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Introduction

Beginning on September 4, 2018 for the Academic Year 2019-2020, the Graduate Division will use Technolutions’ Slate for receiving, reviewing, and making decisions on graduate applications. Slate will be used by anyone participating in the Application Review process, including Graduate Division employees, Academic Department Coordinators, and Faculty Reviewers.

Objectives

At the end of this module, you will be able to:

- Navigate the Slate Reader to locate the correct Reader Bin
- Navigate the Reader Bin to locate specific applications
- Use a quick filter to view specific applications
- Apply filters in the Reader Bin to locate specific applications
- Lookup the student record
- Conduct faculty review of graduate applications
- Conduct committee review of graduate applications
Slate Reader Bin

Applications are reviewed through the Slate Reader. To access the Slate Reader, click the Reader icon after logging in to the Slate landing page. This will take you to the Slate Reader interface.

Reader Bin Structure

Reader Bins illustrate the review workflow within Slate. Each Reader Bin contains applications that are in a distinct stage of the review process. Bins used by the School of Education PhD program are highlighted in yellow.
Column Headings

When you click on a reader bin or look at your queue, you will see several column headings. Some columns will not display fully in this column view, depending on your screen resolution, but the data is always visible when you open the application.

<table>
<thead>
<tr>
<th>COLUMN HEADING</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>C = Citizenship. Options include: D (Domestic) or I (International)</td>
</tr>
<tr>
<td>Deg</td>
<td>Deg = Degree. Options include: Masters, Doctorate or Business</td>
</tr>
<tr>
<td>Interest</td>
<td>Program specialization, if applicable</td>
</tr>
<tr>
<td>GPA</td>
<td>Displays as GPA / scale</td>
</tr>
<tr>
<td>GREv, GREq, GREa</td>
<td>v = Verbal Reasoning score. q = Quantitative Reasoning score. a = Analytical writing score. An * next to the score means it's verified.</td>
</tr>
<tr>
<td>Ref</td>
<td>Slate-assigned ID number</td>
</tr>
<tr>
<td>A</td>
<td>Average applicant rating score from faculty reviewers</td>
</tr>
<tr>
<td>Q/R</td>
<td># of Queues the file is located in / # of times the file has been Read</td>
</tr>
</tbody>
</table>
Slate Reader Interface

Reader Menu

Use the menu on the left side of the page to navigate the Slate Reader and locate applications.

Reader Navigation

You can navigate the Slate Reader using both a mouse and keyboard. Here are some quick tips for navigating through the pages of an application:

- Use Arrow keys to move up/down/left/right
- Mouse to the next page by clicking and dragging
- Swipe to the next page on a touch screen
- Double-click left mouse = zoom in
- Double-click right mouse = zoom out

Reader Features
Application Details

Click the grey application number/name bar at the top left corner of the Reader view to see a snapshot of the application details.

Return to Queue from Reader view

When you're in Reader view, click the Slate icon at the top left corner of the page to return to your Queue view.
Add Applications to Queue

In the Reader view, you can add an application to your queue by clicking the **Add to Queue** button in the bottom left corner:

![Reader view with Add to Queue button highlighted](image)

From a reader bin, you can add an application to your queue:

1. Click an application to highlight it; the row will turn dark blue.
2. Click the **Add to Queue** button in the top right corner of the page.

![Reader bin with applications and Add to Queue button](image)

The application has now been added to your queue. Once an application is in your queue, others can see it in the reader bin, but it will be greyed out and has a lock icon next to it. This indicates that the file is in a queue; however, it can still be added to another faculty member’s queue. Reviews can be conducted simultaneously.
Remove Applications from Queue

In the Reader view, you can remove an application from your queue by clicking the **Remove from Queue** button in the bottom left corner:

In the Queue view, you can remove an application from your queue:

1. Click the **Remove from Queue** button in the top right corner first; it will turn blue.

2. Click the application to be removed from the queue; it will turn blue and the Remove from Queue button will show the number selected.

3. Click the **Remove from Queue** button to confirm the action.
**Queries & Filters**

You can use filters within a bin to search for applications that meet specific criteria. In addition, a series of queries have been pre-built based on program requirements. These are available for Faculty and Academic Department Coordinators to generate reports.

**Quick Filter**

1. Click the Filter button on the right side of the bin:

2. In the Insert Query Part window, scroll down and click on a filter to add it to your query, then click the **Continue** button at the bottom left of the page:

![Insert Query Part window](image)

See **Recommended Filters**, below, for suggestions of which filters to use to narrow down your search.
3. In the Edit Filter window, select how you want the filter to operate (IN or NOT IN) across which criteria, then click the Save button at the bottom left:

![Edit Filter Window]

4. The applications are filtered in place in the bin:

![Applications Filtered]

5. To remove your quick filter, hover your mouse over the right side of the filter you just added, and click the Delete button:
Recommended Filters

Here are some of the custom local filters to help you narrow down to specific applications in the Slate Reader.

