Graduate Studies

Slate Fellowship Training for Graduate Program Coordinators
December 9 & 10, 2020
AGENDA

• Deadlines and Overview
• PRM
• Prospective Student Process
  o Faculty Responsibilities
  o Coordinator Responsibilities
  o Chair Responsibilities
• Continuing Student Process
  o Faculty Responsibilities
  o Coordinator Responsibilities
  o Chair Responsibilities
• Questions
ANNUAL INTERNAL FELLOWSHIP COMPETITION

Award $6.6 million
• 68 fellowship opportunities awarded to 325 students
• 11 open to nonresident alien students

Deadlines
• January 15th: Fellowship applications from students through Slate (our online application system)
  o Some programs have an earlier deadline for prospective students
  o We are encouraging students to ensure their letters of reference are also submitted by January 15th. We send auto-generated reminder emails about missing materials
• Programs Rank students
  o Evaluate in a timely fashion, assemble committees and schedule meetings well before deadlines
  o Meet between Jan 18th and Feb 05th for ranking
• Friday, February 05th: Graduate Programs submit ranked nominations to Graduate Studies
• March: Graduate Studies begins emailing offer letters to students
  o Awards are always confirmed with each graduate program prior to sending the offers to the students
• Second and third round offers continue through May
Overview

Prospective Student Fellowship Process

1) Assign fellowship roles to faculty in PRM

2) Implement a process to determine a sub-set of students you want to consider for fellowship nomination.
   a) Add copies of these students’ admission applications to the “Program Ranking” bin of the Fellowship Workflow

3) Implement a process to confirm the final list of students you want to rank and nominate.
   a) Add any fellowships the students didn’t choose
   b) Add DDGF (optional for some programs)
   c) Rank the students
   a) Move the ranked students to the “Fellowship Chair Submission” bin

4) Confirm your ranked list and have your Fellowship Chair move the ranked students to the “F: Grad Studies” bin

5) Graduate program process is complete
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People and Role Manager (PRM)

Faculty Slate Access

- Login to PRM: https://prm.gs.ucdavis.edu/
- Search for your faculty member (person quick search)
- Choose “+Add Role”
- Slate access choices (gives access to both prospective and continuing student fellowship workflow):
  - Fellowship Reviewer Group = can see all Reader Review Forms
  - Fellowship Reviewer Private = cannot see Reader Review Forms
  - Fellowship Staff Assistant = application read only
- Choose Major Program
- End date is optional
- Save
  - Slate access updates daily, overnight around 3 am

If you can’t find the employee, email: gradpermissions-request@ucdavis.edu
People and Role Manager (PRM)

Faculty Slate Access

- To see who has Slate Access via PRM
  - Go to “Roles by App”
  - Then “Slate Roles” for a full list by Grad Program
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Prospective Student Fellowship Process

Accessing the Admission Workflow

- Start in Slate (https://apply.grad.ucdavis.edu/manage/) and then go into Reader

This workflow is only for Continuing Students and will only be visible if the faculty member has been granted “Fellowship Review” access.
Prospective Student Fellowship Process

Accessing the Admission Workflow

Admission Workflow

- The front page of Reader now contains FAQs and a link to an applicant Excel query which is accessible by EVERY Reader!

We hope to continually add information to this front page to make navigation of Reader easier for users.
Prospective Student Fellowship Process

Faculty fellowship review in the Admission workflow

- When you enter Reader, it starts on the “Home” tab (nothing displays), click on the “Browse” tab to see the bins
- Click on a bin, or the “Search” tab, to see the list of applications from the graduate programs you’ve been given access
Prospective Student Fellowship Process

Faculty fellowship review in the Admission workflow

- Faculty can filter the list using various queries on the right side
- Click on the “display copy” icon to open and review an application
Prospective Student Fellowship Process

Faculty fellowship review in the Admission workflow

- **Only add to your queue when ready to Rate & Comment!**
  - Once application is open, click on “Add to Queue” (lower left of screen) to access the Rate & Comment Reader Review Form. Finish ASAP as applications can only be in one bin at a time.

