

# Guarantee Automation - First Milestone

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  - Prototype:

## Problem Statement

Guarantee (Money Back and Scores Back) products are our most popular product types because it mitigates risk for the customer and puts the burden of improvement on us to deliver on content/instruction. When a student or parent invokes a desire for monetary refund, we need to prove the student is NOT in compliance with the guarantee guidelines. This process is especially difficult to go through, the Operations (Retail Operations and Student Support) Team need to validate the entire student's experience and their adherence/compliance to: Attendance, Homework completion, Full Length Practice test completion and any other requirement guideline. We need to create an internal system to support Operations Team processes.

## Overview

The Guarantee products (Product Metadata, Guarantee Type = Scores Back && Money Back) are our marquee product offering for each test type. These types of products have a score improve guarantee IF and ONLY IF the students do all *required course items* [Homework, Tests, Class Segments, Diagnostic Exams and Topic Focus (for MCAT ONLY)]:

- Required Homework are defined by non-exam type Content Objects = [Assessment].[ContentItems].[ItemTypeID] > 1 and are [Product].[Licenses].  
[LicenseTypeID] in (43,48) and [Product].[Licenses].[ContentKey] = [Assessment].[ContentItems].[ContentObjectGuid]
- Required Test are defined as [Assessment].[ContentItems].[ItemTypeID] = 1 and are found in Exam LearningTracks ([Assessment].[StudyPaths].[IsEval] = 1) denoted by [Assessment].[LearningTracks].[RecommendationRank] = 0
- Required Class Segments are all Segments in a PSO with the string ?Class%? in the [Product].[OfferingTiers].[Description] column. (except in LSAT where segments are denoted as "Unit #")
- Required Diagnostic Exams are defined as [Assessment].[ContentItems].[ItemTypeID] in (2,14) ? [MiniDiagnostic = 2, Paired Drills = 14]
  - Note: We will need to update the logic for the Homework Checker Diagnostic Tests Card to include MiniDiagnostic Content Object Types.
- Required Topic Focus are segments found in a specific PSO only bundled into Classroom based MCAT products.

and the Guarantee Guidelines outlined by the Guarantee Product's Terms and Conditions.

These guidelines are as follows for example but are not limited to:

- Students are to take their assigned work at the time that is the most advantageous for their score improvement
  - Homework items, Tests, Diagnostics for each segment are started and completed before a specified date.
  - The Classroom lectures are attended or the Recorded video is viewed in its entirety.
  - The Official Test is scheduled within a specific window on time from the last segment of the PSO.

The Operations Team (Retail Operations and Student Support) team manages all student communication and requirement compliances for these products. Since each student

may invoke a refund through the guarantee terms, we need to make sure students receive all the necessary support they need to complete the required items and facilitate their progression for score improvement.

As one would imagine, the process where by the Operations Teams try to support each student relies on a very manual and inefficient steps. Student progress are maintained via numerous Diagnostics from the start of a student's course to the end, in case a Guarantee refund is invoked and an Ops personnel needs to review historical and longitudinal information about the student during the course. These manual and inefficient processes include but are not limited to: pulling various reports for Operations reference, miscellaneous Support Portal widgets for instance completion validations, and proxying into the student dashboard for accuracy.

## Objective

Define the full Guarantee process and student requirements for the purpose of building workflow, features, and processes to improve internal admin bandwidth and create a reliable system for validation.

For the First Milestone of this project, the goal is to outline how the guarantee process works from the point of student enrollment to the start of their PSO. Then identify areas of enhancement and propose automations where appropriate to improve internal workflows.

## Scope

### Purchase Flow TSED-125: Purchase Flow IN PROGRESS

When a purchase is completed (on the purchase flow for website purchase or In Support Portal for Enrollment Center purchase), this will trigger the new Enrollment Confirmation

Email that contains the purchase breakdown in line items, any payment plan breakdown, and a summary of the course they purchased. This email will be sent to the student and/or the purchaser.

- Note: check [Product].[PurchaseItems] table for a Purchaser MSMID parameter.

Purchasers may accept the Terms and Conditions on the Purchase Flow. When the parameter indicating the purchaser accepted the T&Cs a triggered email: [Accepted Terms & Conditions Email](#) will be processed and triggered to send, informing the email associated with the account that accepted the T&Cs confirmation their receipt.

## Jump Page

If a product was purchased over the phone through the Enrollment Center, the Terms and Conditions acceptable modal is rendered in the jump page of the purchaser. When the parameter indicating the purchaser accepted the T&Cs a triggered email: [Accepted Terms & Conditions Email](#) will be processed informing the email associated with the account that accepted the T&Cs confirmation their receipt.

## Onboarding (New - Before hitting the Dashboard) <https://tutorcom.atlassian.net/browse/TIA-186> Can't find link

Introduce a new Onboarding form workflow that will collect necessary information we can use to customize and enhance how we support our students.

Onboarding form workflows types: ([Updated with Product Metadata: 12/4/2023](#))

1. Class Retail Products ([Wireframes](#):  [Onboarding Form v2](#) [Prototype](#):  [Onboarding Form v2](#))  
a. ProgramType = Class; Modality = In-Person && LiveOnline; Catalogue = Retail/International, Partnerships
2. Tutoring Retail Products ([Wireframes](#):  [Onboarding Form v2](#) [Prototype](#):  [Onboarding Form v2](#))  
a. ProgramType = Private Tutoring; Modality = In-Person && LiveOnline; Catalogue = Retail/International, Partnerships
3. AP Tutoring Products ([Wireframes](#):  [Onboarding Form v2](#) [Prototype](#):  [Onboarding Form v2](#))  
a. TestType = AP; ProgramType = Private Tutoring; Modality = In-Person && LiveOnline; Catalogue = Retail/International, Partnerships
4. Academic Tutoring Products ([Wireframes](#):  [Onboarding Form v2](#) [Prototype](#):  [Onboarding Form v2](#))  
a. TestType = Academic; ProgramType = Private Tutoring; Modality = In-Person && LiveOnline; Catalogue = Retail/International, Partnerships

