**Potential Inactive Students Report**

The [**Potential Inactive Students Report**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/2e03844e-08a5-4c59-8a82-4a77caae5d00/ReportSection3dd75aa1157b823ca6b7?ctid=97405bf3-68fc-4681-aa9f-205c2a526573)is a report used by Success Programs teams across all regions. Its main purpose is to help us identify those students who are at risk of becoming inactive at the end of the current Fall or Spring semesters.

This dashboard will replace the report that managers used to receive at the close of assessments each semester. With this new format, we hope that Program Leaders will not only be able to make end-of-semester decisions about students who need to be changed to Inactive, but also proactively coach advisors whose students are at risk of becoming inactive if they do not re-enroll.

The dashboard contains 5 main Navigation components:

1. [Main Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#main-slicer-menu)
2. [Expanded Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#expanded-slicer-menu)
3. [Fall & Spring Cards](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#fall-spring-cards)
4. [Logic Guide](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#logic-guide)
5. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#table-views)

The Data Elements featured are:

1. [Last Fall/Spring Enrollment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#last-fall-spring-enrollment)
2. [Current Fall/Spring Enrollment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#current-fall-spring-enrollment)
3. [Total Meetings this Year](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#total-meetings-this-year)

The Logic Elements features are:

1. [Fall/Spring Recommendations](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#fall-spring-recommendations)
   1. [First Year Students](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#what-does-a-first-year-recommendation-mean)
   2. [Active](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#what-does-an-active-recommendation-mean)
   3. [Missing Data](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#what-does-a-missing-data-recommendation-mean)
   4. [Inactive](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#what-does-an-inactive-recommendation-mean)
   5. [Inactive at Manager's discretion](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Potential-Inactive-Students-Dashboard.aspx#what-does-an-inactive-at-manager-s-discretion-recommendation-mean)

Check out a live video tutorial that shows how to use this dashboard [here](https://web.microsoftstream.com/video/3295e03f-7a0b-444f-b54d-c74c88628158).

View of the Potential Inactive Students Dashboard

**Navigation**

**Main Slicer Menu**

* **Definition**: The Main 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 a student's name, enrollment status, etc. Unlike the Expanded slicer menu, the Main 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 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​​​​​​​
* **Example:**

**​​​​​​​**

To access the Expanded slicer menu, click the "More" button located in the bottom-right corner of the Main slicer menu. The Expanded slicer menu includes 6 additional filtering options

**Fall & Spring Cards**

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

**​​​​​​​**

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

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

**Logic Guide**

* **Definition**: Keys provide an extra layer of information to aid the user in understanding and navigating the dashboard
* **Purpose:**Allows us to understand the different meanings of the logic used to set the color codes present throughout the dashboard's table views​​​​​​​
* **Example:**​​​​​​​**​​​​​​​**

The Logic Guide button can be found directly under the Bottom Line logo, and right next to the Fall/Spring cards

Clicking the Logic Guide will bring you to a new menu where you can read more information and get more guidance about the Fall/Spring recommendations

**Table Views**

* **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 report shows two different table views depending on your semester choice. The Fall table view will feature Last Fall, Last Spring, and Current Fall enrollments. The Spring table view will feature Last Spring, Current Fall, and Current Spring enrollments

**Data Elements**

**Last Fall/Spring Enrollment**

* **Definition**: The "last" enrollment status indicates whether a student attended college or not during the previous academic year
* **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 ONLY DURING THE CURRENT FALL/SPRING. If you need to fill in blanks for any missing student data, reach out to your manager or to Michelle Barton for further guidance**​​​​**

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**Current Fall/Spring Enrollment**

* **Definition**: The "current" enrollment status indicates whether a student is attending college or not during this academic year
* **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

**Total Meetings this Year**

* **Definition**: The number of times a student has met with Bottom Line staff this year (including attendance at qualifying events)
* **Why do we need it?**Meetings are included in this dashboard to show whether the student is actively engaged with Bottom Line during the current academic year. (i.e. you may see a student with several blanks for enrollment status, and if you notice that they have also had 0 meetings this year, we would assume that we don't know the student's enrollment status because they are disengaged) ​​​​​​​
* **Where do I enter this information?**Meetings can be connected to Salesforce via your Outlook calendar, or logged directly from Salesforce. See this [Knowledge Base article](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx) for more information on logging meetings.**​​​​​​​**

Meetings appear in Salesforce as an "event" with the pink calendar icon

**Logic Elements**

**Fall/Spring Recommendations**

The "End of Fall" and "End of Spring" recommendations show you a suggested course of action for a given student's change of stage at the end of the listed semester. "End of Fall Recommendation" is to be taken into consideration at the end of the Fall semester and after winter assessments are completed. Similarly, "End of Spring Recommendation" is to be taken into consideration at the end of the Spring semester and after Summer assessments are completed.

