# Applicant Review User’s Guide

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The Manage Tab:
To view this tab, click MANAGE tab at the top right-hand side of the Applicant Review page. Within this tab, you can create groups of student applications, teams of users/administrators, and email templates. You can also personalize your Applicant Review system by altering the table columns which appear on each page, viewing and modifying your saved filters, and adding checklist items that appear in the ‘status check’ that students view to track their progress.

Creating groups:
Creating a group allows you to group students by a category that you’ve created. For example, you may want to create a group of applications for a particular professor or team of reviewers. Once a group is created, you will be able to filter applications by that group (view only the applications that belong to that group), sort applications alphabetically by group name, and/or add additional administrators to that group.

To create a group:

1. Select the MANAGE tab on the top right-hand side of the Applicant Review page.
2. Click the Groups icon.
3. Click the red +Add Group button on the right-hand side of the page. A window that reads Create Group will appear.
4. Enter a group name of your choosing into the Group Name text box.
5. Click the red Create Group button.
Adding and removing student applications from groups:
A group will remain empty until you assign student applications to that group. Student applications can be added to a group one or multiple at a time, and they can be added at any time after creating the group.

To add a student application to a group:

1. Return to the list of applications you wish to select student applications from by clicking the appropriate tab (Unsubmitted Applications, Pre-Review, Review & Recommend, Graduate School Review, or Final Processing) at the top of the page.

2. Select the student(s) you wish to add to the group by clicking the small white box to the left of their name. A black checkmark will appear in the box.

3. Click the blue + Add to Group button above the list of application entries. A window will pop-up that reads “Are you sure you want to add these applications to the selected group?”

4. Select the group you created from the Group drop-down menu.

5. Click the red Yes box in the bottom right-hand corner of the window.
Student applications can also be removed from a group one or multiple at a time, at any time.

To remove a student application from a group:

1. **Select** the student(s) you wish to remove from a group by clicking the small white box to the left of their name. A black checkmark will appear in the box.

2. Click the red - **Remove to Group** button above the list of application entries. A window will pop-up that reads “Are you sure you want to remove these applications from the selected group?”

3. Select the appropriate group from the **Group** drop-down menu.

4. Click the red **Yes** box in the bottom right-hand corner of the window.
Group Administrator Functions:
When you create a group, you will automatically become the **administrator** of that group. This means that you have the capability to **view only the members in this group using the filter function** (See “Filtering unsubmitted applications” for instructions), add and remove student applications from this group, and edit/delete the group. You also have the capability to allow **other users** to become administrators for this group.

Note: A user cannot edit a group unless they are made an **administrator** of that group, as well.

To make someone else an administrator:

1. Select the **MANAGE** tab on the top right-hand side of the Applicant Review page.
2. Click the **Groups** icon.
3. Find the **group** you wish to add an administrator to.
4. Select the blue **Edit Administrators** button aligned with the group (on the right-hand side of the page). A new window appear that reads “Edit Administrators for ___ Group”.
5. Enter the name of the person you wish to give administrator rights to into the **Person** text box. The auto complete feature will search the campus directory by the person’s last name, first name, and/or NetID as you type.
6. Select the **Add** button and the person’s name will appear below. Continue adding administrators to this group or continue onto step 7.
7. When you have finished adding administrators, click the **Save Administrators** button.
### Manage Groups

#### Groups Managed

<table>
<thead>
<tr>
<th>Name</th>
<th>Administrators</th>
<th>Applications Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Group</td>
<td>Chapman, Rebecca</td>
<td>0</td>
</tr>
<tr>
<td>Faculty Review</td>
<td>Chapman, Rebecca</td>
<td>0</td>
</tr>
<tr>
<td>International Applicants</td>
<td>Chapman, Rebecca</td>
<td>0</td>
</tr>
<tr>
<td>Kane’s Group</td>
<td>Chapman, Rebecca</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Edit Administrators for Blue Group

- Chapman, Rebecca
- Dauval, Judith A
- Block, Katelyn Christine

[Add Administrator] [Delete Administrator]
**Group Compare Function:**

The ‘Compare Groups’ function allows you to compare applications across two groups. That is, with this function, you will be able to view which applications are in each group, and/or how many applications are in both groups (or in other words, where there is overlap between groups).