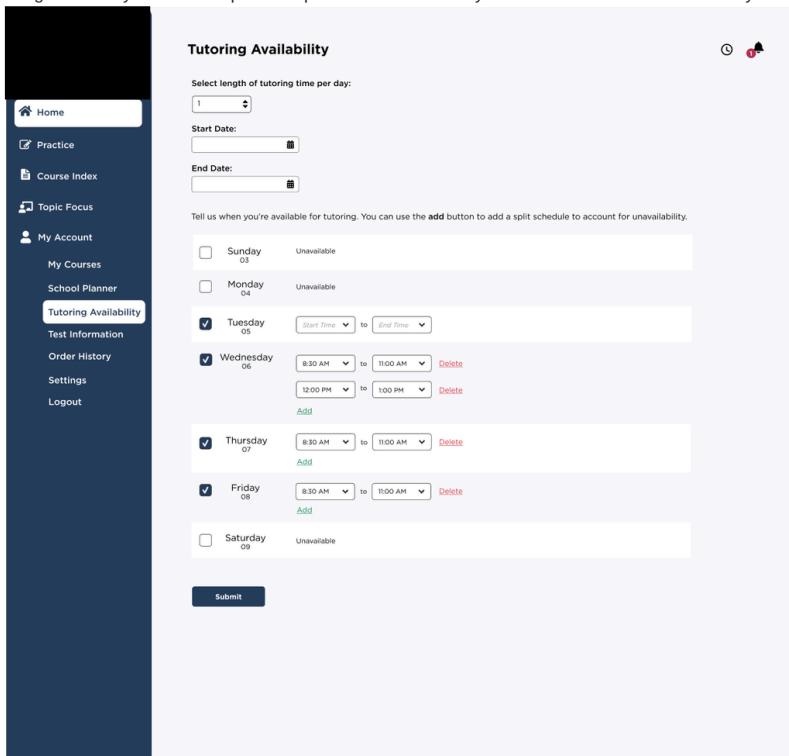
## My Accounts MOVED FROM MILESTONE 2 TO MILESTONE 1 (Updated: 12/4/2023)

The My Accounts Page will allow users to input optional values we ask on the registration and onboarding forms. When the user is signed in, the My Accounts dropdown has the following items: My Courses (previously Home), School Planner, Order History, Settings, Sign Out.

When the user launches a course the My Accounts dropdown has the following items: My Courses (previously Home), School Planner, Tutoring Availability (if the product they purchased is ProgramType = Private Tutoring), Test Information (available for all ProgramTypes), Order History, Settings, Sign Out.

This will be broken down into their own dropdown item:

1. My Courses: this item was previously Home and should take the user back to the Jump Page  
a. <https://secure.edtech-company.com/account>
2. School Planner: this view should be unchanged
3. Tutoring Availability: this item is product specific and should only be rendered in the Dashboard My Accounts, if the product is ProgramType = Private Tutoring



The screenshot shows the 'Tutoring Availability' form. At the top, it asks to select the length of tutoring time per day (set to 1). It has fields for Start Date and End Date. Below, it says to tell when you're available for tutoring and can use the 'add' button to add a split schedule. It lists days from Sunday to Saturday, each with a checkbox and a dropdown for time selection. For Tuesday, June 05, two time slots are shown: 8:30 AM to 11:00 AM and 12:00 PM to 1:00 PM, each with a 'Delete' button. There are 'Add' buttons for each slot. Other days like Wednesday, Thursday, Friday, and Saturday are listed with their respective availability times.

a.

4. Test Information: this item is product specific and should only be rendered in the Dashboard My Accounts.

**Test Information**

Target Test Date: 4/26/2023 (Apr-SAT)

|   | Your Score | Goal Score |
|---|------------|------------|
| Chemical & Physical Foundations of Biological Systems       | 112        | 128        |
| Critical Analysis & Reasoning Skills                        | 113        | 180        |
| Biological & Biochemical Foundations of Living Systems      | 113        | 130        |
| Psychological, Social, & Biological Foundations of Behavior | 113        | 130        |
| Composite Score   | 451        | 918        |

Goal School(s):

Testing Accommodations: Double time (+100%)

Other Accommodations:

**Save Changes**

5. Order History: The only change to this view is adding the tracking number to each order.

a. Jump Page:

i. **Order History**

**Order Number: 1000062 [Pending]** Aug 30, 2023  
**Digital MCAT 513+ Online Classroom** **Amount:**  
 [Course Id: 201597] **Tracking #:**  
**Course Schedule**  
 Tuesday, November 21st, 2023 12:28 PM - 2:28 PM EST **TOTAL (USD):**  
**Paid:**

**Order Number: 1000062 [Pending]** Nov 30, 2020  
**Digital SAT 1400+ Online Classroom** **Amount:**  
 [Course Id: 201523] **Tracking #:**  
**Course Schedule**  
 Tuesday, December 21st, 2023 12:28 PM - 2:28 PM EST **TOTAL (USD):**  
**Paid:**

b. Dashboard:

The screenshot shows the 'Order History' section of a website. On the left, a sidebar menu includes 'Home', 'Practice', 'Course Index', 'Topic Focus', 'My Account', 'My Courses', 'School Planner', 'Tutoring Availability', 'Test Information', 'Order History' (which is selected and highlighted in blue), 'Settings', and 'Logout'. The main content area displays two orders:

**Order Number: 1000062 [Pending]** **Aug 30, 2023**  
Digital MCAT 513+ Online Classroom  
[Course Id: 201597]  
Tracking #: 35HTEJB9212JHNRJ8  
**Course Schedule**  
Tuesday, November 21st, 2023 12:28 PM - 2:28 PM EST  
Amount:  
TOTAL (USD):  
Paid:

**Order Number: 1000062 [Pending]** **Nov 30, 2020**  
Digital SAT 1400+ Online Classroom  
[Course Id: 201523]  
Tracking #: 67FTEJB9212JHNNGH  
**Course Schedule**  
Tuesday, December 21st, 2023 12:28 PM - 2:28 PM EST  
Amount:  
TOTAL (USD):  
Paid:

i.

6. Settings: this will take the user to their Account Center.

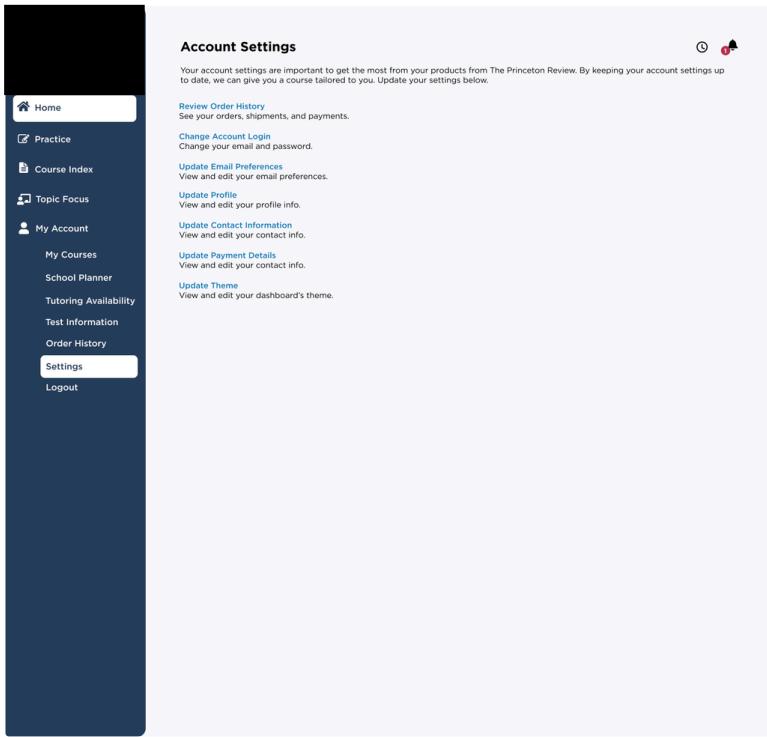
a. Jump Page

i.