<table>
<thead>
<tr>
<th>FILTER</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Interest</td>
<td>Relevant for programs with interests/concentrations/emphases.</td>
</tr>
<tr>
<td>Application Field Value Contains</td>
<td>Selects applicants based on text found in their application. Most common use: Select “Other – Statement of Purpose” and then enter a relevant term or name to narrow down to only applicants who mentioned that in their Statement of Purpose.</td>
</tr>
<tr>
<td>Application Field Value Exists</td>
<td>Selects applicants based on whether or not they typed anything in custom application fields. Most common use: Select “EXISTS” and “Other – Other Financial Awards” to filter based on students who have indicated they may have outside funding.</td>
</tr>
<tr>
<td>Application Submitted</td>
<td>Allows selection based on when an application was submitted. For instance, you filter for applications submitted prior to a “soft” deadline date. (e.g. &lt; 12/01/2018 would return applications submitted prior to 12/01/2018)</td>
</tr>
<tr>
<td>Banner ID</td>
<td>Filter based on applicant’s UCI Student ID.</td>
</tr>
<tr>
<td>Number of Reader Forms Submitted</td>
<td>Filters by how many forms have been submitted</td>
</tr>
<tr>
<td>Queue</td>
<td>Filter to see applications in someone’s queue.</td>
</tr>
<tr>
<td>Reader Form Submissions by Reader</td>
<td>Filter applicants with review forms submitted by a particular reader within a particular bin.</td>
</tr>
<tr>
<td>Reader Form Value</td>
<td>Filter based reader recommendation on a review form. For instance, if a program has a Grad Advisor who makes the final admit decision, the coordinator could filter by “Review Form – Applicant Review – Recommendation:” then enter the response to filter on (e.g. “Admit – fund”) to select only applicants that the Grad Advisor wants to admit with funding.</td>
</tr>
<tr>
<td>Round</td>
<td>Filter by application round (We have three rounds each year. Master/Doctoral / Business)</td>
</tr>
<tr>
<td>Tag</td>
<td>Filters based on tag, such as “test record”</td>
</tr>
<tr>
<td>URM</td>
<td>Select applicants based on underrepresented minority status.</td>
</tr>
</tbody>
</table>
Program-Specific Queries

There are links to program-specific queries on the Slate home page where you can download application data into spreadsheet format for review.

1. Scroll down the home page to the Queries section.
2. Click the Query you want to run.

3. Click the **Run Query** button.

4. Excel Spreadsheet is already selected as the output format. Click the **Export** button.

5. Open the query in Excel to review and analyze the data.
**Student Record Dashboard**

Within the Reader View, you can view a Dashboard of application and student record details such as:

1. Summary of reader ratings showing the count of each rating the applicant received, and an average;
2. Messages sent to the applicant; and
3. Log In Details showing when the applicant logged in to Slate.
Faculty Review Process

Faculty Readers conduct the Faculty Review of applications. The Academic Department Coordinator then uses faculty notes to determine whether an application should advance to the next stage in the Department Review process.

Add Applications to Queue

Depending on your school’s review policy, in some instances Faculty will look at the bin and add applications to their queue. In other instances, a Coordinator will move applications directly into a specific Faculty member queue.

1. Click the **Faculty Review** reader bin.

2. Click an application to highlight it; the row will turn dark blue.

3. Click the **Add to Queue** button in the top right corner of the page.

The application has now been added to your queue. Once an application is in your queue, others can see it in the reader bin, but it will be greyed out and has a lock icon next to it. This indicates that the file is in a queue, however it can still be added to another faculty member’s queue. Reviews can be done simultaneously.
**Conduct Faculty Review**

1. Click the **Queue** button in the Reader menu on the left side of the page:

![Queue button](image1)

2. Click the application in your queue to open it:

![Queue interface](image2)
3. The application opens in the Reader view.

- Use the Reader view menu on the top left side of the page to look at different components in the application package, such as Application, Transcripts, and Recommendations.

- To begin actively reviewing the form, click the **Review Form/Send to Bin** button in the bottom right corner of the Reader view.
4. In the Reader panel on the right side of the page, complete the Applicant Review Form (example on right). Not all fields are required. Your changes are saved automatically.

Because your changes are saved automatically, there’s no Save button. If you want to come back to it later, exit the application by clicking the Slate icon in the top left corner.

5. If you would like to assign another specific faculty member to review this file, begin typing their name in the Next Reader field (see example on bottom right), then click on their name. The application will be added to their queue.

6. When you are done with your faculty review, click the Send button. The application leaves your queue and returns to the Faculty Review bin.

This concludes the Faculty Review process. You will automatically be returned to your queue to review other applications waiting there.
Committee Review

Faculty Readers conduct the Committee Review of applications.

Add Applications to Queue

Depending on your school's review policy, in some instances Faculty will look at the bin and add applications to their queue. In other instances, a Coordinator will move applications directly into a specific Faculty member queue.

1. Click the **Committee Review** reader bin.

2. Click an application to highlight it; the row will turn dark blue.

3. Click the **Add to Queue** button in the top right corner of the page.
**Conduct Committee Review**

1. Click the **Queue** button in the Reader menu on the left side of the page:

![Queue button image]

2. Click the application in your queue to open it:

![Queue application image]
3. The application opens in the Reader view.
   - Use the Reader view menu on the top left side of the page to look at different components in the application package, such as Application, Transcripts, and Recommendations.
   - To begin actively reviewing the form, click the **Review Form/Send to Bin** button in the bottom right corner of the Reader view.
4. In the Reader panel on the right side of the page, complete the Committee Review Form (example on right). Not all fields are required. Your changes are saved automatically.

Because your changes are saved automatically, there’s no **Save** button. If you want to come back to it later, exit the application by clicking the Slate icon in the top left corner.

5. When you are done with your committee review, click the **Send** button. The application leaves your queue and returns to the Committee Review bin.

This concludes the Committee Review process. You will automatically be returned to your queue to review other applications waiting there.