date the student submitted the second part of the Bottom Line application.
* **Why do we need it?**While students don't need to complete Part 2 to be accepted to the program, seeing that the student has completed it on their own indicates to the Intake Advisor that there is new information to review and that the student may be ready for their Bottom Line admissions decision (provided that the questions were answered completely and the student uploaded the necessary documents).​​​​​​​
* **Where do I enter this information?**This information will be automatically updated when a student clicks "Submit" in the student portal.**​​​​**​​​​​​​

**Transcript Status**

* **Definition**: The status of the student's transcript submission
* **Why do we need it?**Reviewing the student's transcript allows us to confirm their GPA and determine their academic eligibility for Bottom Line​​​​​​​
* **Where do I enter this information?**The transcript status is on the student's intake profile, in the Academic Preparedness section**​​​​**

**Income Documents Status**

* **Definition**: The status of the student's family's income documentation
* **Why do we need it?**Reviewing the family's income documents (taxes, benefits statements, etc.) allows us to confirm their financial eligibility for Bottom Line​​​​​​​
* **Where do I enter this information?**The income documents status is on the student's intake profile, in the Family Income section​​​​​​​**​​​​​​​**

**Number of Meetings**

* **Definition**: The sum of all the meetings a student has had with their assigned Bottom Line advisor
* **Why do we need it?**Helps us make sure that our students are ​​​​​​​receiving adequate support from their Bottom Line advisors 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).​​​​​​​

**College Attending**

* **Definition**: The college the student will be attending in the upcoming school year.
* **Why do we need it?**Eligibility for Bottom Line's Success Program is based on attendance at a specific list of Target Colleges; reviewing the College Attending allows us to know whether the student is a candidate for Success (or in Chicago, whether they are eligible for Bluprint.)​​​​​​​
* **Where do I enter this information?**The student will indicate on the student application if they have committed to a college attending; staff can update this information if we learn more during the intake process in the "Success Direct Information" section of the student's intake profile.**​​​​**​​​​​​​

**Program**

* **Definition**: This field shows which program the student is applying for: Access, Success, or Bluprint
* **Why do we need it?**Eligibility for Bottom Line is different for each program, so we need to know which program the student has applied for to assess their eligibility.​​​​​​​
* **Where do I enter this information?**This information is entered automatically when a student completes the application. The only time staff should change this information is in cases where a student applies to Success or Bluprint and throughout the intake process we discover that they are actually eligible for the other program. Recruitment Managers are the only staff with access to switch records between Bluprint and Success.**​​​​**​​​​​​​

**Reason Not Eligible**

* **Definition**: This field indicates the reason(s) why a student was deemed ineligible for Bottom Line.
* **Why do we need it?**We use this information to communicate to students, families, and recruitment partners about why a student's application was deemed ineligible for Bottom Line. ​​​​​​​
* **Where do I enter this information?**Check off all applicable reasons that a student has been deemed ineligible in the "Overview" section of the student's intake profile. Application reviewers can also edit this field from the Reviewer page.**​​​​**​​​​​​​

**Dashboard Tabs**

**Intake Pipeline**

**Description**

The Intake Pipeline tab focuses our attention towards four main data points:

* **Pace of new student applications**
  + As students complete "Part 1" of our application in Form Assembly
* **Progress of students through the recruitment pipeline (Stage)**
  + **​​​​​​​**Allows us to see a snapshot of how many students are currently in each piece of our recruitment process
* **Gender demographics**
  + As reported by the student on the application
* **Race & Ethnicity demographics**
  + As reported by the student on the application

**Page Filters**

Every data element shown in this tab is filtered to show students who are applying for the 2022-23 academic year. The cards featured may have additional filters.

