Office of Graduate Admissions for the College of Education and Communication Graduate Admissions Assistants Guide to Slate

August 2024

Version 1.3

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Introduction

To manage and track prospective and current students interested in attending DePaul University's College of Education and College of Communication, DePaul's office of Graduate Admission utilizes a record system called Slate.

All part and full time employees working in this department are expected to know how to use this platform.

Purpose

This document will guide DePaul University's Office of Graduate Admission Graduate Admissions Assistants/Student Employees through the basics and how to use the Slate platform as Slate is the platform that all employees are expected to use in daily operations. There are some processes that employees will need to do, these processes are:
- How to Login to Slate
- How to Find a Prospective Student's Record/Profile
- How to Review a Prospective Student's Record

What is Slate? Why Do I Need to Know How to Use Slate?

Slate is a cloud-based customer relationship management (CRM) record system for prospective and current students who are interested, applying for or are currently enrolled in an undergraduate or graduate program at DePaul University. Profiles are created for each student that houses the following information:
- Applications
  - Students can have up to 4 applications at one time.
- Application materials
- Personal details, such as:
  - Email addresses
  - Address
  - Phone Number
  - Date of Birth
- Interactions with the student
  - This includes:
    - In-person visits
    - Emails
    - Phone calls
    - Live chat sessions

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How Do I Access Slate?

Slate can be accessed on any electronic device that has the ability to connect Wi-Fi. Slate is most commonly accessed through the following methods:
- On a web browser through the [Slate website](#).
- Through Slate mobile application.

How to Login to Slate

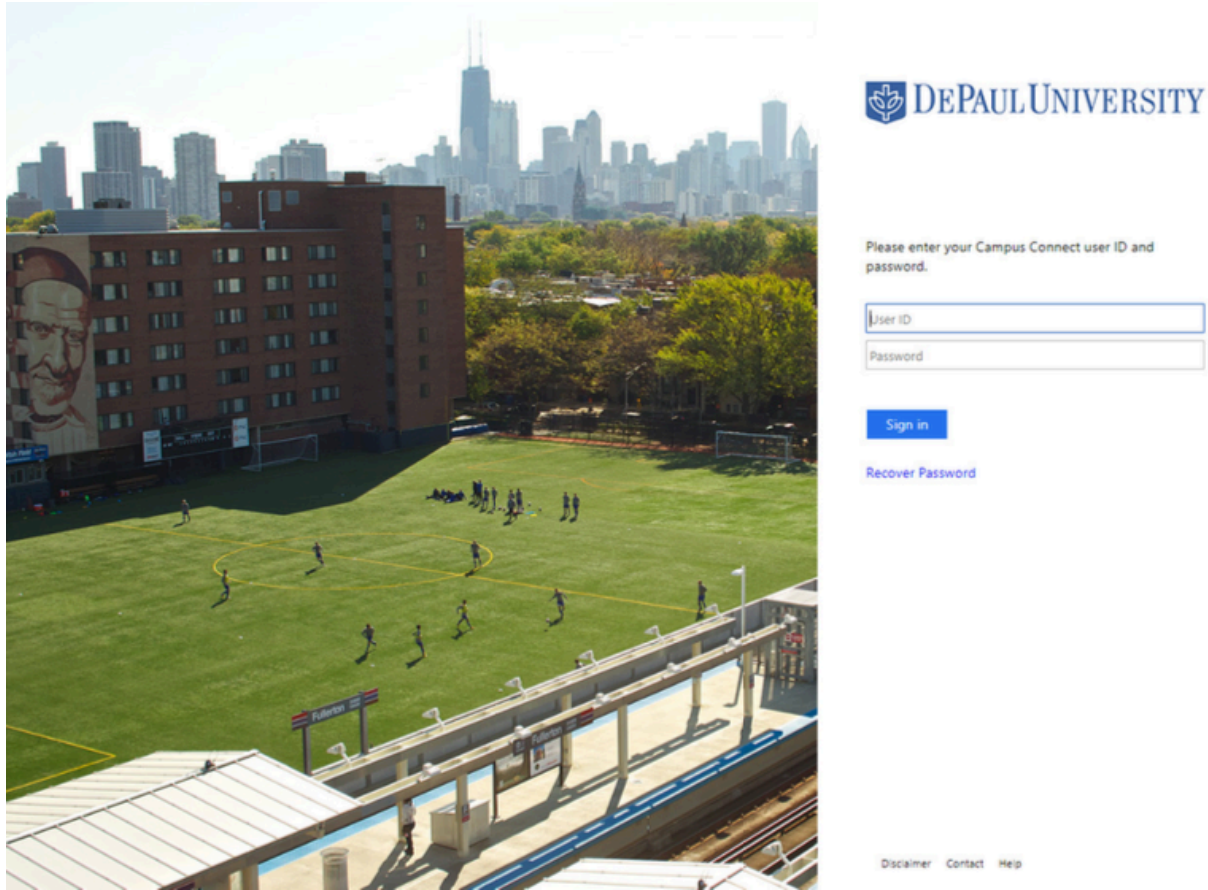The first step to accessing slate is to login to the platform.