Please keep in mind that these are ***Recommendations***and not mandates- Both Advisors and Managers should use them as one of the many talking points that should be considered during a conversation about the student's change of Stage.

If you have questions or want to learn more about why we make these recommendations, make sure to consult the [Salesforce Knowledge Base's article about the Inactive Student Process](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx)

**What does a "First Year" Recommendation mean?**

For this dashboard, we use a combination of previous and current enrollments to determine if a student should have their stage changed to inactive.

First year students have only 1 or 2 enrollments registered in their Salesforce Program Record. Therefore, we don't make any specific recommendations based on their enrollment.

First Year student should not be made inactive unless:

* The student has 0 meetings by the end of their first year, or
* The student specifically requested to be made inactive

Example of different scenarios that receive a "First Year Student" recommendation at the end of the Spring

**What does an "Active" recommendation mean?**

We recommend students remain Active when either of these conditions are met:

* Their overall enrollment history shows progress towards a degree
* There is no enrollment data missing for the 3 most recent semesters
* They are engaged with their advisor

The enrollment statuses that show "progress towards a degree" are:

* Full Time
* Part Time
* Study Abroad
* Co-op/Internship

It is possible you may notice students with zero meetings for which we made an "Active" recommendation at the end of the Fall Semester. In the Fall, our recommendations are entirely based on student enrollment. Students with zero meetings are not candidates to become inactive until the end of the program year. You shouldn't expect to see any "Inactive" recommendations for the end of the Fall based solely on number of meetings.

Example of different scenarios that receive an "Active" recommendation at the end of the Spring

**What does a "Missing Data" recommendation mean?**

When a student's recommendation shows "Missing Data" it means that there is not enough information on file for us to make a judgment call about whether this student meets the criteria to become inactive.

* If the student has been meeting with an advisor this year, encourage the advisor to gather past enrollment data.
* If the student has had no engagement with Bottom Line, the focus should be on re-engaging the student since they will become a candidate for inactive stage due to lack of engagement.

For the dashboard to show this recommendation, the following must be true:

Semester #1 enrollment is Blank   
     OR  
Semester #2 enrollment is Blank   
     OR  
​​​​​​​Semester #3 enrollment is Blank

There is currently no way for advisors to change data for their students' past enrollments. If you need to fill in blanks for any missing student data, reach out to your Program Director, or to the Data & Tech team for further guidance.

Example of different scenarios that receive a "Missing Data" recommendation at the end of the Spring

**What does an "Inactive" recommendation mean?**

When a recommendation shows "Inactive" it means that this student’s stage should be changed to Inactive, unless the advisor makes a compelling case for why they should stay on their caseload (i.e. they are actively engaged in the program AND actively progressing toward re-enrollment by paying down a past bill, transferring to a new school, etc.)

The dashboard will recommend that students be made inactive under two circumstances:

* The enrollment patterns for the student **did not** fit the criteria for the "Active", "Missing Data", or "Inactive at Manager's Discretion" recommendations
* The student has had zero engagements/meetings by the end of the Spring Semester

At the end of both the Fall and Spring semesters, this dashboard will also look at a an additional semester's worth of data to make more informed recommendations.

* By end of the Fall Semester, it will NOT recommend that students be made Inactive if they are enrolled or registered for the Current Spring.
* By the end of the Spring Semester, it will NOT recommend that students be made Inactive if they are enrolled or registered for the Next Fall.

In the "Spring" toggle view, you may also notice students with complete and progressive enrollment histories being recommended for "Inactive" status. These students will show a yellow highlight in the "Total Meetings This Year" field, and they are being recommended for Inactive status due to lack of engagement.

Example of different scenarios that receive an "Inactive" recommendation at the end of the Spring

**What does an "Inactive at Manager's Discretion" recommendation mean?**

When a recommendation says "Make Inactive at Manager's discretion", the advisor's next step is to have a conversation with their manager. After a conversation (and filling in gaps in our data/knowledge), it will be up to the manager to decide whether the student’s stage should be switched to “Inactive.”

The most common reasons for deciding to keep these student with an "Active" stage is because they are both actively engaged in the program, and interested in re-enrolling in school within the next two semesters

For the dashboard to show this recommendation, the following must be true:

**At the end of the Fall Semester:**

Last Spring Enrollment is equal to

* Blank or
* Mid-semester Withdrawal

OR

Current Fall Enrollment is equal to:

* Mid-semester Withdrawal

AND

Current Spring Enrollment is NOT:

* Full Time, Part Time, Study Abroad, or Co-op/Internship

**At the end of the Spring Semester:**

Current Fall Enrollment is equal to

* Blank or
* Mid-semester Withdrawal

OR

Current Spring Enrollment is equal to:

* Mid-semester Withdrawal

AND

Next Fall Enrollment is NOT:

* Full Time, Part Time, Study Abroad, or Co-op/Internship

Example of different scenarios that receive a "Make Inactive at Manager's discretion" recommendation at the end of the Spring