<table>
<thead>
<tr>
<th>To compare groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Select the <strong>MANAGE</strong> tab on the top right-hand side of the Applicant Review page.</td>
</tr>
<tr>
<td>2. Click the <strong>Group Compare</strong> icon.</td>
</tr>
<tr>
<td>3. Select the first group you wish to compare from the – <strong>Select first Group</strong> – dropdown menu.</td>
</tr>
<tr>
<td>4. Select the word corresponding with the comparison you wish to make from the – <strong>Select an Operation</strong> – dropdown menu (i.e. ‘or,’ ‘and,’ or ‘and not in’).</td>
</tr>
</tbody>
</table>

*Hint: By selecting ‘or,’ you will generate a list of all the applicants that are in either of the two groups. Selecting ‘and,’ will generate a list of only those applicants that are in both of the two groups you select. Selecting ‘and not in’ will generate a list of only the applicants that are in Group 1 but not in Group 2.*

| 5. Select the second group you wish to compare from the – **Select second Group** – dropdown menu. |
| 6. Click the red **Show Applicants** button in the bottom right-hand corner of the textbox. |
Emailing Student Applicants:
You can email applicants using either new emails or email templates.

To send an email to an applicant:

1. Navigate to the appropriate list of student applications by clicking the appropriate tab (Unsubmitted Applications, Pre-Review, Review & Recommend, Graduate School Review, or Final Processing) at the top of the page.

2. Select the student(s) you wish to email by clicking the small white box to the left of their name(s). A black checkmark will appear in the box.

3. Click the green Email button above the applicant list. A new window titled “Send Email” will pop up.

4. To create a new email, click the Create New Email button; to use a pre-formatted email template, click the Email from Template button.

   a. If creating a new email, Enter the email Subject and Content into the respective text boxes.

      *Hint: Enter the provided Email Phrases if/when you want the system to auto-populate individual student information into the template. For example, where you type {{FIRST_NAME}} into the template, the applicant’s first name will be filled in when the email is sent out.

   b. If using a template, select your template from the dropdown menu and click the red Select Template button (See the “To create an email template” instructions below).

   c. Once you have selected the email type you would like to send the Sender Name and Sender will auto populate with the information of who is logged in. You are able to change the Sender Name and Sender if you would like.
To create an email template:

1. Select the **MANAGE** tab on the top right-hand side of the Applicant Review page.

2. Click the **Email Templates** icon.

3. Click the red **+ Add Template** button on the right-hand side of the page. A window titled “Edit Email Template” will appear.

4. Enter the **Template Title**, email **Subject**, and email **Content** into the respective text boxes.  
   *Hint: Enter the provided **Email Phrases** if/when you want the system to auto-populate individual student information into the template. For example, where you type {{FIRST_NAME}} into the template, the applicant’s first name will be filled in when the email is sent out.*

5. Click the red **Create Template** button on the bottom right-hand side of the window.
Edit Email Template

**Template Title**: Test

**Subject**: 

**Content**:

```
Dear (FIRST_NAME),

Thank you for completing your application for the Computer Science Masters program at the University of Wisconsin Madison. Next your application will be reviewed by the admission committee and decisions for recommendation to the Graduate School will be made in the coming weeks. Another email will be sent to you when a decision has been made about your application.

Thank you,

Computer Science
University of Wisconsin Madison
```

**Email Phrases**

Phrase | Description
-------|-------------

**Cancel** | **Create Template**
**Template Title**: MS-Recommended for Admission

**Subject**: Recommended for Admission

**Content**

```html
HI {{FIRST_NAME}},

You have been recommended for admission to the {{PROGRAM_NAME}} program for the {{TERM}}. We feel that you would be a great fit for our program.

Before your admission can be finalized the Graduate School will review your application and give a final admission decision.

Please call if you have questions!

Thank you!

The Computer Science Team
```

