AFFILIATE STUDENT ROSTER USER GUIDE - 2021 (NON-BTSP ONLY)

I. BACKGROUND

The National office will request student rosters twice per year: pre-summer (May through first week of summer program) and post-summer (August through mid-September). The focus of the pre-summer rosters will be to update student records and participation for the recently completed school year term, and to upload new student contacts for the summer term; the focus in post-summer will be to update student records and participation for the completed summer term, and upload new student contacts for the school year term. Timeframes for roster entry apply to all affiliates; however, the step-by-step guidance outlined below is only for non-BTSP affiliates.

II. TIMEFRAMES

Summer Program:

Uploading new summer students

- Window: *Pre-Summer* -- May through the end of the first week of summer programming

Updating new and existing summer students

- Window: *Post-Summer* -- End of program through mid-September

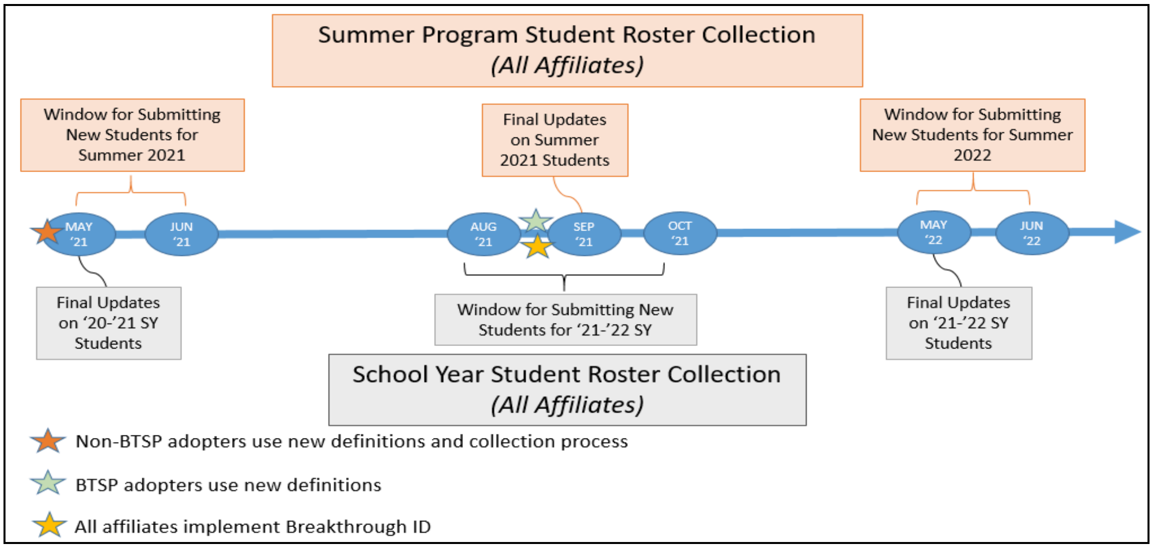
School Year (SY):

Uploading new SY students

- Window: *Beginning of SY* -- End of summer program through early October

Updating new and existing SY students

- Window: *End of SY* -- May through the end of the first week of summer programming



III. ROSTER STEPS

End of Spring Process:

Stage 1: Retroactive-Looking (i.e., closing out School Year rosters)

1. Use the Class Of or other List Views to help you view the list of students in the system for the recently completed School Year term (no *new* Summer term students should be in the system yet). Double check that all existing students have Contact records and up-to-date information.
   a. Update all relevant profile information for all students.
   b. Create student Contact records for any missing/new students.
   c. *If students should have been marked as inactive before the 2020-2021 school year, please send Rachel Martinez an email with a list of students before the next step. She will mark them as inactive for you.*
2. Create Affiliation records for the School Year term of current Program Year.
   a. This is done in bulk by Class Of cohort. You'll need to repeat the process for each Class Of cohort in your programming.
   b. If you make a mistake or encounter an error, please reach out to Rachel.
3. Update those newly created Affiliation records with relevant Participation data including Exited Program status through a ListView.

Stage 2: Future-Looking (i.e., entering Summer rosters)

4. Enter new contact records for new students who are enrolling in Summer term.
5. Updating Summer student records, if needed.
6. Create Affiliation records for the Summer term of current Program Year.
   a. This is done in bulk by Class Of. You'll need to repeat the process for each Class Of cohort in your programming.

7. **Stop here.** You do NOT need to update the Participation indicator in the Affiliation records of Summer right now.