- Click on “Review Form / Send to Bin” (lower right of screen) to open the Reader Review form
Prospective Student Fellowship Process

Faculty fellowship review in the Admission workflow

- Check “Reader Rate & Comment” to expand (open) the form un-expanded view:
  - The single Rating field is used for both admissions and fellowships
  - Once submitted, this appends to the application as a Reader Review Form and removes the application from your queue

Reader Rate & Comment Form

- This field is required. Your program should develop a rubric to ensure ratings are on the same scale.
- This field is not required. May be used to record any comments about the applicant.
- This field is not required. Provided to aid in the admission review process.
- This field can be used to communicate to the program if you think the student would be a good fellowship nominee. This field is not required and selecting “Yes” will not guarantee the student is nominated.
- This defaults to the current bin and faculty will not be able to change this field.
- Click “Send” to save the form and move the application out of your Queue.
Prospective Student Fellowship Process

Faculty fellowship review in the Admission workflow

- If using the “Overall Rating” functionality, all faculty in the program must agree to a common rubric to ensure all ratings are on a common scale.
  - All of our applicants are generally excellent students. A “1” rating isn’t necessarily a terrible student, it is simply the lowest rating in the group of excellent students the faculty member reviewed.
  - All faculty members should try their best to use the entire scale.
    - While it is reasonable to think all the great students who apply to UC Davis should receive 8, 9, or 10 ratings, to use the whole scale simply convert the 8’s to 1’s, the 9’s to 5’s or 6’s, and leave the 10’s.
  - In our experience, once a faculty member reviews a handful of students, they are quickly able to group the students and apply the scale appropriately
  - Your program could also assign definitions to each of the ten rating, for example, “1 = not prepared for graduate study, do not admit” and “10 = an independently wealthy world-class superstar genius candidate, admit yesterday”.

AGENDA

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- PRM
- **Prospective Student Process**
  - Faculty Responsibilities
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  - Chair Responsibilities
- **Continuing Student Process**
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  - Chair Responsibilities
- Questions
• Formulate a process to choose a sub-set of students to rank and nominate for fellowships.
  o Start in the Admission workflow
  o Obviously, you will only nominate students for fellowship consideration if you want to admit them.
• Add copies of admission applications to the Fellowship workflow
Prospective Student Fellowship Process

Coordinator Process

- Tools (queries) to help you identify students and organize reviews
  - Can run actual reports in the Query module
  - Use the “Prospective Student Fellowship” folder
  - Can also filter students in Reader (page 21)
- In Slate, use this pull-down menu to access Queries
Prospective Student Fellowship Process

Coordinator Process

- Tools (queries) to help you identify students and organize reviews
  - For “PINNED” filters, you must add the graduate program(s).
    - Choose multiple programs by pressing the control key while selecting programs
Prospective Student Fellowship Process

Coordinator Process

• Tools (queries) to help you identify students and organize reviews
  - PF: All Fellowship Eligible in Admission Workflow
  - “Prospective Student Fellowship Eligible” = If student has submitted their app before your program’s fellowship deadline AND application is complete. This filter is included in all “fellowship” queries.
  - Many programs will have applications in their admission workflow who are NOT fellowship eligible.

• Faculty Rating Average = Faculty members’ rating average from their Admission Reader (Rate and Review) forms

• Rec for GS Fellowship = at least 1 faculty says “Yes” they recommend the student for fellowship nomination
Prospective Student Fellowship Process

Coordinator Process

- Tools (queries) to help you identify students and organize reviews
  - PF: Fellowships by Student

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Prospective Student Fellowship Process

Coordinator Process

• How to add copies of admission applications to the “Program Ranking” bin of the Fellowship Workflow

• Tools (queries) to help you identify students and organize reviews
  o Can filter students in Reader
  o Select filter “F: Eligible for Prospect Fellowships” in the second drop down menu in the right hand column
  o This filter will display all the students that are eligible for fellowships in their graduate program
  • Select graduate program(s) you want. Note: Coordinators can see entire list of programs here, but will only have access to their programs.
    o You can select multiple programs by holding down the control key and clicking on the programs you want.

• This query includes the “Faculty Average Rating >=0” filter. This can be deleted by clicking the red X.
How to add applications to the “Program Ranking” bin of the Fellowship Workflow

- Add applications to your queue to access the “Add to Prospective Fellowship Workflow” Reader Review form.
- You create a “copy” of the application and add it to the prospective fellowship “Program Ranking” bin by completing the “Yes” answer to this Reader Review form.
- This DOES NOT move the application further in your admission process. The admission application will remain in the current bin for further admission processing.
- This does not nominate a student for fellowship consideration, you could still choose to not nominate/rank this student in the fellowship processes to follow.
Prospective Student Fellowship Process

Coordinator Process

- Program Ranking bin
  - To access the applications in the Fellowship Workflow, you have to exit out of the Admission Workflow and enter the Fellowship Workflow.
  - Copies of the applications you indicated “Add to GS Fellowship Ranking” are now in the “F: Program Ranking” bin under the “Program Review – Prosp.” column in Reader.
Prospective Student Fellowship Process

Coordinator Process

- Tools (queries) to help you identify students and organize reviews
  - PF: Applications in Program Ranking Bin

