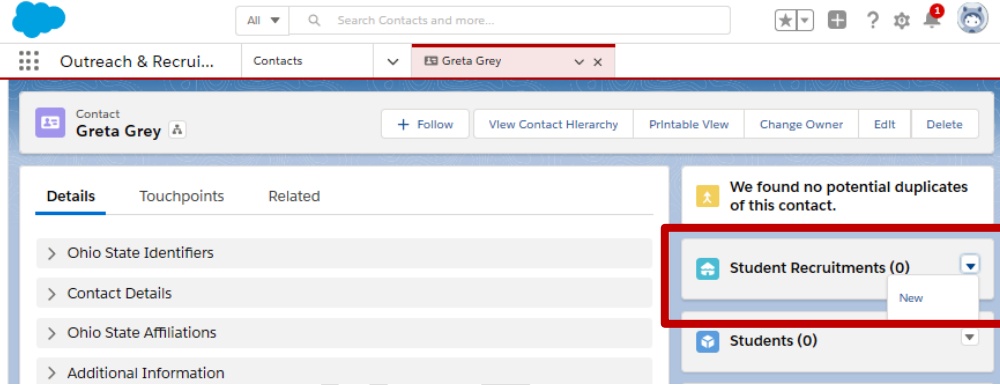
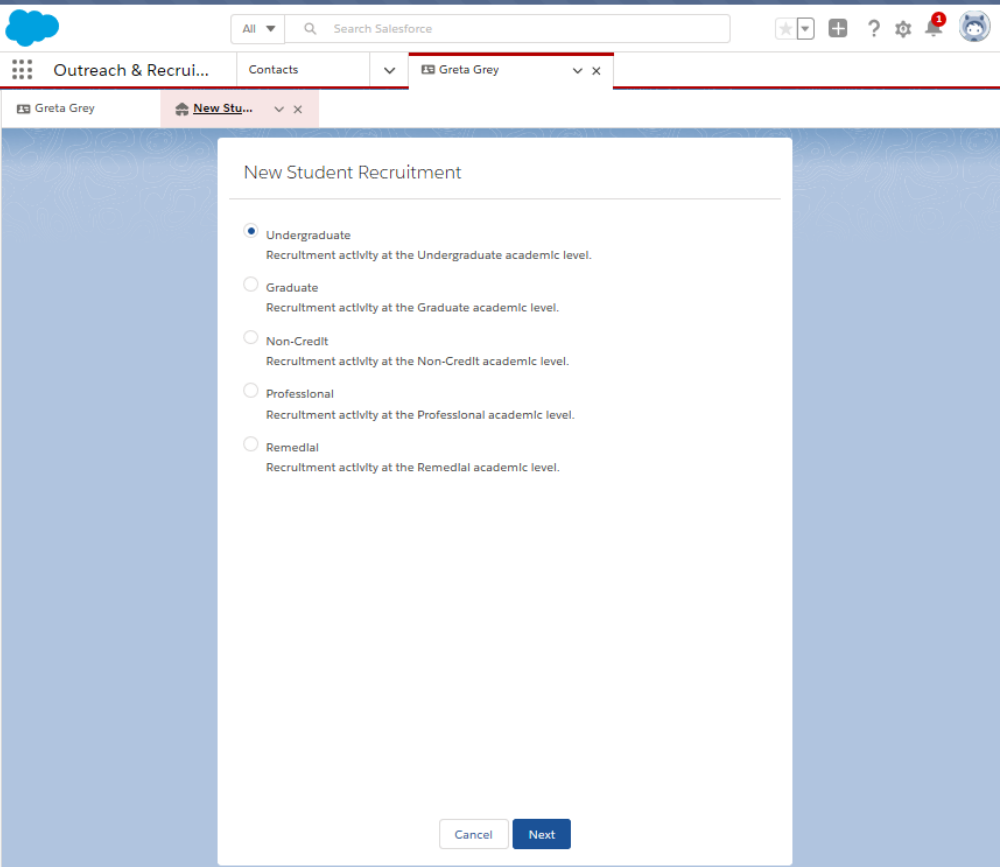
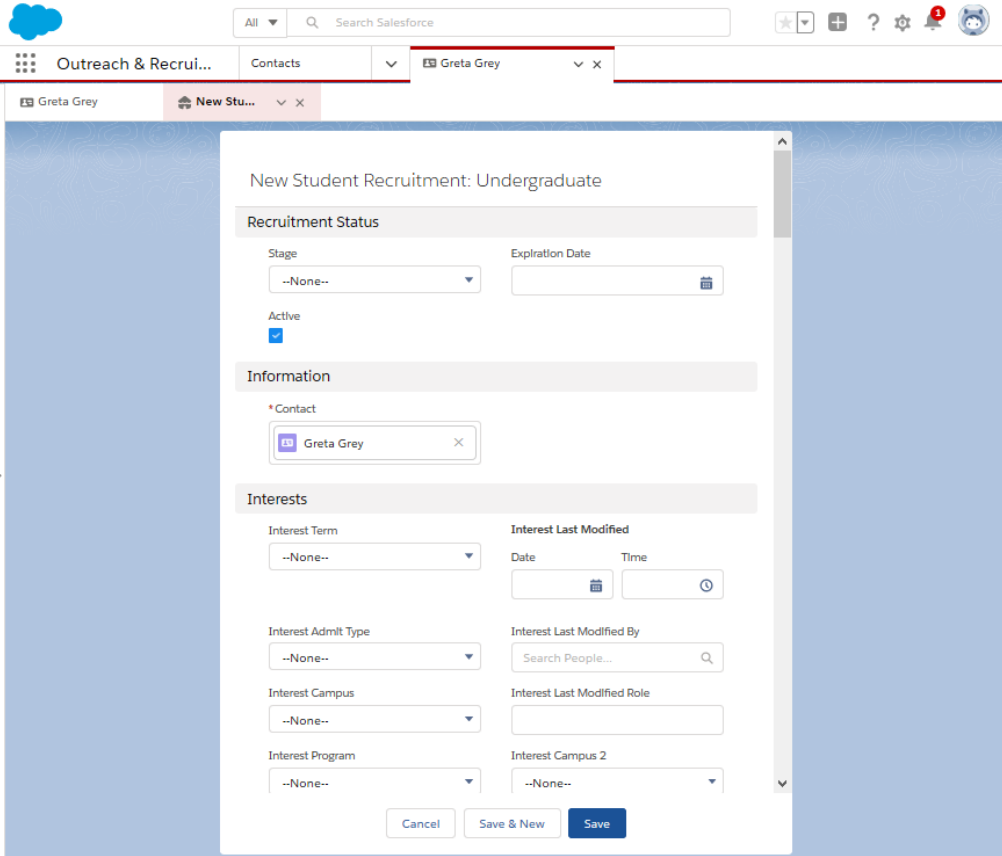
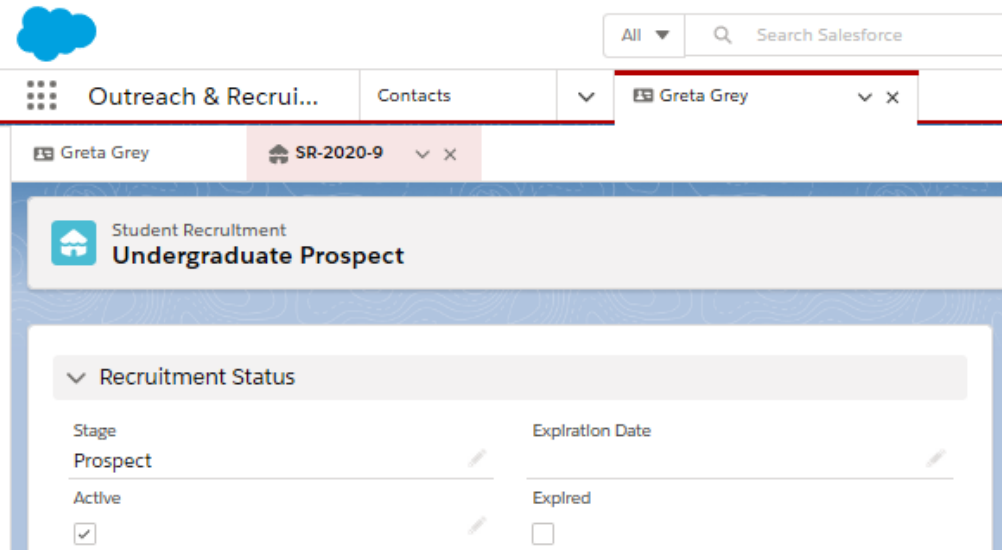
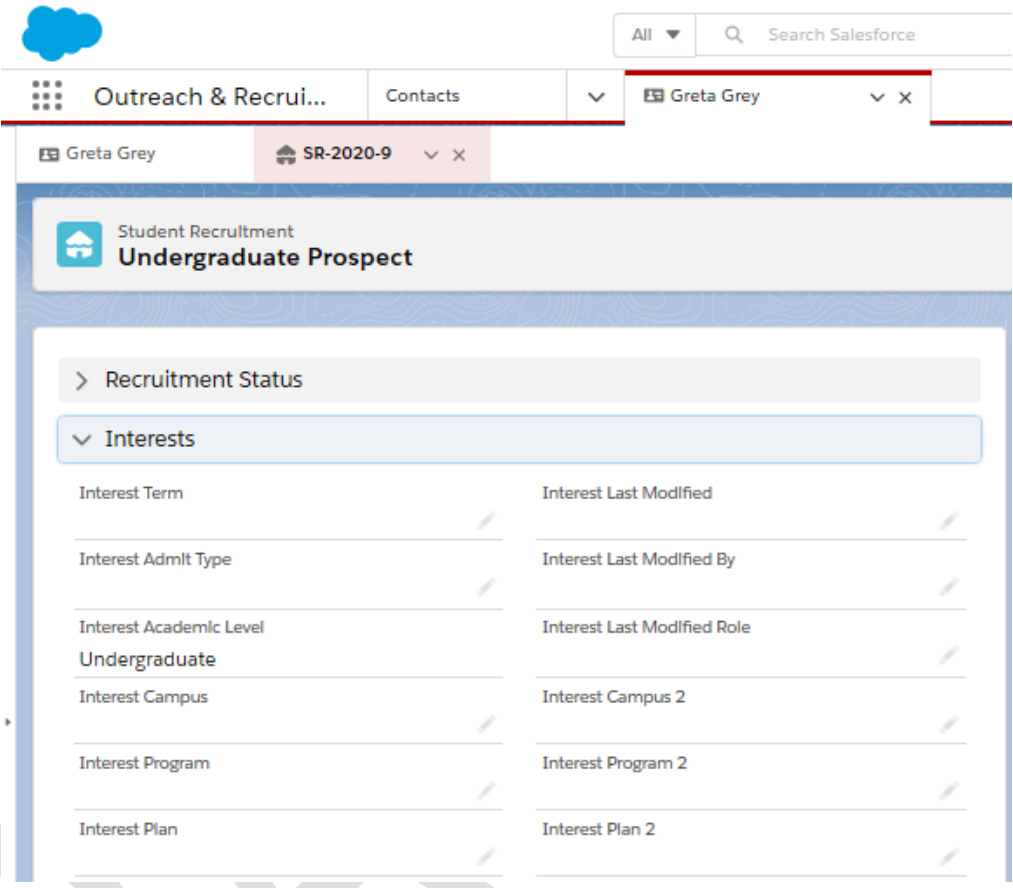
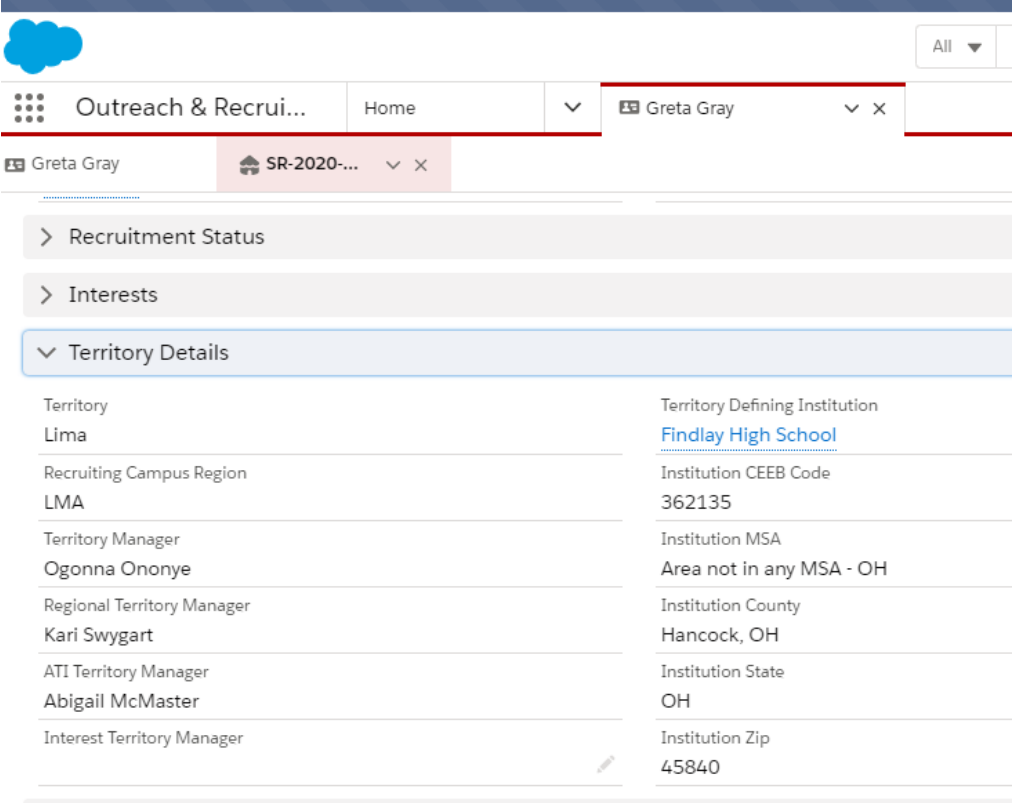
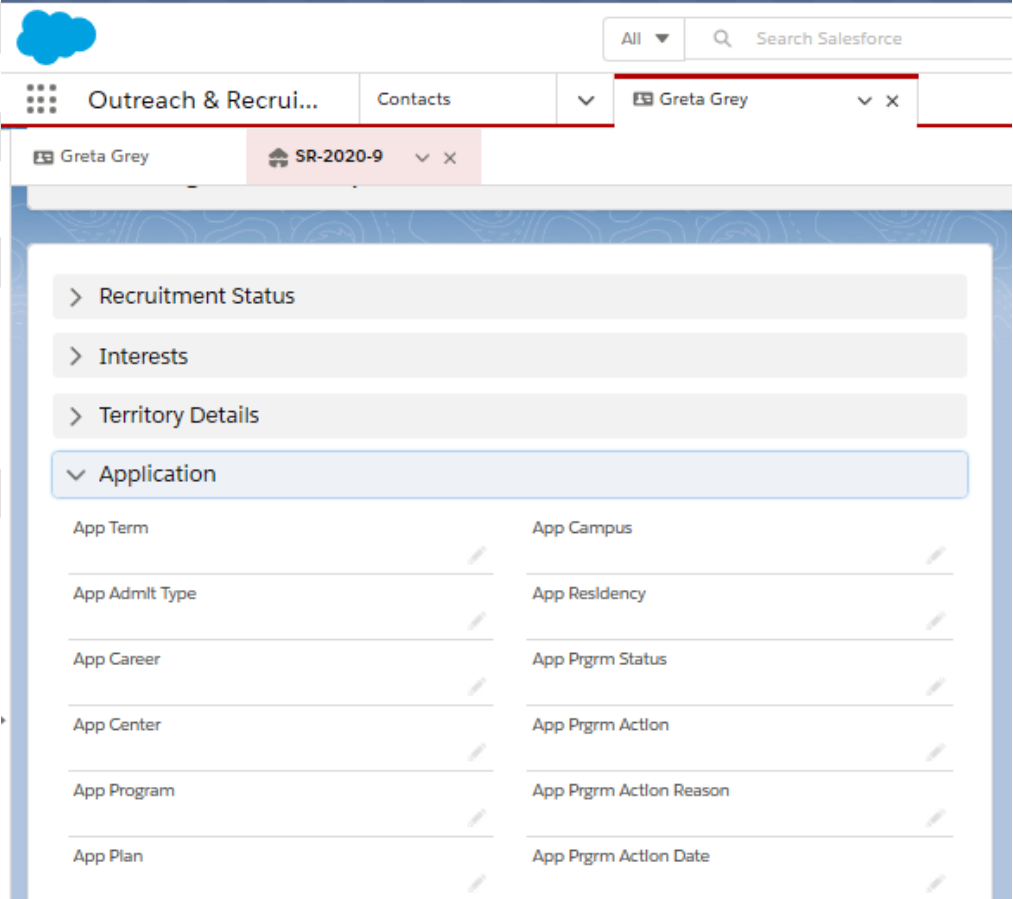


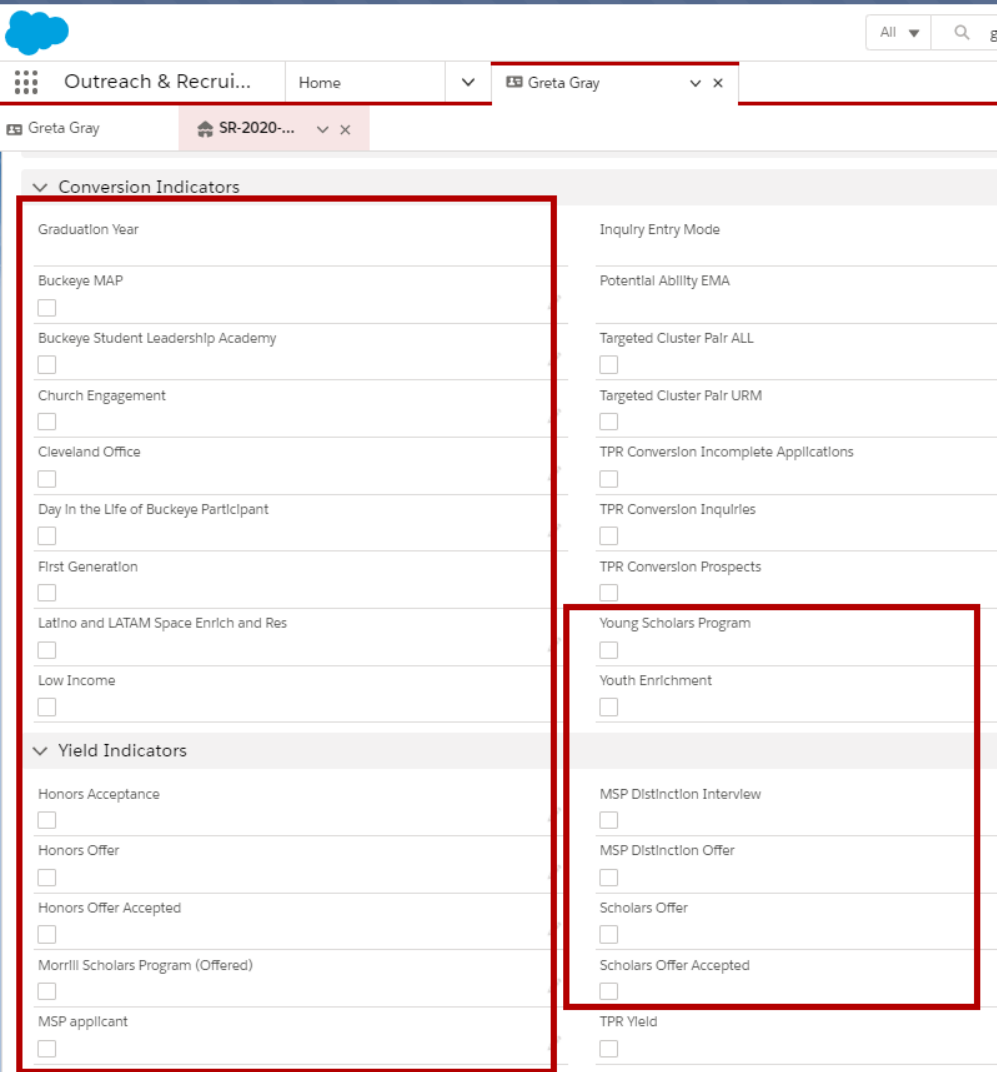
## STUDENT RECRUITMENT RECORDS

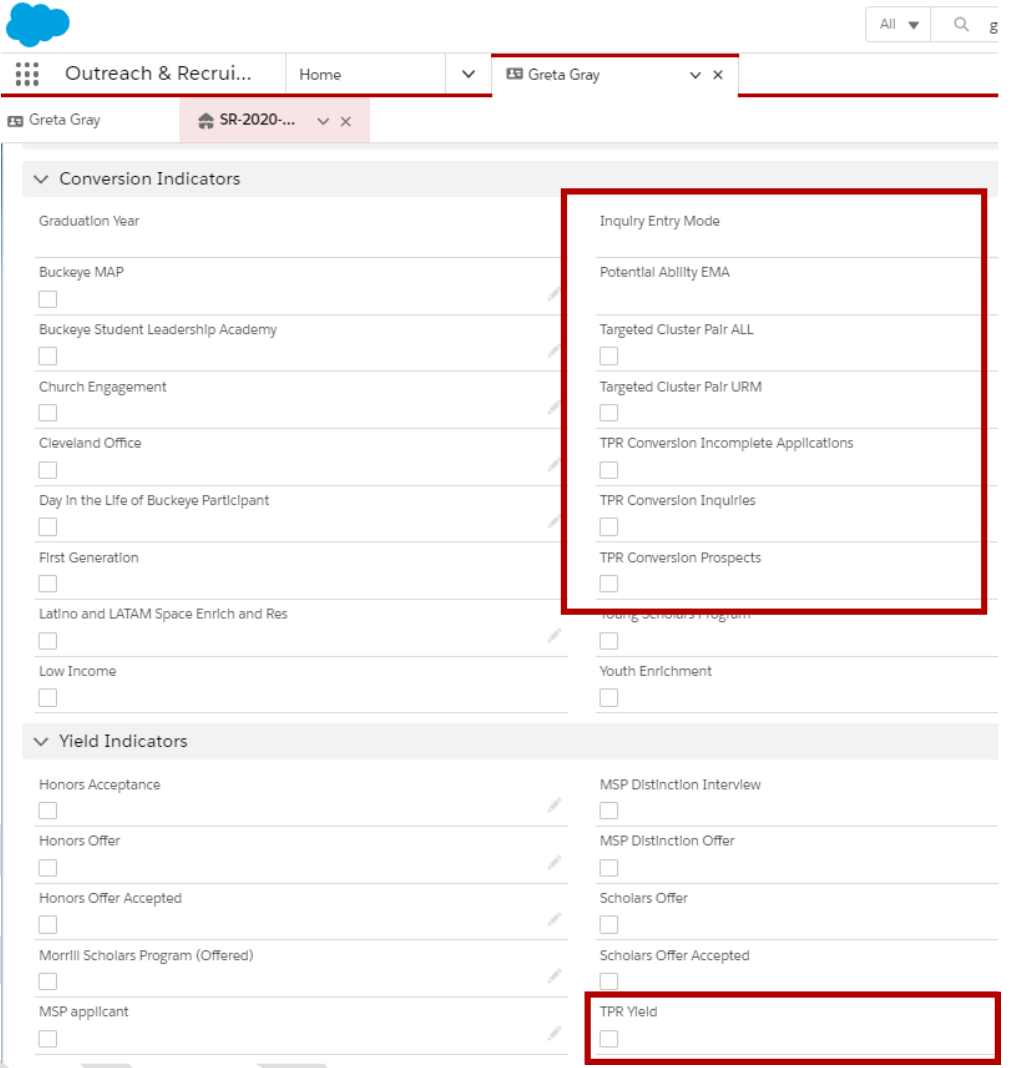
Step-by-Step	Screen
<p>To manually add a Student Recruitment Record, locate the Contact Record</p> <p>In the right pane, click the down arrow in the Student Recruitments section</p> <p>Select New</p>	
<p>Select the type of Student Recruitment</p> <p><b>NOTE:</b> Many of you will have Undergraduate as your default option and will not need to make a selection.</p>	

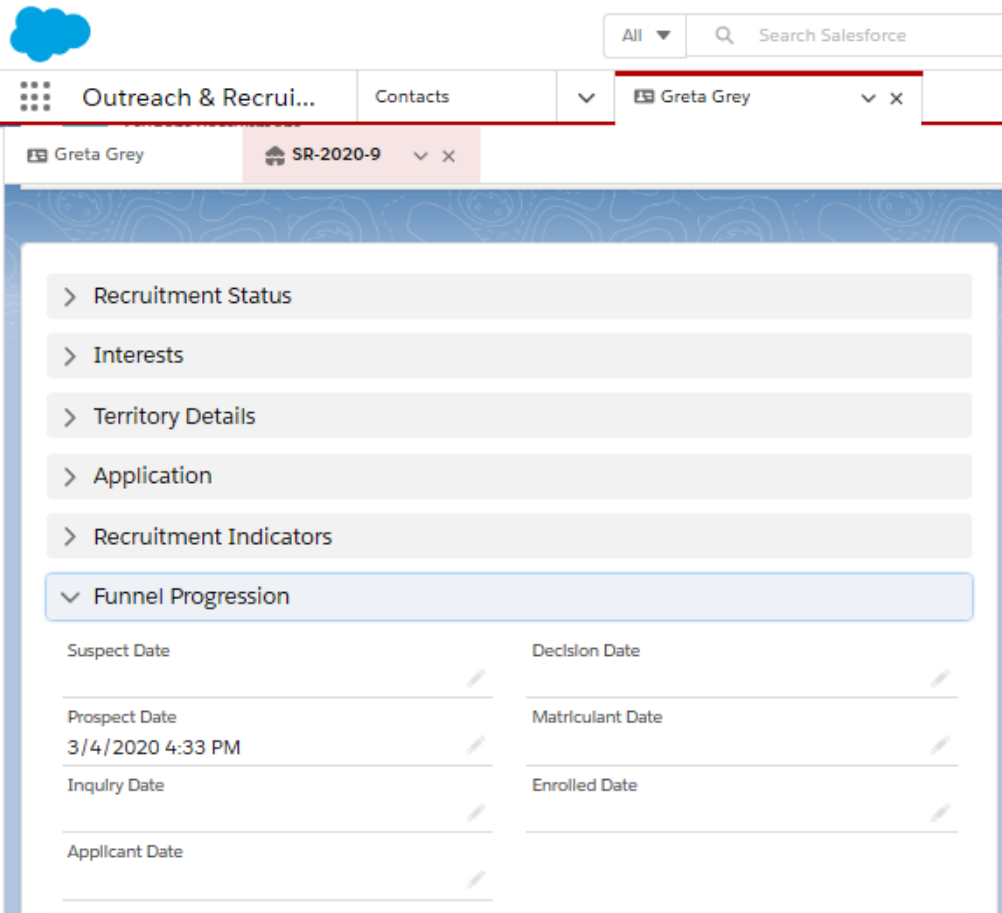
Step-by-Step	Screen
<p>Because you added the Student Recruitment Record from the Contact Record, the Contact is automatically populated</p> <p>Enter as much information as is available</p> <p><b>Note:</b> The majority of information that users referenced in Talisma will be stored under Student Recruitments. Sections of available fields, and the order of sections and fields, may differ by user group</p> <p>Click Save</p>	
