



MAKE WAVES.

Reviewing Grad Applications in the CollegeNet CRM Worklist

Denise Mor, WWU Graduate School

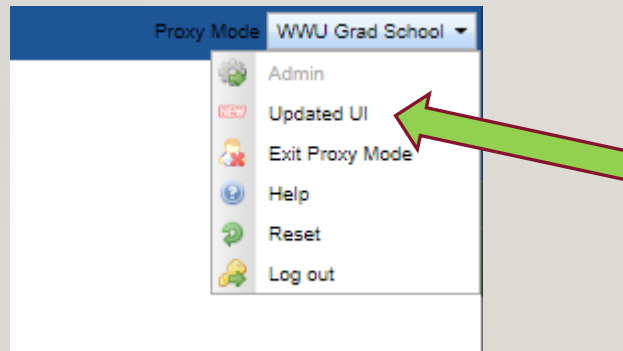
mord@wwu.edu, 360-650-7704

What is the Worklist?

- The Worklist displays all graduate applications that have been specifically assigned to you in the system.
- If you participate in application review for more than one program, these files will display in separate pools in your worklist
- Depending upon your role in application review within your department or program you may be assigned all applications, or just a selection.
- Assignment of applications is done only to make files available to you on the Worklist. It is not intended to imply any tasking beyond department/program established app review expectations.

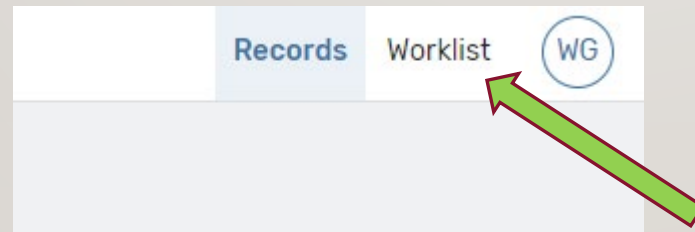
How do I access the Worklist?

- The easiest way to access the worklist is via this direct link:
https://admit.applyweb.com/admit/shibboleth/wwu?apptype=v2&return_to=/admit/evaluate/worklist
- Alternatively, you can navigate to it from the Classic CRM view
 - In the upper right corner of your screen, click on your name and a dropdown menu will appear:



How do I access the Worklist? (continued)

- Select “Updated UI” and a new tab will open displaying the “Records” view in the new user interface
- To switch to the Worklist, simply select that option in the upper right corner of your screen



Display Options in the Worklist

- Using the “Display Settings” on the right, you can toggle between **Table View** and **Summary View**

Western Washington University - Admit

Records Worklist WG

My Worklist

Search

Status: Not Started In Progress Completed

1 - Ready for Review (1 of 1 Records)


Not Started 1 In Progress 0 Completed 0

Actions

Evaluation Status	Not Started	In Progress	Complete	Rating	Tags	Student ID WWIS	Last Name	First Name	F
<input type="checkbox"/> Not Started	1	0	0	My Rating: Average Rating:	No tags added		Testing	Just	J

Evaluate

Display Settings



Display Options in the Worklist (continued)

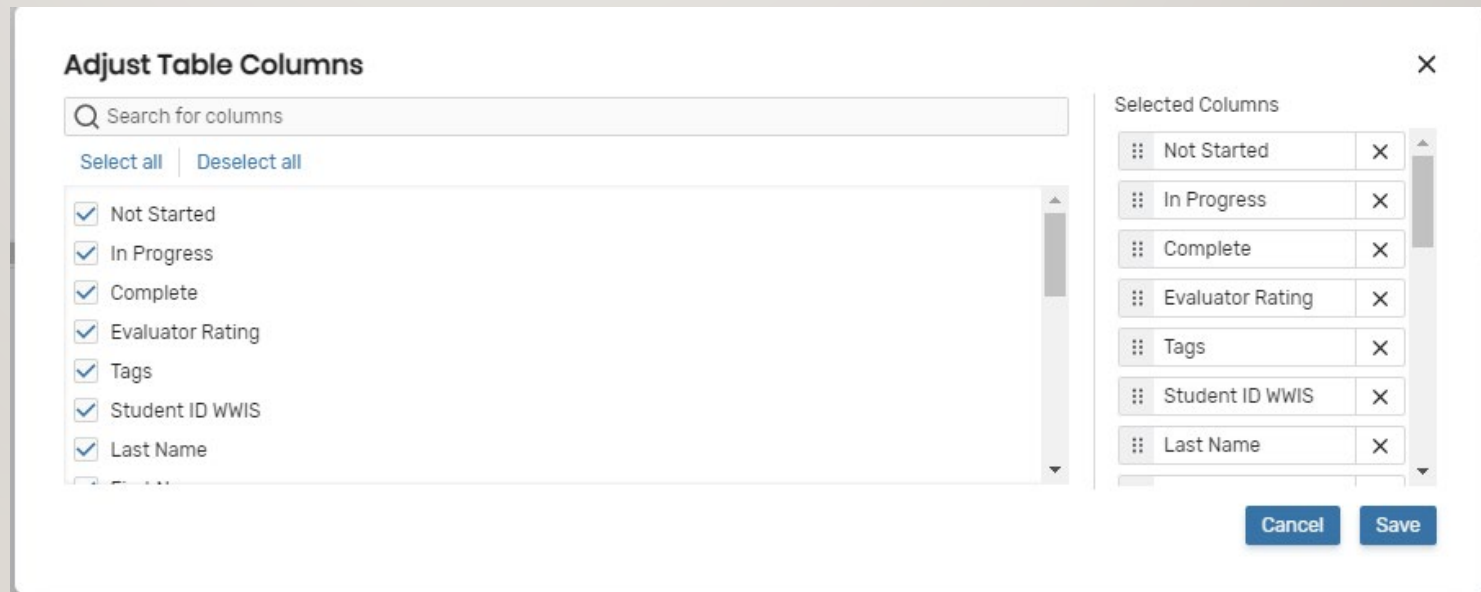
- In the Table View, you have the further options of selecting which columns of info display