**Email Phrases**

<table>
<thead>
<tr>
<th>Phrase</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>{{APPLICATION_LINK}}</td>
<td>Link to eApply</td>
</tr>
<tr>
<td>{{CAMPUS_ID}}</td>
<td>Applicant's Campus ID</td>
</tr>
<tr>
<td>{{FIRST_NAME}}</td>
<td>Applicant's First Name</td>
</tr>
<tr>
<td>{{LAST_NAME}}</td>
<td>Applicant's Last Name</td>
</tr>
<tr>
<td>{{PROGRAM_NAME}}</td>
<td>Description of Plan/Subplan Applied For</td>
</tr>
<tr>
<td>{{SUBMISSION_DATE}}</td>
<td>Date of Applicant Submission</td>
</tr>
<tr>
<td>{{TERM}}</td>
<td>Term applied for</td>
</tr>
</tbody>
</table>

*Hint added email phrases*
Creating Teams:

You can assign applications to either an individual reviewer or a team of reviewers. In order to do so, you must first create the Team.

To create a team:

1. Select the MANAGE tab on the top right-hand side of the Applicant Review page.

2. Click the Teams icon.

3. Click the red + Add Team button on the right-hand side of the page. A new window will pop up titled “Create Team.”

4. Enter the Team Name into the text box.

5. Click the red Create Team button.
To add members to a team:

1. In the Teams section of the MANAGE tab, click the green Edit Members button aligned with the team name (on the right-hand side of the page). A window titled “Edit Members for ___ Team” will pop up.

2. Enter the name of the person you wish to add as a member into the Person text box. As you type, the auto complete feature will search the campus directory by the person’s last name, first name, and/or NetID.

3. Click the Add button. You may add multiple members before saving.

4. Once you have added all members, click the red Save Members button.

Teams can have both members and administrators. Members are able to view the groups to which they are assigned, but cannot make administrative changes to the groups or the team itself.
To add administrators to a team:

1. In the Teams section of the MANAGE tab, click the blue Edit Administrators button aligned with the team name (on the right-hand side of the page). A window titled “Edit Administrators for ___ Team” will pop up.

2. Enter the name of the person you wish to add as an administrator into the Person text box. As you type, the auto complete feature will search the campus directory by the person’s last name, first name, and/or NetID.

3. Click the Add button. You may add multiple administrators before saving.

4. Once you have added all administrators, click the red Save Administrators button.

Team Administrators have more rights than team members, in that they can make changes to groups or the team itself. These changes include adding/deleting members, assigning groups, deleting groups, etc.
Customizing Checklist Items:

On the student-facing side of the website, student applicants can view a “status check.” This is a checklist of items that need to be turned in after submission of the application which allows students to see what they have turned in and what they still need to submit.

Certain items, such as the student’s final transcript and test scores, are defaults for all programs and therefore appear automatically in every student’s checklist. Coordinators can also add program-specific items to the checklist through the Custom Checklists function of the Applicant Review website.
To add custom items to a program’s checklist:

1. Select the **MANAGE** tab on the top right-hand side of the Applicant Review page.

2. Click the **Custom Checklist Items** button.

3. Click the **+ Add Custom List** button on the right-hand side of the page. A window that says “Create Checklist” will pop up.

4. Select the program you wish to add a checklist item for from the **Program** dropdown menu.

5. Type the checklist item description into the **List Item** text box.

6. Click the white **Add** button.

7. Click the red **Create Checklist** button on the bottom right-hand side of the pop-up window.
Customizing Table Columns:

On each page in the Applicant Review system, there are various columns that display automatically. For example, the Unsubmitted Applications Page automatically displays the following columns: Name, Application Progress, Application Summary, and Groups. However, you can customize the columns that appear on each page to suit your own needs. In other words, you can add or remove columns to appear on each page.

To customize your table columns:

1. Select the **MANAGE** tab on the top right-hand side of the Applicant Review page.

2. Click the **Table Columns** button. You will see a table for each Applicant Review Page (i.e. Unsubmitted Applications Page, Pre-Review Applications Page, Recommend Page, Graduate School Review Page, and Final Processing Page) containing the columns that are displayed on that page.

3. Locate the page you wish to edit, and click the **Edit Columns** button in the top right-hand corner of that page’s table. A window will pop up that says “Configure columns to display on ___ Page.”

The various columns that you can choose from are displayed in this window, with a check box to the left of each column type.