<p>Section: Recruitment Status</p> <p>Stage: users can update; may also be updated by data imports</p> <p>Active: based on the interest term</p> <p>Expiration Date: will be set based on interest term</p> <p>Expired: the system will automatically check this box based on the Expiration Date</p>	

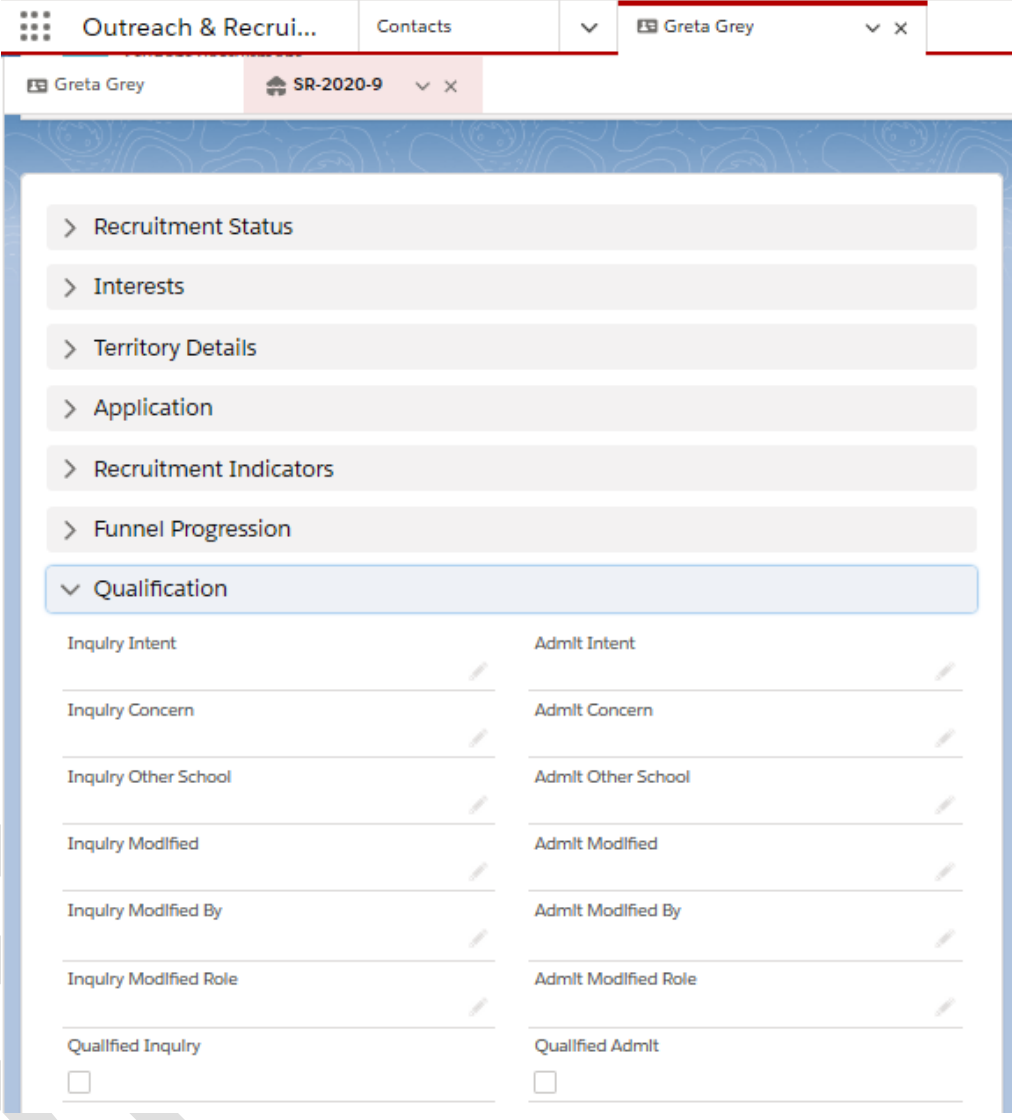
Step-by-Step	Screen												
<p>Section: Interests</p> <p>Inbound data feeds, such as test score purchases and contacts added thru web form submissions, will update these fields</p> <p>Salesforce users can also update these fields</p> <p>Interest Academic Level displays the type of Student Recruitment you selected when creating the record</p> <p>The following fields are automatically updated by the system:</p> <ul style="list-style-type: none"> <li>Interest Last Modified</li> <li>Interest Last Modified</li> <li>Interested Last Modified Role</li> </ul>	 <p>The screenshot displays the Salesforce interface for a 'Student Recruitment Undergraduate Prospect' record. The 'Interests' section is expanded, showing a list of fields with edit icons. The fields are organized into two columns:</p> <table border="1"> <thead> <tr> <th>Interest Term</th> <th>Interest Last Modified</th> </tr> </thead> <tbody> <tr> <td>Interest Admit Type</td> <td>Interest Last Modified By</td> </tr> <tr> <td>Interest Academic Level Undergraduate</td> <td>Interest Last Modified Role</td> </tr> <tr> <td>Interest Campus</td> <td>Interest Campus 2</td> </tr> <tr> <td>Interest