# GRADUATE APPLICATION REVIEW USING THE CRM (aka, TargetX, SALESFORCE)

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ACCESS THE CRM TO VIEW APPLICANT LIST

- Log in with your UWL email (NETID + @uwlax.edu): https://uwlax.my.salesforce.com/

- Select Application Reviews

- Click the down arrow near Application reviews Recently Viewed & select your program in dropdown.

- View list of your program’s applications (column descriptors included below).
  - **HINT:** To sort list by any of the column categories, click the column header.

- **HINT:** To view new applications on your list, sort by “Created date” (click column header) to bring newest apps to the top.
REVIEW AN APPLICATION IN THE CRM

• Click the Review number to open application for a specific student.

• In the top right corner, click the button **Read Application**.

• Wait for documents to load (larger files will take longer)
  - Scroll to view application materials (i.e., transcripts, UW System application, recommendations, & other Applicant Dashboard items).

• Review documents within App Review Tool or download (via icon below)
  - Downloaded application materials contain personal information, be mindful of appropriate data security practices when handling these documents.
    - Share only with secure file sharing formats
    - Delete files from your system upon completion of application review
SUBMITTING AN APPLICATION DECISION

- As soon as you reach a decision, enter the information in the CRM
  - Do this BEFORE any decision communications to student
    - Avoids confusion for accepted applicants when working with other campus partners (i.e., Admissions, Registrars)
  - An admitted applicant should be entered as **Accept**, whether or not they enroll
    - Allows for accurate representation of acceptance rates

HOW TO ENTER A DECISION

- To enter decision, select **Scorecard** from the left navigation.

  ![Scorecard Image]

- Click **Decision** to reveal your decision options
  - Make selection
    - **Accept** student to program
    - **Deny** admission
    - **Other**
      - See pg 5, **WHAT TO DO WHEN . . .** for examples of when to use this option

- Click **Summary Notes** to add important details that need to be communicated to Admissions
  - See page 5, **WHAT TO DO WHEN . . .** for examples of how to use the **Summary Notes** section successfully

- Click **Submit** to submit decision
  - Wait for processing*; **Success** message confirms completion.

*HINT: If you close the application prior to receiving Success message, decision entry will not be forwarded to Admissions; you will have to resubmit your decision.
## WHAT TO DO WHEN . . . (specific CRM decision selection examples)

<table>
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<tr>
<th>SITUATION</th>
<th>PROGRAM ACTION</th>
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| Application accepted                                | - Enter decision in CRM as soon as decision has been made  
  o Select *Admit*  
    - This action triggers an official acceptance letter from Admissions.  
    - Admissions also updates the student’s file to allow for registration and completion of other entry processes. |
| Application denied                                  | - Enter decision in CRM as soon as decision has been made  
  o Select *Deny*  
    - This action triggers a denial letter from Admissions.  
      - Denial letters do not include details of reason for denial.  
      - Students with questions are forwarded to the program. |
| Applicant is waitlisted                             | - Do not enter a decision in the CRM at this point  
  o In *Summary Notes* you may indicate applicant’s waitlisted status  
    - Admissions does not communicate waitlisted status with applicants  
    - Communication of waitlist status should come from program  
  o *As soon as decision is reached*, make selection of *Accept* or *Deny* in CRM |
| Application is complete, but applicant has prerequisite completion needs | Program discretion:  
  - Admit with conditions for prerequisite completion  
    o Select *Admit*  
    o In *Summary Notes* include details of conditional admission  
      - Jen Weber (Admissions) will work with you to develop the conditional info to be provided in the acceptance letter.  
  - Deny  
    o Select *Deny*  
      - Applicant will receive a denial letter from Admissions.  
        - Denial letters do not include details of reason for denial.  
        - Students with questions are forwarded to the program.  
    o You may want to communicate with the applicant directly to encourage reapplication upon completion of prerequisites. |
| Applicant cancels application PRIOR to program decision | o Select *Other*  
  o In *Summary Notes* indicate that student canceled application.  
    - Jen Weber will update WINGS. |
| Applicant cancels application AFTER you have entered application decision | o Forward email from applicant to Jen Weber  
  - Jen Weber will update WINGS You do not need to take further action in CRM.  
  o No further action needed in CRM |
| Application remains incomplete                      | If efforts to contact student regarding missing application materials have failed and the application deadline* has passed:  
  o Select *Other*  
  o In *Summary Notes* indicate that app is incomplete  
    - No messaging will be sent to applicant from Admissions |

*Programs w/rolling admission should mark incomplete apps *Other* **within the month following the application’s program start date**
TROUBLESHOOTING TIPS

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<tr>
<th>PROBLEM</th>
<th>REASON</th>
<th>ACTION</th>
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| I’m trying to enter a decision but CRM won’t let me | • Admissions materials (i.e., transcripts, application fee) are missing  
  See Admissions docs uploaded column (image, pg 2)  
  • Yes = app fees & transcripts received  
  • No = missing fees or transcripts | • Alert student to log in to WINGS to identify missing transcripts  
• Contact Jen, Admissions re: transcript status questions |
| Applicant reports not receiving Applicant Dashboard invite | • Applicant Dashboard invites are sent 48-72 hours after application submission  
• Invite may be in junk/spam folder | • Contact Kayah-Bah, Grad Studies re: Applicant Dashboard questions |
| Applicant reports references having problems with recommendation submission | • Invite to submit a recommendation may be in junk/spam folder of the reference | • Contact Kayah-Bah, Grad Studies re: recommendation related issues |
| Applicant needs to make a change to their application (i.e., term or program) | • Applicant made error while completing UW System App, or wants to apply to a different term | • Notify Jen, Admissions of requested changes |
| My program uses a CASS for applications; applicants only complete the UW system App after acceptance | • Applicants in OT, PT, PA, & AT are selected for the program through a CASS application system. | • Provide Jen in Admissions a list of students you have accepted via CASS  
• Select “Accept” in CRM as UW System Apps are completed |

POINTS OF COMMUNICATION TO ASSIST APPLICANTS

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<th>POINT</th>
<th>COMMUNICATION</th>
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| Prior to application | In discussions with prospective applicants, highlighting the following points may help them to avoid common application issues.  
• Follow the Application Process page on your website for important application information, completion hints, & timelines.  
• Allow a minimum of 2-3 weeks to complete the application process (delays are common, with receipt of transcripts and recommendations).  
• Be aware of the correct start date for the program. Applicants select a specific term in UW System App. This is a common point of confusion. |
| During application process | • Reach out to students with outstanding application items to encourage application completion. |
| After acceptance | • Reach out to confirm accepted applicant plans and answer questions about next steps (i.e., registration, program specific items). |
| After deadline (for incomplete apps & apps denied due to prerequisite needs) | • These individuals are potential prospects for future terms. You may want to reach out to them to initiate that conversation. |
WHO DO I REACH OUT TO FOR HELP?

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>ASSISTANCE AREAS</th>
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<tbody>
<tr>
<td>Admissions (Jen Weber)</td>
<td>• Changes needed for an existing application (e.g., term or program change)</td>
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<td></td>
<td>• Incorrectly entered decision</td>
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<td>• Transcript questions</td>
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<td>• Withdrawn/canceled applications</td>
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<tr>
<td>Graduate Studies (Kayah-Bah Malecek)</td>
<td>• Technical issues with the CRM</td>
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<tr>
<td></td>
<td>• Applicant Dashboard issues/questions</td>
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<td>• Recommendation issues/questions</td>
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<td>• When you aren’t sure where to start!</td>
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