4. **Check** the boxes to the left of the columns you wish to display. **Uncheck** the boxes next to the columns you do not want to display.

5. Click the red **Save Configuration** button in the bottom right-hand corner of the window.

*Note: columns can be reconfigured at any time. Simply return to this page and check the columns you wish to see and uncheck those you don’t.*
Review Scales Function: ***

You can create review forms for your program and choose which review forms to use on this page.

To add a review form for your program:

1. Select the **MANAGE** tab on the top right-hand side of the Applicant Review page.

2. Click the **Review Scale** button.

3. Click the red **+ Add Review Form** on the right side.

4. Select your program from the **– Select Program –** dropdown menu.

5. Write out your desired instructions in the **Review Form Instructions** box.

6. Select ’yes,’ if you wish to use a ranking scale.

   *If you do not, select ’no,’ and skip step 7 and 8.

7. Pick a numerical review scale by entering numbers into the ‘**Range Start**’ and ‘**Range End**’ boxes.

8. Enter a number into the **Range Interval** box to determine the increments for the ranking scale.

9. Select ’yes,’ if you would like to have a “Recommend for Admission? Y/N” question in the review form.

10. Click the red **Create Review Form**.

   *Note: to choose which form to use, check the box under the ‘Use Yes/No?’ column.
To view a summary of the stage in the review process of all the applications for a specific program:

1. Select the **DASHBOARD** tab at the top left-hand side of the page.

2. Select the desired term from the **Select a Term** dropdown menu.

3. Select the desired program from the **Select a Program** dropdown menu.

4. Click the red **Get Stats** button. A chart will appear which will display the number of applicants in each stage of the application program.

*Hint: In order to view the exact number of applicants in a category, hover your
To view a summary of citizenship status and AOF eligibility of applicants for a specific program:

1. Select the **DASHBOARD** tab at the top left-hand side of the page.

2. Select the **–Select a Term—** dropdown menu. (You will be able to view one term at a time.)

3. Select the desired program plan from the **–Select a Plan—** dropdown menu. (This is the second box from the top of this page.)

4. Click the red **Get Stats** button. A box will appear which lists the total number of applicants, along with two graphs which display the AOF eligibility and Citizenship status statistics of the current applicants for this program.

*Hint: In order to view the exact number of applicants in a category, hover your cursor over a ‘pie piece’ of the chart and a bubble will appear displaying this information.*

Applications can also be broken down by citizenship status and AOF eligibility.
To view a summary of citizenship status and AOF eligibility of applicants for a specific group:

1. Select the **DASHBOARD** tab at the top left-hand side of the page.
2. Select the **Select a Term** dropdown menu. (You will be able to view one term at a time.)
3. Select the desired program from the **Select a Group** dropdown menu. (This is the third box from the top of this page.)
4. Click the red **Get Stats** button. A box will appear which lists the total number of applicants in this group, along with two graphs which display the AOF eligibility and Citizenship status statistics of the current applicants in this group.

*Hint: In order to view the exact number of applicants in a category, hover your cursor over a ‘pie piece’ of the chart and a bubble will appear which will displaying this information.*

You can also view Citizenship and AOF Eligibility statistics for students in a certain applicant group. In this case, you do not need to select a Program or a Plan, because all the applicants in a particular group are likely applying to the same program.
The Unsubmitted Applications Tab:
Within this tab, you can sort/filter, and group applications that have not been completed, as well as send emails to student applicants. To view this tab, click UNSUBMITTED APPLICATIONS on the top of the page, directly underneath the words ‘Applicant Review.’

Sorting applications:
Sorting applications allows you to order the applications by alphabetical order of students’ last name, application group name, or application progress.

To sort applications:

1. Click the arrow icons in bottom right-hand corner of the box displaying the category you wish to sort by (e.g., ‘Name’ or ‘Application Progress’).

2. To sort the same information in the opposite direction (e.g., alphabetical order to reverse alphabetical order), click the same arrow icons again.
Filtering applications:
The filter function allows you to view *only* applications which fall into certain categories of your choosing. You can filter applications by the following categories: student first name, student last name, program, term, application ID, or group.

