**Contact Information**

**First Name**

* The student's legal first name (i.e. the name that would be used on FAFSA or any legal documents)

FAQ:

If my student legally changes their name, what should I do? *Please update this field so that it always reflects the student's current legal name (as associated with their Social Security Number, if applicable, for financial aid purposes).*

**Last Name**

* The student's legal last name (i.e. the name that would be used on FAFSA or any legal documents)

FAQ:

If my student legally changes their name, what should I do? *Please update this field so that it always reflects the student's current legal name (as associated with their Social Security Number, if applicable, for financial aid purposes).*

**Chosen Name**

* The student's chosen first name (i.e. the name the student would like to be called in all communication from Bottom Line)

FAQ:

I just entered a chosen name for my student, but their legal name is still showing up everywhere. *Please submit a ticket and ask to have the student's legal name replaced on the program record, and see below.*

Why is my student's legal name showing up in some places and their chosen name in others?*We have been working over the course of the 2020-21 school year to replace legal names with chosen names wherever they appear. It's a complicated technical process to make the changes everywhere, but we hope to get to the point next school year where chosen name always appears.*

Should this field be used for nicknames? *If your student would like all official communication from Bottom Line to use that nickname, this field may be used for nicknames (e.g. a student named Odunlade who goes by Ade).*

**Gender Identity**

* The student's gender identity, as self-reported on the student application
* **WHY**: In addition to tracking demographic information on our student applicants, we may use this field to target recruitment for gender-specific events (for example, info sessions for an all-women's college, a corporate event for Black men in engineering, etc.)
* **What to enter**: the student will select an option during the application process, but may later request to change their gender identity in our system. It is important that this selection reflect **the student's self-reported identity,**and never the advisor's perception of their identity.
* *Note: gender identity is NOT the same as a student's*[*pronouns*](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#pronouns)*. We should not make assumptions about a student's pronouns based on their gender identity.*

FAQ:

Gender Identity is blank for my student. What should I do? *Since Gender Identity is a relatively new field on our student application, students who applied a few years ago may not have had the opportunity to self-report. In these cases, you may leave the field blank, or you may ask the student to self-report their gender identity to you, if they are comfortable doing so.*

**Pronouns**

* The student's pronouns, as self-reported on the student application
* This is an open write-in field so as not to limit students to any particular response(s)
* If blank, the student chose not to report them, but the advisor can add them later if the student is comfortable sharing them
* *Note: pronouns are not the same as a student's*[*gender identity*](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#gender-identity)*. We should not make assumptions about a student's gender identity based on their pronouns.*

**US Citizenship Status**

* The student's current citizenship status in the US, as confirmed during the student application process
* **What to enter**:
  + US Citizen
    - The student has a US Birth Certificate, US Passport, or Naturalization Certificate to show they are a citizen of the United States (we do not need to see these, but they might need them to certify their citizenship status as part of the financial aid process)
  + Permanent Resident
    - The student has a US Green Card (we do not need to see these, but they might need them to certify their citizenship status as part of the financial aid process)
  + TPS (Temporary Protected Status)
    - TPS is a temporary immigration status provided to nationals of certain countries experiencing problems that make it difficult or unsafe to be deported there; TPS students can reside in the US until the government decides it is safe for them to return to their country of citizenship
    - These students do not qualify for financial aid and are generally not eligible for Bottom Line
  + [DACA](https://www.dhs.gov/deferred-action-childhood-arrivals-daca) or Undocumented
    - These students do not qualify for federal financial aid and are generally not eligible for Bottom Line
    - In New York and Chicago, students with DACA status qualify for state financial aid, so we accept a limited number of these students each year
  + Refugee or Asylee
    - Most students with this status qualify for financial aid and are eligible for Bottom Line; this should have been confirmed via official documentation during the intake process
  + Other
    - You shouldn't see any students with this status; their citizenship status should have been confirmed as part of the intake process. If you see a student with this status, please inform your manager

FAQ:

My student's citizenship status has changed. What do I need to do? *Please update this field to reflect the student's current citizenship status, and please see the instructions, below, by region, for helping the student update their status for financial aid purposes:*

* [*Chicago*](https://tbl500amory.sharepoint.com/:w:/s/SuccessProgramCurriculum/EXbufqsxKnFDr1hJveI8-jcBgTfaxDXc3Sh3GfS_8Bkruw?e=s98jSB)
* [*MA*](https://tbl500amory.sharepoint.com/:w:/s/SuccessProgramCurriculum/EUI1adfzd3xAlPKlKcpdR7sBQguggRMk1a7T65bP5ESszA?e=zY5ALY)
* [*NY*](https://tbl500amory.sharepoint.com/:w:/s/SuccessProgramCurriculum/EVgt6QAhlatMmBRcqEkIUasBzWWq_mUXb8WscX_8e7Kk7w?e=Lk2pLy)

**Birthdate**

* The student's birth date, as self-reported on the student application

**Race**

* The student's race, as self-reported on the student application

**Ethnicity**

* The student's ethnicity, if self-reported on the student application

**Preferred Contact Method**

* Use this field to indicate if your student has a strong preference for communicating via:
  + Phone
  + Email
  + Text
  + Video Chat

**Preferred Email**

* Use this field to indicate which e-mail address your student prefers to have messages sent to. **Please be sure the e-mail address is listed in the correct corresponding box!**
  + College
  + Personal
  + Alternate
  + Work

**Preferred Phone**

* Use this field to indicate which phone number your student prefers to have calls/messages sent to. **Please be sure the phone number is listed in the correct corresponding box!**
  + Mobile
  + Home
  + Work
  + Other

**Mailing Address This Semester**

* **WHY**: We often (at least once per semester) send mail in the form of cards and care packages to students. Without updated mailing addresses, a lot of our mail is returned to the office and money is wasted on postage.
* **What to enter**:
  + Address Line 1
    - The student's street address
    - If this is a campus address, double check how the college prefers students address their mail; sometimes the name of the college has to be in this box
  + Address Line 2
    - The student's apartment/unit/mailbox #, if applicable
    - If this is a campus address, double check how the college prefers students address their mail
  + City
  + State
  + Zip
  + Address Last Updated
    - Enter the date this address was last changed or confirmed. We expect these fields to be reviewed/updated, at minimum, within the first few weeks of school in the fall, to be sure that mail is being sent to the right place throughout the school year

**Date Earned BA**

* **WHY**: Our Employability goal for students is that they are employed full-time or enrolled in graduate school within 6 months of graduation. This field allows us to track when the student graduated, even if we didn't hear the news right away.
  + Entering a date in field is also what will prompt your manager to change the student's stage to "Graduated."
* **What to enter**:
  + The date the student **officially earned their Bachelors Degree**
    - Estimates are fine. For example, if the student graduated at the end of the spring semester but we don't know when, enter 5/15

FAQ:

My student walked at graduation but still has a few credits to earn over the summer or still owes a bill to the college. Can I count them as graduated? *No. In order to earn a degree each student must:*

* *Earn the minimum****number of credits****required by their college*
* *Fulfill the requirements for their****Bachelors Degree***
* ***Owe $0****to the college*

*Some colleges will allow students to walk at graduation if they have met some but not all of these requirements;****Bottom Line will only consider a student graduated once they have fulfilled all 3 requirements and officially earned their degree****.*

My student earned an Associates Degree this semester and they are not planning to pursue a Bachelors Degree. Can I enter a graduation date here? *No. This field should only be used to track students' Bachelors Degree attainment.*