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

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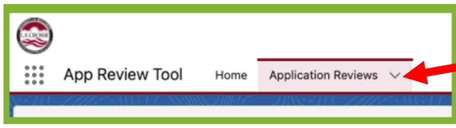
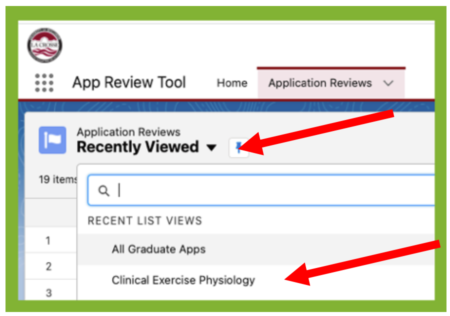
ACCESS THE CRM TO VIEW APPLICANT LIST

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

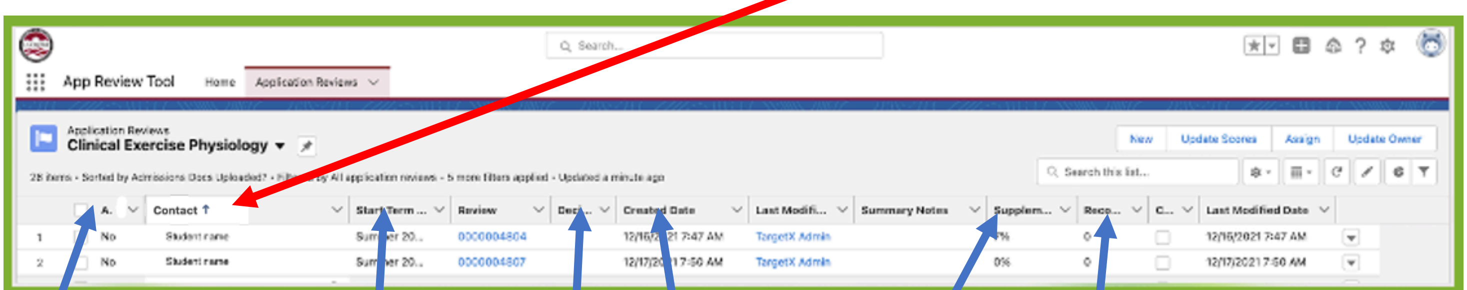
- Select ***Application Reviews***



- 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.*



Admissions docs uploaded
- Yes = app fees & transcripts received
- No = missing fees or transcripts

Start Term & Year
- Intended program start date as selected by student within UW System App

Decision
- If you have entered a decision for an applicant, it will appear here
- **<u>DO NOT ENTER A DECISION IN THIS COLUMN</u>**; decisions must be entered from within the *Read Application* CRM feature (see pg 5, *HOW TO ENTER A DECISION*)

Recommendations received
- Read application to verify presence of recommendation*

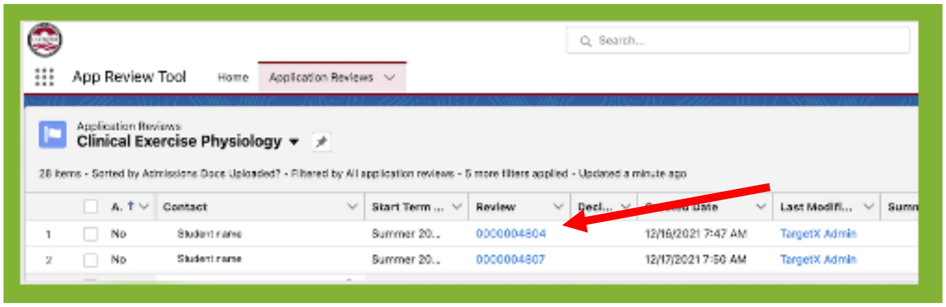
*If a reference clicks through the request link they receive, but fails to upload the requested document, this column may incorrectly indicate presence of a recommendation

Supplemental % complete
- Percentage of Applicant Dashboard items student has completed
- 100% indicates student has submitted all supplemental items & has submitted contact info for references (if required)
  - Submitting contact info for references triggers system to email recommendation requests to references.

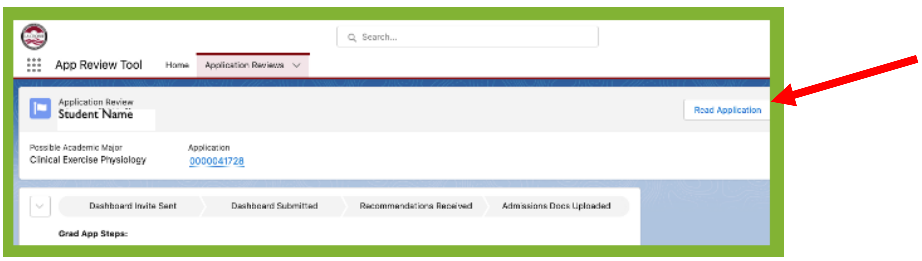
Created date
- Date app was started
- ***HINT***: *To view new applications on your list, sort by "Created date" (click column header) to bring newest apps to the top.*

REVIEW AN APPLICATION IN THE CRM

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

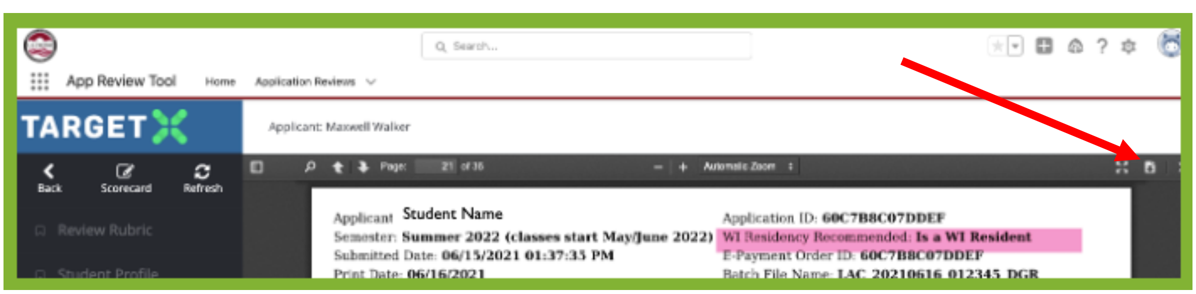


- In the top right corner, click the button **Read Application**.