Steps

1. On any Internet browser, navigate to the [Slate website](#) or on an electronic device, download and open the Slate mobile application.

- For employees who are accessing Slate for the first time, it is recommended to use a computer rather than a mobile device.

2. Graduate Admissions Assistants will then be prompted to enter in their DePaul Campus Connect credentials as the "User ID" and "Password." Reference **Figure 1** below for the DePaul University Slate Login page.
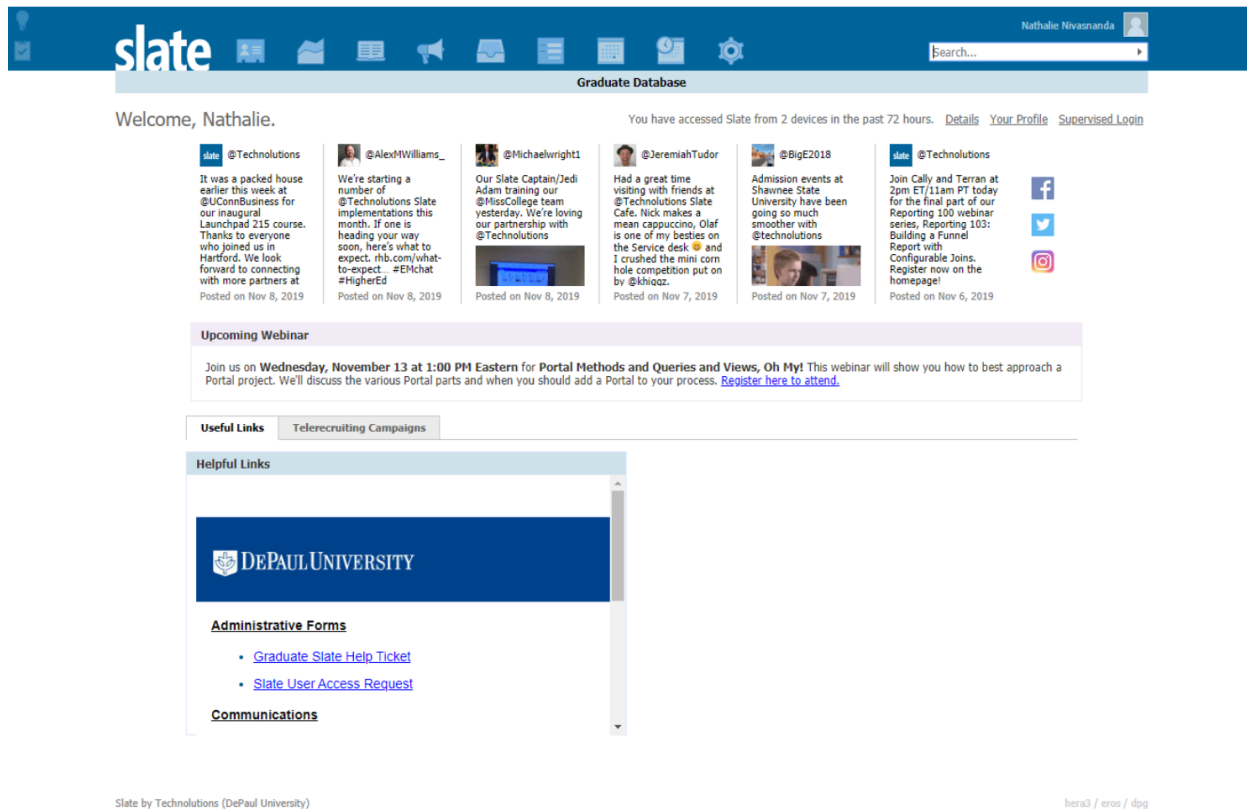
- The DePaul Campus Connect credentials will be the same ones that they are using for their current undergraduate or graduate programs.
- If Graduate Admissions Assistants have forgotten their DePaul Campus Connect credentials, they will need to select "Recover Password" and follow the Help Desk prompts.
    - Help Desk can be contacted at 312-362-8765 (recommended) or through email at helpdesk@deapaul.edu.
        - The hours of operations are as follows:
            - Monday-Thursday
                - 8:00am-8:00pm (CT)
            - Friday
                - 8:00am-5:00pm (CT)