End of Summer Process:

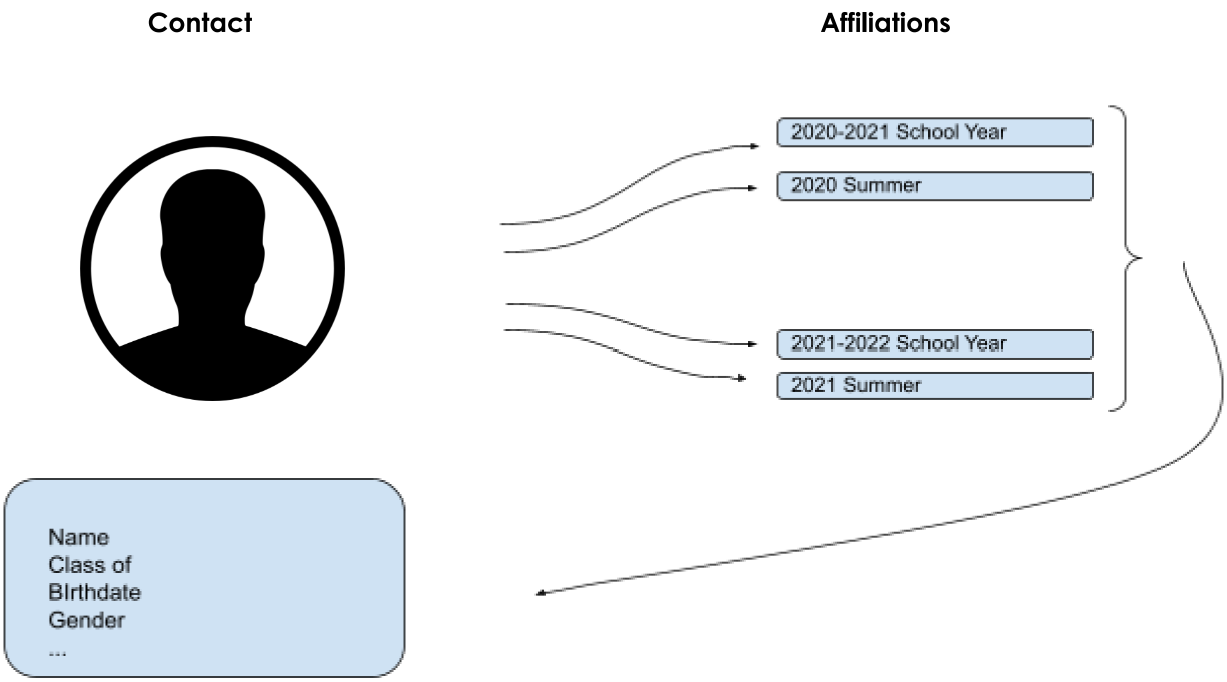
Stage 1: Retroactive-Looking (i.e., closing out Summer rosters)

1. Use the Class Of or other List Views to help you view the list of students in the system for the recently completed Summer term (no new School Year term students should be in the system yet). Double check that all existing students have Contact records and up-to-date information.
    a. Update all relevant profile information for all students.
    b. Create student Contact records for any missing/new students.
    c. *If students should have been marked as inactive before the 2020-2021 school year, please send Rachel Martinez that list of students before the next step.*
2. Create RETROACTIVE Affiliation records manually for the Summer term and current Program Year ***if there are new students in the system***.
    a. This is a different process than in the Spring, and only applies if a student was added after the Summer term began.
    b. If you make a mistake, please reach out to Rachel.
3. Update those Affiliation records with relevant Participation data including Exited Program status through a ListView.

Stage 2: Future-Looking (i.e., entering School Year rosters)

4. Enter new contact records for new students who are enrolling in School Year term.
5. Updating School Year student records, if needed.
6. Create Affiliation records for the School Year term of current Program Year.
    a. This is done in bulk by Class Of. You'll need to repeat the process for each Class Of cohort in your programming.
7. **Stop here.** You do NOT need to update the Participation indicator in the Affiliation records right now.

IV. DATA STRUCTURE OVERVIEW



Salesforce keeps student information and participation information in two separate areas. The **Contact** record is where student-specific information is found. The information in the Contact record includes things that are (fairly) static, e.g., demographics. The **Affiliation** record is where student participation is found (e.g., not exited), and also when the student was active (e.g., School Year term of 2020-2021). The participation and term information you input into the Affiliation record is then mapped back to the Contact record.