The screenshot shows the 'My Worklist' interface for Western Washington University. At the top, there's a header with the university name and a navigation bar with 'Records', 'Worklist', and a 'WG' button. Below the header, there's a search bar and a status filter set to 'Not Started'. The main content area shows a table with columns for 'Evaluation Status', 'Not Started', 'In Progress', 'Complete', 'Rating', 'Tags', 'Student ID WWIS', 'Last Name', and 'First Name'. A dropdown menu is open on the right side of the table, showing options for 'VIEW OPTIONS' (Table View, Summary View), 'COLUMN OPTIONS' (Adjust Table Columns, Auto-size Columns, Fit Columns to Page), and 'TABLE ROW SIZE' (Normal, Compact). A green arrow points to the 'Adjust Table Columns' option.

Evaluation Status	Not Started	In Progress	Complete	Rating	Tags	Student ID WWIS	Last Name	First Name
<input type="checkbox"/> Not Started	1	0	0	My Rating: Average Rating:	No tags added		Testing	Just

Display Options in the Worklist (continued)

- Using the [Adjust Table Columns](#) feature you can select which fields are visible to you on the list. These selections are associated with only your user account and will be saved for future sessions.



The screenshot shows a modal window titled "Adjust Table Columns" with a close button (X) in the top right corner. Inside the window, there is a search bar labeled "Search for columns". Below the search bar are two buttons: "Select all" and "Deselect all". A list of columns is displayed with checkboxes next to them, all of which are checked. The columns are: Not Started, In Progress, Complete, Evaluator Rating, Tags, Student ID WWIS, and Last Name. To the right of this list is a section titled "Selected Columns" which contains a list of the same columns, each with a double colon icon and a close button (X). At the bottom right of the dialog are two buttons: "Cancel" and "Save".

Column Name	Selected
Not Started	Yes
In Progress	Yes
Complete	Yes
Evaluator Rating	Yes
Tags	Yes
Student ID WWIS	Yes
Last Name	Yes

Reviewing and Evaluating Files

- To review a file in the Worklist, simply click on the “**Evaluate**” button associated with that record

Western Washington University - Admit

Records Worklist WG

My Worklist

Search

Status: Not Started In Progress Completed


1 - Ready for Review (1 of 1 Records)

Not Started 1 In Progress 0 Completed 0

Actions

Evaluation Status	Not Started	In Progress	Complete	Rating	Tags	Student ID WWIS	Last Name	First Name	P
<input type="checkbox"/> Not Started	1	0	0	My Rating: Average Rating:	No tags added		Testing	Just	J

Evaluate



Reviewing and Evaluating Files (continued)

- The default view in Evaluate mode is a Split Screen view, which enables you to see the file and the evaluation form at the same time.

The screenshot displays the Western Washington University Admit portal in a split-screen view. The left pane shows a PDF of the 'Graduate School Application' form, which includes sections for Biographical, Contact, Residency, Citizenship / English Proficiency, Ethnicity, and Institutions Attended. The right pane shows the 'My Evaluation' form, which includes sections for Evaluation and Program Recommendation. The evaluation form has fields for 'Accept as Advisee?', 'Evaluator Comments', 'Evaluator Rating', 'Program Recommendation', 'Date of Recommendation', 'User Making Recommendation', and 'Comments (Prov Adm/ Prereq/ Adviser)'.

Western Washington University - Admit

Records Worklist WG

Environmental Education (Residency) / 1 - Ready for Review Testing, Just

0 Tags 0 Notes Split-Screen View

Pages Documents

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file.pdf 1 / 4 68%

Graduate School Application

Western Washington University provides equal opportunity in education without regard to race, color, creed, national origin, sex, age, marital status, sexual orientation, disability, or status as a disabled veteran or Vietnam era veteran. Western Washington University is a Title IX institution.