The screenshot shows the 'Account Settings' page. At the top, there are navigation links for 'Grades K-8', 'Grades 9-12', 'Graduate', 'Professional', 'For Partnerships', 'Explore Schools', a search bar, and a 'My Account' dropdown menu. Below this, the 'Account Settings' heading is displayed, followed by a paragraph about account settings being important for product tailoredness. There are several sections with links:

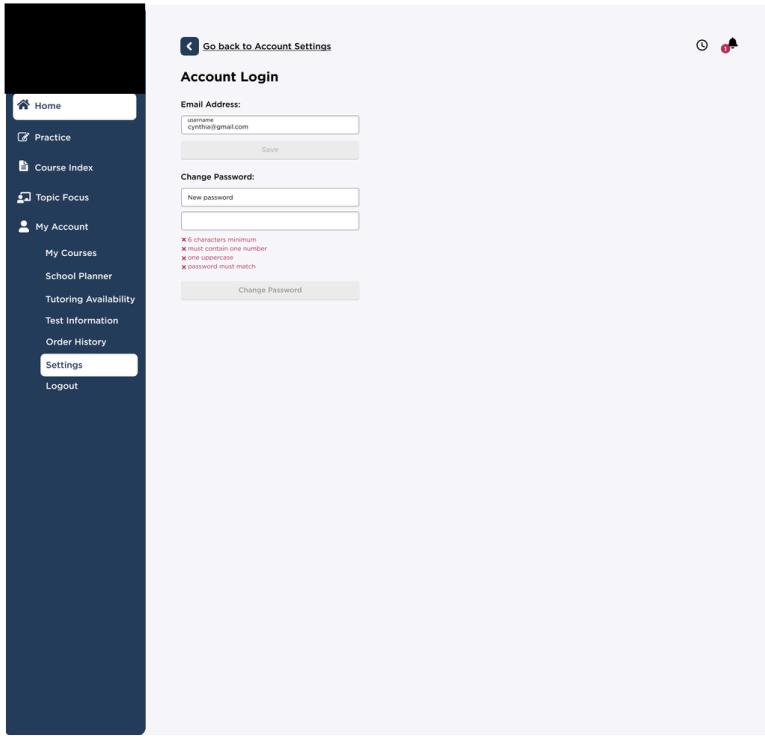
- Review Order History**  
See your orders, shipments, and payments.
- Change Account Login**  
Change your email and password.
- Update Email Preferences**  
View and edit your email preferences.
- Update Profile**  
View and edit your profile info.
- Update Contact Information**  
View and edit your contact info.
- Update Payment Details**  
View and edit your contact info.

b. Dashboard



7. a. Review Order History will take the user to their Order History Page
- b. Change Account Login will take the user to the login info page. We added password requirements to the page

i. <https://secure.edtech-company.com/account/logininfo>



ii.

- c. Update Email Preferences:

i.

d. Update Profile will take the user to the existing view

i.

e. Update Contact Information

The screenshot shows the 'Contact Information' section of the account settings. On the left is a dark sidebar with navigation links: Home, Practice, Course Index, Topic Focus, My Account (selected), My Courses, School Planner, Tutoring Availability, Test Information, Order History, Settings (selected), and Logout. The main area has a header with a back button and a 'Go back to Account Settings' link. Below is a 'Contact Information' section with fields for First Name, Last Name, Email Address, Birthday, Primary Phone Number, Phone Type, Address, Address Type, City, State, Zip Code, and a 'Save Changes' button. There is also a link to 'Add Another Address'.

i.

f. Update Payment Details: this is a new view under the account center. If the user chooses to change the card, render the same form used in the purchase flow.

The screenshot shows the 'Payment Details' section of the account settings. The sidebar and header are identical to the previous screenshot. The main area has a header with a back button and a 'Go back to Account Settings' link. Below is a 'Payment Details' section with a 'Edit Payment Details' link, a 'Credit Card' field showing a placeholder card number (redacted), a 'Change Card' link, and a 'Update Payment' button.

The screenshot shows a 'Payment Details' form within a web application. At the top left is a back button labeled 'Go back to Account Settings'. On the right are two small icons: a clock and a bell. The main section is titled 'Payment Details' and contains the following fields:

- Enter New Card Information:
- Name:
- Address:
- City:  State:  Zip Code:
- Card Number:
- Security Code:

At the bottom right of the form is a grey button labeled 'Update Payment'.

g.

Support Portal > Student > Tutoring Availability



If the student purchases a product that is ProgramType = Private Tutoring and filled out their Tutoring Availability in the onboarding form. That information will be rendered in Support Portal under the student's account as a new Tutoring Availability Tab using the same view as the onboarding form.

#### **Dashboard Tour Widget MOVED TO MILESTONE 2 (Updated: 10/28/2023)**

Support Portal > Diagnostics > Workflow and Cases



There are new Diagnostic Case types and updates to a Diagnostic workflow, specifically to support all Guarantee products and the Guarantee Automation workflow.

New Diagnostic Cases should be created by the system with a closed default status as to avoid clogging up the pending queue.

Updating the Diagnostic workflow to help streamline steps that can be automated.

#### **Guarantee Score Review Workflow**

Updating how this works. We will be deprecating the original trigger that creates this and enhancing the View that gets created to allow for User Adjustments. Approving this Diagnostic will automatically create a score entry for the student in the [Platform].[User\_Assessments] table.



Automate score association through a student x Operations Team workflow of accepting and rejecting Diagnostics.

#### **Exceptions**



New Diagnostic Case that will store Exception parameters about the student, provided by teachers, support staff and Ops team to use as a repository of information they

collect about the student through ad hoc interactions. This will be used for the end of course Money Back Guarantee review/appeal process.

