

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

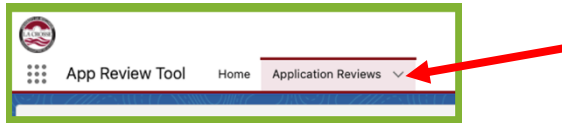
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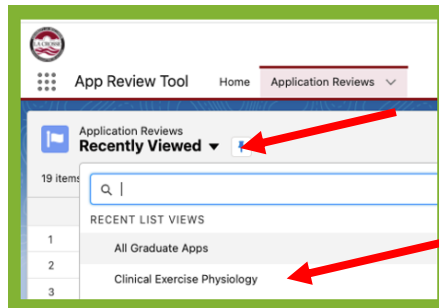
ACCESS THE CRM TO VIEW APPLICANT LIST

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

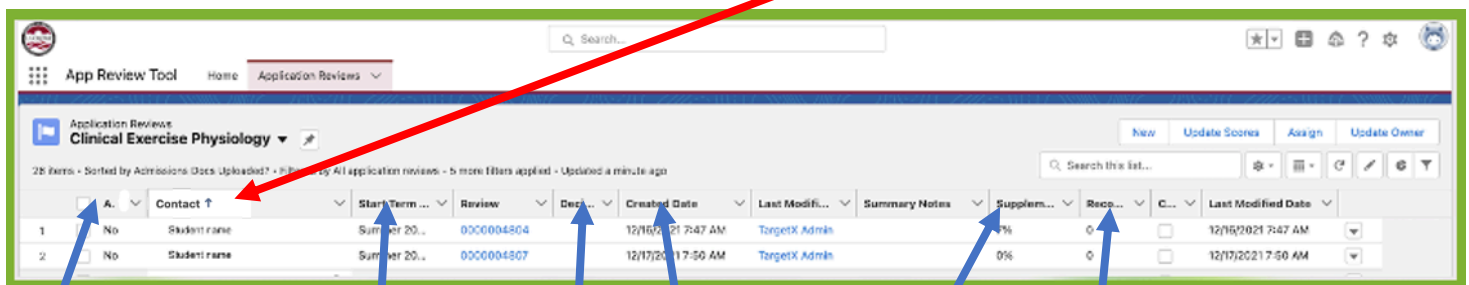
- Select **Application Reviews**



- 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
- **DO NOT ENTER A DECISION IN THIS COLUMN;** decisions must be entered 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

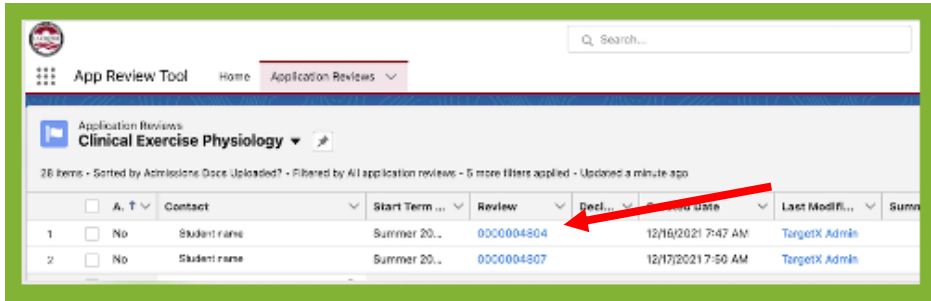
- Percentage of Applicant Dashboard items student has completed
- 100% indicates student has submitted all supplemental items & has submitted contact info for references (if required)
 - Submitting contact info for references triggers system to email recommendation requests to references.

Created date

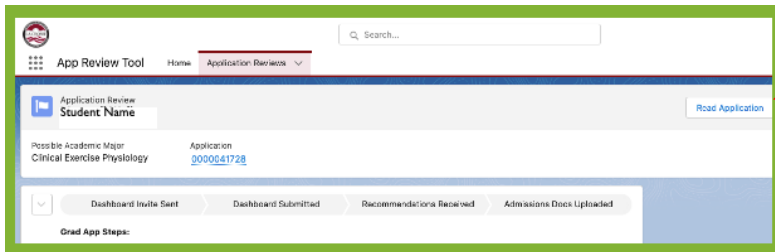
- Date app was started
- **HINT:** To view new applications on your list, sort by "Created date" (click column header) to bring newest apps to the top.

