**Completing Student Applications**

## Intake Overview

All students who appear to be eligible for Bottom Line will receive an e-mail via Salesforce asking them to create a login and complete part 2 of our application. At this time, they will also be assigned an Intake Advisor, someone who will follow up with them to make sure they complete the process, answer any questions they have, and ultimately review their materials and determine whether the student will be accepted, wait listed, or denied from Bottom Line.

On this page you will find information on:

* [The Student Portal & Finalist Form](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Completing.aspx#the-student-portal)
* [Managing Intake in Salesforce](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Completing.aspx#managing-intake-in-salesforce)
* [Outreach to your Caseload](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Completing.aspx#outreach-to-your-caseload)
* [What makes a complete application?​​​​​​​](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Completing.aspx#what-makes-a-complete-application)
* [What happens when a student doesn't complete an application?](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Completing.aspx#what-happens-when-a-student-doesn-t-complete-an-application)
* [FAQs](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Completing.aspx#faq)

**Questions? Feedback? Bring them to the Student Recruitment Teams Channel!**

**The Student Portal**

Once students create their login, they can access the 2nd part of our application, and they can save and return as often as needed before they finish. During this part of the application, we are collecting:

* **Required eligibility documents**
* Referral Source
* Additional Family Information
* Parent/Guardian Contact Info
* Standardized Test Scores
* College Preferences (Access only)

The email invitation sometimes goes to spam - please remind your students to check their junk/spam folders!  
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**If your student's link has expired, you will need to ask your Recruitment Manager to reset the student's password.**

**Managing Intake in Salesforce**

**NEW**: Check out the video for a quick overview of the Intake Screens: see and manage your intake caseload, review students' application materials, and follow up with students to move them forward in the process.

**Intake Student Timeline**

On the right hand side of each intake student record, you'll see a timeline of all tasks, contact attempts, emails, and meetings you have planned or completed with the student. See below for instructions for using and logging each type of interaction.

**New Task**

Create a task and add a relevant due date for any reminders you'd like to leave for yourself about the student's application. (These tasks will also show in your Tasks Tab if you like to use that for caseload management)

**Email**

Write and send an e-mail to your student directly from Salesforce!

*Note: these emails are more likely to go to Spam, especially if you are emailing a student with an email address associated with Chicago Public Schools.*

**Add a Meeting**

Click "More" and then "Add a Meeting" to capture your Engagement Call with the student. Change the subject of the meeting to "Engagement Call" and add the date/time the meeting happened/will happen.

**Log Contact Attempt**

Each time you reach out to a student on your intake caseload, use "Log Contact Attempt" to log that outreach. The only thing you need to do is select a contact method (phone, text, etc.) and save. Salesforce will assume the outreach was done today, though that can be edited on the timeline if need be.

**Outreach to your Caseload**

​​​​​​​**Step 1: Every couple of days, reach out to new students who are assigned to you**

* Contact new students as soon as possible (at maximum, within 2-3 business days of applying) to ensure that they register for the portal within a week (or their link will expire!) We strongly recommend making this first touchpoint a **phone call**, but you should text/email if they don't pick up
  + Log all outreach via "Add a Contact Attempt"
  + Verify that the student received the email and that it didn't go to their spam/junk folder
  + Answer any questions students might have about the portal or the documents that are needed

**Step 2: Continue outreach for up to one month**to support Finalist Form completion and document submission, and to answer any questions that come up for students about the process or about Bottom Line

* Log all outreach via "Add a Contact Attempt"
  + Keep track of your outreach attempts, successful and unsuccessful
* Our best practice is to contact students every week using a variety of methods (call, text, email) and at different times of the day to maximize the chances of catching them at a good time
* If students are struggling with the Finalist Form, you can collect the remaining data from them over the phone and enter it into Salesforce directly
* Exhibit excellent customer service
  + Be a friendly and helpful ambassador of Bottom Line's services
  + Review documents submitted and let the student know whether they fulfilled the requirement (or whether follow-up is needed)
  + Be patient and know you are going to answer the same questions many, many times over the course of recruitment season
* Year after year our data shows that the first month is a crucial time to follow up with students while their enthusiasm about joining Bottom Line is still fresh!

**NEW 2023**: When students upload an eligibility document in the student portal, the Intake Advisor will receive an email notification!​​​​

**What makes a complete application?**

[**Full Eligibility Info Here**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx)

When an application is assigned to an Intake Advisor, a reviewer has already confirmed that the student is eligible based on:

* Zip code
* Citizenship Status
* High School or Partner Program

Your next step is to work with the student to confirm their eligibility in the following areas:

* **Year in School (and College Attending for Success)**
* **Academic Preparedness**
* **Family Income**
* **College Generation Status**​​​​​​​

Some of this information was submitted by students in the first part of the application, some will be submitted as part of the Finalist Form, and the most critical pieces will be confirmed by documents submitted by the student.

**Year in School / College Attending**

High school transcripts often show a student's graduation year. For Access applicants, we are looking for grades from freshman, sophomore, and at least partial junior year of high school. For Success applicants, we are looking for grades from freshman, sophomore, junior, and at least partial senior year of high school.

