

## Table of Contents

The Reader.....	2
Navigating the Reader.....	3
Overview of Bins and Bin Structure.....	3
Filtering within the Reader.....	4
Bin movement.....	8
Reviewing or “Taking Action” on an Application.....	8
Moving Multiple Applications into Queues and Bins.....	9
Overview of Review Forms.....	12
Waive Dept Exam Form.....	13
Pre-Review Form.....	14
DGP Review Form.....	15
Dept Reader (Faculty) Review Form.....	16
Post Decision Workflow.....	17

## Reader Keyboard Shortcuts

- **Arrow Keys:** move up/down/left/right
- **Pg Up/Pg Down:** page up, page down
- **+/-:** zoom in, zoom out
- **Tab:** next section in index
- **Shift + Tab:** previous section in index
- **1-9:** display 1st tab, 2nd tab, etc. in index
- **Ctrl + Left/Right Arrow:** rotate page (PC)
- **Cmd + Left/Right Arrow:** rotate page (Mac)
- **Shift + H:** toggle highlight remover
- **H:** toggle highlighter
- **N:** toggle note editor
- **Q:** toggle display of queue
- **R:** toggle display of Review Form / Send to Bin
- **S:** toggle display of search
- **Esc:** close open panels, return to first section

## Reader Mouse Shortcuts

- Click tabs in the left panel to change sections
- Double-click on a page to zoom in
- Right-click on a page to zoom out
- Click-and-drag to move within/between pages

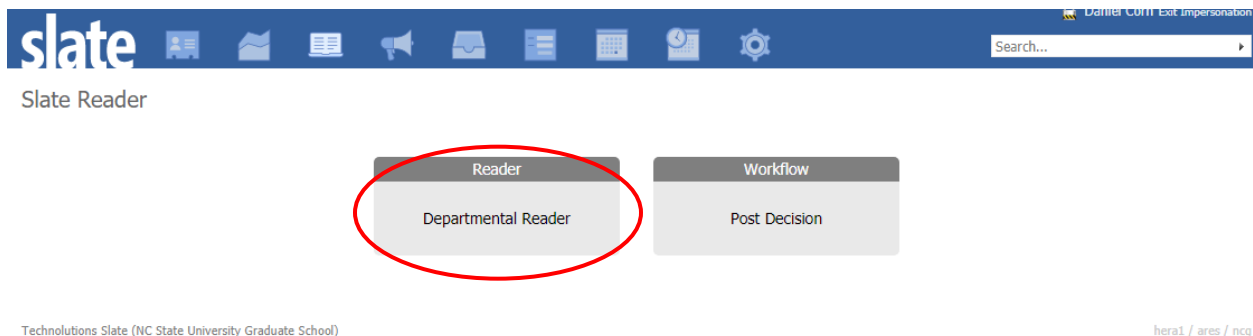
## The Reader

Although applicant look-up and certain materials (test scores, essays, transcripts, etc.) can be viewed through the Records icon, the application review process will occur in the Slate Reader.

The Slate Reader can be accessed by clicking on the navigation bar's third icon.



To perform an initial review of an application, click on “Departmental Reader.” The “Workflow: Post Decision” link is for applications that have already been reviewed. This will be explained later in the document.



## Navigating the Reader

slate	
Home	
Browse	
Search	
Queue	
Recent	
Share	
Help	
Exit	

Menu Option	Explanation
Home	The default Reader landing page.
Browse	View all Reader Bins, including the total # of applications in each bin.
Search	View applications in a list view and add filters to narrow results.
Queue	View only applications that are currently in your queue.
Recent	View a list of only the most recently viewed applications.
Share	Allows the leader of a reading meeting to broadcast their screen to all other viewers in the meeting.
Help	Access helpful Reader resources, like documentation and webinars.
Exit	Exit the Reader and return to the student record view.

**\*Your most used menu tabs will be Browse, Search and Queue.**

## Overview of Bins and Bin Structure

By clicking on Browse, you open an overview of all the bins accessible to you – it is the easiest way to visualize where your program's applications fall in the review process. The bottom-right corner of each bin displays the number of applications it currently holds.