#### **Guarantee Guidelines Widget**



#### **Accommodations**

New Guarantee Guidelines widget that will store Accommodation parameters the student provides during onboarding and for the Ops team to use as a repository of accommodation information they collect about the student through ad hoc interactions.

#### **Guarantee Guidelines**



New Guarantee Guidelines widget that will store a student's compliance with Guarantee Guideline parameters driven by the system on a Product level. This widget will automatically flag student behavior within the scope of guarantee guidelines.

## Workflow

### Step by Step table

| Step #  | Action  | Reaction  |
|---------|---|---|
| Step 1  | Purchase Completed  | Trigger Confirmation Email  |
| Step 2  | Materials Status Shipped  | Trigger Shipping Email  |
| Step 3  | End User Accepts T&Cs   | Trigger T&C Receipt Email   |
| Step 4  | Onboarding Form Section: Student Information                                  | Student Answers Questions 1-3 of profile information  |
| Step 5  | Student prompted Accommodations question                                      | No = Move to next question<br><br>Yes = Collect Accommodation Data and create Diagnostic to store information in student account  |
| Step 6  | Onboarding Form Section: Score Information                                    | Prompt: Have you taken --TestType-- Exam?<br><br>No = Test Date Collection Question Set<br><br>Yes = Score Breakdown Question Set   |
| Step 7  | Student Submits Score breakdown and attaches score report.                    | Creates a Diagnostic with relevant information for Ops Personnel to review, validate, and approve/reject  |
| Step 8  | Ops Personnel Answers Accept/Reject   | Reject = Student receives a rejection email informing them to reach out to a phone number to reconcile the issue<br><br>Accept = Automatically create an entry in the student's account Scores Tab under Type = Qualifying Score <u>equal</u> Actual  |
| Step 9  | The Guarantee Automation system creates a row in the database for this score. | Trigger Accepted Score email to purchaser and student email addresses.  |
| Step 10 | Student takes the baseline score  | IF:<br><br>Student completes the test instance <u>before</u> the test guidelines for the testtype and the score is higher than submitted score report = send another Accepted Score Email reflecting the higher score.<br><br>Student completes the test instance <u>after</u> the test guidelines for the testtype and the score is higher than submitted score report = no action |

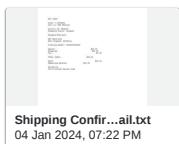
### Flowchart

## Automated Emails

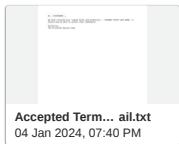
### Enrollment Confirmation Email



## Shipping Confirmation Email

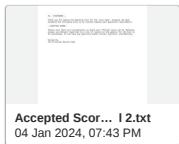
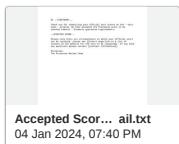


## Accepted Terms & Conditions Email



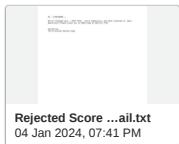
## Accepted Score Email

Exception: The Accepted Email template will not be sent to any student enrolled in a PSO for products with [Product].[Products].[GuaranteeTypeId] = Null.



## Rejected Score Email

Exception: The Rejected Email template will not be sent to any student enrolled in a PSO for products with [Product].[Products].[GuaranteeTypeId] = Null.



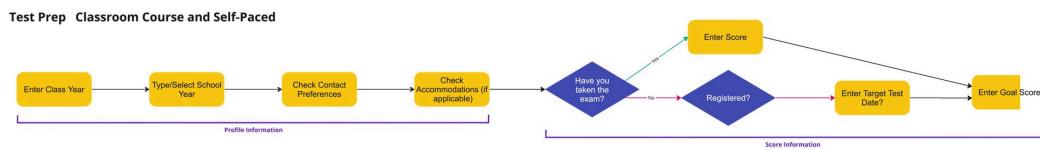
## Student Progress Report Email (Added on 1/22/2024)

Student and Parents are sent an email on a weekly cadence, on Monday informing them of student guarantee compliance from the week prior 3PM EST the previous Monday to 2:59 PM EST the current Monday. The email will showcase the student's compliance for Required Tests, Homework and Required Segment Attendance.

(Mock Pending @Katherine Fernandez )



## Onboarding Form Overview- Class Products



## Onboarding Form Prototype

### Profile Information Questions

The set of questions on this section of the Onboarding Form will cover general user profile details. Some of these parameters are collected in the registration flow. We should use the same tables when collecting congruent data and fill information where the user have previously provided feedback.

e.g. Question 1 and 2 are for sure asked on the registration form.

Question 3 is also collected in the My Accounts page for under the Admissions products setup

#### Accommodations Question (#3 & #4)

Question 4 will be a new parameter we collect that will drive a different line of questioning based on if the user answers Yes or No.

- Yes - will render a time accommodation question for 'Time and a Half' or 'Double Time' – meaning the user is allowed to take a test for extended time.
  - if a student has a 'Time and a Half' they are allowed to take an SAT Full Length Exam for up to 4.5 hours - the same convention would apply for other test types.
  - if a student has a 'Double Time' they are allowed to take an SAT Full Length Exam for up to 6 hours - the same convention would apply for other test types.
- Time and a half and Double Time accommodation parameters should be stored and used to check against all full length practice test instances if the student started and completed a test based on time accommodations – See this section for testing time limit by test type: [Guarantee Automation - First Milestone | Test Taking Length by Test Type](#)
- [Automation Flags] - If a student starts and completes a full length practice test instance that falls outside of their defined time allotment, a flag in the Guarantee Guidelines Widget should be made.
  - See Accommodation Mock under Guarantee Guidelines widget - [Guarantee Automation - First Milestone | Guarantee Guidelines Widget](#):
- No - will not render any additional questions.

Question 5 if the user answers 'Yes' render a short text input field to collect open ended feedback from the user about their test taking accommodations. This feedback will be stored in the Guarantee Guidelines widget under the student's account.

#### Score Information Questions

The set of questions on this section of the Onboarding Form will cover specific test types based score information. On this section we will be collecting the user's parameters on an official test they took before the start of their course and the goal score they want to get through taking our course.

Question 1 will ask the user if they have taken an official exam for the product they are currently enrolled in.

- Have you taken the <[Product].[Ref\_TestTypes].[Description]> Exam?
  - No - will render a line of questioning asking the student for registered test date or target test date
  - Yes - will render a line of question asking the student when they took their test, the score breakdown by section of the test they took, their goal score, and an upload field to select score report files they received from the testing organization.