For Success students, the SAR also shows their anticipated grade next year: look for the answer in question 29. (*In the example below, this student has attended college for at least one year previously*.)

**College Generation Status**

This information will be based on students' self-reported information, and you may need to follow up with the student if they report "Not Sure" for any of the family college questions. It is critical that we know which of these categories best fits each student, as we often report this information to funders.

**First in Family** = Neither parent graduated from a college in the US and no siblings have a degree or are currently working toward a degree.

**First Generation** = Neither parent graduated from a college in the US, an older sibling is currently in college or graduated from college with a 4-year degree

**Parent w Bachelors** = 1 or more parent graduated with a 4-year degree from a college in the US

FAQs about specific examples can be found [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#first-generation-status).

**Academic Preparedness**

You are looking for a high school transcript that shows an unweighted GPA of 2.5 or higher.

*NY, use*[*this conversion chart*](https://pages.collegeboard.org/how-to-convert-gpa-4.0-scale)*to convert 100-point GPAs to 4-point.*

Students with a 2.3+ GPA may be eligible for Bottom Line if we have reason to believe they are eligible for admission at four-year colleges, generally:

* SATs above 900
* ACTs of 17+
* NY: Regents in the 80s
* Manager discretion​​​​​​​\*

\*Knowing that many students have not taken standardized tests this academic year because of the Coronavirus, we expect to have to rely on manager discretion more often than we did in previous years. We recommend, as a best practice, initially waitlisting students who fall into this category so that decisions about admissions can be made by regional leadership as a group, rather than by individual intake advisors and managers.

**Family Income**

It is **absolutely critical** that we know a student's AGI or EFC at the time they are accepted to the program. As an organization that serves students from low-income backgrounds, we are constantly asked to provide this information to funders.

There are a number of potential documents students can use to prove their financial eligibility for Bottom Line:

* **REDACTED 2022 Federal taxes (Form 1040) (pictured right)** that show a qualifying AGI on line 15 (see chart below)
  + We will accept 2021 taxes as a placeholder for 2022 if the student's income is well within the "Target" range
  + If the areas shown in red on the right are not redacted, delete the document and ask the student to upload it again with the numbers blanked out (you may enter the AGI before deleting the document!)
* An **SAR (pictured right)**that shows an EFC of $5,576 or less (Success only)
* If the parent(s) do not file taxes, any proof of **benefits**, such as Social Security, SSI, TANF/Cash Assistance, Disability, SNAP, etc.
* Court documents that show a student is in a **legal guardianship**

|  |  |  |
| --- | --- | --- |
| **Family Size** | **"Target" Range** | **"Discretion" Range / Cap** |
| 1 | $40,000 | $60,000 |
| 2 | $40,000 | $60,000 |
| 3 | $50,000 | $70,000 |
| 4 | $60,000 | $80,000 |
| 5 | $70,500 | $90,500 |
| 6 | $81,000 | $101,000 |
| 7 | $91,000 | $111,000 |
| 8 | $101,500 | $121,500 |
| >8 | + $10,500 per extra person | + $10,500 per extra person |

​​​​​​​We take special care to ensure that we understand the student's **financial aid household** while reviewing tax documents

* Always compare financial documents to who the student said they live with. If the student said "Both Parents" or "Parent and Step-Parent" but there is only one parent on the taxes, we need income information from the second parent (or step-parent) in order to confirm the student
* If the student said they had a household size of 6, but the taxes only show 3, follow up with the student and find out if the additional 3 people would count toward their financial aid household size for FAFSA

Sample 1040 Form  
Note: Students' tax documents must be redacted - see red highlights for areas where Social Security Numbers and bank account information must be blanked out

Sample SAR (EFC highlighted in yellow)

**Ready to make a decision about a student's application?**

[**Click here for next steps!**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Confirming-Eligibility.aspx)

**What happens when a student doesn't complete an application?**

Occasionally, students decide after applying for Bottom Line that the program isn't right for them or that they're not willing to complete the application. Navigating this is a tough line for intake advisors to walk, because we want to be sure we are extending every opportunity for new students to join us, but we also want the students in our program to be excited to be part of Bottom Line.

Students who have not submitted the Finalist Form within a month of being added to your intake caseload should have their applicant status changed to "**Unresponsive**," as long as all contact attempts outlined above have been made. *Note: many students who become "unresponsive" do follow up with us eventually and submit their info, they will just come off your list of students that you need to be contacting regularly.*

Students may also let you know explicitly that they are no longer interested in joining the program. In these cases, you can change the student's applicant status to "**No Longer Interested**."

**FAQ**

What if the student's transcript or report card screenshots don't include their overall GPA? *Download a copy of this*[*GPA calculator*](https://tbl500amory.sharepoint.com/:x:/s/BottomLine/EeOMxPx7BRlNhIVZzdEOJ0ABDga_JB9GMibL_QIRNBZ2VQ?e=w99k9w)*to plug in the student's grades and see their unweighted GPA!*

**NY Only**: Should all GPAs be reported in a 100-point scale even if the school/student reports it on a 4-point scale? *Yes, please convert GPAs on a 4-point scale to 100-point using this*[*conversion scale*](https://pages.collegeboard.org/how-to-convert-gpa-4.0-scale)*.*