The new process for inputting students contains two major steps:

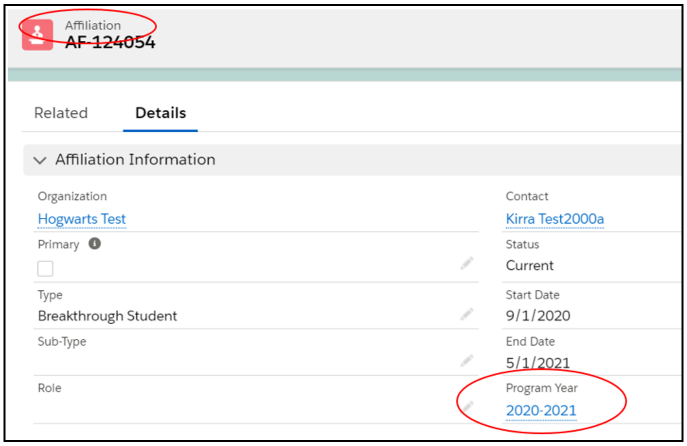
- Step 1: update/add new students in the Contact record
- Step 2: create Affiliation records to denote participation and term

New Fields in the Affiliation Record:

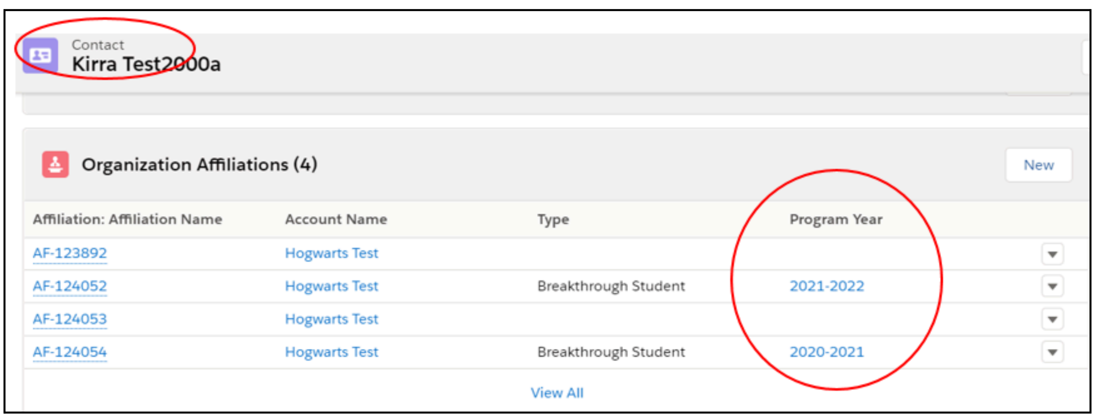
The National Office has added two new indicators into Salesforce: *Program Year* and *Participation* records.

- **Program Year** records will indicate specific years of active programming, beginning in summer and ending after the spring. For example, students participating during the School Year program in 2020-2021 will have a program year of 2020-2021; students participating during the Summer of 2021 will have a program year of 2021-2022. Other records in Salesforce will be connected to Program Year and enable easier year over year analytics and more nuanced holistic yearly analytics. For example, teaching fellow applications will also be associated with the program year record in which the teaching fellow applied.

You can find the Program Year field under the Affiliations record...

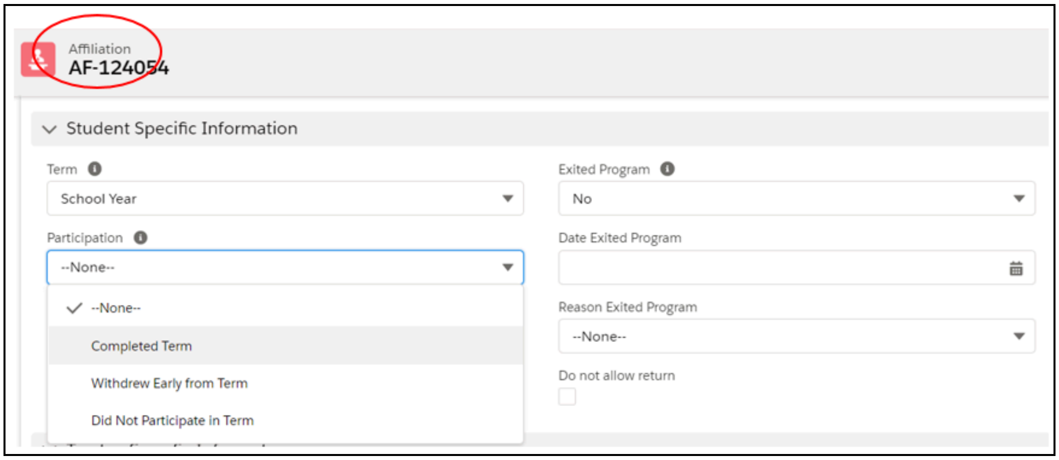


...which pulls into the student's Contact record. You can see all the student's Program Year fields in their Contact record, found under the "Organization Affiliations" section (in the "Related" tab):