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Figure 1: Slate DePaul University Campus Connect Logins

3. Once employees have logged in successfully, they will be taken to Slate's Dashboard Homepage.

- Employees should see a welcome message on the left side of the page and have their employee profile with their first and last name on the top right side of the page.
- Reference *Figure 2* below for a view of this Dashboard.

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Figure 2: Slate Dashboard

Header Icons on Slate

Now that employees have successfully logged into Slate, they will see a header row that consists of nine icons at the top of the Slate Dashboard. Reference *Figure 3* below for these icons.

Figure 3: Slate Icons

Note: The icons that have an "*" symbol in this section, represent icons that a Graduate Admissions Assistant will need to use in their position. Below are each of the icons and more information about them:

Record Search

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This quick access tool will keep track of the last 10 Slate profiles that have been searched and opened. If Graduate Admissions Assistants need to go back to a previously accessed Slate record/profile, they can easily do so here.

Figure 4: Record Search Icon

Query

This icon builds and runs queries to find Slate data. Graduate Admissions Assistants do not have access to this, the only employees who have access to this icon are Directors, Assistant Directors and the Event and Office Manager.

Figure 5: Query Icon

Slate Reader

This icon is used in reviewing applications. Graduate Admissions Assistants do not have access to this, the only employees who will have access to this icon are Directors, Assistant Directors and the Event and Office Manager.

Figure 6: Slate Reader Icon

Deliver

Used in sending system-generated email campaigns, Graduate Admissions Assistants will not be able to select this icon.

Figure 7: Deliver Icon

Inbox*

This icon stores all email communications for prospective students who have opted in to receive emails from edgradadmissions@depaul.edu and grad-com@depaul.edu.

Figure 8: Inbox Icon

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Forms

This icon holds all information that has been entered in about a student or that the student has entered in themselves on their Student Portal. Graduate Admissions Assistants do not have access to this.

Figure 9: Forms Icon

Events/Trips*

This icon shows the event schedule for the whole department. Graduate Admissions Assistants can use this icon to view and prepare for upcoming events, see attendance lists for each event and add/remove attendees (as needed).

Figure 10: Events/Trips Icon

Scheduler*

This icon shows all scheduled one-on-one in-person and phone appointments that prospective students have registered for. Graduate Admissions Assistants can create, edit and delete one-on-one appointments using this Scheduler.

Figure 11: Scheduler Icon

Database

This icon directs to the Slate Help Community Message Boards.

Figure 12: Database Icon
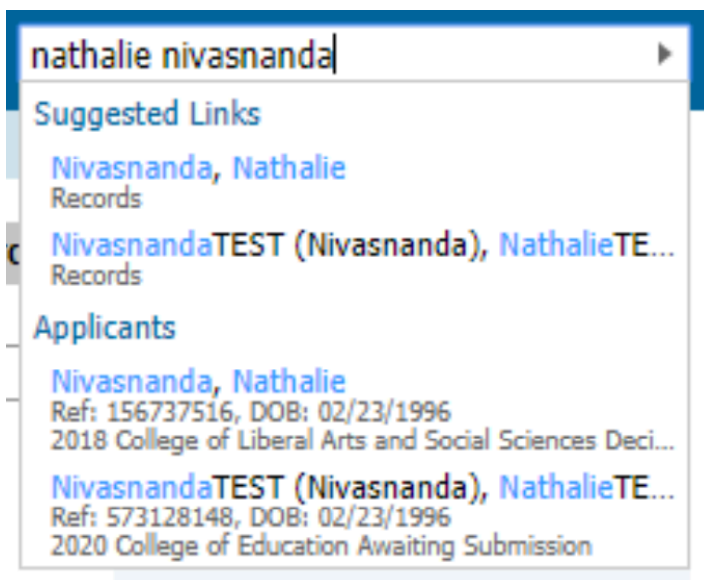
How to Find a Prospective Student's Record/Profile

1. On the right side of the Slate header, locate the search bar.
   a. Reference **Figure 13** below for a view of the empty search bar.

