**Confirming Eligibility**

**Confirming Eligibility**

Once students' applications are complete, Intake Advisors review the data one more time, enter a few required fields, and determine whether each student is **accepted, waitlisted, or not eligible**.

Follow the steps on the right to ensure that each application is fully processed in Salesforce.

Click the links to read the full eligibility information and FAQs.

This video will show you a quick step-by-step of the instructions listed below, assuming this student is fully eligible for Bottom Line.

[**College Generation Status**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#first-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

**Steps in Salesforce**

1. Fill in the College Generation Status field using the definitions on the left.

[**Family Income**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#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.

Once you receive the student's financial documents, please confirm that the [**correct parent(s) and family size are listed**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#family-income) and assess their income eligibility:

**Target**= AGI within the "Target" range, students with a Legal Guardian (or who are otherwise considered independent on FAFSA), EFC of $5,576 or less, and students whose parent(s) don't file taxes

**Discretion**= AGI within the "Discretion" range

**Above Cap**= AGI above the "Discretion" range

|  |  |  |
| --- | --- | --- |
| **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 |

**Steps in Salesforce**

1. Fill in the Confirmed Family Income or Confirmed EFC field.
   1. Confirmed Family Income should reflect the 2022 AGI (or 2021 if 2022 was not available) ​​​​​​​
      1. Enter 0 if the student's parent(s) do not file taxes or if the student is in a legal guardianship

​​​​​​​

1. Fill in the Income Eligibility field using the guide on the left.

[**Academic Preparedness**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#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 fewer students are opting to take standardized tests, 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.

**Steps in Salesforce**

1. Update the GPA to reflect the unweighted GPA from the student's transcript.
2. Fill in the Academic Preparedness - Eligibility field.

[**Year in School / College Attending**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#year-in-school)

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*.)

**Steps in Salesforce**

No action is needed on Year in School as long as you have made absolutely sure that the student is in the correct year of high school.

Success Only:

1. Confirm that the College Attending reflects the Target School where the student is enrolled for the fall.

**Other**

Double check the student's [zip code/city](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#citizenship-status) and [citizenship status](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Eligibility-Criteria.aspx#citizenship-status) and talk to your manager about any students a reviewer assigned to you who don't appear to meet one of those criteria.

**Making a Decision**

Based on the criteria above, each student will fall into one of these three categories:

**Accepted Students:**

Student meets ALL eligibility requirements:

* *Zip Code*
* *Year in School/College Attending*
* *First Generation*
* *Academically Prepared*
* *Citizenship Status*
* *Family Income in the "Target" Range*

Change the student's Eligibility Ranking to **"Target"** and save the page. Change their applicant status to **"Accepted"**​​​​​​​after completing the Engagement Call​​​​​​​ (see screenshot below)

**What's the next step for accepted students?**

**Access**: We generally begin meeting 1:1 with new students in July. Some regions may have events for accepted students throughout the spring, but all students can expect to hear from us in June/July to set up their first official meeting.

**Success**: They will need to attend/complete a Success Orientation in the late spring/early Summer. After that, they will be invited to meet 1:1 with an advisor for a Checklist Meeting.

​​​​​​​

**Waitlisted Students:**

Student meets all eligibility requirements**except:**

* *First Generation AND Family Income in the "Discretion" Range  
  ​​​​​​​OR*  
  *Parent with a degree AND Family Income in the "Target" Range*

Change the student's Eligibility Ranking to **"Discretion"** and save the page. Then change their applicant status to **"Waitlist"**(see screenshot below)

Student does not meet one or more eligibility criteria AND is a participant in a **partner program**that allows for exceptions:

* *The student does not qualify as Academically Prepared*
* *Family Income is above the "Discretion" Range*
* *A parent has a 4-year degree AND income is in the "Discretion" Range*
* *The student lives outside of our service area*
* *The student's Citizenship Status is not on the list of eligible statuses for the region   
  ​​​​​​​*

Change the student's Eligibility Ranking to **"Exception"** and save the page. Then change their applicant status to **"Waitlist" or "Accepted,"** depending on your MOU with the partner

**Not Eligible Students:**

Student does not meet one or more eligibility criteria:

* *The student does not qualify as Academically Prepared*
* *Family Income is above the "Discretion" Range*
* *A parent has a 4-year degree AND income is in the "Discretion" Range*
* *The student lives outside of our service area*
* *The student's Citizenship Status is not on the list of eligible statuses for the region*​​​​​​​

Change the student's applicant status to **"Not Eligible"**(see screenshot below) and fill in the "Reason Ineligible" field

In about 1 hour, the student will receive an automated message from your regional recruitment e-mail address letting them know that they are not eligible and referring them to other programs in your area.

**Changing the Applicant Status**

*\*Technical note:*

*You will not be able to change the student's status to "Accepted" or "Waitlist" until all of the fields mentioned above are filled in and saved. You will need to save the page with complete information before you are able to change the status without seeing an error message.*