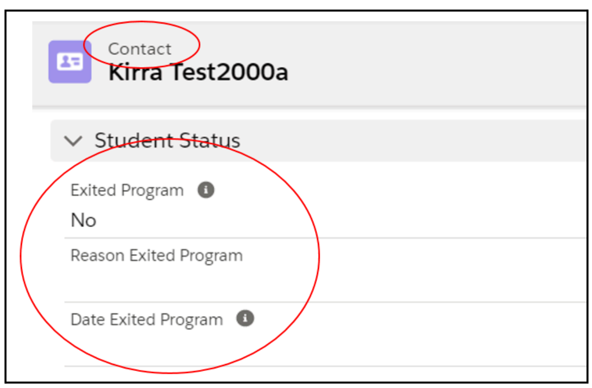


- **Participation** records are also housed and editable in the Affiliation record. Participation is captured by three primary fields: Term, Participation, and Exited Program.
    - Term: Denotes the term for which the information is associated with. Options are *Summer* or *School Year*.
    - Participation: Denotes whether the student completed the term or not. Program completion should be based on your local definition of completion. Options for this field are *Completed Term, Withdrew Early from Term,* or *Did Not Participate in Term*.

- Exited Program: Denotes whether the student is no longer in the program. This field is only used if the student is more or less permanently out of the program, not for use if the student is not participating during a particular term but still in the program. Options for this field are *Yes* or *No*. If this field is "Yes", the Date Exited Program field should also be completed, along with Reason Exited Program field.



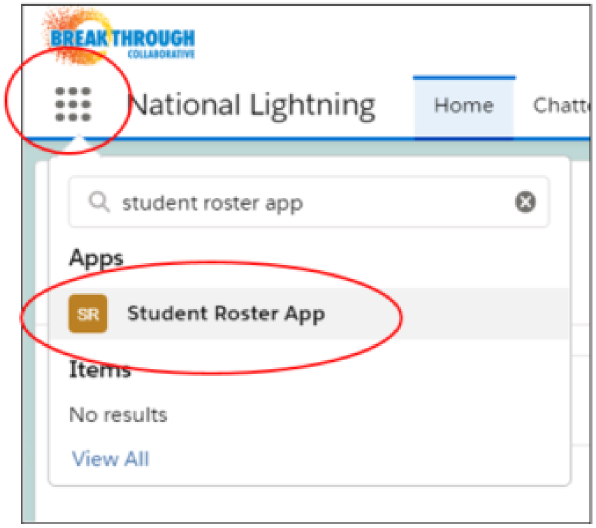
These participation data can be viewed in the student's Contact record, but not editable there, as it needs to be edited in the Affiliation record. The participation data in the Contact record is found under the Details tab.



V. STEP-BY-STEP ROSTER PROCESS

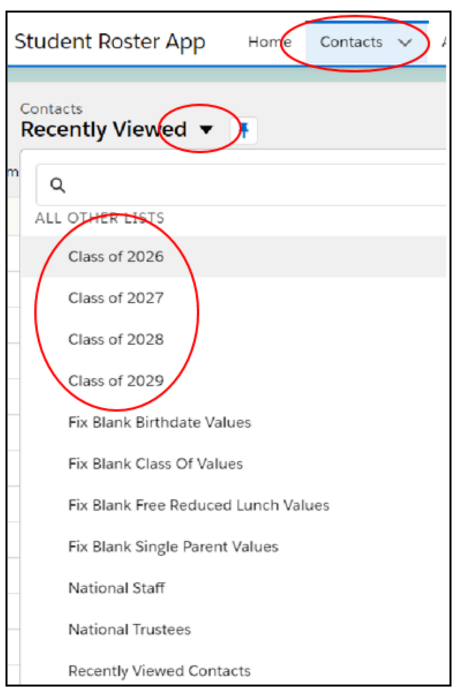
Entering Salesforce

To begin the Roster process, log in to National Salesforce and go to the Student Roster App by clicking the dot grid in the top left corner of the screen.

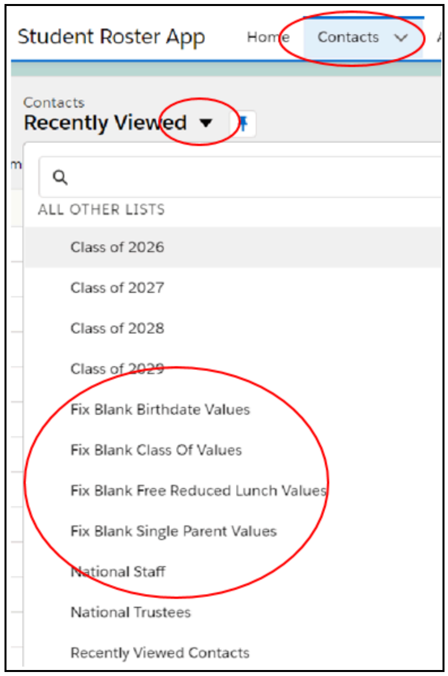


Using Class Of and Other List Views to Check Rosters

You can verify student rosters in a number of ways, but the recommended way is by Class. You can access all of these views through the Contacts tab and click on the downward arrow to see the lists.