The screenshot shows the 'Browse' page in the 'slate' application. The left sidebar contains a menu with 'Browse' highlighted. The main content area displays a grid of review bins. The bins are organized into two columns: 'Pre-Review' and 'Program Review'. The 'Pre-Review' column includes 'Awaiting Materials' (0). The 'Program Review' column includes '1 Dept Review' (1), '2 Dept Review' (0), '3 Dept Review' (0), '4 Dept Review' (0), and 'Waitlist' (0). A red box highlights the '1 Dept Review' bin, and a callout points to the number '1' in its bottom-right corner, indicating the number of applications currently in that bin.

Applications in the Awaiting Materials Bin, in the Pre-Review column, are applications that have been submitted, had their application fee paid, and are waiting on required, supporting materials to be received by the Graduate School. These items are most commonly official test scores and recommendation letters. Once all outstanding materials are in, applications in the Awaiting Materials Bin will automatically move into the 1 Dept Review Bin.

**Best Practice: This should be kept in mind when determining how your department wants to utilize the four Department Review Bins. Once applications are in the “Program Review” column of bins, all movements are customizable and may be tailored to your department’s needs.**

If your program is strict about not review applications until all materials are in, you can essentially disregard the Awaiting Materials bin, as *all* submitted applications with *all* supporting documents will move automatically into the 1 Dept Review Bin. However, if you have an application in the Awaiting Materials bin that you are willing to review before all materials have been received, you can manually move it into the 1 Dept Review Bin. **You can also waive an applicant’s entrance exam from Awaiting Materials Bin. Instructions for this waiver can be found on page 13 of this manual.**

Once your applications are in the 1 Dept Review Bin, your program or department can decide how the four review bins will be utilized for your review process. There are several different approaches you can take when setting up bin structure, and the Graduate School would be happy to talk through potential processes with your program. One thing to remember is that while all the bins in the Program Review column are yours to control and manage, **the names of each bin cannot be changed**, as their naming conventions are seen campus-wide.

### Filtering within the Reader

To isolate particular types of applications, you can apply filters to a specific bin, your queue, or all applications, which can be viewed via the Search and Browse menu tabs. The Graduate School’s pre-programmed filters are always available via the drop-down menu on the right-hand side of the screen. **If you’d like custom filters for your program’s review needs, please reach out to the Graduate School.**

The screenshot shows the 'slate' application interface. The top navigation bar includes 'Home', 'Browse' (selected), 'Search', 'Queue', 'Recent', 'Share', 'Help', and 'Exit'. The main content area is titled 'Browse' and features a 'Refresh' button in the top right. The interface is split into two columns: 'Pre-Review' and 'Program Review'. The 'Pre-Review' column has one bin, 'Awaiting Materials', with a count of 2. The 'Program Review' column has four bins: '1 Dept Review' (count 1), '2 Dept Review' (count 0), '3 Dept Review' (count 0), and '4 Dept Review' (count 0). On the right, there is a filter dropdown menu set to 'Default' and buttons for 'Filter', 'NOT', '(', 'OR', and ')'. A red arrow points from the text 'drop-down menu' in the text above to the filter dropdown menu.

The “Default” filter will be initially set for all applications. The other pre-set filters are self-explanatory and fairly broad in use, or you may have had custom filters created for you by the Graduate School.

**Please reach out if you’d like us to create custom reader filters.** However, if you want to sort your applications by more specific criteria – sex, citizenship, age, etc. – the filter tools are more useful.

For example, if you want to see how many applications belong to international female applicants, you can set the filter to sort on both “Citizenship Status” and “Sex.” This example shows only the “Sex” portion of this. **To start, click on “Filter” and type “Sex” into the Search bar within the “Insert Query Part” pop-up screen.**

**Best Practice:** You can add filters you frequently use to your Pinned Filters so they always appear at the top of the list. Click “Edit Pinned” to add the filter on the query page that will open, and the next time you open filter tool, the filters you added will show.

**Insert Query Part**

Search

Groups ☒ Pinned Filters ☒ Local Filters

**Pinned Filters**

**Local Filters**

**Lookup**

**Prospects**

**Sex**

Operators: IN, NOT IN

[Sex Exists](#)

**Applications**

Once you find and select the desired filter, click "Continue." You will then be prompted with the "Edit Filter" screen to specify which results you want to show.

**Continue** **Cancel**

**Edit Filter**

Sex

**Female**

Male

In this example, we are filtering on female applicants, so "Female" is selected in the drop-down menu. Hit Save to apply the filter.