#### Have You Taken The <TestType> Exam? NO Path

Question 2 will ask the student if they are registered for a future actual test date

- No - Collect Target Test date
  - Question 3 When is your Target Test Date?
    - Date Picker

This feedback will be stored in the Guarantee Guidelines Widget under the student's account.

- Yes - Collect Registered Test Date
  - Question 3 When are you registered to take the actual test?
    - Date Picker

#### Have You Taken The <TestType> Exam? YES Path (See [Guarantee Automation - First Milestone | Support Portal Scores Tab Automation](#))

Question 2 will ask the student when they took the test

Question 3 will ask the student if they can provide their official scores

Question 4 will ask the student to provide their scores on an individual section basis of their official test score report.

- Their Official Section Scores will be side by side with their Goal Section Scores.
- The Sections scores fields available will vary based on the test type (See [here](#))
- Regardless of the Test Type the composite score will be inactive and the value rendered will be the sum of each section the student inputs.
- The section scores the student enters in the onboarding will be Upserted into [Platform].[User\_Assessments] table, with IsApproved = 0.

Question 5 will allow the student to select up to 3 files of their score report.

When the student clicked Enter, this will create a Diagnostic Workflow (Type = ?Qualifying Scores Review?), a process that currently exists through the following endpoint:

secure.edtech-company.com/account/submitscore?purchaseitemid= {purchaseitemid}.

The scope of changes are:

- Additional Parameters on the Left Rail
  - An area for individual section scores the student inputted in Question 3 (these section score values should be editable by Support Portal User if there is a discrepancy between official score report and user input).
- Automated Database Insert: When Operations Personnel ?Approves? this workflow, this will trigger an application to update record in the database from isApproved = 0 to isApproved = 1.
  - TestTypeName should be pulled dynamically based on the Test Type of the onboarding form
  - Exam Type should be 'Qualifying Exam - Actual Exam'
    - Note: If the string "Qualifying" doesn't drive any particular logic, please update "Qualifying" to "Baseline" where relevant.
  - Scores should be what the values the student inputted and approved by Operations Personnel
    - Once the Guarantee Score Review Diagnostic has been approved, a Qualifying Exam - Actual Exam record should be inserted into the database, the system should send the student and purchaser the following emails: [Guarantee Automation - First Milestone | Accepted Score Email](#)

**Sunset: \*\*\*\*\*WE ARE DEPRECATING THE LINK AND PAGES BELOW\*\*\*\*\***



My Campus

SAT 1400+

Submit Qualifying Scores



Next Session Date: 6/6/2023  
Access expires: 5/19/2024

[Open Course](#)

# Qualifying Scores for SAT 1400+, SAT 1500+, ACT 31+ or ACT 34+

In order to qualify for the Money-Back Guarantee for SAT 1400+, SAT 1500+, ACT 31+ or ACT 34+, you need to submit a valid, qualifying score report.

If students enrolling into an SAT 1400+ program on September 22nd, 2020 or later your program guarantees a score increase (when meeting all eligibility requirements; see guarantees page for details) determined by your qualifying score. If your qualifying score is under 1250 your guaranteed score increase is at least 150 points, if your qualifying score is 1250 or higher you are guaranteed a score of at least 1400 on the SAT.

If students enrolling into an ACT 31+ program on September 22nd, 2020 or later your program guarantees a score increase (when meeting all eligibility requirements; see guarantees page for details) determined by your qualifying score. If your qualifying score is under 26 your guaranteed score increase is at least 5 points, if your qualifying score is 26 or higher you are guaranteed a score of at least 31 on the ACT.

If enrolled in a SAT 1400+ or ACT 31+ course before September 22nd, 2020 you must meet the following minimum required score: for ACT 31+ programs, the minimum qualifying score is 26; for SAT 1400+ programs, the minimum qualifying score is 1200.

In order to qualify for the SAT 1500+ course and guarantee, you will also need to submit a valid qualifying score report or take a Qualifying Test. The qualifying score for the SAT 1500+ course and guarantee is at least 1400. If you enrolled in a SAT 1500+ Comprehensive Tutorial package, your program guarantees a score increase (when meeting all eligibility requirements; see guarantees page for details) determined by your qualifying score. If your qualifying score is under 1300 your guaranteed score increase is at least 200 points, if your qualifying score is 1300 or higher you are guaranteed a score of at least 1500 on the SAT.

If enrolled in an ACT 34+ Comprehensive Tutorial package, your program guarantees a score increase (when meeting all eligibility requirements; see guarantees page for details) determined by your qualifying score. If your qualifying score is under 29 your guaranteed score increase is at least 5 points, if your qualifying score is 29 or higher you are guaranteed a score of at least 34 on the ACT.

Please make sure to visit our [Guarantees](#) page to explore the relevant details for your program and find the full details regarding qualifying scores.

Please select an option below to submit your score report or take a Qualifying Test.

Option 1:  Option 2:

## Upload an Official PDF of Your Full Score Report

Upload your official scores

Choose File

If you have taken an official SAT or PSAT examination (for SAT 1400+ and SAT 1500+ students) or ACT examination (for ACT 31+ and ACT 34+ students) within the past year, please send us the full PDF of the score report prior to the start date of your course.

For SAT/PSAT students: Log into your student account on collegeboard.org and download the full PDF copy of your official score report. Due to rendering and attaching issues with mobile devices experience with these files, we ask that you please do not use a mobile device when downloading or submitting your official score report. The report must include your full name along with the test date and detailed results for each section. We are NOT able to accept screenshots of scores, collegeboard.org login links, or self-reported scores.

For ACT students: Log into your student account on ACT.org and navigate to your most recent score report and capture a screen shot which must include your full name, the date of test, score, and score breakdown. Alternately, take a photo of your paper ACT score report including full name, test date, score, and score breakdown. We are not able to accept ACT.org login links, or self-reported scores.

Please submit your downloaded SAT/PSAT PDF or your ACT Image file or PDF above. That's it!

If you have any questions regarding what to send, please call [800-273-8439](tel:800-273-8439), select option 2, followed by option 2 again. Someone will be available to speak with you Monday-Friday 9am-5pm EST, or Saturday and Sunday 9am-2pm EST.