There are also List Views starting with "Fix" that will also assist you with specific fields that are missing:

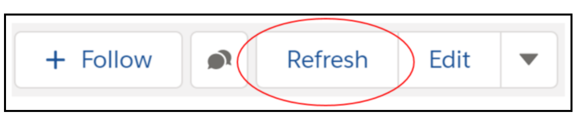


The following are additional List Views you can use:

- **My Students: Language Information:** with the restructuring of the "primary language" key indicators, most student records need updated language information for the student and guardians. This view will allow you to enter and mass update languages.
- **My Inactive Students**: will show a list of all students who have been marked as having exited programming. Students who are marked as having exited do not show up anymore in the Class Of lists.
- **My Students Contact Info**: will show phone, email, and address information for your students. You can add contact info or update directly from this List View.
- **My Students Profile Data**: will show all (new) key indicator fields for your students. You can update mass or individually.

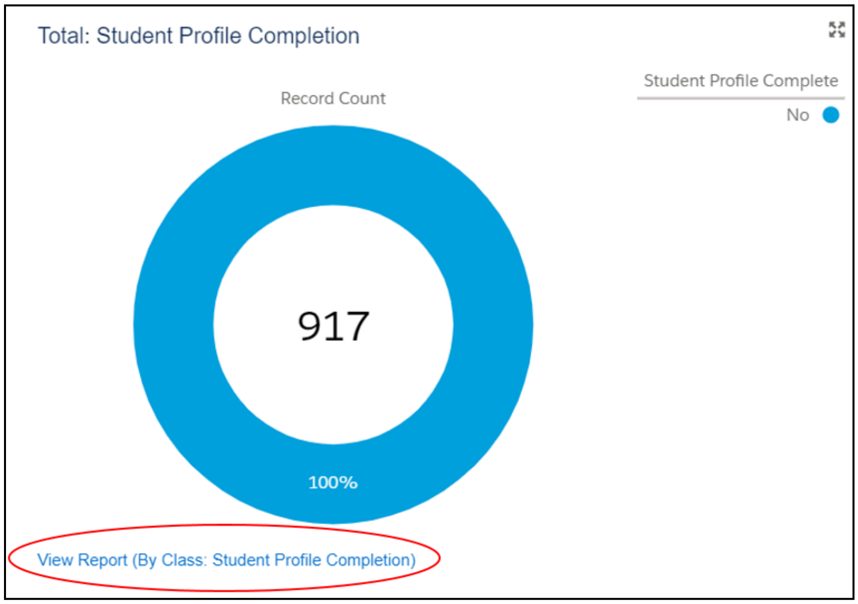
Useful Dashboards:

The following dashboards in the "Core Program: Students" folder may provide useful summaries throughout the roster process. Before reviewing any data, please click on "Refresh" at the top right corner of the page.



- [My Site: Student Profile]
- [My Site: Enrollment and Participation]
- [My Site: Missing Information]

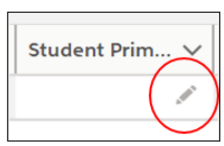
- My Site: Student Profile: The Student Profile Completed metric= NO (2nd row of figures) indicates that key information is missing from those students. To view the specific students, use the hyperlinked report associated with that figure.



To update information or enter new information, click the "Edit" button located at the top right hand corner of the student's Contact record, and when finished, click "Save".

Updating Contacts via List Views

To update a single field on the List View, hover your mouse over the area to see a pencil icon appear.



Click the pencil icon and the field will become editable. Update the missing or incorrect fields, and then you must click "Save" at the bottom of the screen. If you don't click "Save", all the updates will be lost.

To mass update one field in a List View: You are able to change one field for multiple students, but it must be a field that is a single picklist, for example if you want to select English as the Student's Primary Language for 33 students at once.

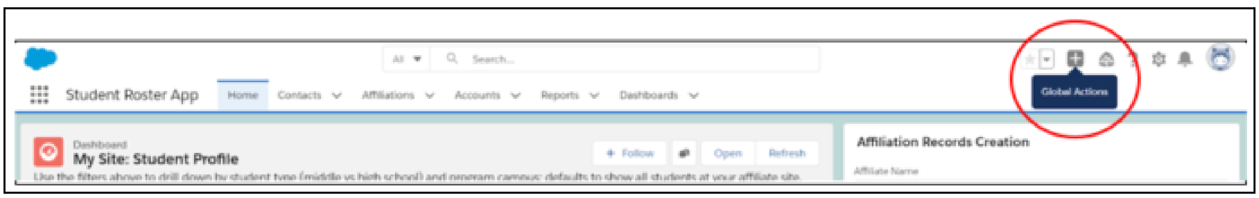
First, select the records you want to mass update by checking the checkboxes on the left hand side of the student record. Please note that you must select only the records that need to be updated with the same answer choice. Then click the pencil icon in the field that you'd like to update. Select the value that you need, and then check the "Update X selected items" checkbox. When you click "Apply" and "Save", all the selected records will be updated.