- 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)



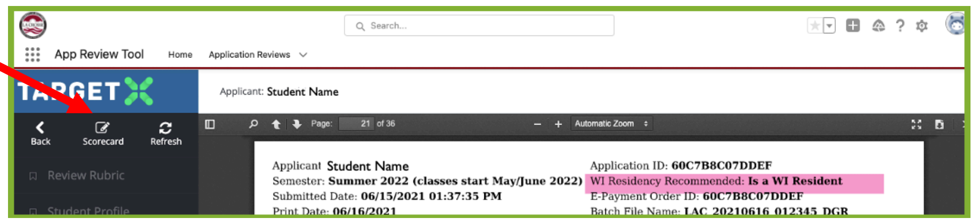
  - Downloaded application materials contain personal information, be mindful of appropriate data security practices when handling these documents.
    - Share only with secure file sharing formats
    - Delete files from your system upon completion of application review

SUBMITTING AN APPLICATION DECISION

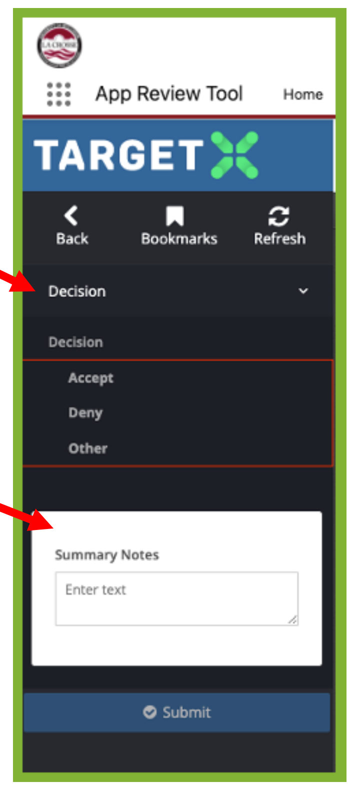
- <u>As soon as you reach a decision</u>, enter the information in the CRM
  - Do this <u>BEFORE</u> any decision communications to student
    - Avoids confusion for accepted applicants when working with other campus partners (i.e., Admissions, Registrars)
  - An admitted applicant should be entered 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.



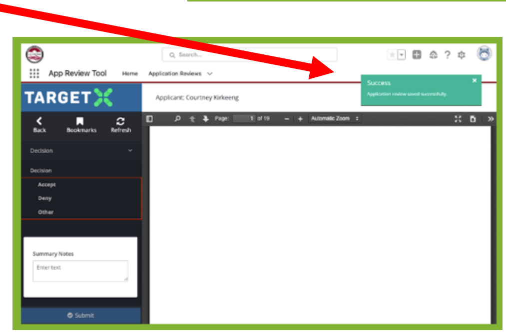
- Click ***Decision*** to reveal your decision options
  - Make selection
    - <u>Accept</u> student to program
    - <u>Deny</u> admission
    - <u>Other</u>
      - See pg 5, *WHAT TO DO WHEN . . .* for examples of when to use this option



- Click ***Summary Notes*** to add <u>important details</u> 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* *<u>will not be</u>*** *forwarded to Admissions; you will have to resubmit your decision.*



WHAT TO DO WHEN . . . (specific CRM decision selection examples)

SITUATION	PROGRAM ACTION

Application accepted	▪ Enter decision in CRM as soon as decision has been made
	  ○ 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
	  ○ 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
	  ○ 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
	  ○ 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
	  ○ Select ***Admit***
	  ○ In ***Summary Notes*** include details of conditional admission
	    ▪ Mikaela Robarge (Admissions) will work with you to develop the conditional info to be provided in the acceptance letter.
	▪ Deny
	  ○ 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.
	  ○ You may want to communicate with the applicant directly to encourage reapplication upon completion of prerequisites.

Applicant cancels application PRIOR to program decision	○ Select ***Other***
	  ○ In ***Summary Notes*** indicate that student canceled application.
	    ▪ Mikaela Robarge will update WINGS.

Applicant cancels application AFTER you have entered application decision	○ Forward email from applicant to Mikaela Robarge
	    ▪ Mikaela Robarge will update WINGS You do not need to take further action in CRM.
	  ○ 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:
	  ○ Select ***Other***
	  ○ 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*

TROBLESHOOTING TIPS

PROBLEM	REASON	ACTION
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 Mikaela, 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 Ania, 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 Ania, 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 Mikaela, 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 Mikaela 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

POINT	COMMUNICATION
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 <u>minimum</u> 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?

CONTACT	ASSISTANCE AREAS
Admissions (Mikaela Robarge)	• Changes needed for an existing application (e.g., term or program change) • Incorrectly entered decision • Transcript questions • Withdrawn/canceled applications
Graduate Studies (Ania Meier)	• Technical issues with the CRM • Applicant Dashboard issues/questions • Recommendation issues/questions • When you aren't sure where to start!