Reviewing Grad Applications in the CollegeNet CRM Worklist

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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 comer of your screen , click on your name and a dropdown menu will appear:
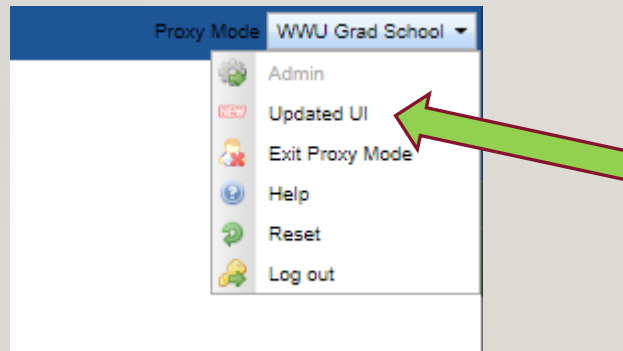
How do I access the Worklist? (continued)

- 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
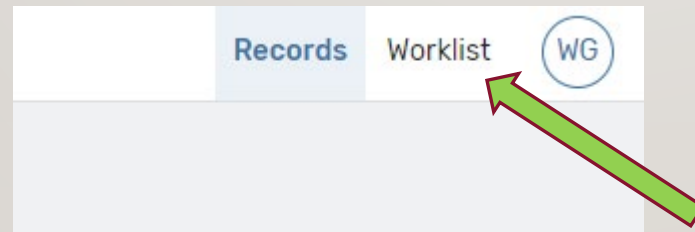
Display Options in the Worklist

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

Display Options in the Worklist (continued)
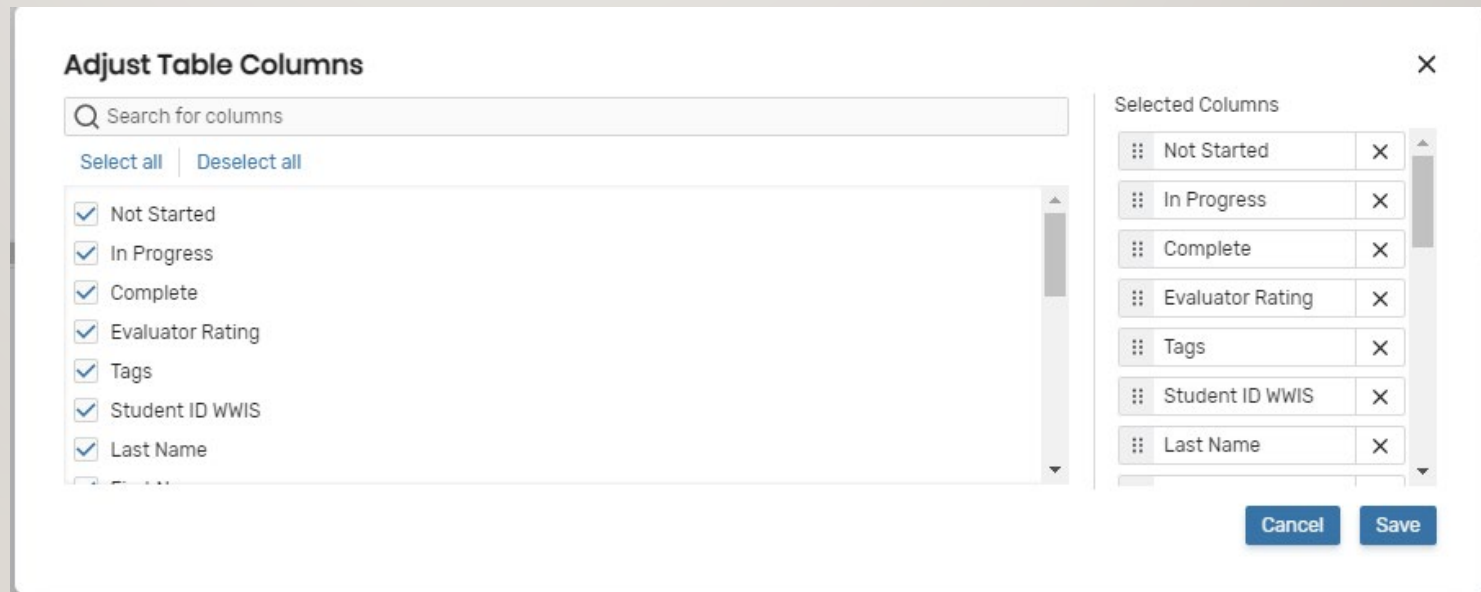
- In the Table View, you have the further options of selecting which columns of info display

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.

Reviewing and Evaluating Files

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

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.

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 that 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.