**Save** **Cancel**

Follow the same steps to add any other filters. Each added filter will show on the right-hand side of the page.

Filter **NOT** ( **OR** )

**Sex** IN Female

**Citizenship Status** IN Foreign National

Once the filter(s) are applied, you will see the number of applications decrease, meaning you are only looking at applications the filter is capturing.

**slate** Browse Refresh

Home Browse Search Queue Recent Share Help Exit

Pre-Review  
Awaiting Materials 2

Program Review  
1 Dept Review 1

2 Dept Review 0

3 Dept Review 0

4 Dept Review 0

Waitlist 0

Default  
Filter NOT ( OR )

Browse is the best view for a general overview of how many applications are being isolated by the filter in each individual bin.

After you select preset filters or add your own, you'll see the numbers of applications in each bin change. Once you remove a filter, the number will return to the actual, total number for each bin.

**slate** Applications (3) Build Query Classify Refresh -5 +5 Add to Queue (0)

Home Browse Search Queue Recent Share Classify Help Exit

Name	Term	Degree Type	Program	Area of Interest	Certificate	Bin	Dept Reader Decision 1	Dept Reader Decision 2	Dept Reader Decision 3
2198		Doctor of Phi...	Computer Sci...			1 Dept Review			
2191		Master of Sci...	Mechanical E...			1 Dept Review			
2191		Master of Fin...	Financial Mat...			1 Dept Review			

Prev Next

Search...

Program Review - 1 Dept Review

Default

Filter NOT ( OR )

Sex IN Female

Citizenship Status IN Foreign National

If you are applying filters in Search, Queue or within a bin, you will see the number of applications decrease on the top of the screen.

Prev Next

Search...

Program Review - 1 Dept Review

Default

Filter NOT ( OR )

Sex IN Female

Citizenship Status IN Foreign National

To edit a filter, click the paper and pen icon.

To remove a filter, click the red "X".

## Bin Movement

Before moving applications from bin to bin, it's best to understand the function of bin movement. As a general rule, **bin movement occurs from left to right and top to bottom, and does NOT go backwards.**

Moving applications from bin to bin can occur one by one or many at a time. Later in this document, we will explain the situations in which mass-moving applications will be useful. It can be more efficient to move multiple applications at once, but typically, you won't move an application to the next bin until you have reviewed the application and completed the review form. Sending an application to the next Department Review Bin is, in effect, handing it off to the next reader in your program's review process – this is also something to keep in mind when configuring the bins in your Program Review column.

## Reviewing or “Taking Action” on an Application

To review or move an application, you first need to add the application to your queue. Applications can only be in one bin at a time, but can be in multiple reader's queues at the same time. If you and a colleague are both reading an application, it will appear in both of your queues, but will remain in the same bin. **Best Practice: Don't add an application to your queue until you know you are ready to fill out a review form or move it to another bin.**

The images below demonstrate how to add applications to your queue. When you click on a bin that is holding applications, you will see a list of the applications currently in that bin. In the sample below, the “Pre-Review – Awaiting Materials” bin has two applications in it:

The screenshot shows the 'Applications (2)' interface. On the left is a sidebar with navigation links: Home, Browse, Search, Queue, Recent, Share, Help, and Exit. The main area displays a table of applications. The table has columns: Name, Term, Degree Type, Program, Area of Interest, Certificate, Bin, and three Dept Reader Decision columns. Two applications are listed: 'Fernandez...' and 'Test, H1B'. Both are in the 'Awaiting ...' bin. To the right of the table is a filter panel with a search bar, a dropdown menu currently set to 'Pre-Review - Awaiting Materials', and buttons for 'Filter', 'NOT', '(', 'OR', and ')'. A red box highlights the dropdown menu, and a text box points to it with the tip: 'Tip: If you want to jump to other bins, you can do so by selecting their title in this drop-down menu.'

Name	Term	Degree Type	Program	Area of Interest	Certificate	Bin	Dept Reader Decision 1	Dept Reader Decision 2	Dept Reader Decision 3
Fernandez...	2198	Master of ...	Electrical ...			Awaiting ...			
Test, H1B	2198	Master of ...	Computer...			Awaiting ...			

To select an application to add to your queue, click anywhere on the application row. Selected rows will be highlighted in dark blue. In the top right corner, the number of selected applications is indicated in parenthesis on the “Add to Queue” button. When satisfied, click “Add to Queue.”

