**Summer Transition**

**Using this Page**

This page is intended to collect information from/about students during or after their Checklist Meeting. Many of these fields already exist in Salesforce, but they are compiled in one place to make data entry more streamlined for advisors.

**NOTE: You must change a student's stage to "Active" before you can access this tab.** This is because some of the data is saving to the critical data for fall, and students will not have a fall semester to save to if they are not yet active in the program.

This screenshot shows where you can find your summer caseload and change their stage to Active before continuing with the steps outlined on this page.

**Summer Transition - Key Transitions**

**Success Orientation Meeting Status**

* Choose "Completed" if the student attended a Success Orientation, either live (virtually) or the self-paced "course."

FAQ:

How do I know if my student attended the self-paced orientation? *When students complete the course survey, a designated person in your region will receive the response and let you know. (CHI: Janelle Norman, MA: Emelda Lagos, NY: Dan Papson)*

**Checklist Meeting Status**

* Choose "Completed" if the student attended a Checklist Meeting

**Success Send-Off Status**

* Choose "Completed" if the student attended the Success Send-Off

FAQ:  
  
​​​​​​​How do I know if my student RSVPed for the Send-Off? *Regions are each handling Send-Off RSVPs independently, so please check in with your region's Transition Leads for more info on tracking RSVPs. This field is only to capture who attended the event.*

**Degree**

**Student ID**

* The student's ID at the college where they will be attending
* While not required for our records, this can be a helpful tool when advocating for students, especially those with bill or verification issues

**College Email**

* The student's email address at the college they will be attending
* Anything added here will also show on the Contact Info tab

**OP Participation Status**

* Reflects whether the student is attending an academic bridge program, either over the summer or beginning in the fall
* Be sure to capture if the student is attending a summer Opportunity Program, especially, because it may impact their ability to attend required Bottom Line events.

**Success Direct**

* This field is not editable, but a check in the box indicates that the student joined Bottom Line via Success Direct (which means you may want to ask more quesitons about the student's financial aid and bill than you would an Access to Success student!)

**Fall Enrollment Status**

* Confirms that the student is registered for classes in the coming fall semester
* **What to enter:**
  + Registered
    - The student has registered for at least one course at the college they will be attending
* Anything added here will also show in the critical data for NEXT Fall

**Fall Credits Attempted**

* **WHY**: Comparing semester credits attempted to semester credits earned can help inform an advisor if a student is off-track for Satisfactory Academic Progress. Knowing the number of credits attempted also shows advisors whether students are on track to meet the milestone of earning at least 10% of their credits in a given semester.
* **What to enter**: The number of credits the student is enrolled in for the coming fall semester
* Anything added here will also show in the critical data for NEXT Fall

**High School GPA**

* This field is for your reference; it shows the student's high school GPA as confirmed as part of their application to Bottom Line

**Employability**

**Work Study**

* Use this field to indicate whether the student qualifies for work study and whether they have already secured a work study job.
* Be sure to create a follow-up task for any student who answers that they are still looking for a work study job

**Life**

**Housing Type**

* Captures whether the student plans to live on campus, at home, or at another off-campus location
* For advisor use in bill resolution and other follow-up on housing, making a commuting plan, etc.

**Health Insurance Waiver**

* **WHY**: Most colleges will charge students for their college-provided health insurance as part of their fall bill. Students who already have private or state health insurance can waive this fee, but must complete paperwork to prove they have health insurance from elsewhere in order to avoid the fee.
* **What to enter**:
  + Waiver Complete
    - The student has already submitted their health insurance waiver form
  + Waiver Incomplete
    - The student still needs to submit their health insurance waiver form
  + N/A
    - The student plans to enroll in the college's health insurance
    - The student was not charged for school health insurance and does not need to complete a waiver

**Waiver Will Be Available On**

* Schools aren't always on top of making sure an up-to-date waiver form is available for students. If your student won't be able to submit a waiver until a later date, you can make note of it here for service planning purposes

**Health Insurance Enrolling**

* Captures students' plans for enrolling in school health insurance

**Affordability**

**Fall Bill Status**

* **WHY**: The most important thing to us is that our students’ bills are resolved for the current semester so that they are able to register for the following semester without any holds on their account. This information can also be used to look school-by-school and identify institutions where students have a harder time resolving their bills during the semester.
* **What to enter**:
  + Yes – the balance has been paid in full
  + Payment Plan – the student has enrolled in a payment plan through their college and their semester balance is considered to be 0 (provided they keep up with the payment plan throughout the year)
  + No – there is a remaining balance on the student’s account
* Anything added here will also show in the critical data for NEXT Fall

FAQ:

What if my student has a plan to pay their balance, but they have not paid it yet? *​​​​​​​Please select "No" until the balance is fully paid.*

**Fall Bill Due Date**

* If the student still needs to pay their bill, capture the due date for service planning purposes

**Entrance Counseling Status**

* Note whether the student was able to complete entrance counseling at or before your meeting, if applicable

**MPN Status**

* Note whether the student was able to complete their MPN at or before your meeting, if applicable

**Receiving Pell Grant**

* **WHY**: Eligibility for Pell Grants is often a measure that we are asked to report on as a way to gauge how many of the students in our program come from a low-income family
* **What to enter**:
  + Yes – the student is receiving at least $1 in Pell Grant funds for this semester
  + No – the student is receiving $0 in Pell Grant funds for this semester
* Anything added here will also show in the critical data for NEXT Fall

**Link to Student Waiver Form**

* Share this link with a student so they can fill out Bottom Line's student waiver. This link is unique to each student, so be sure to ONLY share the link from the student's own profile, or their information will be saved to the wrong student's page

**Student Waiver Signed Date**

* A date in this field indicates that the student successfully completed the student waiver form