**Cards**

The Intake Pipeline tab shows 6 cards highlighting key metrics. Those metrics are:

* **Total Student Applications**
  + Shows the total number of applications for the current academic year
* **Confirmed + Scheduled + Active**
  + Shows the total number of students who have been accepted to the program (student with a current stage of confirmed, scheduled, or active.)
* **Active**
  + Shows the number of students who are active in the current year's class
* **Confirmed**
  + **​​​​​​​**Separate from the Confirmed + Scheduled + Active card, this number specifically shows the number of students who have been accepted but have not yet scheduled their 1st Meeting/Checklist Meeting with us
* **Scheduled**
  + **​​​​​​​**Separate from the Confirmed + Scheduled + Active card, this number specifically shows the number of students who are scheduled for their 1st Meeting/Checklist Meeting with us
* **Not Eligible**
  + **​​​​​​​**Shows the number of applicants who have been determined to be ineligible for Bottom Line

**Graph & Table Views featured**

The Intake Pipeline tab features a combination of clustered column charts (representing stage), line charts (representing student applications), and stacked bar graphs (representing student gender, race, and ethnicity)

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**Advisor Caseload Assignments**

**Description**

The Advisor Caseload Assignments tab focuses our attention towards **X** different data points:

* **Progress of students through the recruitment pipeline (Stage)**
  + **​​​​​​​**Allows us to see a snapshot of how many students are currently in each piece of our recruitment process
* **Advisor Caseload Sizes**
  + Need some narrative here
* **ADD OTHER THINGS HERE**

**Page Filters**

Every data element shown in this tab is filtered to show students who are applying for the 2022-23 academic year. The cards featured may have additional filters.

**Cards**

The Advisor Caseload Assignments tab shows 6 main cards highlighting key metrics. Those metrics are:

* **Total Student Applications**
  + Shows the total number of applications for the current academic year
* **Confirmed + Scheduled + Active**
  + Shows the total number of students who have been accepted to the program (student with a current stage of confirmed, scheduled, or active.)
* **Active**
  + Shows the number of students who are active in the current year's class
* **Confirmed**
  + **​​​​​​​**Separate from the Confirmed + Scheduled + Active card, this number specifically shows the number of students who have been accepted but have not yet scheduled their 1st Meeting/Checklist Meeting with us
* **Scheduled**
  + **​​​​​​​**Separate from the Confirmed + Scheduled + Active card, this number specifically shows the number of students who are scheduled for their 1st Meeting/Checklist Meeting with us
* **Not Eligible**
  + **​​​​​​​**Shows the number of applicants who have been determined to be ineligible for Bottom Line

In addition to the 6 main cards, 2 other metrics are highlighted using cards: Average High School GPA and Average Family Income. Their definitions can be found in the "Data Elements" section, or by following the links above.

**Graph & Table Views featured**

The Advisor Caseload Assignments tab features a combination of bar graphs (representing stage and eligibility ranking), table views (representing advisor caseloads, 1st Generation status, and High Schools represented), cards (showing avg. GPA and Family Income), and tree maps (representing referral sources)

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**Intake Management**

**Description**

The Intake Management tab is divided into two different views **(Planned for Future Sprints)** accessible through a toggle.

The Manager view focuses our attention towards 3 different data points:

* It gives an overview of the number of pending applications
* The success rate at which a typical applicant got accepted into Bottom Line
* The current rate at which average application is processed

The Partner view focuses our attention towards **X** different data points: **(Planned for future Sprints)**

* **ADD THINGS HERE**
  + **​​​​​​​**Need some narrative here

**Page Filters**

Every data element shown in this tab is filtered to show students who are applying for the 2022-23 academic year. The cards featured may have additional filters.

**Cards**

The Manager View of the Intake Management tab shows 3 main cards highlighting key metrics. Those metrics are:

* **Current # Under Review**
  + This number indicates the number of applications that are received but are under review and the decision in not yet made
* [**% Yield**](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#yield)
  + Click the link to get the description
* [Average # of days to confirm](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx#average-number-of-days-to-confirm)
  + Click the link to get the description

The Partner View of the Intake Management tab shows 3 main cards highlighting key metrics. Those metrics are: **(Planned for Future Sprints)**

* **Current # Under Review**
  + Same as above
* **Current # Confirmed**
  + **​​​​​​​**Shows the number of students who have been accepted but have not yet scheduled their 1st Meeting/Checklist Meeting with us
* **Current # Active**
  + Shows the number of students who are active in the current year's class

**Graph & Table Views featured**​​​​​​​​​​​​​​​​​​​​​

**[Intake & Recruitment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Intake-%26-Recruitment.aspx" \t "_blank)**

tbl500amory.sharepoint.com

The I ntake & Recruitment Dashboard is used by the Programs teams across all regions to track potential incoming students. Its main purpose is to track progress toward our recruitment and yield goals. The dashboard contains 5 main Navigation compone…