**Assessment Data Collection Guide**

**Form Assembly**

We use a survey in Form Assembly to collect critical student data. Advisors are not required to send this to every student, but can use it as a tool when student data is hard to collect. Since more schools are opting to use two-factor authentication, it has become more difficult for advisors to gain direct access to student data, and Form Assembly allows students to submit their data directly to us.

When students answer the survey, the answers will be entered into Salesforce in the corresponding critical data fields, you will get an e-mail saying their response was collected, and a task titled "Review Student Assessment Response" will appear for the advisor (due in 5 days). **Note: the student response (if not blank) will overwrite any information that was previously in those fields.**

Students are asked to **upload their transcript**directly via the survey, so our hope is that advisors will be able to compare the transcript to the data students entered and confirm that it's correct (or update it as needed). While we expect some of our students will make mistakes or be confused by a few of the questions, we still think this will be more efficient than dealing with student account logins and asking advisors to key in all of these numbers by hand.

*Note: the survey is "smart," so students who answer "No" to the first question will not see the questions about Spring GPA or credits earned. They can also use "Add another response" to attach more than one file if their transcript is multiple pages or they're using screenshots.*​​​​​​​

Because we want the survey to go out to students **just after they have received their grades** for the semester, advisors are able to control when each student receives the survey link. The students you select will receive an e-mail (detailed below) with a link to the survey (pictured on the right.)

**Managing the Survey**

Click on the down arrow next to "Program Records" in your Salesforce navigation and select "Send Winter Assessment Email Alert" to view the dashboard where you can manage your assessment surveys. ***Note: the first time you do this you will need to click the "Program Records" tab before the assessments dashboard shows on your "recent" list.***​​​​​​​

**Enter a date in the "Date to Send Assessment"**column or use the checkbox at far left to select multiple students and bulk change the date (for instance, for all students at the same college.) Click save at the bottom of the page, and your e-mail and text will be sent around noon on the day you select. (If you enter today's date in the morning, it will send at noon. If you enter today's date after noon it will send in a few minutes.)

**To RE-send the survey** (i.e. you sent it previously and now you want to send it again), clear out the original date, SAVE, and then put in the new date and save.

Watch this video for an overview of scheduling e-mails to go out to students and monitoring responses

*Please ignore the references to the Student Satisfaction Survey in this video! We no longer include student satisfaction questions with the assessment survey.*

**Email to Students**

Dear Chosen/First Name,   
  
​​​​​​​I hope that you feel seen and valued as you continue to work towards your goals and take care of yourself during these difficult times. As the year comes to a close, we want to connect and be sure that we have the information we need to support you in the coming months! **Please complete this brief survey regarding your degree progress. SURVEY LINK**  
  
Are you currently enrolled in classes? If so, you will need to upload a copy of your unofficial transcript at the end of the survey. We recommend downloading a copy of your unofficial transcript before starting the survey. If you are not enrolled, no need to attach a transcript, but please still fill out the survey.  
   
As a thank you for completing this survey you will be entered in a **raffle for a $250 gift card**!

Finally, if you have not yet scheduled your end-of-semester reflective conversation, please do as soon as possible. You can schedule this meeting using the link below.   
  
CALENDLY LINK

Take care and feel free to reach out if you need anything!

Warmly,

Advisor First Name

**Thank You** to former advisors Terrell James (Chi) and Sam Pearl (MA), for helping us draft this communication to students!

**What Data are we collecting and how?**

**Degree**

|  |  |  |
| --- | --- | --- |
| **Self-Reported / Advisor Reviewed** | **Advisor Entered** | **Data to Revisit / Double Check** |
| [Past Semester Credits Earned](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#semester-credits-earned) | [Anticipated Graduation](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#anticipated-graduation) with a Bachelors Degree (Fall 2022, Spring 2023, Summer 2023) | [Past Semester Enrollment Status](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#semester-enrollment-status) |
| [Past Semester GPA](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#%28coming-soon%29-semester-gpa) | [NEXT Semester Enrollment Status](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#semester-enrollment-status) | [Past Semester Credits Attempted](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#semester-credits-attempted) |
| [Cumulative Credits Attempted](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#cumulative-credits-attempted) | [Maintained SAP](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#maintained-sap) | [College Credits to Graduate](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#college-credits-to-graduate) |
| [Cumulative Credits Earned](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#cumulative-credits-earned) |  | [Major(s)](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#college-major-from-lookup) & [Minor](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#minor) |
| [Cumulative GPA](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#cumulative-gpa) |  |  |
| [NEXT Semester Credits Attempted](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#semester-credits-attempted) |  |  |
| [Upload Transcript](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Files.aspx) |  |  |

**Employability**

|  |  |
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| **Advisor Entered** | **Data to Revisit / Double Check** |
| Add [career-relevant experiences](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Experience-Tab.aspx) the student secured this spring/summer | Confirm (using the student's resume and/or LinkedIn) that all previous career-relevant experiences are listed on the [Experience Tab](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Experience-Tab.aspx) |
| Ensure the student's updated resume is [uploaded](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Files.aspx) into Salesforce | Ensure any open [E Milestone tasks](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx) have the correct status |
|  | [Career interest(s)](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#career-information) |

**Affordability**

|  |  |
| --- | --- |
| **Advisor Entered** | **Data to Revisit / Double Check** |
| [Receiving Pell Grant](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#receiving-pell-grant) | [Bill Status](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#semester-balance-paid) |
| [Total Loans](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Critical-Data.aspx#total-loans) | Confirm status of any outstanding [financial aid tasks](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks) |

**Meetings & Tasks**

|  |  |
| --- | --- |
| **Advisor Entered** | **Data to Revisit / Double Check** |
| Schedule Reflective Conversation & [connect to SF](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx) | Confirm status of any overdue [tasks](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks) (change the due date, if applicable, or mark as Not Pursued) - ALL open tasks should reflect the student's current service plan |
| Mark "Reflective Conversation" [task](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks) complete after the conversation\* |  |
| Add planned [tasks](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks) for next semester and/or adjust due dates of automated tasks as needed |  |
| Mark "Spring Service Plan Ready for Review" [task](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks)complete once you feel that the upcoming service list reflects the best next steps based on the available data and collaborative goalsetting |  |

*\*If you were not able to connect with the student for a reflective conversation, change the status to "Not Pursued" at the end of the assessment period*