Program</td> <td>Interest Program 2</td> </tr> <tr> <td>Interest Plan</td> <td>Interest Plan 2</td> </tr> </tbody> </table>	Interest Term	Interest Last Modified	Interest Admit Type	Interest Last Modified By	Interest Academic Level Undergraduate	Interest Last Modified Role	Interest Campus	Interest Campus 2	Interest Program	Interest Program 2	Interest Plan	Interest Plan 2
Interest Term	Interest Last Modified												
Interest Admit Type	Interest Last Modified By												
Interest Academic Level Undergraduate	Interest Last Modified Role												
Interest Campus	Interest Campus 2												
Interest Program	Interest Program 2												
Interest Plan	Interest Plan 2												
<p>Section: Territory Details</p> <p>This section should be automatically populated through data imports that include the Contact's high school.</p> <p>Indicating that the Contact's high school is Primary is accomplished through the Affiliated Account Record.</p> <p>Interest Territory Manager has been added to allow regional users to manually add themselves as a contact if a student inquires or applies to that location but is not in that</p>													

Step-by-Step	Screen
<p>campus's recruiting region.</p>	
<p>Section: Application</p> <p>The fields in this section will be automatically updated via an import of application data</p> <p>Salesforce users will not update these fields</p>	

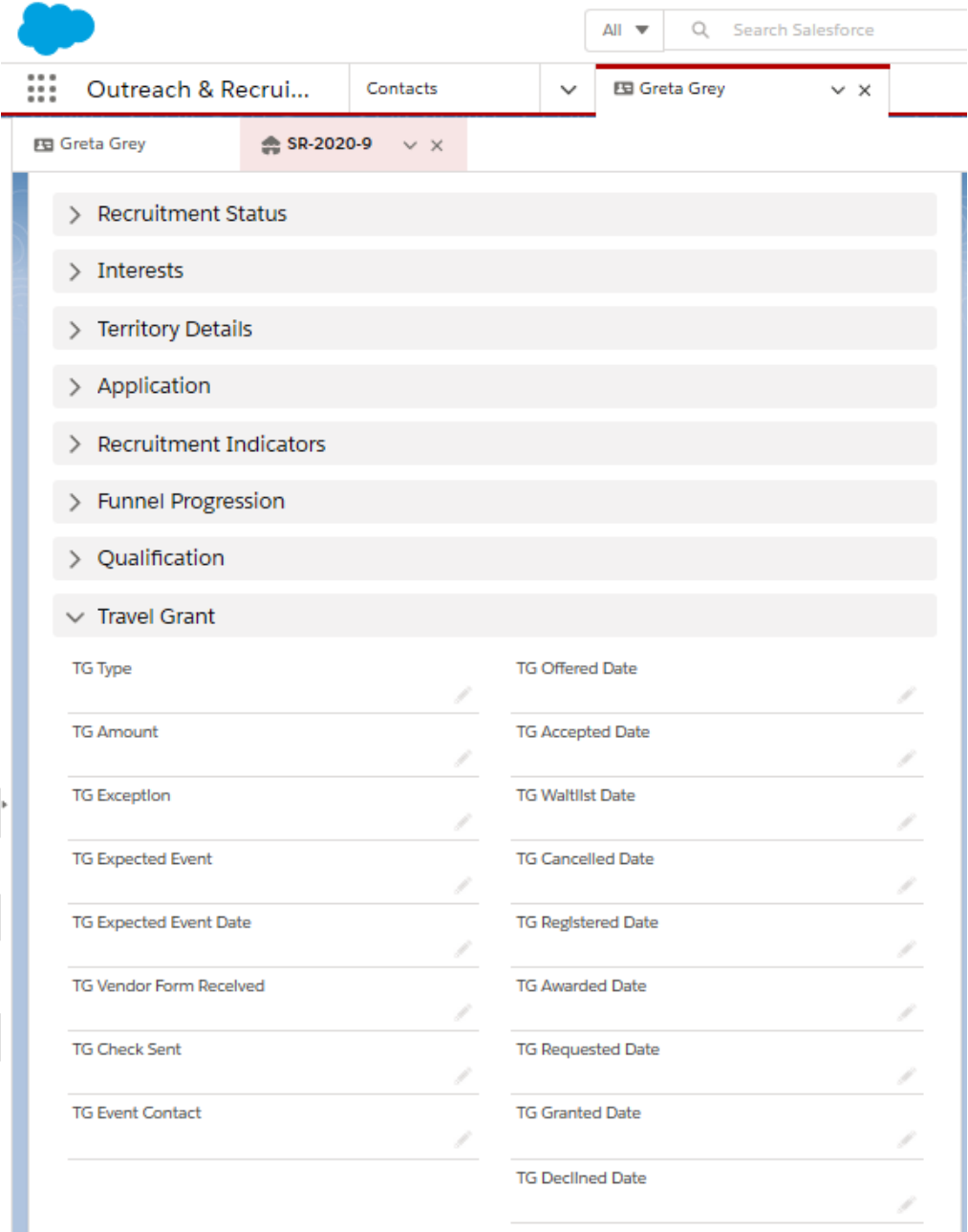
Step-by-Step	Screen
<p>Sections: Conversion and Yield Indicators</p> <p>Most fields can be manually updated.</p> <p>First Generation and Low Income are marked based on test score purchases</p>	 <p>The screenshot displays the 'Student Recruitment Records' system interface. The top navigation bar includes a sidebar with 'Outreach &amp; Recruit...' and 'Home' tabs. The main content area is titled 'Conversion Indicators' and 'Yield Indicators'. The 'Conversion Indicators' section includes fields like 'Graduation Year', 'Buckeye MAP', 'Buckeye Student Leadership Academy', 'Church Engagement', 'Cleveland Office', 'Day In the Life of Buckeye Participant', 'First Generation', 'Latino and LATAM Space Enrich and Res', and 'Low Income'. The 'Yield Indicators' section includes fields like 'Honors Acceptance', 'Honors Offer', 'Honors Offer Accepted', 'Morrill Scholars Program (Offered)', and 'MSP applicant'. A red box highlights the 'Conversion Indicators' section, and another red box highlights the 'Yield Indicators' section.</p>

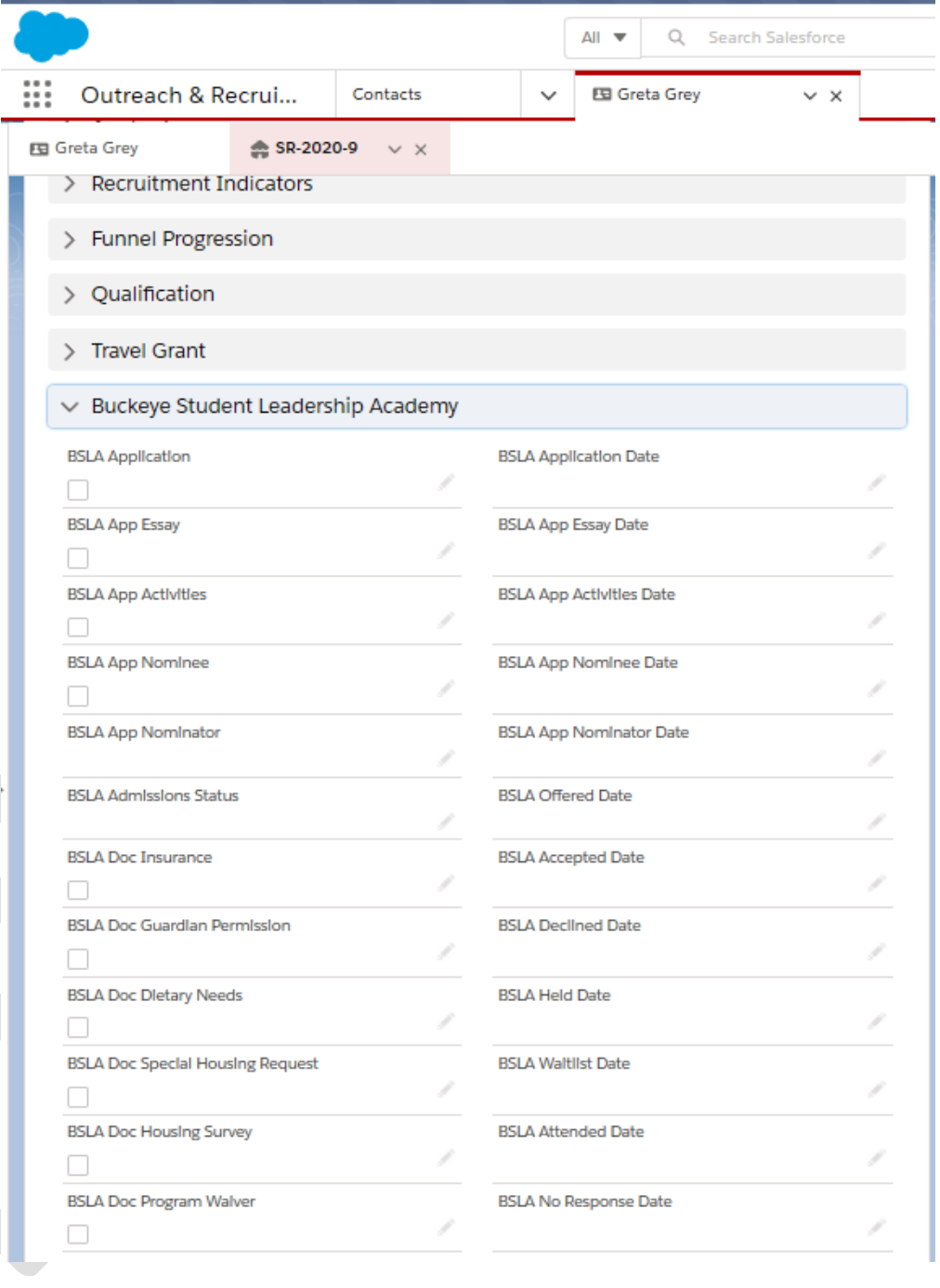
Step-by-Step	Screen
