



MAKE WAVES.

Reviewing Grad Applications in the CollegeNet CRM Worklist

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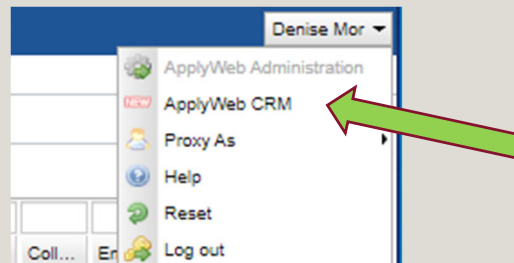
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What is the Worklist?

- 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 corner of your screen, click on your name and a dropdown menu will appear:



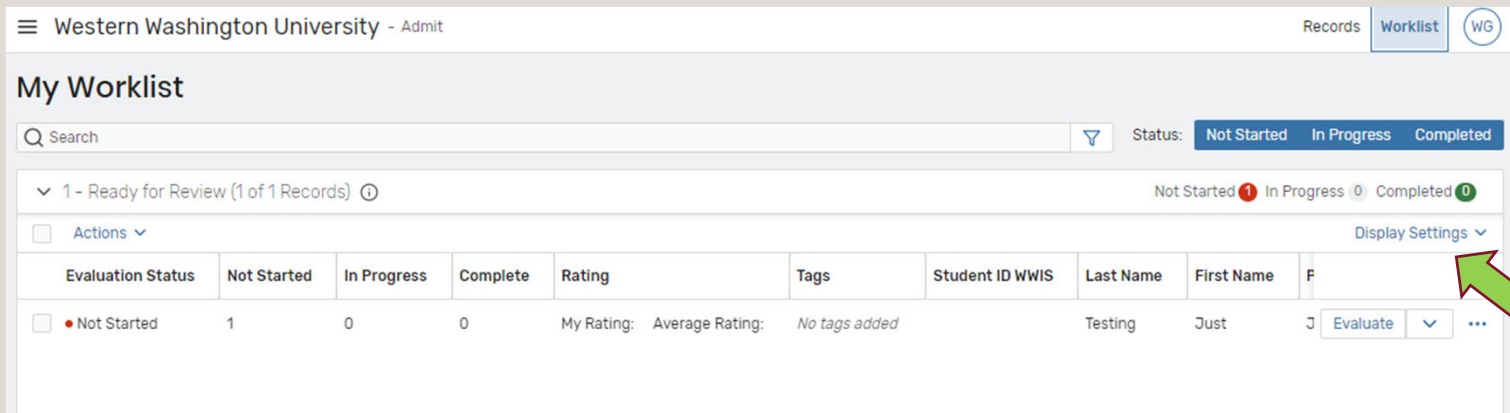
How do I access the Worklist? (continued)

- Select “ApplyWeb CRM” 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
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

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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	
<input type="checkbox"/> Not Started	1	0	0	My Rating: Average Rating:	No tags added		Testing	Just	

Display Settings

- VIEW OPTIONS
 - Table View
 - Summary View
- COLUMN OPTIONS
 - Adjust Table Columns
 - Auto-size Columns
 - Fit Columns to Page
- TABLE ROW SIZE
 - Normal
 - Compact

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.

Adjust Table Columns ×

Search for columns

Select all | Deselect all

- Not Started
- In Progress
- Complete
- Evaluator Rating
- Tags
- Student ID WWIS
- Last Name