This screenshot shows the same 'Applications (2)' interface, but with the 'Test, H1B' application row selected (highlighted in dark blue). The 'Add to Queue (1)' button in the top right corner is now highlighted with a red box and a red circle around the '(1)'. A text box points to the '(1)' with the text: 'Indicates number of applications that will be added to queue.'

Name	Term	Degree Type	Program	Area of Interest	Certificate	Bin	Dept Reader Decision 1	Dept Reader Decision 2	Dept Reader Decision 3
Fernandez, A...	2198	Master of Sci...	Electrical Eng...			Awaiting Mat...			
Test, H1B	2198	Master of Sci...	Computer Na...			Awaiting Mat...			



Once you click “Add to Queue,” the queue tab will automatically open, showing all applications currently in your queue. You can now open any application by clicking anywhere in its row. In the open application, you will see a thin gray bar at the very bottom of the screen. On the far right side of the gray bar, click “Review Form/Send to Bin” to open the form with the option to send to the next bin.

### Moving Multiple Applications into Queues and Bins

Follow the steps outlined below to move many applications at one time into someone’s queue, or into a bin. Once you are in the bin that you are moving applications from, **click the “Build Query” button** in the top right corner.

Applications (2)									
							Build Query	Classify	Refresh
Name	Term	Degree Type	Program	Area of Interest	Certificate	Bin	Dept Reader Decision 1	Dept Reader Decision 2	Dept Reader Decision 3
Fernandez, A... ⚠ You have this file in your queue.	2198	Master of Sci...	Electrical Eng...			Awaiting Mat...			
Test, H1B ⚠ You have this file in your queue.	2198	Master of Sci...	Computer Ne...			Awaiting Mat...			

A query will open with pre-generated criteria. These criteria, listed under “Exports,” are the same as the header fields shown in the “Search” and “Queue” screens. On this page, **you only need to click the “Run Query” button at the top right.**

### Quick Query

User

Population

Departmental Reader

Run Query

Preview Results

Display SQL

Save Copy

### Exports

Name
Term
Degree Type
Program
Area of Interest
Certificate
Bin
Dept Reader Decision 1
Dept Reader Decision 2
Dept Reader Decision 3
Users
Readers
Notes

Export

Literal

Existence

The filter will be automatically be set to produce all applications from the bin you were previously in (the bin from which you select “Build Query”).

Filters Check Logic Matching Rows: 2

Bin IN Pre-Review - Awaiting Materials

Filter

To move the query results to a specific bin, select **“Bin”** under the **“Batch Management”** heading in the **“Output”** drop-down menu. After you select **“Bin,”** click **“Export.”**

[All Queries](#) > [Quick Query](#)

## Quick Query

The screenshot shows the 'Quick Query' interface. On the left, there's a table with two rows: 'Fernandez, Annabelle' and 'Test, H1B', both with a 'Term' of '2198'. Above the table is a 'Rows' dropdown set to '1-2 of 2'. To the right of the table is a large 'Output' dropdown menu. The menu is open, showing 'Export Destinations' (Excel Spreadsheet, Deliver Mailing, Report Builder, Comma-Delimited CSV File, Tab-Delimited File, PDF Document Export, Decision Letter Export to Word, PDF Report, HTML Report, Mail Merge Word Document) and 'Batch Management' (Activity, **Bin**, Checklist, Decision, Field, Generate PIN, Interaction, Priority). The 'Bin' option is highlighted with a red box. To the right of the dropdown is a search bar and a 'Search...' button.

After you click **“Export,”** you will be taken to the **“Bin Management”** page. From the **“Bin Action”** drop-down menu, select **“Set Bin.”** In the **“Bin”** drop-down menu, select the bin to which you want to move the applications. This same process – using a Reader query to move multiple applications into Dept Review bins –can be followed to waitlist or deny multiple applications at once.