Creating Student Contact Records

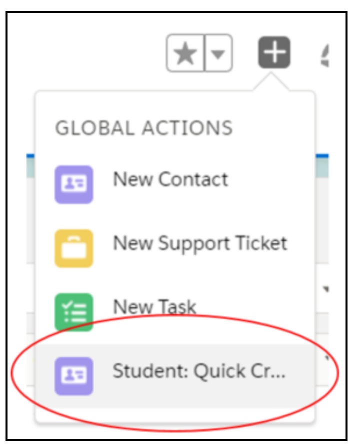
If the student is not in National Salesforce or is new to Breakthrough this term, you'll need to create a Contact record and complete their demographic profile information, including the new key indicators.

1. First, search the National Salesforce to make sure that the student doesn't already have a contact record. This will help cut down on the number of duplicates in the system. You can use the search textbox at the top of the page to see if this student is in the system.

2. Once you have confirmed that the student doesn't have a record, click the sign on the top right hand corner of the screen. This is a shortcut to take you to Global Actions: actions that you can do while anywhere in the system, regardless of what page or record you may be on.

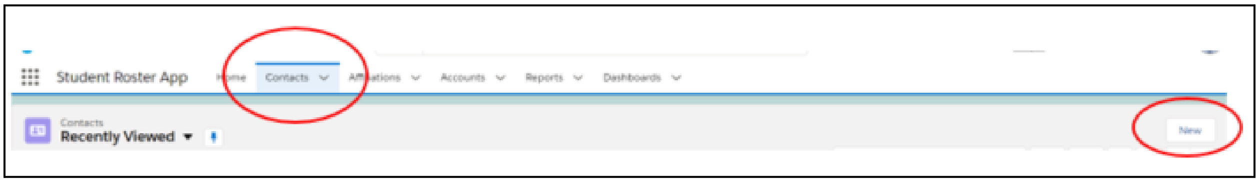


3. Select the Global Action titled "Student: Quick Create." This shortcut method will only prompt you to fill in a handful of key fields.



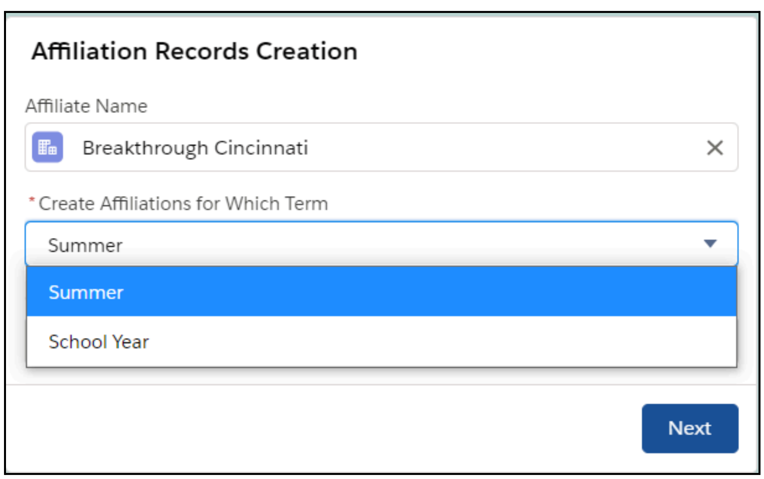
The "Student: Quick Create" window will pop up in the bottom right hand of the screen. Enter as much information as you know. Hit "Save" when finished and you will be taken to the newly created student's Contact page.

4. Alternatively, if you wish to enter a more full record of the student, click the Contacts tab and then the "New" button on the right hand side.

