**Program Record**

**Student**

* This field displays the student's legal name (not chosen name) for use on official documents, such as the FAFSA​​​​​​​

**Program Record Name**

* This field is for display only and just helps the database distinguish students who may have the same name so we can tell which student we're looking up (by region, cohort, and program)

**Program Year**

* This field displays the academic year during which the student started the Success program (e.g. 2019 - 20)
  + Essentially, this is another way of displaying the same information as [Program College Year](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#program-college-year)
* Not editable

**Program Site**

* This field displays the Bottom Line region who most recently provided service to this student
* Not editable by program staff; please submit a ticket if you have a student who is changing regions (e.g. a NY Access student who will be attending a MA Target College)

**College Attending**

* This field displays the college the student is enrolled in during the current semester
* For example, if a student is transferring from College A in the fall to College B in the spring, it will say "College A" while the current semester is fall, and change to "College B" once the current semester becomes spring

FAQ:

I changed my student's college attending for this semester in Critical Data, why isn't it updated here? *You will need to reload the page after editing the current semester to make the correct college display.*

**Date to Send Assessment**

* This field is can be managed from the Send Winter Assessment Email Alert screen; as a reminder it's the date that the student will receive the Form Assembly link to send in their self-reported assessments data.
* The goal is to send these out just after students receive their grades from school.

**Primary Major**

* **WHY**: In addition to helping the student make progress toward their degree, our staff use major(s) to identify students who may be a good fit for career-related opportunities with Bottom Line partner organizations
* **What to enter**: The student's college major, choosing the best fit available from the dropdown
  + ​​​​​​​Please enter "Undecided" if the student is unsure

FAQ:

Can we add a more specific major to this list? *While we realize that this list won't capture exactly what each student's major is, because there's so much variance between schools, categorizing majors in broader categories makes the process of identifying students for career opportunities much more efficient.*

**Second Major**

* If a student is double majoring, this is where a second major can be entered.
* **WHY**: In addition to helping the student make progress toward their degree, our staff use major(s) to identify students who may be a good fit for career-related opportunities with Bottom Line partner organizations
* **What to enter**: The student's college major, choosing the best fit available from the dropdown
  + ​​​​​​​This can be left blank if the student is not double majoring

FAQ:

Can we add a more specific major to this list? *While we realize that this list won't capture exactly what each student's major is, because there's so much variance between schools, categorizing majors in broader categories makes the process of identifying students for career opportunities much more efficient.*

How do I know which major is "primary" or "secondary"? *Ask your student! Choose the major that the student thinks is most likely to align with their career goals post-college.*

**Minor**

* **WHY**: In addition to helping the student make progress toward their degree, our staff use minors to identify students who may be a good fit for career-related opportunities with Bottom Line partner organizations
* **What to enter**: The student's college minor, choosing the best fit available from the dropdown
  + ​​​​​​​This can be left blank if the student has no minor

FAQ:

Can we add a more specific minor to this list? *While we realize that this list won't capture exactly what each student's minor is, because there's so much variance between schools, categorizing minors in broader categories makes the process of identifying students for career opportunities much more efficient.*

What if my student is double minoring? *Choose the minor that the student thinks is most likely to align with their career goals post-college.*

**Success Meeting Orientation Status**

* **WHY**: The Success Orientation is the first step to joining the Success Program, once accepted. Students need to be engaged in our summer transition programming (the orientation, Checklist Meeting, and Send-Off event) in order to officially matriculate into Bottom Line.
* **What to enter**: If the student attended a Success Orientation (whether live or self-paced), mark this as "Completed."

FAQ:

I marked a student's Success Orientation as completed on the Transition tab, but it's not showing up here! *Because of some complicated Salesforce reasons, these are actually two separate fields. Anything you enter in THIS field will be automatically transferred to the transition tab, but not the other way around. What's on the transition tab is the field that matters for tracking & reporting, so you do not need to fill in "completed" here if it is already marked on the transition tab.*

**College Student Id Number**

* **WHY**: Advisors may find it helpful to have the student's college ID number on file when advocating for the student on their behalf. Additionally, as we work to build out data sharing agreements with colleges, this will be the easiest way to identify student data that is sent back and forth
* **What to enter**: The student's ID number at the college they currently attend (or most recently attended)​​​​​​​

**Current Academic Year**

* Shows whether the section is referring to the fall or spring term
* Not editable​​​​​​​

**Stage**

* The student's current standing in the Bottom Line program
  + Active
    - The student is currently participating in the Bottom Line Success program (all students on Success Advisors' caseloads are active)
  + Inactive
    - The student is not currently participating in the Bottom Line Success program (due to lack of engagement, misconduct, or deciding not to pursue a 4-year degree)
    - These students are still included in Bottom Line's results/outcomes for up to 6 years
    - Review the [Inactive Policy](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx) to read the process for having students' stages changed to Inactive
  + Graduated
    - The student graduated with a Bachelors Degree and therefore completed the Bottom Line Success program
    - Review the [Assessing Graduates section](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#assessing-graduates) to read the process for having students' stages changed to Graduated
  + Timed Out
    - The student participated in Bottom Line Success for the maximum of 6 years without earning a Bachelors Degree
* ​​​​​​​​​​​​​​​​​​​​​​​​​​​​This field is not currently editable by advisors