REVIEW AN APPLICATION IN THE CRM

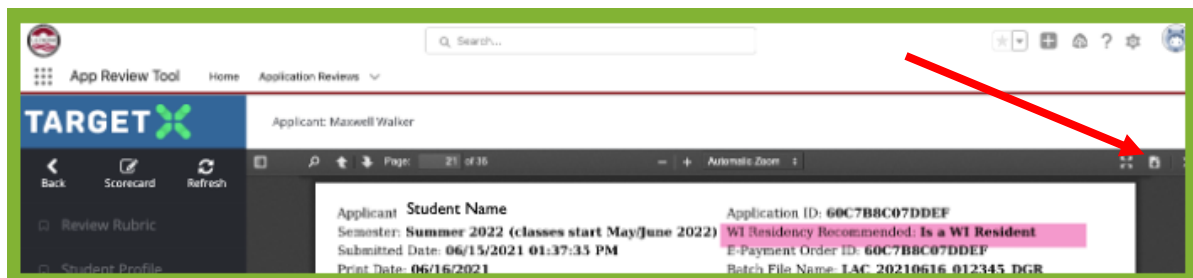
- Click the Review number to open application for a specific student.



- 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)



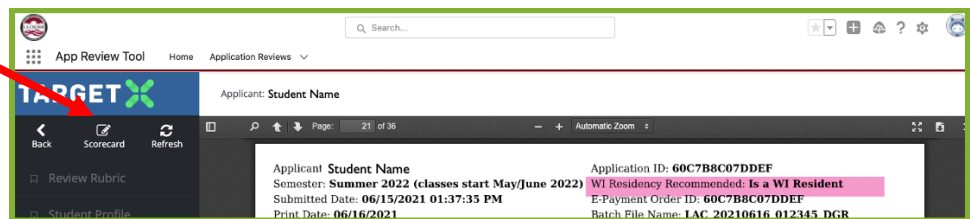
- Downloaded application materials contain personal information, be mindful of appropriate data security practices when handling these documents.
 - Share only with secure file sharing formats
 - Delete files from your system upon completion of application review

SUBMITTING AN APPLICATION DECISION

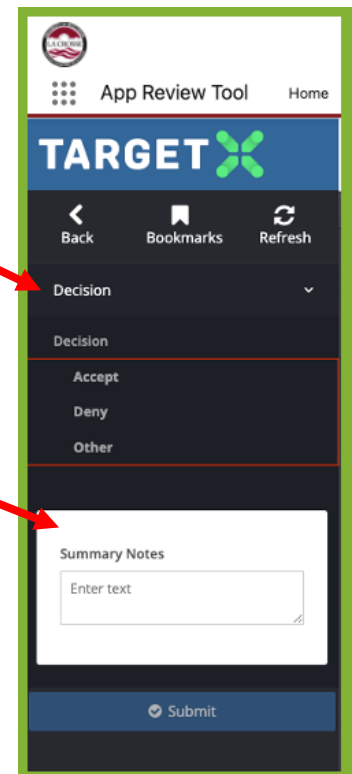
- As soon as you reach a decision, enter the information in the CRM
 - Do this BEFORE any decision communications to student
 - Avoids confusion for accepted applicants when working with other campus partners (i.e., Admissions, Registrars)
 - An admitted applicant should be entered as **Accept**, whether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

HOW TO ENTER A DECISION

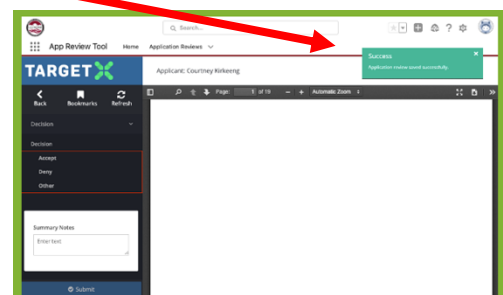
- To enter decision, select **Scorecard** from the left navigation.