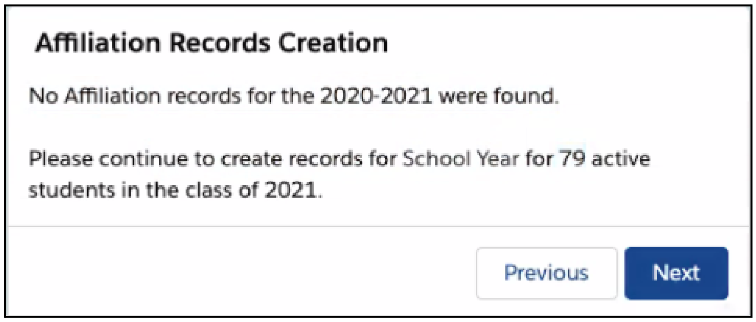


Creating Affiliation Records to Record Participation/Enrollment

1. First, you must ensure that all new students are uploaded into Salesforce, and all data on students have been updated via the Contact records (see previous sections). Please **do not** add new students for your next term; otherwise, this will create an incorrect participation record. *Example: in May, you should have all new students from the School Year into the system and should have updated any missing or incorrect data from the School Year students. No new upcoming Summer students should be added to the system yet.*
2. Next, you will need to trigger the creation of the affiliation records. To do this, go to the Home page tab in the Student Roster App. On the right hand side will be a box labeled "Affiliation Records Creation." Enter in your Affiliate Name. Under "Create Affiliates for Which Term", please select the program term that just ended - Summer or School Year. For example, for the roster upload at the end of this spring, you will need to select "School Year" and 2020-2021. For the roster upload at the end of this summer, you will need to select "Summer" and the **school year that is coming up** (2021-2022). Then you need to select the Class Of that you are doing this for.



- Then you will see the message that confirms that there are no previous affiliation records created for this group, along with the number of students that it is creating affiliation records for.

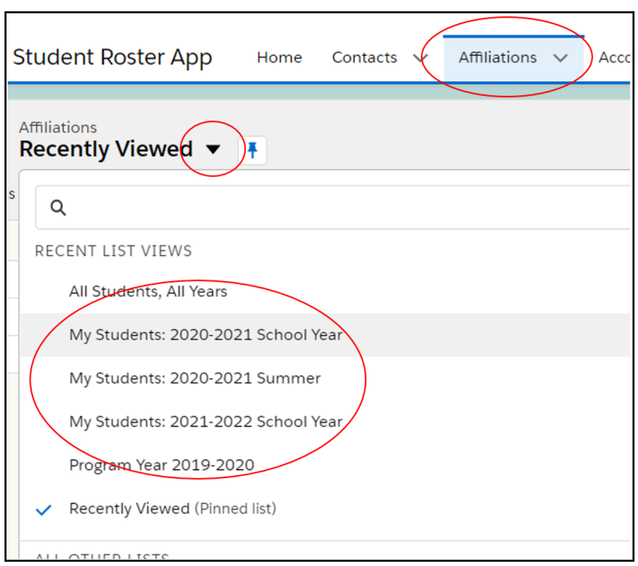


- When you click Next, then it will congratulate you on creating the affiliation records.

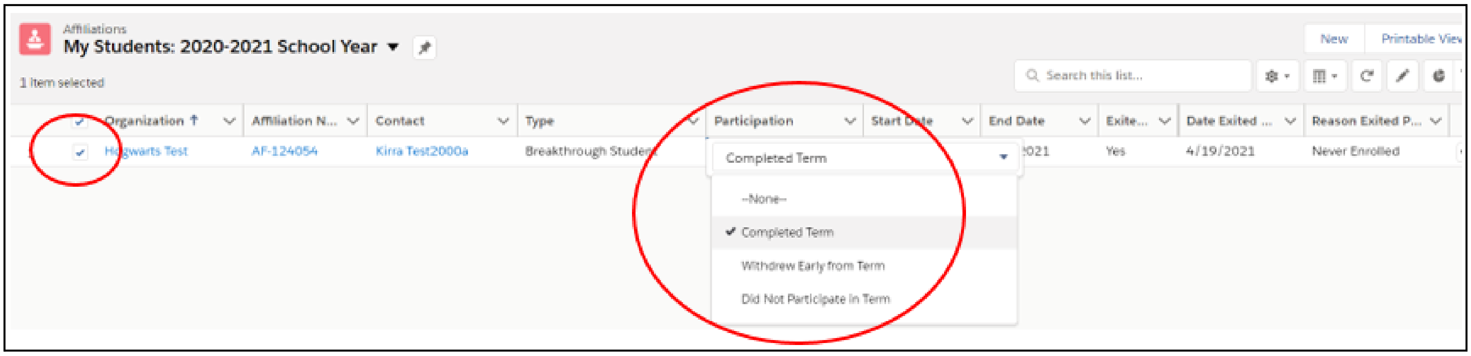
3. Then you must repeat Step 2 of this process for each Class you have.
4. If you just created affiliation records for the School Year 2020-2021 students, please move on to the next section. If you are creating placeholder affiliation records for the upcoming Summer 2021 students, you can stop here.

Updating Participation/Enrollment Record

1. On the Affiliations tab, navigate to the List Liew of the appropriate Program Year and Term. Please remember that the Summer terms are associated with the next school year, so Summer programming in 2021 should be listed as 2021-2022.



