**Tasks**

**Tasks Overview**

Tasks come in two different forms: [**automated/scheduled tasks**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks), and [**advisor-created tasks**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx?Mode=Edit#advisor-created-tasks). You can read more about each type below. Regardless of the type of task, here are some general guidelines to follow:

* Use the due date to indicate when the task needs to be completed by, and change it to the date the task was completed once it's done
* If a task does not apply to your student (i.e. because of their enrollment status), change the status to "Not Pursued"
* Change tasks to "Completed" only when fully complete.
  + For example, if it takes two meetings for a student's resume to meet the guidelines for BL approval, only change the task to "Completed" after the second meeting
  + If you begin working on a task with a student but don't complete it, we recommend changing the status to "In Progress." This will not factor into goals completion, but it will help you and your manager see progress and prioritize follow-up

Tasks appear in two places in Salesforce: on the timeline in the [**Engagement Tab**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx) on a student-by-student basis, and on the [**Tasks Tab**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#tasks-tab) for your whole caseload (or team, if you're a Team Manager).

**Automated/Scheduled Tasks**

* Automated tasks are tasks that all or almost all of our students need to complete at a specific time of the year
  + These tasks will appear for all students at the start of the academic year, with set due dates
* Employability milestones are automated, but they are not based on the start of the academic year and the due dates are flexible. Read more about E Milestones by clicking on the button to the right
* Some financial aid tasks are automated for all eligible students, and others are automated for students at specific schools that have additional requirements. Read more about financial aid task management by clicking on the button to the right
  + These due dates are automated by school or by region

[**Schedule of Automated Tasks**](https://tbl500amory-my.sharepoint.com/:b:/g/personal/mbarton_bottomline_org/ETP9x1-eVGhDkZYVa9KYruoB3D6iByEuafku87JwFr6KNg?e=l288vB)

[**Employability Milestones**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)

[**Financial Aid Task Management**](https://tbl500amory-my.sharepoint.com/:b:/g/personal/mbarton_bottomline_org/EThR76PdZcpJlSN4oJwjP1QBF4Kr9F4vV7mDQ-PtrXOboA?e=q62S16)

**Advisor-Created Tasks**

* Advisors can also enter their own tasks to support their service planning for the coming semester
  + ​​​​​​​Choose from a set list of common tasks, or write in your own task to help you manage your work, for example, "Review Student's resume and send feedback."
* ​​​​​​​Financial aid task management also requires advisors to create and enter tasks, for example, when a student is selected for verification​​​​​​​

[**Creating and Managing Tasks**](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx)

[**Financial Aid Task Management**](https://tbl500amory-my.sharepoint.com/:b:/g/personal/mbarton_bottomline_org/EThR76PdZcpJlSN4oJwjP1QBF4Kr9F4vV7mDQ-PtrXOboA?e=q62S16)

**Tasks Tab**

The Tasks Tab is a special list view in Salesforce that shows advisors all open tasks for every student on their caseload (or for managers, all of their team's open tasks). This list is intended to help advisors manage processes that are heavily task-reliant, like financial aid. Type "verification" into the search box, and you will quickly get a list of students who still have verification requirements to complete.

**Pinning the List View**

This video will show a new user how to pin the correct list view so they always see the full list of outstanding tasks.

**Navigating the Tasks Tab**

Once you've pinned the correct list view, watch this video to get an idea for how to view and filter your list of tasks.

*Notes:*

* *\*****Flashing light warning****\* The top of the video inexplicably flashes for the first 38 seconds, so skip ahead if that's something you're sensitive to*
* *The name of the tab has changed since this video was created - you'll now just see "Tasks" at the top of your page*