Figure 13: Slate Search Bar

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2. Prospective students can be located in Slate in a couple of different ways. Some ways to search for a prospective student include entering in:
   a. The student's first and last name
   b. A phone number
   c. An email
   d. An Applicant's ID number
      i. Each prospective student is given a unique 9 digit code by Slate to help identify them in Slate systems.
3. Using any of the prospective student's information from step #2 and entering into the search bar will result in a drop down menu. Clicking directly on the name of a prospective student will route to their Slate record/profile.
   a. Reference *Figure 14* below for a view of this dropdown menu where there are two profiles with the same name.

Figure 14: Student Record/Profile Drop Down Menu

   b. Another way to locate a prospective student's profile is to enter in the prospective student's information and select "Enter." Slate will display a list of results in a "Lookup" screen. Reference *Figure 15* below for an example of a "Lookup" Screen.

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Figure 15: Student Record/Profile Lookup Screen

Reviewing a Prospective Student's Record

Now that Graduate Admissions Assistants know how to find a prospective student's record/profile, each record/profile will have 5-6 tabs:
1. Dashboard
2. Timeline
3. Application(s)
   a. Note: This will only be a tab if the prospective student has started an application. Each application that has been started has a separate tab.
4. Profile
5. Materials
6. Student Information

Reference **Figure 16** below for the five standard Slate record/profile tabs. In this specific example, the prospective student has not started any applications so there are no application tabs.
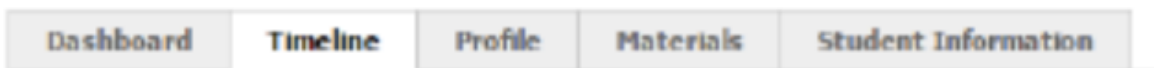
Figure 16: Five Standard Student Record/Profile Tabs

To better break down these tabs, each tab has its own sections. See below for information on each tab in a prospective student's Slate record/profile:
- ***Dashboard***
- ***Timeline***
- ***Application(s)***
- ***Profile***
- ***Materials***
- ***Student Information***

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The Dashboard

When opening a prospective student's Slate record/profile, it will route to the student's Dashboard. This dashboard contains information that the prospective student has entered in on their Student Portal or been automatically entered in based on information given to Slate. This includes:

- Anticipated entry term
- List of schools previously attended
- Academic inquiries
- Whether or not the student is a DePaul University alumni
- Contact information
- Mailing address

Note: Not all prospective students will provide all of the above information so some records/profiles may have blank entries.

Reference **Figure 17** below for a view of a prospective student's Slate record/profile. This prospective student has not entered a lot of information, the only information that can be seen is the list of schools previously attended and the student's address.

