

## Onward Israel CRM Update - 30.9.2020

### Credit indication for Summer 2020 July Fellowship applicants/Remote program participants

1. How to track the credit eligibility, in summer 2021 new applications
  2. How to mark those eligible applicants when they utilized the credit in summer 2021 process
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#### Requirements:

1. Marking credit amount on application
2. Indicating if a Remote participant did not successfully complete the Remote program
3. Following up who is ineligible for credit
4. Marking that a past applicant/participant has utilized the credit in the current program

#### Background:

In Summer 2020, a \$100 credit toward future registration was promised to applicants who completed the Remote program successfully. Note that this was not applied to all Remote program participants.

This new "Credit" CRM function gives the CRM user the option to see the latest update regarding the credit eligibility of an applicant/past participant and the details regarding past participation in a Remote program.

This mechanism was built in a way that the CRM user will be able to see all required information in one place, the applicant's current application. These new sections on application pages give you the ability to see the most recent updates regarding this applicant (even if the past application wasn't under your treatment and therefore is not accessible to you) and also to update about the applicant's credit use in real time.

#### Process:

The following Summer 2020 populations, were entitled as **Credit Eligible**:

1. **Likely participants** in the July Fellowship program that was cancelled. All of these contacts were updated with our new application status: **Cancelled Program**. To reiterate, this may not be relevant to all partners and organizers, but this data may appear in current applications for credit eligibility reference

2. **Confirmed participants** in the Remote tracks in Summer 2020

In order to mark the participants who did not successfully complete their Remote program (this does not necessarily mean that they did not finish their Remote internship, but rather that the staff determined that they did not complete all the requirements of the program), we established new sections on Application Page:

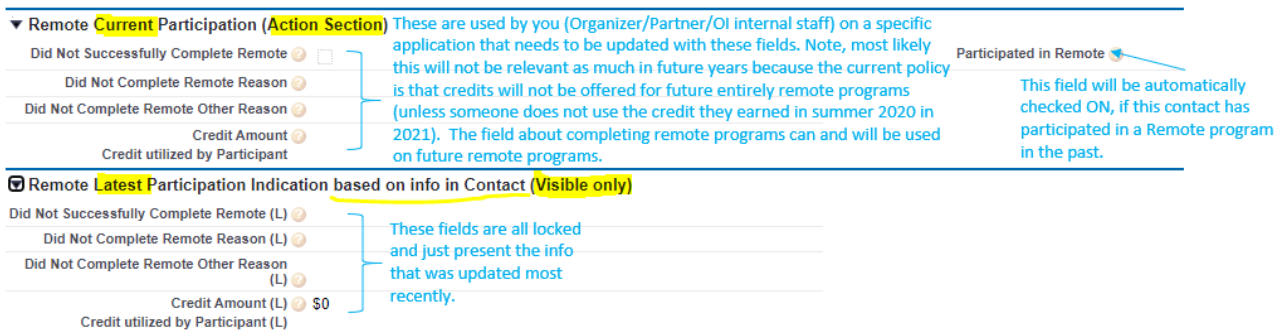
1. Remote Current Participation (Action Section)
2. Remote Latest Participation Indication based on info in Contact (Visible only)

We have established a set of fields to indicate that a participant did not finish as well as a field that will show the credit amount. An applicant/past participant that is eligible for the credit should have \$100 in the **Credit Amount** field. An applicant/past participant that is not eligible for the credit will show an unpopulated **Credit Amount** field.

The reasons for not completing the Remote program can be:

- Didn't complete the professional requirements
- Didn't complete the educational requirements
- Didn't complete the professional and educational requirements
- Left the program - Participant decision
- Left the program - Organizer/Employer Decision
- Other

New sections as they appear on the CRM in **Application Page**:



▼ Remote **Current** Participation (**Action Section**) These are used by you (Organizer/Partner/OI internal staff) on a specific application that needs to be updated with these fields. Note, most likely this will not be relevant as much in future years because the current policy is that credits will not be offered for future entirely remote programs (unless someone does not use the credit they earned in summer 2020 in 2021). The field about completing remote programs can and will be used on future remote programs.

Participated in Remote  This field will be automatically checked ON, if this contact has participated in a Remote program in the past.

Did Not Successfully Complete Remote

Did Not Complete Remote Reason

Did Not Complete Remote Other Reason

Credit Amount

Credit utilized by Participant

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☑ Remote **Latest** Participation Indication based on info in Contact (**Visible only**)

Did Not Successfully Complete Remote (L)

Did Not Complete Remote Reason (L)

Did Not Complete Remote Other Reason (L)

Credit Amount (L)

Credit utilized by Participant (L)

These fields are all locked and just present the info that was updated most recently.

Please note that you will also see the following information on Contact page, but you will not need to use it at any stage.