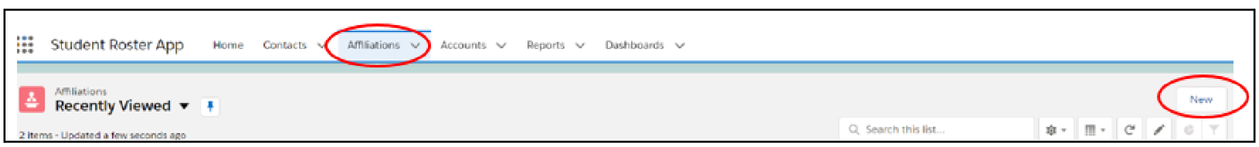
2. From here, you can individually update or mass update information. Go to the Participation column, and select each students' participation.



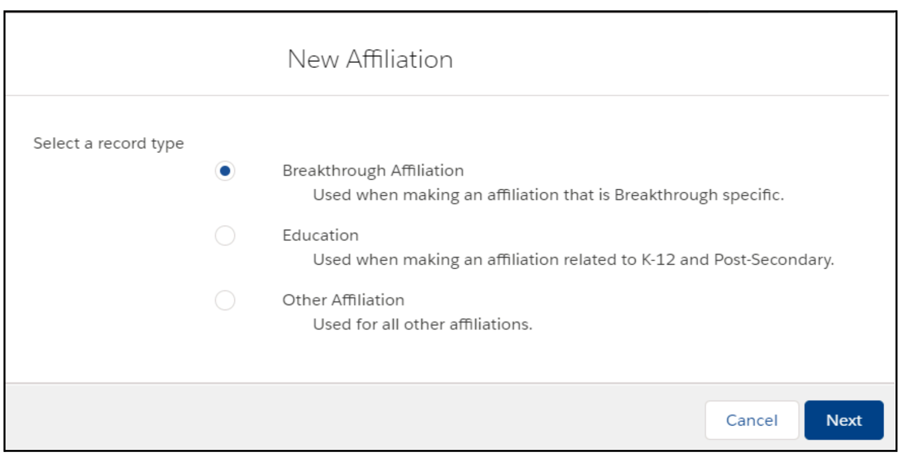
Create RETROACTIVE Affiliation Records Manually

This process is only applicable to students who were added after the term (e.g., Summer or School Year) began, and has no Affiliation record as a placeholder. For example, I have a student who joined the Summer program after I inputted all my new Summer students. I need to create an Affiliation record for this new student.

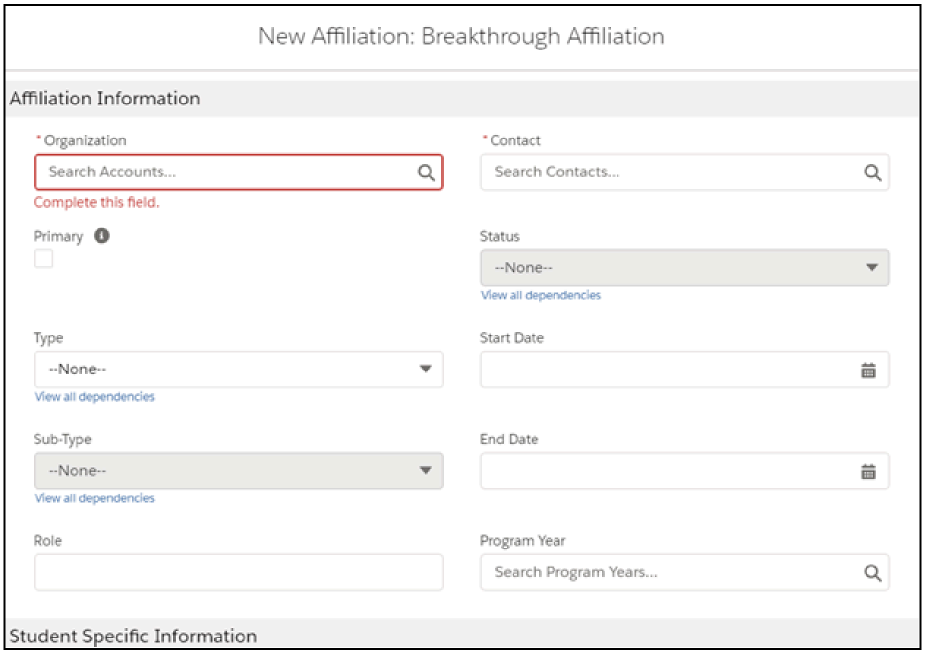
1. Go to the Affiliations tab, and click New.



2. Select Breakthrough Affiliation.



3. In the Affiliation information section, fill in your affiliation name, search for the student in the Contact box, type is Breakthrough Student, and Program Year.



a. In the Student Specific Information, this is where the Participation information is housed. If it is at the end of the term, please fill out the Participation information. If this is before the term is complete, you can fill out only the Summer.