Figure 17: Student Record/Profile Dashboard Tab
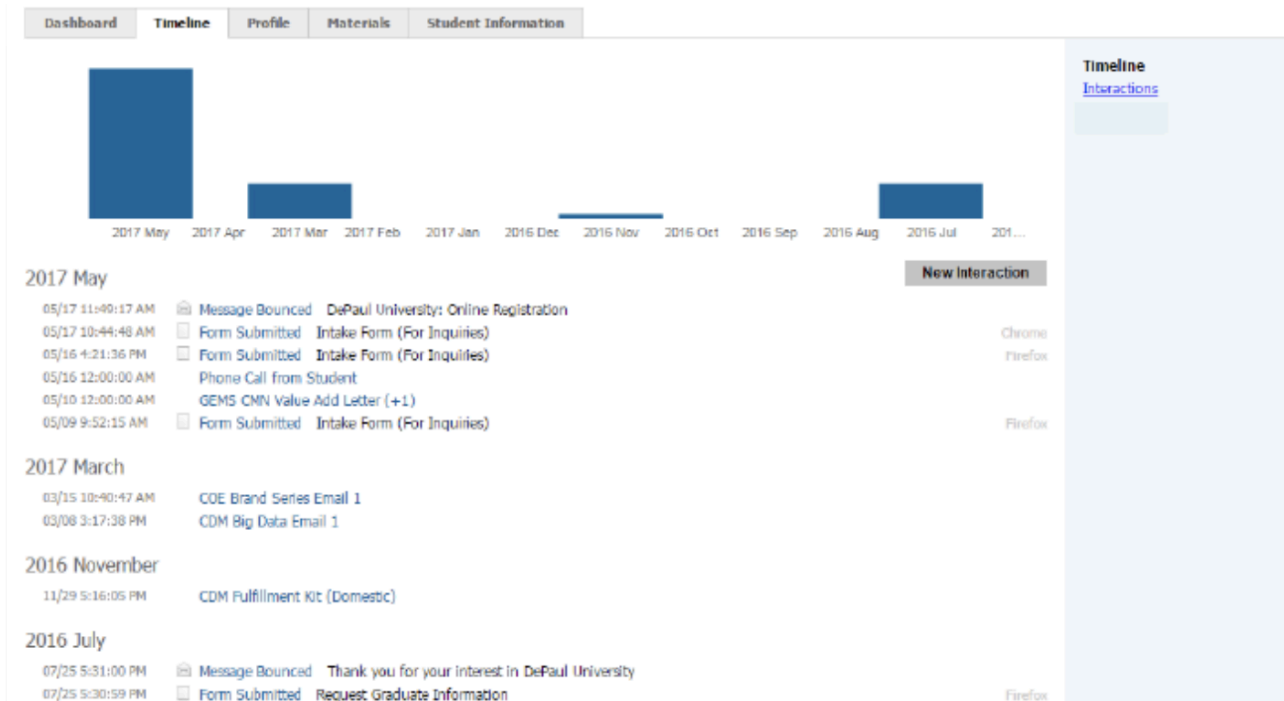
The Timeline

This tab will contain all interactions that a prospective student has had with DePaul University Office of Graduate Admission. This can be viewed in two ways: Timeline or Interaction.

Using the Timeline View

The view will show the prospective student and Office of Graduate Admission interaction based on when they happened.

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A bar graph will be organized by month with a snapshot of the prospective student's activity and below that, is a list of interactions between the prospective student and DePaul University. Each interaction can be selected, if an employee is wanting more context to what a specific interaction was about.

In *Figure 18* below, the bar for May 2017 is larger than the other months because the student made a phone call to the Office of Graduate Admission, intake form updates and registered for an event.

Figure 18: Slate Timeline Tab

Using the Interactive View

This view will list all interactions in a text format and organized by the month/date/year of said interaction. In *Figure 19* below, each interaction will have code categorizations such as:

- Sources
  - These are all the times that a prospective student's data is entered and updated in Slate. This includes times that the prospective student has updated their own information or if the Office of Graduate Admissions has gone in and updated the prospective student's information.
- Message
  - These are all email and SMS communication sent to and received by the prospective student to the Office of Graduate Admissions.
- Mailing

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○ All mail and telerecruiting items that have been sent from the Office of Graduate Admissions to the prospective student are considered "Mailing."
● Contact
○ When prospective students have made phone calls to this office, Slate classifies this as a "Contact." These types of interactions will need to be created manually by employees within the Office of Graduate Admissions as Slate is not connected to the office phone number.

**Figure 19: Slate Timeline Interactive Tab**

How to Update a Prospective Student's Record/Profile Timeline

Graduate Admissions Assistants are expected to document all interactions a prospective student has made to the office. If prospective students have reached out to the Office of Graduate Admission via the live chat or email, Slate will automatically track that and enter it into the prospective student's timeline. Phone calls will need to be added to the timeline manually and are not tracked in Slate.

It is important to track all interactions with a prospective student because it can assist with future live chats, emails or phone calls that the prospective student places. Instead of having a prospective student explain their previous issues again, employees can search up their record and read through what happened and what was told to the prospective student.