## Bin Management

The screenshot shows the 'Bin Management' interface. On the left, there's a table with two rows: 'Bin Management: App' and 'Test, H1B', both with a 'Term' of '2198'. Above the table is a 'Rows' dropdown set to '1-2 of 2'. To the right of the table is a large 'Bin Management' dropdown menu. The menu is open, showing 'Bin Action' (Set Bin) and 'Bin' (Awaiting Submission, Awaiting Payment, Awaiting Materials, **1 Dept Review**, 2 Dept Review, 3 Dept Review, 4 Dept Review, Waitlist, Complete - Send to Grad School, Campus Safety, Int'l Review Liaison, Int'l Exceptions, Awaiting CFR/VCF, Int'l Clearance CFR/VCF, OIS Clearance, Awaiting Official Transcripts, Liaison Finalize Admit, Exceptions, Admit - Release, Deny - Release). The 'Set Bin' option is highlighted with a red box, and the '1 Dept Review' option is highlighted with a blue box.

You'll notice that some options in the **“Bin”** drop-down list don't appear in your Reader view. These bins are for Graduate School use only. **No bins listed between “Waitlist” and “Deny-Release” should ever be selected.**

Once you select a bin, you can then also use the “Queue Action” drop-down menu to add or clear readers. If you select “Add Readers,” enter their names into the “Add Reader” field to add the selected applications to their queue. Their names will auto-populate once you begin typing.

**Bin Management**

Workflow	Default Workflow ▼
Bin Action	Set Bin
Bin	1 Dept Review
<b>Queue Action</b>	Add Readers Add Readers Clear Readers Clear Specific Readers
Add Reader	

**Best Practice: If you don’t want the applications to move bins, and only have readers assigned to them, you can set the “Bin Action” drop-down menu to “Leave Current” and just select “Add Readers” from the “Queue Action” drop-down.**

If you want to remove the selected applications from readers’ queues, select “Clear Readers” from the “Queue Action” drop-down menu. To remove individual – but not all – readers who have the selected applications in their queue, select “Clear Specific Readers,” and then type their name(s) in the “Remove Reader” field.

**Bin Management**

Workflow	Default Workflow ▼
Bin Action	Set Bin
Bin	1 Dept Review
Queue Action	Clear Specific Readers
Remove Reader	
Add Reader	

## Overview of Review Forms

Once an application has been added to your queue and the “Review Form/Send to Bin” button is selected, all forms will be located to the right side of the reader.

There are four forms available to departments, depending on user's security role and which of the Reader's bins you are currently viewing. The below table shows which forms are available in which bin. Depending on your security role, you may have access to multiple forms.

	Waive Dept Exam Form	Pre-Review Form	Departmental Reader Review Form	DGP Decision Review Form
<b>Awaiting Materials</b>	X	X		
<b>1 Dept Review</b>		X	X	X
<b>2 Dept Review</b>		X	X	X
<b>3 Dept Review</b>		X	X	X
<b>4 Dept Review</b>		X	X	X
<b>Waitlist</b>				X

## Waive Dept Exam Form and Pre-Review Form

The Waive Dept Exam and Pre-Review Forms are both available in the “Awaiting Materials” bin.

**Waive Dept Exam (GRE, GMAT, MAT) Review Form**

Waive Departmental Entrance Exam (GRE, GMAT, MAT)?

**Pre-Review Comments**

Department Comments

Student is applying to an ABM program  
☐ Yes

Ugrd GPA

Grad GPA

Withdraw Application

**Send to Bin**

Current Bin  
 Awaiting Materials

Next Bin (required)

Next Reader (optional)

To mark departmental entrance exams as “Received,” select “Yes” in the drop-down menu. This will mark the checklist item as “Waived” on the application.

If an applicant should be in the ABM program, select “Yes.” After completing the form, you should upload an ABM Plan of Work via the Slate dashboard. [See upload materials instructions...](#)

Selecting “Withdraw” will remove the application from further review and will post a decision of “Withdrawn” to the applicant’s record.

Select the “Next Bin” to which you want to send the application and click “Send.”

Once you click “Send,” the application will be removed from the current bin and moved into the selected “Next Bin.”

**If you want to waive the departmental entrance exam, but leave it in the current bin until other materials are received, set the “Next Bin” to “Awaiting Materials.”**

## Pre-Review Form

The Pre-Review form is available in the “Awaiting Materials” bin and all of the departmental review bins, including the “Waitlist” bin.