<p>Sections: Conversion &amp; Yield Indicators</p> <p>The following fields are imported from EMA:</p> <ul style="list-style-type: none"> <li>• Inquiry Entry Mode</li> <li>• Potential ability</li> <li>• Targeted Cluster Pair ALL</li> <li>• Targeted Cluster Pair URM</li> <li>• TPR Conversion Incomplete Applications</li> <li>• TPR Conversion Inquiries</li> <li>• TPR Conversion Prospects</li> <li>• TPR Yield</li> </ul>	 <p>The screenshot displays the 'Student Recruitment Records' system interface. At the top, there is a navigation bar with tabs for 'Outreach &amp; Recruit...' and 'Home'. Below the navigation bar, there are two main sections: 'Conversion Indicators' and 'Yield Indicators'. Each section contains a list of fields with checkboxes. A red box highlights the 'Inquiry Entry Mode' field in the 'Conversion Indicators' section. Another red box highlights the 'TPR Yield' field in the 'Yield Indicators' section.</p>

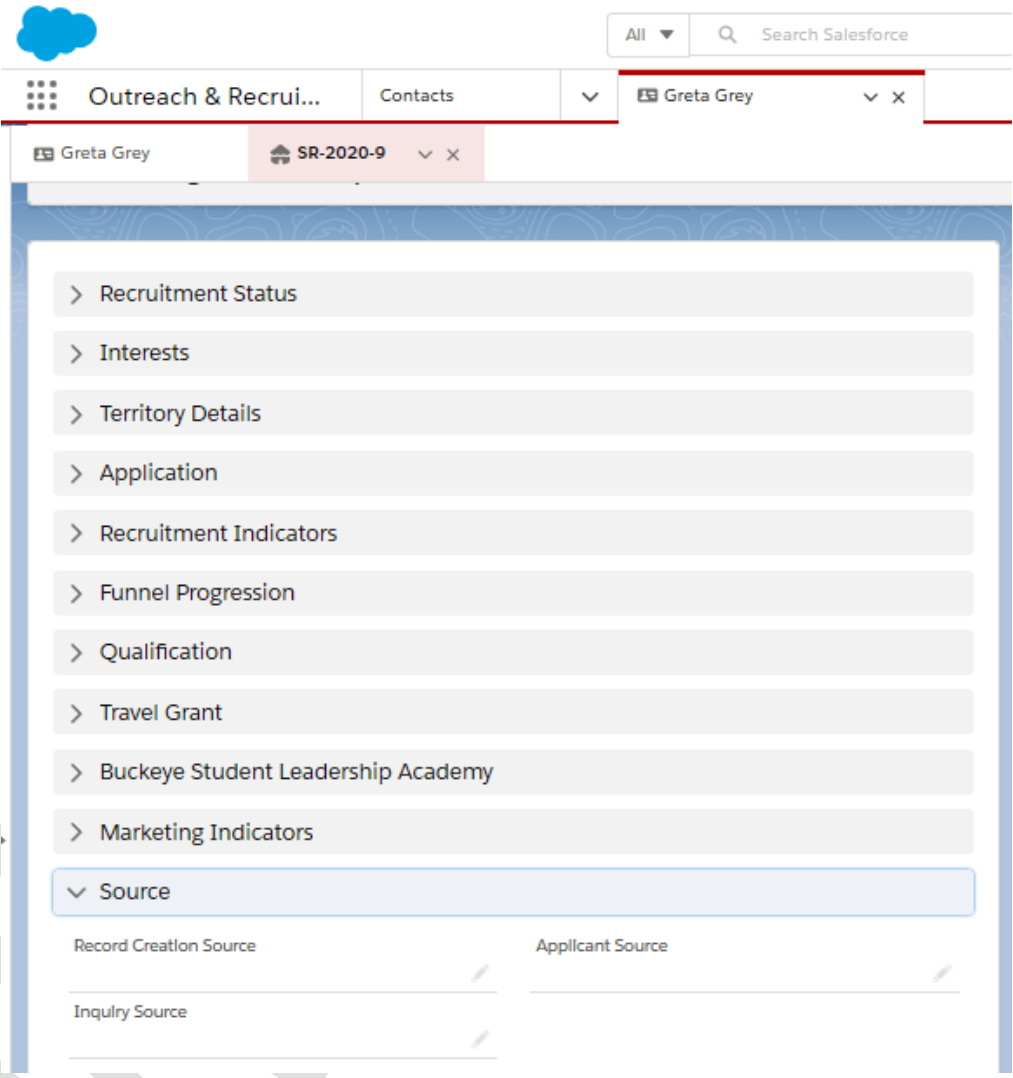
Step-by-Step	Screen																
<p>Section: Funnel Progression</p> <p>The system will automatically set these fields based on entries in other sections</p>	 <p>The screenshot shows the Salesforce interface for a record named 'Greta Grey' in the 'Outreach &amp; Recruitment' section. The 'Funnel Progression' section is expanded, displaying a table of dates:</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Suspect Date</td> <td></td> </tr> <tr> <td>Prospect Date</td> <td>3/4/2020 4:33 PM</td> </tr> <tr> <td>Inquiry Date</td> <td></td> </tr> <tr> <td>Applicant