Biographical

Last: Testing
First: Just
Middle: checklist
Preferred Name:
Gender: Female
Birthdate: 01-01-2000
Former Names:

Program Selection

Program Code: G-MATH2
Term: Winter 2023
TA Interest? Yes
WWU ID:

Contact

Email: denise.mor@wwu.edu
Permanent Address:
516 High St. On 645
Bellingham, WA 98225
United States
Mailing Address: from: to:

Residency

Resident of WA? No
Dates of residence in WA, from: to:
Lived in WA continuously for 12 months?

Citizenship / English Proficiency

US Citizenship status: US Citizen
Country of Birth: United States
English Native Language? Yes
Tribal Affiliation:

Ethnicity

Hispanic?
Ethnicity:
Enrolled? No

Institutions Attended

from	to	Degree Type/Field of Study/Status
07-1989	05-1993	No Degree Expected / English / Non-Degree
Oxford University		

My Evaluation

Evaluation-TEST for new UI

Evaluation

Accept as Advisee?
Evaluator Comments
Evaluator Rating

Program Recommendation

Program Recommendation
Date of Recommendation
(not specified)
User Making Recommendation
(not specified)
Comments (Prov Adm/ Prereq/ Adviser)

Reviewing and Evaluating Files (continued)

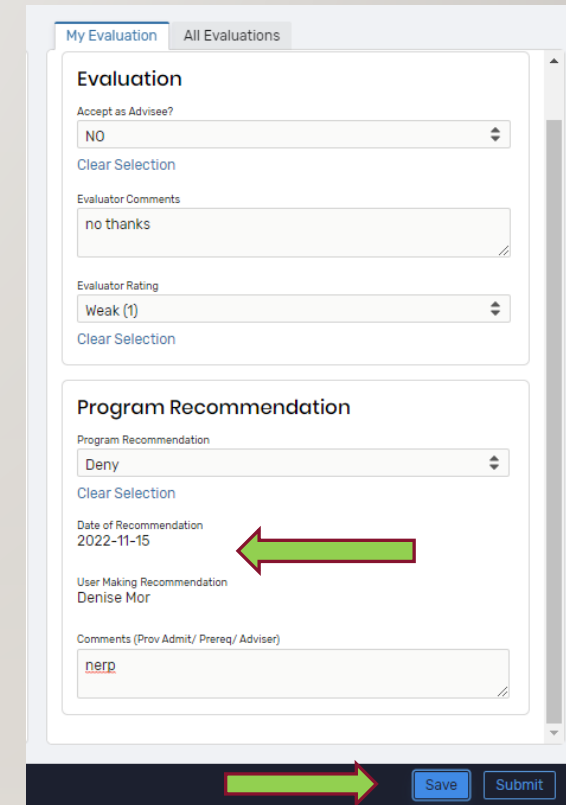
- Many programs have custom evaluation forms. Those customizations are preserved in the new Worklist.
- You may begin an evaluation and preserve your work to return to later by clicking the “[Save](#)” button at the bottom right of the screen. When you return to the Table View, the Evaluation Status will show as “[In Progress](#)”
- To complete an evaluation, first “Save” and then “[Submit](#)”. When you return to the Table View, The Evaluation Status will show as “[Complete](#)”
- Even once Complete, records will remain visible on your Worklist.
- Evaluations are still editable after being Submitted.

Entering Program Recommendations

- A new feature of the evaluation form is the ability to support the entry of [Program Recommendations](#) (eliminating the need for Program Advisors or designated proxies to navigate to the “Decision” tab in the classic view to enter this information)
- Only Program Advisors or designated proxies who have edit permissions in Ready for Review pools have the ability to enter Program Recommendations in the evaluation form. Other users will see the fields locked against edit.
- It is not necessary for you to complete the Evaluation part of the form before entering the Program Recommendation.

Entering Program Recommendations (continued)

- After entering your decision and any comments (Thesis Advisor, Provisional Admit justification, prerequisite coursework) be sure to click the **Save** button at the lower right.
- You will know that the record is saved, and the decision processed when your name and the current date populate in the form.
- Once the decision is entered and saved, the record will no longer appear on your (or anyone else's) Worklist.



The screenshot shows a web form titled 'My Evaluation' with two tabs: 'My Evaluation' and 'All Evaluations'. The 'Evaluation' section contains a dropdown menu for 'Accept as Advisee?' set to 'NO', a 'Clear Selection' link, a text area for 'Evaluator Comments' with the text 'no thanks', and a dropdown menu for 'Evaluator Rating' set to 'Weak (1)', also with a 'Clear Selection' link. The 'Program Recommendation' section contains a dropdown menu for 'Program Recommendation' set to 'Deny', a 'Clear Selection' link, a 'Date of Recommendation' field showing '2022-11-15' (highlighted by a green arrow), a 'User Making Recommendation' field showing 'Denise Mor', and a text area for 'Comments (Prov Admit/ Prereq/ Adviser)' with the text 'nerp'. At the bottom of the form, there is a dark blue bar with a green arrow pointing to the right, and two buttons: 'Save' and 'Submit'.