**PD Report**

**Overview**

As a reminder, this data set is for **internal**programmatic inquiry, tracking, and exploration only. This data should not be shared with development or anyone external to the organization for any reason. We're using this as a ​​​​​​​**temporary**stop-gap to help us ideate and build future reports/dashboards for data inquiry that will best serve directors' needs moving forward. As you are using this tool, please be thinking to yourself/keeping track of:

* What data do I wish was presented differently? Included? Excluded?
* What questions am I coming here to answer often/regularly?
* If I am regularly coming here to support advisors'/managers' needs, how might we make the necessary information readily accessible to them directly?

The flattened data set is available [**here**](https://na88.lightning.force.com/lightning/r/Report/00O1Y000006pyzYUAQ/view?queryScope=userFolders)and each field is detailed below.

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| --- | --- |
| **Field** | **Definition** |
| **Site** | The program site/region where the student is currently being served |
| **Success Program Record Lookup: Advisor Name** | The student's current Success Advisor |
| **Success Program Lookup: College Attending** | The College Attending listed in the Critical Data section of the semester that is considered the "current semester." (For example, if a student attended College A in the fall and will transfer to College B in the spring, the "College Attending" will show College A until Salesforce is told that the current semester is spring. |
| **Contact Lookup: First Name For Display** | The student's chosen First Name, or legal first name if no chosen name is listed |
| **Last Name** | The student's last name |
| **Mobile Phone** | The student's cell phone number |
| **Contact Lookup: Email** | The student's preferred email address |
| **Student Type** | Displays whether the student entered the program as A2S (Access to Success) or SD (Success Direct) |
| **College Bound Status** | Indicates whether students identified as first-generation college students (including first in their family) at the time that they were accepted to the program |
| **Fee for Service Partner** | Lists students' affiliation with any of our Fee for Service partnerships |
| **Success Special Initiatives** | Lists whether students are part of a pilot program or other special initiative |
| **Partner Affiliation** | Lists whether students are affiliated with any of our recruitment partners |
| **Gender Identity** | Captures what students listed as their gender identity on the student application *(not captured for some students because the question is relatively new/was previously optional)* |
| **Race** | Captures what students listed as their race/ethnicity on the student application (*this is the old field we used in previous years, not the new fields on this year's student application)* |
| **Confirmed Family Income at Intake** | The student's family's AGI (Adjusted Gross Income) at the time they were accepted to the program, if captured |
| **High School** | The high school the student attended |
| **Success Y1 Fall College Attending** | Captures the college listed on the fall semester of the student's first year in Bottom Line |
| **Success 2nd Semester Persistence** | Captures if the student was enrolled in college the first fall AND first spring after high school graduation. If not available in SF, this data is filled in by an NSC pull |
| **Success 3rd Semester Persistence** | Captures if the student was enrolled in college the first fall, first spring AND second fall after high school graduation. If not available in SF, this data is filled in by an NSC pull |
| **Success Cohort** | The academic year that the student joined the Success program |
| **Last or Most Recent Success Acad Year** | The most recent academic year (in this case, 2020-21) will appear here if the student was in the program last year |
| **Last or Most Recent Advisor** | The Success Advisor assigned to the student before their current one, if applicable |
| **Last or Most Recent Year in BL Program** | The student's BL year (e.g. Year 3) during the last/most recent academic year (2020--21) |
| **Success Program Record Lookup: College Progression Year** | Based on % credits earned, the student's current status of freshman, sophomore, junior, or senior |
| **Last or Most Recent Loan Total** | The student's total amount of loans at the end of last academic year (if on file) |
| **Last/Most Recent # Independent Interactions** | The total number of engagements the student had with Bottom Line during last academic year (2020-21) |
| **Last/Most Recent #In Person Interactions** | The total number of **in-person** engagements (including calls after Covid hit) the student had with Bottom Line during last academic year (2020-21) |
| **Last/Most Recent SAP** | No longer relevant |
| **Success Program Record Lookup: # Success Contact Attempts** | The number of unsuccessful contact attempts logged for this student (all time) **(NOTE: the semester-specific numbers are only accessible in PowerBI)** |
| **Success Program Record Lookup: Stage** | The student's current stage |
| **Success Program Record Lookup: Total Completed Tasks** | The total number of tasks (including events) completed with/by the student (Note: there are no date parameters here) |
| **Success Program Record: Program College Year** | The student's current BL year (e.g. Year 3) |
| **Success Program Record Lookup: # Completed Events** | The total number of events (meetings) completed with the student (Note: there are no date parameters here) |
| **Success Program Record Lookup: Primary Career Interest** | The top-choice field the student hopes to work in after graduation |
| **Success Program Record Lookup: # Days Since Last Meeting** | No Longer Relevant |
| **Success Program Record Lookup: Anticipated Graduation** | The advisor's assessment of whether the student is graduating in Fall 2021, Spring 2022, or Summer 2022 |
| **Success Program Record Lookup: Primary Major** | The student's current major, according to Salesforce |
| **Success Program Record Lookup: Second Major** | The student's second major, if they are double majoring |
| **Success Program Record Lookup: Current Fall Lookup: Semester College** | The College Attending listed in the fall 2021 critical data |
| **Success Program Record Lookup: Current Fall Lookup: Semester Enrollment** | The enrollment status listed in the fall 2021 critical data |
| **Success Program Record Lookup: Current Fall Lookup: Cumulative Credits Attempted** | The cumulative credits attempted as of the end of the fall 2021 semester (winter assessments) |
| **Success Program Record Lookup: Current Fall Lookup: Semester Credits Attempted** | The credits the student attempted in the fall 2021 semester |