Date</td> <td></td> </tr> <tr> <td>Decision Date</td> <td></td> </tr> <tr> <td>Matriculant Date</td> <td></td> </tr> <tr> <td>Enrolled Date</td> <td></td> </tr> </tbody> </table>	Field	Value	Suspect Date		Prospect Date	3/4/2020 4:33 PM	Inquiry Date		Applicant Date		Decision Date		Matriculant Date		Enrolled Date	
Field	Value																
Suspect Date																	
Prospect Date	3/4/2020 4:33 PM																
Inquiry Date																	
Applicant Date																	
Decision Date																	
Matriculant Date																	
Enrolled Date																	

Step-by-Step	Screen																
<p>Section: Qualification</p> <p>Users can update fields in this section, or use the guided flow options; see the Qualifying Recruits &amp; Admits job aid</p>	 <p>The screenshot shows the 'Qualification' section of the Outreach &amp; Recruitment system. The interface includes a sidebar with navigation options: Recruitment Status, Interests, Territory Details, Application, Recruitment Indicators, Funnel Progression, and Qualification (selected). The main area displays a table with fields for Inquiry and Admit, including Intent, Concern, Other School, Modified, Modified By, Modified Role, and Qualified status.</p> <table border="1"> <thead> <tr> <th>Inquiry</th> <th>Admit</th> </tr> </thead> <tbody> <tr> <td>Inquiry Intent</td> <td>Admit Intent</td> </tr> <tr> <td>Inquiry Concern</td> <td>Admit Concern</td> </tr> <tr> <td>Inquiry Other School</td> <td>Admit Other School</td> </tr> <tr> <td>Inquiry Modified</td> <td>Admit Modified</td> </tr> <tr> <td>Inquiry Modified By</td> <td>Admit Modified By</td> </tr> <tr> <td>Inquiry Modified Role</td> <td>Admit Modified Role</td> </tr> <tr> <td>Qualified Inquiry</td> <td>Qualified Admit</td> </tr> </tbody> </table>	Inquiry	Admit	Inquiry Intent	Admit Intent	Inquiry Concern	Admit Concern	Inquiry Other School	Admit Other School	Inquiry Modified	Admit Modified	Inquiry Modified By	Admit Modified By	Inquiry Modified Role	Admit Modified Role	Qualified Inquiry	Qualified Admit
Inquiry	Admit																
Inquiry Intent	Admit Intent																
Inquiry Concern	Admit Concern																
Inquiry Other School	Admit Other School																
Inquiry Modified	Admit Modified																
Inquiry Modified By	Admit Modified By																
Inquiry Modified Role	Admit Modified Role																
Qualified Inquiry	Qualified Admit																



Step-by-Step	Screen
<p>Section: Travel Grant</p> <p>The system automatically sets the date fields based on updates made to the Travel Grant (TG) fields</p>	 <p>The screenshot displays the Salesforce interface for the 'Travel Grant' section. The top navigation bar shows 'Outreach &amp; Recrui...' and 'Contacts' tabs. Below