▼ Remote Latest Participation Indication (Visible only)

Did Not Successfully Complete Remote  Remote Participations

Did Not Complete Remote Reason

Did Not Complete Remote Other Reason

Credit Amount \$100

Credit utilized by Participant

Time limits on the \$100 credit:

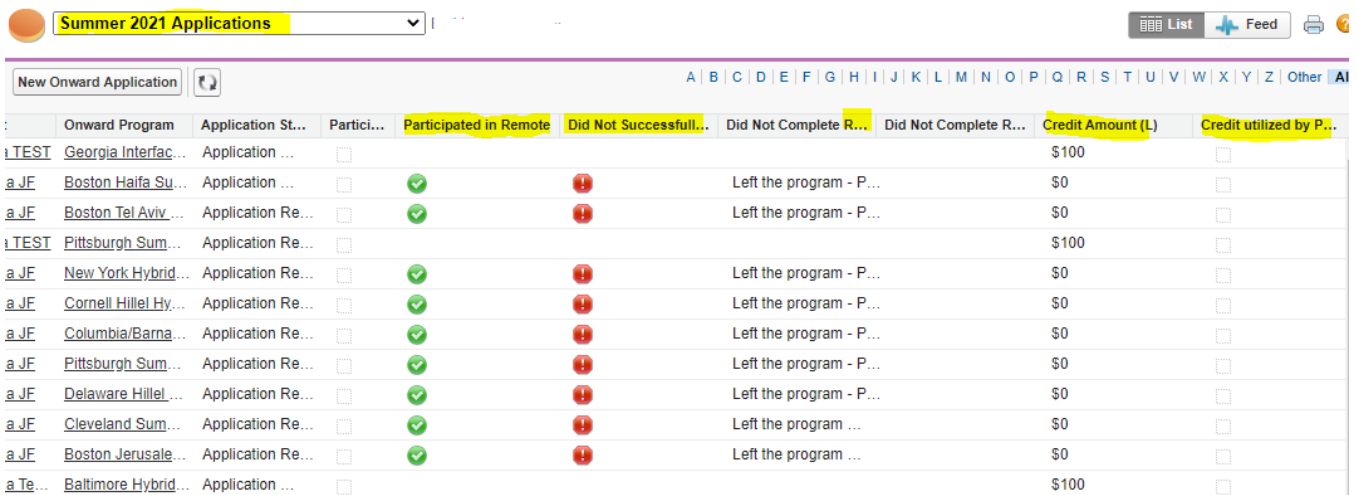
Though credits may not be offered on future programs, these fields will provide CRM users and program partners the ability to track:

1. Whether a past applicant/participant has a \$100 credit to use on a future program
2. To indicate when this credit is utilized

A credit can be utilized within two summer seasons, meaning that a Summer 2020 Remote participant may use the credit in Summer 2021, Winter 2022 and Summer 2022. They may not utilize the credit and not afterwards.

Helpful notes:

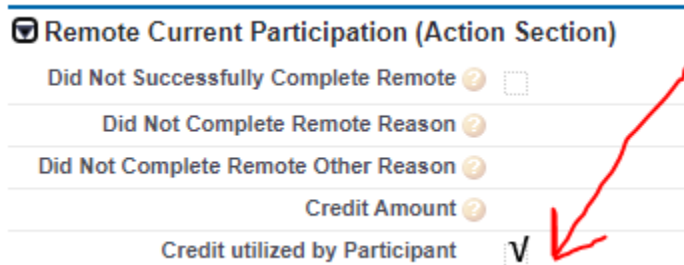
1. On the Applications Tab, on the **Summer 2021 Applications** list view, we added new fields (see screen shot below)
2. When you have an applicant that did not complete the Remote program, you will see a red icon along with a field indicating the reason this applicant did not complete the Remote program. You will also see and a green icon indicating that the applicant participated in a Remote program



	Onward Program	Application St...	Partici...	Participated in Remote	Did Not Successfull...	Did Not Complete R...	Did Not Complete R...	Credit Amount (L)	Credit utilized by P...
i TEST	Georgia Interfac...	Application ...	<input type="checkbox"/>					\$100	<input type="checkbox"/>
a JF	Boston Haifa Su...	Application ...	<input type="checkbox"/>	✓	!	Left the program - P...		\$0	<input type="checkbox"/>
a JF	Boston Tel Aviv...	Application Re...	<input type="checkbox"/>	✓	!	Left the program - P...		\$0	<input type="checkbox"/>
i TEST	Pittsburgh Sum...	Application Re...	<input type="checkbox"/>					\$100	<input type="checkbox"/>
a JF	New York Hybrid...	Application Re...	<input type="checkbox"/>	✓	!	Left the program - P...		\$0	<input type="checkbox"/>
a JF	Cornell Hillel Hy...	Application Re...	<input type="checkbox"/>	✓	!	Left the program - P...		\$0	<input type="checkbox"/>
a JF	Columbia/Barna...	Application Re...	<input type="checkbox"/>	✓	!	Left the program - P...		\$0	<input type="checkbox"/>
a JF	Pittsburgh Sum...	Application Re...	<input type="checkbox"/>	✓	!	Left the program - P...		\$0	<input type="checkbox"/>
a JF	Delaware Hillel...	Application Re...	<input type="checkbox"/>	✓	!	Left the program - P...		\$0	<input type="checkbox"/>
a JF	Cleveland Sum...	Application Re...	<input type="checkbox"/>	✓	!	Left the program ...		\$0	<input type="checkbox"/>
a JF	Boston Jerusale...	Application Re...	<input type="checkbox"/>	✓	!	Left the program ...		\$0	<input type="checkbox"/>
a Te...	Baltimore Hybrid...	Application ...	<input type="checkbox"/>					\$100	<input type="checkbox"/>

How to mark if someone utilized their credit:

In the **Action Section**, check the **Credit utilized by Participant** field, as seen below:



Remote Current Participation (Action Section)	
Did Not Successfully Complete Remote ?	<input type="checkbox"/>
Did Not Complete Remote Reason ?	
Did Not Complete Remote Other Reason ?	
Credit Amount ?	
Credit utilized by Participant ?	<input checked="" type="checkbox"/>

The credit must be utilized fully. There is no option to split it or use it partially. We do not expect applicants to request this, but this is the policy should that rare occasion arise.

For any further questions feel free to reach out directly.

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