To filter applications:

1. Choose a category in the blue **Active Filters** box.

2. **Enter** the application information into the text box (e.g., student first name, last name, or application ID)
   - or-
   **Select** the application information from the drop-down menu (e.g., term, group, program)

3. Click the **Apply Filter** button. Only those applications which fall into the categories you have selected will appear in the list of applications below.

*Note: You can enter/select multiple categories at a time.*
Saving filter configurations:
You can save certain filter category configurations so that you can pull them up and use them again later. For example, if you often view applications by program and term, you can save this configuration to use it again later.

To save filter configurations:
1. Follow the “To filter applications” instructions for the category configuration you wish you save.
2. Enter a name for your filter configuration into the white square to the left of the Save Filter box (in the upper right-hand corner of the Active Filters box). The name of the filter configuration should help you identify and use the filter again later.
3. Click the blue Save Filter button in the upper right-hand corner of the Active Filters box.

To use saved filter configurations:
1. Click the Load Filter button in the upper right-hand corner of the Active Filters box.
2. Locate the filter you wish to use, and click the red Select button aligned with that filter.
The Pre-Review Tab:
Within this tab, you can view applications that have been submitted but not yet moved to the Review & Recommend page. You can also download applications, Request a GPA evaluation, assign an application to a specific user, and move an application into review. To view this page, click the PRE-REVIEW tab at the top-center of the Applicant Review page.

Filtering in the Pre-Review Tab:
While the filter function on the ‘Pre-Review’ page works in the same way as it does on the ‘Unsubmitted Applications’ section, at this stage more information regarding each applicant will be available. Because of this, this section contains more possible filters.

Unique filter capabilities on this page include: the capability to filter students by their application Submit Date, GPA range, date of GRE score submission, AOF Eligibility, and Citizenship status.

To filter applications by the date that they submitted their applications,

1. Select the PRE-REVIEW tab at the top middle of the page.

2. Locate the section of the Active Filters box titled Submit Date.

3. Click the grey box to the right of the words ‘Start Date’. A drop-down calendar will appear.

4. Click on the date you wish to enter as the start date. The ‘Start Date’ box will automatically display the date you selected.

5. Do the same for the ‘End Date.’

   *Hint: do not forget to select a program if you are only interested in viewing applications submitted to a specific program.

6. Click the red Apply Filter button in the bottom right-hand corner of the Active Filters box. The Applicant Review table below the Active Filters box will now display only the applications that were submitted within the date range that you selected.

In order to filter applications by the date they submitted their GRE scores, follow the above directions exactly, but do so using the section of the Active Filters box titled GRE Received.
To filter applications by GPA,

1. Locate the section of the **Active Filters** box titled **GPA**.

2. In the box that says ‘**Range Start,**’ type a number from 0-4.0. This number will represent the low end of the GPA range you wish to search.

3. In the box that says ‘**Range End,**’ type a number from 0-4.0. This number will represent the high end of the GPA range you wish to search.

   *Hint:* do not forget to **select a program** if you are only interested in viewing applications submitted to a specific program.

4. Click the red **Apply Filter** button in the bottom right-hand corner of the Active Filters box. The Applicant Review table below the Active Filters box will now display only the submitted applications which have GPAs within the range that you specified.

In order to filter applications by AOF eligibility and/or citizenship, simply click the bubbles next to the characteristic you wish to display. For example, click the bubble to the left of **Domestic** if you wish to view only domestic student applications.
To download a specific application or group of applications:

1. **Select** the student(s) whose applications you wish to download by clicking the small white box to the left of their name(s). A black checkmark will appear in the box.

2. Click the white **Download** button above the Applicant Review table.

3. The downloaded application will appear as an icon on the lower left hand side of your browser, **click** the icon to view the spreadsheet.
Requesting a GPA Evaluation:
Using the ‘Request GPA Eval’ function, you can request an evaluation by the Graduate School of a student’s GPA. You may choose to do this when a student has submitted a GPA from a school that you are unsure about (such as an international institution).

To request a GPA Evaluation,

1. In the Pre-Review tab Select the student(s) for whom you wish to request a GPA evaluation by selecting the small white box to the left of their name(s). A black checkmark will appear in the box.