The screenshot shows the Pre-Review Form interface. At the top, there is a checkbox labeled "Pre-Review Comments" which is checked. Below this is a section titled "Pre-Review Comments" containing a large text area for "Department Comments". Further down, there is a section titled "Student is applying to an ABM program" with a "Yes" checkbox. Below this are input fields for "Ugrd GPA" and "Grad GPA", and a "Withdraw Application" dropdown menu. A section titled "Send to Bin" shows the "Current Bin" as "Awaiting Materials" and a "Next Bin (required)" dropdown menu. Below this is a "Next Reader (optional)" input field. At the bottom, there is a "Send" button and a "Draft Saved" status indicator. Red callout boxes provide instructions: one points to the "Pre-Review Comments" checkbox, another to the "Department Comments" text area, a third to the GPA input fields, a fourth to the "Next Bin" dropdown, and a fifth to the "Send" button.

☒ Pre-Review Comments

**Pre-Review Comments**

Department Comments

Student is applying to an ABM program

☐ Yes

Ugrd GPA

Grad GPA

Withdraw Application

**Send to Bin**

Current Bin  
Awaiting Materials

Next Bin (required)

Next Reader (optional)

**Send** Draft Saved

Check the “Pre-Review Form” box to expand the form.

A GSC can add any notes that they may want DGPs or departmental reviewers to see while reviewing the application.

Indicating the applicant’s GPAs here will populate the GPA fields on both the DGP review form and the Graduate School Liaison form.

Select the “Next Bin” to which you want to send the application and click “Send.”

## DGP Review Form

The DGP review form is available in all the departmental review bins, including the “Waitlist” bin.

☒ DGP Decision Review Form

**DGP Decision Review Form**

Program  
Chemistry ▼

DGP Recommended Degree/Delivery Method  
Doctor of Philosophy (Ph.D.) - Chemistry ▼

DGP Recommended Concentration/Subplan  
Organic ▼

DGP Recommended Admit Term  
Fall 2019 ▼

Student is in an ABM program  
☐ Yes

Ugrd GPA

Grad GPA

**Decision**

DGP Decision  
 ▼

Add to Waitlist  
☐ Yes

**Send to Bin**

Current Bin  
1 Dept Review

Next Bin (required)  
 ▼

Next Reader (optional)

**Send** Draft Saved

Check the “DGP Decision Review Form” box to expand the form.

The applicant’s program, delivery method, area of interest, and admit term will populate based on the information provided in the application. If the information they have entered is correct, leave the fields alone. If they should change, select the correct option from the drop-down.

If an applicant should be in the ABM program, select “Yes.” After completing the form, you should upload an ABM Plan of Work via the Slate dashboard.

Select either Deny, Recommend Full Admission, Recommend Provisional Admission, or Withdraw from the drop-down.

If you are not ready to make a decision on the application and want to add it to your waitlist, check the “Add to Waitlist” box. NO communication or decision is sent to the applicant when this box is checked.

Once the DGP review form is complete and ready to be sent to the Graduate School, **the DGP should set the “Next Bin” to the “Complete – Send to Grad School” bin and click “Send.” This will complete the application.**

## Dept Reader (Faculty) Review Form

The Reader review form is available in all the departmental review bins, including the “Waitlist” bin. **If you’d like this form customized for your unique review process, please contact the Graduate School.**

☒ Dept Reader Review Form

**Dept Reader Review Form**

Please rank the applicant on the following characteristics:

**Rating Scale:**  
 5 - Outstanding  
 4 - Good  
 3 - Average  
 2 - Fair  
 1 - Poor

Academic Performance

Scholarly Activity and Writing Ability

Relevant Experience

Letters of Recommendation

Career Goals

Overall Fit for the Program

Total Rating

The ratings from these fields are averaged to produce the total rating.

Are you interested in serving as the advisor for this student  
☐ Yes  
☐ No

Recommended Decision  
☐ Accept  
☐ Deny

Recommend for Funding  
☐ No  
☐ Yes, HAVE Funding to Offer  
☐ Yes, NO Funding to Offer

Additional Comments

**Send to Bin**

Current Bin  
 1 Dept Review

Next Bin (required)

Next Reader (optional)