| **Success Program Record Lookup: Current Fall Lookup: Cumulative Credits Earned** | The cumulative credits earned as of the end of the fall 2021 semester (winter assessments) |
| **Success Program Record Lookup: Current Fall Lookup: Semester Credits Earned** | The credits the student earned in the fall 2021 semester |
| **Success Program Record Lookup: Current Fall Lookup: Cumulative GPA** | The student's cumulative GPA as of the end of the fall 2021 semester (winter assessments) |
| **Success Program Record Lookup: Current Fall Lookup: Semester GPA** | The student's GPA for the fall 2021 semester |
| **Success Program Record Lookup: Current Spring Lookup: Semester College** | The College Attending listed in the spring 2022 critical data |
| **Success Program Record Lookup: Current Spring Lookup: Semester Enrollment** | The enrollment status listed in the spring 2022 critical data |
| **Success Program Record Lookup: Current Spring Lookup: Cumulative Credits Attempted** | The cumulative credits attempted as of the end of the spring 2022 semester (summer assessments) |
| **Success Program Record Lookup: Current Spring Lookup: Semester Credits Attempted** | The credits the student attempted in the spring 2022 semester |
| **Success Program Record Lookup: Current Spring Lookup: Cumulative Credits Earned** | The cumulative credits earned as of the end of the spring 2022 semester (summer assessments) |
| **Success Program Record Lookup: Current Spring Lookup: Semester Credits Earned** | The credits the student earned in the spring 2022 semester |
| **Success Program Record Lookup: Current Spring Lookup: Cumulative GPA** | The student's cumulative GPA as of the end of the spring 2022 semester (summer assessments) |
| **Success Program Record Lookup: Current Spring Lookup: Semester GPA** | The student's GPA for the spring 2022 semester |
| **Success Program Record Lookup: EM: Apply interview for min 3 career opp** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Create LinkedIn Profile Meets BL** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Demo interview skills gets process** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Establish min 1 new connection** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Establish min 2 new connections** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Establish min 3 new connections** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Identified values interests skills** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM:Individualized career plan complete** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM:Narrow career interests to 3 clusters** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM:Understand key elements of job search** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Understand mechanics of & has resume** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Success Program Record Lookup: EM: Update resume tailored for career op** | A checkbox that indicates (if checked) that the advisor marked this pre-populated E Milestone task as Completed |
| **Contact Lookup: College Address Line 1** | Line 1 of the student's current address (home or campus), as confirmed at the start of the 2021-2022 school year |
| **Contact Lookup: College Address Line 2** | Line 2 of the student's current address (home or campus), as confirmed at the start of the 2021-2022 school year |
| **Contact Lookup: College Address City** | City of the student's current address (home or campus), as confirmed at the start of the 2021-2022 school year |
| **Contact Lookup: College Address State** | State of the student's current address (home or campus), as confirmed at the start of the 2021-2022 school year |
| **Contact Lookup: College Address Zip** | Zip Code of the student's current address (home or campus), as confirmed at the start of the 2021-2022 school year |
| **Success Program Record Lookup: # Fall Overall Independent Interactions** | The number of events (meetings) the student participated in between 8/23/21 and 1/23/22 (*Note: this field is fixed (frozen); adding meetings from the fall will not change/increase this count, though it will increase the total*) |
| **Success Program Record Lookup: Total Completed Tasks Fall** | The number of tasks the student/advisor completed between 8/23/21 and 1/23/22 (*Note: this field is fixed (frozen); adding tasks from the fall will not change/increase this count, though it will increase the total*) |
| **Success Program Record Lookup: # Spring Overall Independent Interactions** | This automation has been turned off - disregard |
| **Success Program Record Lookup: Total Complete Tasks Spring** | This automation has been turned off - disregard |
| **Success Program Record Lookup: Total Completed Emp Milestones** | The total number of Employability Milestones the student has completed overall, including up to 3 Career-Relevant Experiences (up to 15) |
| **Success Program Record Lookup: Total Completed Emp Milestones This Year** | The total number of Employability Milestones the student has completed this academic year (up to 3), including up to 3 total Career-Relevant Experiences |
| **Success Program Record Lookup: Advisor Full Name** | The student's current Success Advisor |
| **Success Program Record Lookup: Current Spring Lookup: Semester Balance Paid** | The status of the student's bill for the Spring 2022 semester |
| **Success Program Record Lookup: Success Date FAFSA Submitted** | The date that the student last filed a FAFSA (i.e. older dates will appear for FAFSAs completed in previous years if a new FAFSA hasn't been filed since then) |
| **Contact Lookup: College Address Last Updated** | The date that the student's mailing address was last updated (i.e. older dates will appear for previous years if the address hasn't been confirmed since then) |
| **Success Program Record Lookup: Days Since Last Engagement Success** | The number of days since the student had a meeting/event with Bottom Line (according to SF) |
| **Success Program Record Lookup: Last Engagement Date Success** | The date of the student's last meeting/event with Bottom Line (according to SF) |
| **Success Program Record Lookup: # Career Relevant Experiences** | The total number of career-relevant experiences a student has had during their time in BL |
| **Success Program Record Lookup: # Career Relevant Experiences this Year** | The number of career-relevant experiences a student has had with a start date on or after 8/23/21 |
| **Success Program Record Lookup: First Destination Record: FD: Employment Status** | Shows the status of a student's employment after college (i.e. Full Time, Internship, etc. - includes "No, Still Looking" and "No, Not Looking" as options for when we know students do not have a confirmed opportunity lined up.) |
| **Success Program Record Lookup: First Destination Record: First Destination** | Shows whether a student's First Destination is logged as Employment or Grad School |