Workflow

Reference **Figure 20** below for a workflow of how to record an interaction in Slate when a prospective student calls DePaul University's Office of Graduate Admission. Recording an interaction involves 3 parties (Prospective Student, Graduate Admissions Assistant/Student Employee and Help Desk). The primary party responsible for recording this will be the Graduate Admissions Assistant/Student Employee. This workflow will start with the prospective student making a phone call to the office and end with saving the interaction in their profile.

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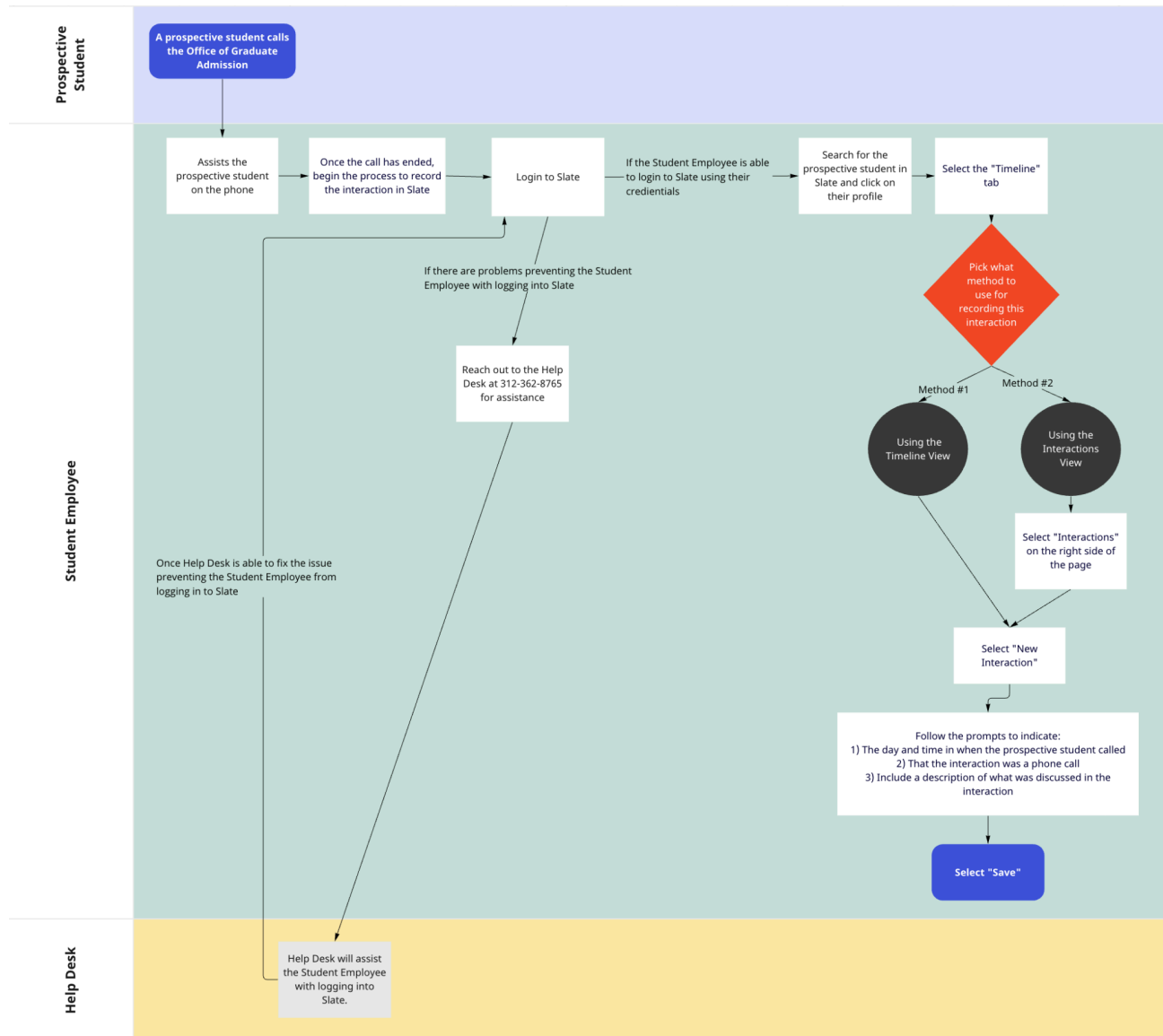
Figure 20: How to Record Prospective Student Interactions in Slate Workflow

The Application(s)

The Application tab displays each application a prospective student has started. The application tab follows the format of "YEAR" and the acronym for the school to which the prospective student is applying for. As an example: A student applying for a College of Education and College of Communication programs for the Winter 2025, will have tabs that read: "2025 COE" and "2025 CMN".

