Reader Overview

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

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

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

Bins and Bin Movement

By clicking on Browse, you open an overview of all the bins accessible to you. The bottom-right corner of each bin displays the number of applications it currently holds. 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.

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.
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.

Moving Applications one at a time

To move applications one at a time, 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.

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:

Bins sort applications via the filter function. You can navigate to other bins by selecting their title in this drop-down menu. Once a bin is selected, you can return to this screen by clicking the “Search” link in the navigation bar.

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.”

Indicates number of applications that will be added to queue.
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.

**Review Form Breakdown**

Once 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

<table>
<thead>
<tr>
<th></th>
<th>Waive Dept Exam Form</th>
<th>GSC Review Form</th>
<th>Departmental Reader Review Form</th>
<th>DGP Decision Review Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Materials</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Dept Review</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2 Dept Review</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>3 Dept Review</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>4 Dept Review</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Waitlist</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Waive Dept Exam Form and GSC Form

The Waive Dept Exam Form and the GSC Form are both available in the “Awaiting Materials” bin. The GSC Form will only be available to those with the NCS CAMPUS GRAD Admiss Processor security role.

[Diagram of form]

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.”
GSC Review Form

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

Check the “GSC 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 GPA here will populate the GPA 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.

#### Instructions:
- **Check the “DGP Decision Review Form” box to expand the form.**
- **The applicant’s major, area of interest, and admit term will populate based on the information provided in the application.**
- **If the applicant’s major, area of interest, and admit term are correct, leave these blank. If they should change, enter the updated information into these fields.**
- **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 to admit, deny, or withdraw the applicant. Select only one option.**
- **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 Review Form

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

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

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

Follow the steps outlined below to move multiple applications at once.

Once you are in the bin that you are moving applications from, click the “Build Query” button in the top right corner.

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.

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”).
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.”

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.

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.

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.

If you are clearing or adding readers as you are moving applications from bin to bin, the directions above can be followed exactly. However, if you want to clear or add readers while keeping applications in their current bin, select “Leave Current” from the “Bin Action” drop-down menu.
If you notice there are some applications in the query results that do not need to move bins or be assigned to a reader, you can de-select them from the list and click “Update Selected,” rather than “Update All.” Once you have all of the correct applications selected, click either “Update Selected” or “Update All” to execute.

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.

The “Default” filter will be initially set for all applications. The other pre-set filters are self-explanatory and fairly broad in use. 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.

If the filter criteria you want to add is already showing here, click it, rather than typing it in the “Search” bar.
Follow the same steps to add any other filters. Each added filter will show on the right-hand side of the page.
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.

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.

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.

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

To remove a filter, click the red “X”.

Search...

Program Review - 1 Dept Review

Default

Filter NOT ( ) OR )

Sex IN Female

Citizenship Status IN Foreign National
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.

There is only one bin that holds all applications that have been recommended for admission.

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.