Instructions to download a full SAT or PSAT score report PDF from collegeboard.org can be found at: <https://collegereadiness.collegeboard.org/about/scores/score-report-help>

## Score Details By Test Type

SAT

ACT

GRE

GMAT

LSAT

MCAT

OAT

DAT

Support Portal Scores Tab Automation



We should be able to automate the storage of user generated score breakdown that is approved by operations team (Guarantee Score Review Diagnostic Workflow) and

when a student takes their Baseline Test 1. The system needs to automatically store each score type (Qualifying Exam - Actual Exam & Qualifying Exam - Practice Test). If the student submits their score report via the Onboarding Form, which created the Guarantee Score Review Diagnostic Workflow and Operations Team personnel approves it, the parameters should be saved as:

- Exam Type: Qualifying Exam - Actual Exam into ETC.Login\_TestResults for that student.
- When this record is added to the database, the accepted Official Score email should be sent to the student and the purchaser

If the student takes their Baseline Test 1, this should be added in the ETC.Login\_TestResults table using the instance values for that test and saved as:

- Exam Type: Qualifying Exam - Practice Test into ETC.Login\_TestResults for that student.
- When this record is entered the accepted Baseline Score email should be sent to the student and the purchaser, **IF and ONLY if that score is higher than the student's Official Score value and IF and ONLY IF the student completed the test instance within the time limit and before the start of their first class segment.**

### Baseline Tests (Added on 1/22/2023)

Baseline tests are any Exam Content Object associated with the [Assessment].[LearningTrack\_ContentObject].[SortOrder] = 1 of a Exam Group Learning Track Entitled to the appropriate PSO with a [Assessment].[StudyPaths].[RecommendationRank] = 0

For MCAT Products this Exam ContentObject is an ContentObjectType = AAMC. The scores and test parameters are pulled via API from AAMC

For LSAT Products, this Exam is ContentObject within our system, however the data is pulled from LSAC via API.

Diagnostics 

### Spec Updated on 1/22/2024

We are transitioning the Accommodation and Guarantee Guidelines Diagnostic to be a widget instead of Diagnostic.

See [Guarantee Eligibility Widget header](#).

### Guarantee Score Review Workflow

Currently, the Guarantee Score Review Workflow is created when a student submits a score report via the 'Submit Qualifying Score' link.



My Campus

SAT 1400+



Next Session Date: 6/6/2023  
Access expires: 5/19/2024

[Open Course](#)

Since we are deprecating this link and the page it leads to, we will need to iterate on what triggers this Diagnostic Workflow.

Currently, submitting a score through this link creates a Diagnostic Workflow with the following Parameters

```

1 SELECT
2 *
3 FROM
4 [REDACTED]
5 [REDACTED]
6 [REDACTED]
7 WHERE
8 [REDACTED]
```

with the following result set:

| TypeId | StatusId | UserId | PurchaseItemId | ZeeCode   | Amount | SubmittedBy | SubmittedDate | AmountLevel             | ProductLevel | TestTypeLevel | IsGeneric | AssignedTo | IsHighPriority | CaseType   | CaseSubtype | CaseOrigin | CaseStatus | CaseResolution | DueDate    | RemindDate | ShipmentId | ExpectedShipDate | IsRead  | ProgramOrderId | MasterContractId        | OpportunityNumber | ProductOfferingCode | ExpenseDate | ExpenseTypeId | Type | Body | InsertBy | InsertDate | Attachment |
|--------|----------|--------|----------------|-----------|--------|-------------|---------------|-------------------------|--------------|---------------|-----------|------------|----------------|------------|-------------|------------|------------|----------------|------------|------------|------------|------------------|---|----------------|-------------------------|-------------------|---------------------|-------------|---------------|------|------|----------|------------|------------|
| 444828 | 15       | 4      | 317233386      | 116328409 | DL     | NULL        | System        | 2023-06-06 14:58:47.740 | 0            | 0             | 0         | 1          | [REDACTED]     | [REDACTED] | [REDACTED]  | [REDACTED] | [REDACTED] | [REDACTED]     | [REDACTED] | 1111558    | 444828     | 1                | A student has submitted their official score report for review. Please verify that it is authentic and log it in the student's Scores tab as "Qualifying Exam - Actual Exam". | System         | 2023-06-06 14:58:47.740 | NULL              | [REDACTED]          | 0           | NULL          | NULL |      |          |            |            |
| 444828 | 15       | 4      | 317233386      | 116328409 | DL     | NULL        | System        | 2023-06-06 14:58:47.740 | 0            | 0             | 0         | 1          | [REDACTED]     | [REDACTED] | [REDACTED]  | [REDACTED] | [REDACTED] | [REDACTED]     | [REDACTED] | 1111559    | 444828     | 7                | NULL  | System         | 6d9dbfbe078f.pdf        | [REDACTED]        | 0                   | NULL        | NULL          |      |      |          |            |            |

|   |        |      |      |           |           |      |      |        |            |              |      |      |      |      |         |        |      |                     |
|---|--------|------|------|-----------|-----------|------|------|--------|------------|--------------|------|------|------|------|---------|--------|------|---------------------|
| 4 | 444828 | 15   | 4    | 317233386 | 116328409 | DL   | NULL | System | 2023-06-06 | 14:58:47.740 | 0    | 0    | 0    | 1    |         | 0      | NULL | NULL                |
|   | NULL   | NULL | NULL | NULL      | NULL      | NULL | NULL | 1      | NULL       | NULL         | NULL | NULL | NULL | NULL | 1112156 | 444828 | 4    | added to scores tab |

DB ID References:

|   |  |
|---|--|
| 1 |  |
| 2 |  |
| 3 |  |

Moving forward the Guarantee Score Review Workflow creation will be created by the student answering 'Yes' to Question 1, "Have you taken the {Test Type} Exam?" of the Score Information section of the onboarding form.

Values for Question 2 & 3 should be stored in ETC.Login\_TestResults IF and ONLY IF the Guarantee Score Submission Review has a [Platform].[DiagnosticSessions].[StatusId] = 4

Updated the requirement above, to the one below this (1/8/2024)

When the Qualifying Scores Review Diagnostic is approved, the student's test result will be moved from the [Platform].[Login\_TestResultsPending] table to the [Platform].