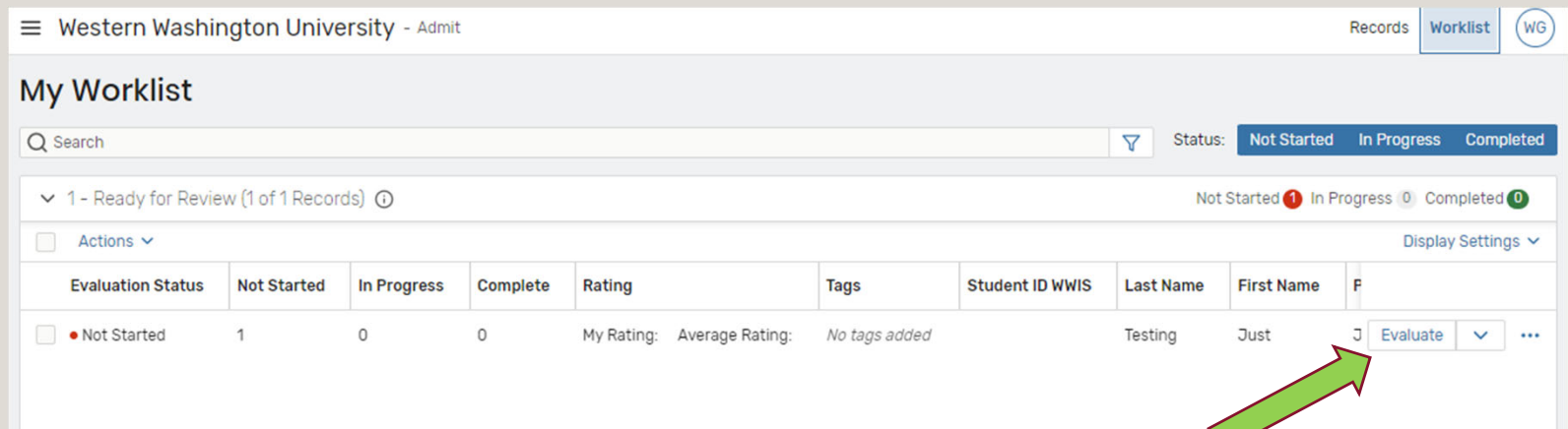
Selected Columns

- Not Started ×
- In Progress ×
- Complete ×
- Evaluator Rating ×
- Tags ×
- Student ID WWIS ×
- Last Name ×

Cancel Save

Reviewing and Evaluating Files

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



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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 Display Settings

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. The main content area is split into two panes. The left pane shows a PDF document titled 'file.pdf' with a zoom level of 68%. The right pane displays the 'Graduate School Application' form, which includes sections for Biographical, Program Selection, Contact, Residency, Citizenship / English Proficiency, and Ethnicity. The form contains various input fields, dropdown menus, and checkboxes. On the right side of the portal, there is a 'My Evaluation' section with a sub-section 'Evaluation-TEST for new UI'. This section includes fields for 'Accept as Advisee?', 'Evaluator Comments', 'Evaluator Rating', 'Program Recommendation', 'Date of Recommendation', 'User Making Recommendation', and 'Comments (Prov Adm/ Dir/seq/ Adviser)'. The top navigation bar includes 'Records' and 'Worklist' tabs, and the bottom of the page features a wooden floor graphic.

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.

The screenshot shows a web interface for entering program recommendations. It features two tabs: 'My Evaluation' and 'All Evaluations'. The 'My Evaluation' tab is active. The form is divided into two main sections: 'Evaluation' and 'Program Recommendation'.
In the 'Evaluation' section, there is a dropdown menu for 'Accept as Advisee?' with 'NO' selected. Below it is a 'Clear Selection' link. The 'Evaluator Comments' text area contains 'no thanks'. The 'Evaluator Rating' dropdown menu has 'Weak (1)' selected, with another 'Clear Selection' link below it.
The 'Program Recommendation' section has a dropdown menu for 'Program Recommendation' with 'Deny' selected. Below it is a 'Clear Selection' link. The 'Date of Recommendation' field is populated with '2022-11-15'. The 'User Making Recommendation' field is populated with 'Denise Mor'. The 'Comments (Prov Admit/ Prereq/ Adviser)' text area contains 'DERP'.
At the bottom right of the form, there are two buttons: 'Save' and 'Submit'. A green arrow points to the 'Save' button.