the navigation bar, there is a list of sections: Recruitment Status, Interests, Territory Details, Application, Recruitment Indicators, Funnel Progression, Qualification, and Travel Grant. The Travel Grant section is expanded, showing a list of fields: TG Type, TG Amount, TG Exception, TG Expected Event, TG Expected Event Date, TG Vendor Form Received, TG Check Sent, TG Event Contact, TG Offered Date, TG Accepted Date, TG Waitlist Date, TG Cancelled Date, TG Registered Date, TG Awarded Date, TG Requested Date, TG Granted Date, and TG Declined Date. Each field has a corresponding date field to its right.</p>

Step-by-Step	Screen
<p>Section: Buckeye Student Leadership Academy</p> <p>The system automatically sets the date fields based on updates made to the BSLA fields</p>	

Step-by-Step	Screen
<p>Section: Source</p> <p>These fields are generally set by the system based on data imports</p>	 <p>The screenshot displays the Salesforce interface for the 'Source' section. The top navigation bar includes the Salesforce logo, a search bar, and user information for Greta Grey. The main content area shows a list of sections on the left, with 'Source' selected and expanded. The 'Source' section contains three input fields: 'Record Creation Source', 'Applicant Source', and 'Inquiry Source'. Each field has a small edit icon (pencil) to its right.</p>