[Login\_TestResults] table

The answer values for Question 2, "When did you take the Test?? ? should be stored in [Platform].[User\_Assessments].[TestDate].

the answer values for Question 3, "Enter the following score information"

- for section scores under ?Your Score? ? should be stored in [Platform].[User\_Assessments].[Score]
- for section scores under ?Goal Score? ? should be stored in [Platform].[LoginDetails].[Key] like [TestType]\_Target[SectionScoreName]
- For Example: (Added code snippet below on 1/8/2024)

```

1 public static string GetTargetScoreLoginDetailKey(ScoreWithValue score)
2 {
3     if (score.IsTestCompositeScore)
4     {
5         if (score.TestType == Components.Assessment.TestType.ACT)
6         {
7             return String.Concat(score.TestType, "_TargetComposite");
8         }
9         return String.Concat(score.TestType, "_TargetTotal");
10    }
11    return String.Concat(score.TestType, "_Target", score.Alias.Replace(" ", ""));
12 }
```

|    |           |                         |             |                         |              |                       |     |  |  |  |  |  |  |  |  |  |  |  |
|----|-----------|-------------------------|-------------|-------------------------|--------------|-----------------------|-----|--|--|--|--|--|--|--|--|--|--|--|
| 1  | User Id   | Key                     | Insert Date | Text Value              | Binary Value | Searchable Text Value |     |  |  |  |  |  |  |  |  |  |  |  |
| 2  | 311897992 | GRE_TargetAnalytical    | Writing     | 2017-12-23 23:35:14.147 | 6            | NULL                  | 6   |  |  |  |  |  |  |  |  |  |  |  |
| 3  | 311897992 | GRE_TargetQuantitative  | Reasoning   | 2017-12-23 23:35:04.940 | 170          | NULL                  | 170 |  |  |  |  |  |  |  |  |  |  |  |
| 4  | 311897992 | GRE_TargetVerbal        | Reasoning   | 2017-12-23 23:35:21.993 | 160          | NULL                  | 160 |  |  |  |  |  |  |  |  |  |  |  |
| 5  | 310154409 | MCAT_TargetBioBioChem   |             | 2016-05-26 20:16:11.477 | 129          | NULL                  | 129 |  |  |  |  |  |  |  |  |  |  |  |
| 6  | 310154409 | MCAT_TargetCARS         |             | 2016-05-26 20:15:56.067 | 129          | NULL                  | 129 |  |  |  |  |  |  |  |  |  |  |  |
| 7  | 310154409 | MCAT_TargetChemPhys     |             | 2016-05-26 20:16:04.040 | 129          | NULL                  | 129 |  |  |  |  |  |  |  |  |  |  |  |
| 8  | 310154409 | MCAT_TargetPsychSoc     |             | 2016-05-26 20:16:02.307 | 129          | NULL                  | 129 |  |  |  |  |  |  |  |  |  |  |  |
| 9  | 311898018 | MCAT_TargetBioBioChem   |             | 2018-05-28 05:13:30.303 | 132          | NULL                  | 132 |  |  |  |  |  |  |  |  |  |  |  |
| 10 | 311898018 | MCAT_TargetCARS         |             | 2018-05-28 05:13:28.610 | 132          | NULL                  | 132 |  |  |  |  |  |  |  |  |  |  |  |
| 11 | 311898018 | MCAT_TargetChemPhys     |             | 2018-05-28 05:13:27.333 | 132          | NULL                  | 132 |  |  |  |  |  |  |  |  |  |  |  |
| 12 | 311898018 | MCAT_TargetPsychSoc     |             | 2018-05-28 05:13:31.590 | 132          | NULL                  | 132 |  |  |  |  |  |  |  |  |  |  |  |
| 13 | 311898020 | MCAT_TargetBioBioChem   |             | 2017-12-25 19:17:50.963 | 129          | NULL                  | 129 |  |  |  |  |  |  |  |  |  |  |  |
| 14 | 311898020 | MCAT_TargetCARS         |             | 2017-12-25 19:17:48.363 | 130          | NULL                  | 130 |  |  |  |  |  |  |  |  |  |  |  |
| 15 | 311898020 | MCAT_TargetChemPhys     |             | 2017-12-25 19:17:46.393 | 129          | NULL                  | 129 |  |  |  |  |  |  |  |  |  |  |  |
| 16 | 311727494 | GMAT_TargetAnalytical   | Writing     | 2018-01-18 01:53:04.497 | 5            | NULL                  | 5   |  |  |  |  |  |  |  |  |  |  |  |
| 17 | 311727494 | GMAT_TargetIntegrated   | Reasoning   | 2018-01-18 01:53:00.413 | 6            | NULL                  | 6   |  |  |  |  |  |  |  |  |  |  |  |
| 18 | 311727494 | GMAT_TargetQuantitative |             | 2018-01-18 01:52:47.003 | 54           | NULL                  | 54  |  |  |  |  |  |  |  |  |  |  |  |
| 19 | 311727494 | GMAT_TargetTotal        |             | 2018-01-18 01:53:08.333 | 720          | NULL                  | 720 |  |  |  |  |  |  |  |  |  |  |  |
| 20 | 311727494 | GMAT_TargetVerbal       |             | 2018-01-18 01:52:53.720 | 52           | NULL                  | 52  |  |  |  |  |  |  |  |  |  |  |  |
| 21 | 312423476 | ACT_TargetScience       |             | 2018-08-21 00:48:08.073 | 32           | NULL                  | 32  |  |  |  |  |  |  |  |  |  |  |  |
| 22 | 312423491 | SAT_2016_TargetMath     |             | 2018-07-16 23:17:00.400 | 540          | NULL                  | 540 |  |  |  |  |  |  |  |  |  |  |  |
| 23 | 312423491 | SAT_2016_TargetVerbal   |             | 2018-07-16 23:17:03.243 | 540          | NULL                  | 540 |  |  |  |  |  |  |  |  |  |  |  |

Values for Question 4, "Upload your score report." ? should be stored in [Ref\_DiagnosticDetailTypes]= 7

When the student clicks 'Continue' on this step of the Onboarding Form:

The Guarantee Score Review Diagnostic workflow that gets created looks like this, with some enhancements:

Enhancement are including the Composite and section score values we asked the student to submit as part of the Onboarding Form. These parameters should be editable by Operations to validate that these are the same values as the values in the score report the student attached on their onboarding form.

When this Diagnostic Workflow has been approved by someone in the Operations Team in Support Portal, with a value of [Platform].[DiagnosticDetailTypes] = 4 and an entry on the ETC.Login\_TestResults table for the section scores the student provided on the onboarding form, we need to send the student the new Accepted Score automated email (

[Guarantee Automation - First Milestone | Accepted Score Email](#) ).

## Exceptions Case

This new Diagnostic Case Type should be created for all students upon enrollment similar to the Accommodation Diagnostic type with the status of ?Completed?. --NEED TO UPDATE THIS WITH LOGIC FOR APPEALS-- However, there does not need to be any automated entries for this Diagnostic as the Operations Team will be using this Diagnostic to collect any exceptions the student earns through out their PSO that does not disqualify them from invoking a Guarantee refund at the end of their PSO.

## Guarantee Eligibility Widget (Added on 1/22/2024)

Instead of using the Diagnostic system to collect student activity related to Accommodations and Guarantee Guidelines, a widget will be used instead. We will be using existing application code used for the Progress Summary Widgets to report on student activity parameters for Operations Team use case.