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Prospective students can have up to four open applications at one time. For the purposes of this office, employees should only focus on "COE" and "CMN" applications. Any applications that do not have this acronym, belong to a different department.

Reference *Figure 21* on the next page for a view of a prospective student's Slate record/profile applications. Each application will display the following:
- Application Status
  - Towards the left side of this tab, the status of the application will be present with terms such as "In Progress" and "Completed".
    - This indicates whether or not the student has submitted their application or if they are still in the process of completing it.
  - If a student has submitted their application, the decision status will indicate where the application currently is and if a decision has been made from the admission team.
- Current Bin
  - For applications that have been submitted, this will indicate what admission team will review this application.
    - In *Figure 21* below, this application is for the "English - MA" program. This program is a part of the College of Liberal Arts and Social Sciences. Thus, the current bin is "LAS/CSH Awaiting Submission" because this application will be reviewed by the admission team for the College of Liberal Arts and Social Science/College of Science and Health.
      - Applications for the College of Education and Communication will have "COE Awaiting Submission" and "CMN Awaiting Submission."
- Last Updated/Submitted
  - These are the dates that the application was last updated and submitted.
- Program and Term
  - This is the program a prospective student is applying for and the term for this particular application.
- Required Materials Checklist
  - The rest of this tab is a checklist of the required materials that the student has/still needs to submit.
  - The required materials will vary based on the prospective student, what quarter they are applying for and the program, as each program has different requirements.
  - This checklist has 3 different symbols for each item on the checklist:
    - Red "X"
      - This means that those materials are outstanding. Students will need to submit these documents prior to their application being reviewed by the admission team. Once all the red "X"s are gone from this checklist, the application and all materials will be sent to the admission team for a decision.

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- ○ Green Check Mark
  - ■ This means that those materials have been received and have been entered into the prospective student's record/profile. No further action related to that checklist item is needed.
- ○ Gray Check Mark
  - ■ This means that the specific materials are not needed by the prospective student and that it has been waived by the Office of Graduate Admissions.
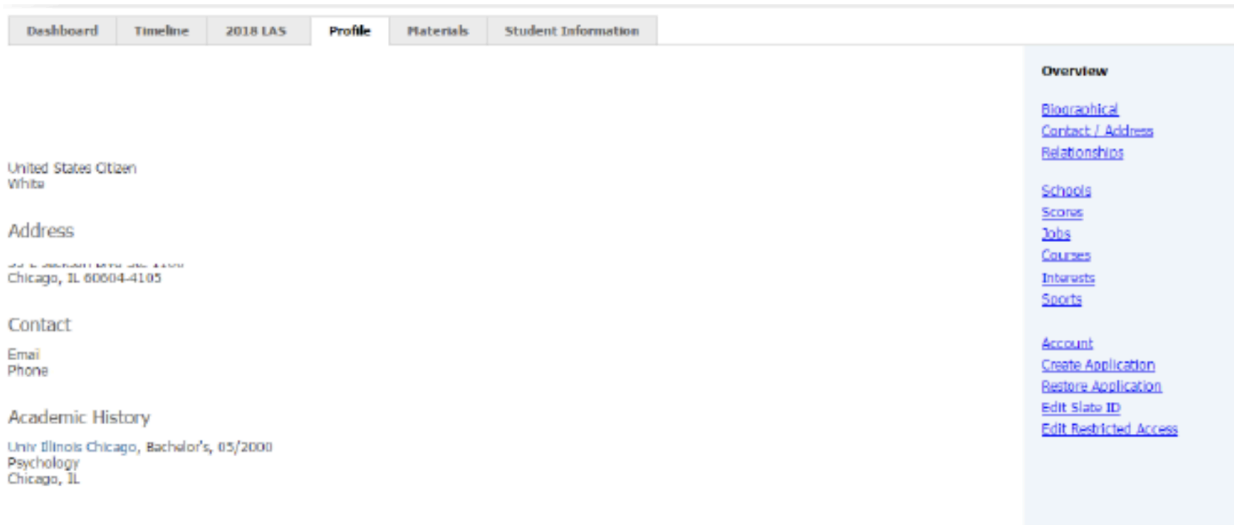

Figure 21: Slate Record/Profile Applications Tab

The Profile

This Profile tab contains the profile of a student with biographic information such as:
- Mailing addresses
- Contact information
- Academic history

Reference **Figure 22** below for a view of a prospective student's profile tab.