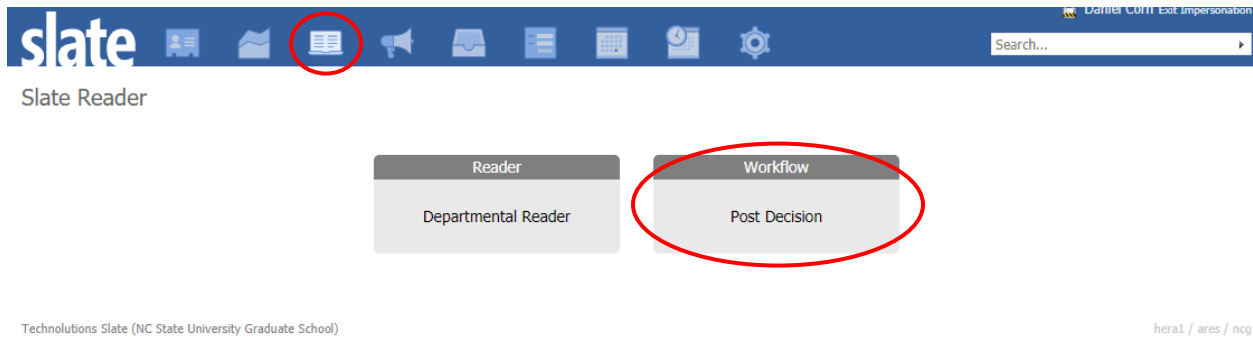
**Send** Draft Saved

Once the Dept Reader Review Form is complete, the reviewer should click “Send.” No change to “Next Bin” is necessary.

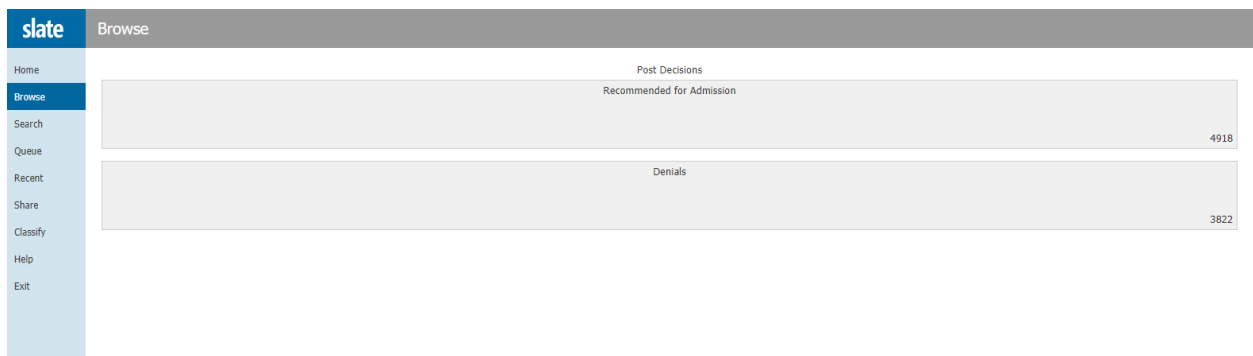


## Post Decision Workflow

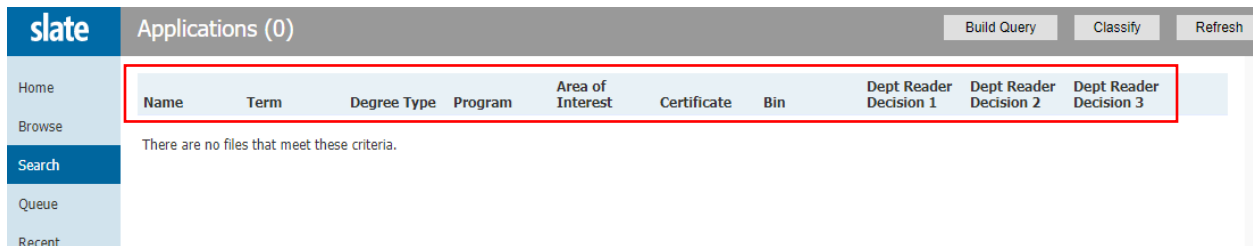
Once applications have been recommended for admission and sent to the Grad School for review, they'll disappear from your Program Review column of bins. If you need to go back and look at those applications again, you'll click on the Post Decision workflow under the Reader section.



Click on “Browse” as you would in the Departmental Reader for an overview of bins. There is one bin for all applications that have been recommended for admission, and one bin for all applications that have been denied for admission. They are named “Recommended for Admission” and “Denials”, respectively.



You'll notice that the column headers are different than in the normal reader. All other features will work the same as they do in the normal reader.



**If you have any questions or need assistance, please contact The Graduate School.**