Support Portal: Student Page > Enrollments/PSOs



A link to ?Guarantee Guidelines? need to be added to the Enrollments/PSOs tab in Support Portal under the student's account for products with a Guarantee Type = Money back or Scores Back:

## Guarantee Guidelines Widget:

### Accommodations

On the Onboarding form's Profile Information section, Question 4, "Do you have official time accommodations?" – when the student answers 'Yes.' we render a Question 4b [Radio Buttons] for Time and a Half and Double Time.

- Time and a Half is a test taking accommodation a student has which will allow them to take 1.5x time of the expected time limit for a test.
- For example: an SAT full length practice test has a time limit of 3 hours, a 'Time and a Half' time accommodation enables the user to take a full length practice test for 4.5 hours; 6 hours if the student has a 'Double time' time accommodation.

Based on the Time Accommodation the student selects, all their full length practice test instances will be subjected to the accommodations.

- If the student has no time accommodation, their tests need to be completed within the Test Taking Length by Test Type (see section below)
  - If the student's test instance is *greater than* this value, an indicator in the Guarantee Eligibility widget for the test needs to be rendered
- Similar mechanic needs to happen if a student has Time and a Half or Double Time on any given test type.

## Test Taking Length by Test Type:

The maximum time for a student can take in normal time for each test by test type should be pulled from each Exam Content Objects's total time limit for all the associated sections. Total time can be found by summing all the time limits for each section in an exam content object found in [Assessment].[Sections].[Timelimit].

The times below are all approximates for each test by test types.

- SAT = 3 hours
- ACT = 3 hours and 35 minutes
- MCAT = 7 hours and 30 minutes
- GRE = 3 hours and 30 minutes
- GMAT = 3 hours and 30 minutes
- LSAT = 3 hours and 30 minutes

## Important Note (Added on 1/22/2024):

A student is only compliant with the timelimit if they are under each section's [Assessment].[Sections].[Timelimit], not the overall length they took the test.

## Guarantee Guidelines

When it comes to the onboarding form, we will use this widget to store the student's responses to a certain path in the Score Information segment of the Onboarding form.

If the student answers

- 'No' to the "Have you taken the {TestType} Exam?"
- 'Yes' to the "Are you registered for a future actual test date?"
- Student inputs a date for the question "When are you registered to take the official test?"
  - We would store that date in the DB and put in an entry on this widget that the student selected that date.
    - If the student selects a date that does not align with the Guarantee Guidelines pertaining to the Product's Timeframe for taking the official test, the student is prompted to acknowledge that they are outside of their Guarantee guideline and asked to check a box. That bit should be stored in this widget.
- 'No' to the "Are you registered for a future actual test date?"
- Student inputs a date for the question "What is your target test date?"

- o We would store that date in the DB and put in an entry on this widget that the student selected that date
- o If the student selects a date that does not align with the Guarantee Guidelines pertaining to the Product's Timeframe for taking the official test, the student is prompted to acknowledge that they are outside of their Guarantee guideline and asked to check a box. That bit should be stored in this Diagnostic.

Other automated entries to this Diagnostic will be driven by a student's adherence to their Guarantee Guidelines outlined on this spreadsheet:



Information that should be reflected in this widget regarding their Guarantee Eligibility below:

- If a student selects an official test date that is not 'On or Before Target Test Date' or '30 days after last tutoring session' or 'No later than expiration of dashboard access' (see the Guarantee Guidelines Matrix).
- If a student did not take their Baseline Test 1 before their PSO's first class segment
- If a student was not in attendance in any of their class segments
- If a student was not in attendance in any of their required Supplemental Sessions or required Topic Focus Segments
- If a student did not complete a full length practice test before it was due or if they took a test that is outside of their test accommodation
- If a student did not complete homework before it was due

## Onboarding Form - Tutoring Products (Updated: 12/4/2023)

Questions asked on the onboarding forms below will be used to match student to tutor. We would need to store their timezone and availability for tutoring in such a way that the Enrollment Center and Tutoring Managers will be able to run a report regarding these details to match students with available tutors.

### Tutoring Product Types

The product types below will use both sections of the Onboarding Form outlined above including additional sections only pertinent to these product types.

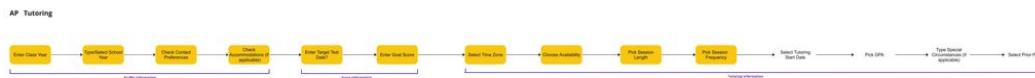
#### Test Prep Tutoring



1. What time zone are you in? (required)
2. When are you available for tutoring? (at least one day and time range required)
3. When would you like to start tutoring? (required)
4. How long would you like each tutoring session to be? (required)
5. How often would you like to meet with your tutor? (required)
6. What is your Unweighted GPA? (optional)
  - a. If SAT, ACT, or AP, this is HS GPA
  - b. Else this is Undergraduate GPA
7. Is there anything else we should be aware of? (optional)
8. If you've prepared for the test before, what resources have you used? (optional)

Prototype:

#### AP Tutoring



#### AP Test Score Information

1. When are you registered to take the official test? (optional)
2. What is your Goal Score? (required)

#### AP Tutoring Information

1. What time zone are you in? (required)
2. When are you available for tutoring? (at least one day and time range required)
3. When would you like to start tutoring? (required)
4. How long would you like each tutoring session to be? (required)

5. How often would you like to meet with your tutor? (required)
6. What is your Unweighted GPA? (optional)
  - a. If SAT, ACT, or AP, this is HS GPA
  - b. Else this is Undergraduate GPA
7. Is there anything else we should be aware of? (optional)
8. If you've prepared for the test before, what resources have you used? (optional)

Prototype: [🔗](#)

#### Academic Tutoring [🔗](#)



#### Tutoring Information [🔗](#)

1. What time zone are you in? (required)
2. When are you available for tutoring? (at least one day and time range required)
3. When would you like to start tutoring? (required)
4. How long would you like each tutoring session to be? (required)
5. How often would you like to meet with your tutor? (required)
6. What is your Unweighted GPA? (optional)
  - a. If SAT, ACT, or AP, this is HS GPA
  - b. Else this is Undergraduate GPA
7. Is there anything else we should be aware of? (optional)
8. If you've prepared for the test before, what resources have you used? (optional)

#### Academic Information [🔗](#)

1. What type of support do you need? (required)
2. What grade are you currently in? (required)
3. What subject(s) would you like tutoring? (required)
4. Current/Goal Grade? (required)
5. What books or materials are you using in school? (optional)
6. What is your objective for this tutoring? (required)
7. What content in the subject are you having the most difficulty with? (optional)
8. What are your current study habits? (optional)

Prototype: [🔗](#)