**Reason Inactive**

* This field should remain blank unless the advisor thinks the student meets certain criteria laid out in our [Inactive Process](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx)
* **WHY**: There are a few reasons (outlined in our [Inactive Process](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx)) why a student might no longer be an active participant in our program. However, most students can re-engage with the program if they change their mind down the road! In order to tailor outreach to inactive students and have a record of why the student left the program, this is a required filed for advisors to fill in before asking their manager to change the student's stage.
* **What to enter**:
  + Misconduct
    - Bottom Line chose to remove this student from the program after becoming aware of inappropriate or illegal actions (e.g. verbally harassing another Bottom Line student)
  + Not Engaged
    - The student has had no engagement with Bottom Line for at least a full academic year, despite regular outreach from BL staff
  + Not Interested in Program
    - The student has specifically and repeatedly asked that Bottom Line no longer contact them
  + Not Pursuing Degree
    - The student has been unenrolled for 3 consecutive semesters with no plan to enroll in the following semester

FAQ:

What if a student was changed to inactive and later re-engages? *Great! Once the student is changed back to Active, please remove the value from this field so it's blank once again.*

**Intake Advisor**

* The Bottom Line staff member who was assigned to this student as they were completing the intake process
* Not editable by advisors; editable by Managers and Recruitment Managers in the Intake UI under "Success Intake Advisor"

**Summer Advisor**

* The Bottom Line staff member who was assigned to this student during their first summer in the program (before they were assigned a permanent advisor)
* Not editable by advisors; editable by Managers in the list view called "[Region] Summer Advisor Assignment"

**Advisor**

* The Bottom Line staff member currently providing service to this student
* Not editable by advisors; editable by Managers via the Manage tab --> Assign Advisors

**College Credits to Graduate**

* **WHY**: In order to assess whether our students are on track to earning their degrees, we need to know where the finish line is. This number is used to calculate whether our students met the milestone of earning at least 10% of their credits toward their degree each semester
* **What to enter**: The total number of credits the student needs to earn their Bachelors degree
  + ​​​​​​​For the majority of your students, this number will be based on the college's overall requirements
  + You may have students enrolled in a specific degree program with different requirements than the college (e.g. their accounting program requires 128 credits, rather than 120 credits, to attain a degree)

FAQ:

What if my student is currently working toward an Associates Degree? *Please enter 120, which is the most common number of credits needed for a Bachelors Degree*

**Program College Year**

* This field displays how many years the student has been in Bottom Line (e.g. Year 2)
  + Essentially, this is another way of stating the same information as [Program Year](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#program-year)
* Not editable

**Total College Credits Earned**

* This field displays the information that was entered **last semester** so that advisors can see the student's progress toward their degree, even if the critical data for that semester is no longer visible
* Not editable

**Cumulative College GPA**

* This field displays the information that was entered **last semester** so that advisors can see the student's progress toward their degree, even if the critical data for that semester is no longer visible
* Not editable

**Anticipated Graduation**

* **WHY**: To help the advisor create a service plan to support the student in their degree requirements and career goals before graduation. It is also used by Career Connections Teams to plan for events like Recognition Night, and by Program Directors to predict class sizes/caseloads for the next semester
* **What to enter**: ​​​​​​​
  + ​​​​​​​Fall 2021: the student is graduating in the fall of next academic year
  + Spring 2022: the student is graduating in the spring of next academic year
  + ​​​​​​​Summer 2022: the student is graduating in the summer of next academic year

FAQ:

Why can't I choose anything further ahead than next Summer? *We previously required advisors to note an anticipated graduation date for all students, but we learned that it was a LOT of administrative work and that students' plans changed a lot right up until (and sometimes during) the last year they were in school. Strategically, we need to have accurate data on who is graduating this academic year, so that is what we have prioritized. During Summer Assessments, you will be able to indicate who you believe is graduating next academic year!*

**Career Information**

**Primary Career Interest**

* **WHY**: Our Career Connections staff (or program leadership, where there is no CCT) are focused on connecting students with experiences, events, and volunteers that can help the student advance their career goals. Knowing what type of field they hope to enter after graduation (especially if different from their major) helps us make sure that students are made aware of any relevant opportunities.
* **What to enter**: The top-choice field the student hopes to work in after graduation; choose the best fit from the options on this list

FAQ:

Can we add a more specific career interests to this list? *While we realize that this list won't capture exactly what each student's interests are, categorizing them in broader categories makes the process of identifying students for career opportunities much more efficient.*​​​​​​​

**Secondary Career Interest**

* **WHY**: Our Career Connections staff (or program leadership, where there is no CCT) are focused on connecting students with experiences, events, and volunteers that can help the student advance their career goals. Knowing what type of field they hope to enter after graduation (especially if different from their major) helps us make sure that students are made aware of any relevant opportunities.
* **What to enter**: The second-choice field the student hopes to work in after graduation, if they are considering more than one; choose the best fit from the options on this list
  + ​​​​​​​This can be left blank if the student only has one area of interest

FAQ:

Can we add a more specific career interests to this list? *While we realize that this list won't capture exactly what each student's interests are, categorizing them in broader categories makes the process of identifying students for career opportunities much more efficient.*