- 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)

SITUATION	PROGRAM ACTION
Application accepted	<ul style="list-style-type: none"> ▪ Enter decision in CRM <u>as soon as decision has been made</u> <ul style="list-style-type: none"> ○ Select Admit <ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ Enter decision in CRM <u>as soon as decision has been made</u> <ul style="list-style-type: none"> ○ Select Deny <ul style="list-style-type: none"> ▪ This action triggers a denial letter from Admissions. <ul style="list-style-type: none"> • Denial letters <u>do not</u> include details of reason for denial. • Students with questions are forwarded to the program.
Applicant is waitlisted	<ul style="list-style-type: none"> ▪ Do not enter a decision in the CRM at this point <ul style="list-style-type: none"> ○ In Summary Notes you may indicate applicant’s waitlisted status <ul style="list-style-type: none"> ▪ Admissions does not communicate waitlisted status with applicants ▪ Communication of waitlist status should come from program ○ <u>As soon as decision is reached</u>, make selection of Accept or Deny in CRM
Application is complete, but applicant has prerequisite completion needs	<p>Program discretion:</p> <ul style="list-style-type: none"> ▪ Admit with conditions for prerequisite completion <ul style="list-style-type: none"> ○ Select Admit ○ In Summary Notes include details of conditional admission <ul style="list-style-type: none"> ▪ Jen Weber (Admissions) will work with you to develop the conditional info to be provided in the acceptance letter. ▪ Deny <ul style="list-style-type: none"> ○ Select Deny <ul style="list-style-type: none"> ▪ Applicant will receive a denial letter from Admissions. <ul style="list-style-type: none"> • Denial letters <u>do not</u> 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 <u>PRIOR</u> to program decision	<ul style="list-style-type: none"> ○ Select Other ○ In Summary Notes indicate that student canceled application. <ul style="list-style-type: none"> ▪ Jen Weber will update WINGS.
Applicant cancels application <u>AFTER</u> you have entered application decision	<ul style="list-style-type: none"> ○ Forward email from applicant to Jen Weber <ul style="list-style-type: none"> ▪ Jen Weber will update WINGS You do not need to take further action in CRM. ○ No further action needed in CRM
Application remains incomplete	<p>If efforts to contact student regarding missing application materials have failed and the application deadline* has passed:</p> <ul style="list-style-type: none"> ○ Select Other ○ In Summary Notes indicate that app is incomplete <ul style="list-style-type: none"> ▪ No messaging will be sent to applicant from Admissions <p><i>* Programs w/rolling admission should mark incomplete apps Other within the month following the application’s program start date</i></p>

TROUBLESHOOTING TIPS

PROBLEM	REASON	ACTION
I'm trying to enter a decision but CRM won't let me	<ul style="list-style-type: none"> Admissions materials (i.e., transcripts, application fee) are missing <p>See <i>Admissions docs uploaded</i> column (image, pg 2)</p> <ul style="list-style-type: none"> Yes = app fees & transcripts received No = missing fees or transcripts 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Applicant Dashboard invites are sent 48-72 hours after application submission Invite may be in junk/spam folder 	<ul style="list-style-type: none"> Contact Ania, Grad Studies re: Applicant Dashboard questions
Applicant reports references having problems with recommendation submission	<ul style="list-style-type: none"> Invite to submit a recommendation may be in junk/spam folder of the reference 	<ul style="list-style-type: none"> Contact Ania, Grad Studies re: recommendation related issues
Applicant needs to make a change to their application (i.e., term or program)	<ul style="list-style-type: none"> Applicant made error while completing UW System App, or wants to apply to a different term 	<ul style="list-style-type: none"> Notify Jen, Admissions of requested changes
My program uses a CASS for applications; applicants only complete the UW system App after acceptance	<ul style="list-style-type: none"> Applicants in OT, PT, PA, & AT are selected for the program through a CASS application system. 	<ul style="list-style-type: none"> 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

POINT	COMMUNICATION
Prior to application	<p>In discussions with prospective applicants, highlighting the following points may help them to avoid common application issues.</p> <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Reach out to students with outstanding application items to encourage application completion.
After acceptance	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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 (Jen Weber)	<ul style="list-style-type: none">• Changes needed for an existing application (e.g., term or program change)• Incorrectly entered decision• Transcript questions• Withdrawn/canceled applications
Graduate Studies (Ania Meier)	<ul style="list-style-type: none">• Technical issues with the CRM• Applicant Dashboard issues/questions• Recommendation issues/questions• When you aren't sure where to start!