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Figure 22: Slate Record/Profile Profile Tab

On the right side of the tab, there is an "Overview" link. This tab will show a quick snapshot of the information that the prospective student has given to DePaul University such as:

- Whether or not the student is a US citizen
- Race
- Address
- Contact information
- Academic history

Each link on the right side of the page, contains more comprehensive information about the prospective student. There are six categories with a "*" symbol to indicate that this will be important to the Graduate Admissions Assistant position, below:

- Biographical*
    - This includes:
        - The student's full name
        - Gender
        - Birthdate
        - Citizenship
- Contact/address*
    - This includes:
        - Email
        - Phone
        - Mailing address
- Relationships

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- This includes:
  - A record of associated relations (parents, spouse, etc.)
- Schools*
  - This includes:
    - All previously attended undergraduate programs and schools
    - All previously attended graduate programs and schools
- Scores
  - This includes:
    - Test score data
- Jobs
  - This includes:
    - Job employment history

The Materials

The Materials tab contains a record of all documents that have been submitted to the Office of Graduate Admissions. Once a prospective student has submitted or sent materials to our offices (such as letters of recommendation, both unofficial and official transcripts, personal statements, and any additional documents needed for the application process), the Office of Graduate Admission staff will scan and upload materials to the prospective student's Slate record/profile.

Once the materials have been scanned into Slate, a confirmation email will be sent to the prospective student to let them know their materials have been received and the item will be checked off on the prospective student's application.

Note: Graduate Admissions Assistants do not have the ability to upload materials into Slate profiles. Only Directors, Assistant Directors and the Event and Office Manager have this ability.

Reference *Figure 23* below for a view of the Materials tab.

Figure 23: Slate Record/Profile Materials Tab

Every document that has been submitted by the student and the Office of Graduate Admission staff will have:

- Date

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- ○ This is the date that the document has been uploaded into Slate.
- Description
  - ○ This will indicate what was uploaded to Slate. In *Figure 23* above, this prospective student has uploaded a copy of their transcript, resume and Slate application.
  - ○ Selecting each material under the "Description" column will display a copy of the document as it is in Slate.
- Record
  - ○ Materials that have been uploaded into Slate will need to be connected to an application. Records will connect the uploaded materials to an application.
  - ○ In *Figure 23*, the prospective student's resume has been connected to the 2017 CSH application so the resume Record entry has "2017 CSH."
- User
  - ○ If materials have been uploaded into Slate by the prospective student, the user will be blank.
  - ○ If materials have been uploaded into Slate by the Office of Graduate Admission staff, the "User" will indicate the first and last name of the Office of Graduate Admission staff.

The Student Information

The last tab to be aware of is the Student Information tab that contains information about the prospective student. Reference *Figure 24* below for a view of this tab. Data displayed on this tab include:

- Academic Interest Data
  - ○ This lists:
    - Study type
    - Entry term
    - Two primary academic interests
    - Previous academic interests
    - Whether or not the student is a combined degree student
    - If the student has been assigned a staff member as a contact in the admissions process
- Communication Data
  - ○ Some prospective students will indicate how they would like to be contacted.
- Student Data
  - ○ This lists:
    - The PeopleSoft ID number
      - If a prospective student has been accepted into a program, the PeopleSoft ID number will be the student's Campus Connect ID number.
    - Whether or not the prospective student is an alumni of DePaul University
    - If the prospective student has been in the military

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■ If the prospective student is part of a Cohort program

Figure 24: Slate Record/Profile Student Information Tab

For Any Questions or Additional Help

If Graduate Admissions Assistants are still having some questions or need further assistance, they are encouraged to contact any of the following:
- Manager
- Directors
- Assistant Directors
- Event and Office Manager

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