2. Click the blue Request GPA Eval button above the Applicant Review table. A window will appear that says “Are you sure you want to request a GPA evaluation for these applications?”

3. To the right of the words ‘Type of Evaluation Request,’ select either Routine or Rush by clicking on the bubble to the left of the appropriate word. An evaluation should be considered “Rush” if you need it by a certain impending date.

4. Enter any information you may want to include in your GPA Evaluation request in the Request Comments text box. This information will be received by the Graduate School employee who fulfills your GPA evaluation request.

5. Click the red Yes button in the bottom right-hand corner of the window.
Assigning an Application to a User:
The Assign function allows you to assign a student application to either a Team of reviewers or an individual person.

To assign an application to a user:

1. **Select** the student(s) you wish to assign to a user by clicking the small white box to the left of their name(s). A black checkmark will appear in the box.

2. Click the blue **Assign** button above the Applicant Review table. A window will appear that says “Are you sure you want to assign these applications?”.

3. To assign an application to a team: select the appropriate team from the **Team** dropdown menu.
   - or -
   To assign an application to an individual person, type the person’s name or NetID into the **Person** text box. The autocomplete features will search for the individual by first/last name and/or NetID as you type.

4. Click the red **Yes** button in the bottom right-hand corner of the window.
Select Team from drop down

Type in the person’s name
Moving an Application to Review:

When an application is complete and ready to move into the Review stage, you can do that here.

To move a student application to review:

1. **Select** the student(s) you wish to move to review by clicking the small white box to the left of their name(s). A black checkmark will appear in the box.

2. Click the white **Move to Review** button above the Applicant Review table. A window will appear that says ‘Are you sure you want to move these applications to the Review & Recommend section?’

3. Click the red **Yes** button in the bottom right-hand corner of the popup window. This student’s application will now appear in the Review & Recommend section of the applicant review website.
The Review & Recommend Tab:
To view this tab, click REVIEW & RECOMMEND at the top-center of the Applicant Review page. Within this tab, you can view applications that have been moved to review but not yet given a recommendation to move forward. Like previous tabs, here you can view, sort, filter, group, and download applications, as well as email one or more applicants. From this page, you will also be able to recommend or not recommend a student application for Graduate School review.

To Recommend a student application for Graduate School Review:

1. Click the **Review & Recommend** tab at the top-center of the Applicant Review page.

2. **Select** the student(s) you wish recommend/not recommend by clicking the small white box to the left of their name(s). A black checkmark will appear in the box.

3. Click the blue **Recommend** button above the Applicant Review table. A window will appear that says “Program Recommendation Form”.

4. Select the appropriate program by clicking on the grey **Select Program** box, which will prompt the display of a full list of programs.

5. Select the admit code from the – **Select Admit Code** – dropdown menu.  
   *Note: International applications require a code to be selected from the **International Code** dropdown menu.

6. Enter the month and year that the student will be expected to complete the program from the **Completion Date – Month** – and – **Year** – dropdown menus.  
   *Note: This step is required for **International Applicants**

7. Click the red **Yes** button in the bottom right-hand corner of the window.
To Not Recommend a student application for Graduate School Review:

1. Click the **Review & Recommend** tab at the top-center of the Applicant Review page.

2. Select the student(s) you wish not to recommend by clicking the small white box to the left of their name(s). A black checkmark will appear in the box.
The Graduate School Review Tab:
To view this tab, click GRADUATE SCHOOL REVIEW at the top right-hand side of the Applicant.
Within this tab, you can view applications that have been moved into the Graduate School review stage. Like in previous tabs, here you can view, sort, filter, group, and download applications, as well as email one or more applicants. You can also sort applications by their admit code. From here, you can track the status of an applicant: whether they have been reviewed or not yet reviewed by the graduate school.

The Final Processing Tab:
To view this tab, select the FINAL PROCESSING tab at the top right-hand side of the Applicant Review page. Within this tab, you can view applications that have moved beyond the Graduate
School review stage and into the final processing stage. Like in previous tabs, here you can view, sort, filter, group, and download applications, as well as email one or more applicants. Applicants that can be seen in this tab have been reviewed but not yet matriculated in the system.