Exports

- Name
- Graduate Program
- Faculty Rating Average
- Rank?
- Ranking

Filters

- Matching Rows: 0

- Round IN Application for Graduate Admissions
- Workflow Bin IN Fellowship: F
- Faculty Rating Average PINNED >= 0
- Graduate Program PINNED IN
Prospective Student Fellowship Process

Coordinator Process

- Program Ranking bin
- Tools (queries) to help you identify students and organize reviews
  - Can filter students in Reader
- Default filter is “F: Prospect Fellowship – Ranking”.
- Select graduate program(s) you want. Note: Coordinators can see entire list of programs here, but will only have access to their programs.
  - You can select multiple programs by holding down the control key and clicking on the programs you want.
- Coordinators can also add an addition filter of “Faculty Rating Average”
- This filter will display all the students in the Program Ranking bin along with their Average Faculty Rating and your fellowship nomination ranking.
Prospective Student Fellowship Process

Coordinator Process

• Program Ranking bin
  • Add applications to your queue to access the “Prosp Fellowship Ranking” Reader Review form.
  • To expand the form, select “Yes” for “Rank the applicant?”
  • Rank the student (multiple Ranking Reader Forms may be submitted to change/correct a previously submitted ranking)
  • Option to add fellowships for which the student did not self-nominate.
  • If your program is eligible, there are separate fields to nominate the student for the DDGF
  • Send the form but keep in the same bin until you are finished ranking all students you want to nominate.
  • Check your progress by running the filter or the query.
  • When finished ranking, send the applications to the “F: Fellowship Chair Submission” bin (individually from Reader or by batch using the “Applications in Program Ranking bin” query).
    o Choose your chair in the “Next Reader” bin to add the applications directly to their queue.
  • You may simply leave un-ranked students in this bin.
Prospective Student Fellowship Process

Program Ranking bin

- Ranking Strategy
  - Rank 1, 2,…,30, with 1 being the highest.
    - We’ve set the maximum to 30. The average number of nominations we receive per program is 10.
    - The system allows duplicate ranking, please audit for this error.
  - Rank students based primarily on overall quality/recruiting priority, not by fellowship.
  - You do not have to decide whether to rank a merit fellowship or a diversity fellowship as #1.
    - Graduate Studies reviews these two types of fellowships separately and for each graduate program I extrapolate the students’ ranking based on the fellowship type.
Prospective Student Fellowship Process

Coordinator Process

- Tools (queries) to help you identify students and organize reviews
  - PF: Dean’s Distinguished Query
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Prospective Student Fellowship Process

Fellowship Chair Process

- Fellowship Chair Submission bin
  - To access the applications in the Fellowship Workflow, you have to exit out of the Admission Workflow and enter the Fellowship Workflow.
Prospective Student Fellowship Process

Coordinator Process

- Tools (queries) to help you verify your final ranking
  - PF: Applications in Chair Submission Bin

In the reader queue, you can choose the Reader Form and see the ranking.
Fellowship Ranking Review Tool: In the Program Ranking Bins in the Fellowship Workflow ("F: Program Ranking – CF" and "F: Program Ranking"), you will now see a new tab at the bottom of your navigation screen labeled Ranking Review. If you click on this tab (WITHIN ANY APPLICATION IN THAT BIN), it will show you a report of all applications in the same major.

- This report will show both the Faculty Average Rating for each application AND the Fellowship Rank for any applicants you have ranked.
- The report will automatically sort the results to show Rank order (1-30) and then Faculty Rating Average (10-0):
- You can use this report to check your rankings of other applications so that you don’t accidentally assign 2 applications the same rank. The nice part about this report is that you can be looking at it while you are filling out the Fellowship Ranking Form.
Prospective Student Fellowship Process

Fellowship Chair Process

- Fellowship Chair Submission bin
- Confirm rankings using Reader filter or Query report
- The Chair should access Reader via the Fellowship Workflow
- To revise a ranking, send the application back to the “Program Ranking” bin
- Coordinators can view this bin but only the Chair can submit the Reader Review form
- The Chair needs to add all applications in the “Fellowship Chair Submission” bin to their Queue.
  - Coordinator could have already placed them all in the Chair Queue
- To confirm Ranking and Fellowship Nomination for each application, choose “F: Grad Studies” as the “Next Bin” and hit “Send”.
- When all applications have been confirmed, the “Fellowship Chair Submission” bin will be empty.
Prospective Student Fellowship Process

Coordinator Process

• Tools (queries) to help you verify your submitted applications
  o PF: Confirm Nomination - Prosp

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<tbody>
<tr>
<td>Name</td>
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<tr>
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<td>Prosp Student Degree Obj</td>
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<tr>
<td>Prosp Student Program Rank</td>
</tr>
<tr>
<td>Current Workflow Bin</td>
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<tr>
<td>Workflow IN Fellowship</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Filters</th>
<th>Check Logic</th>
<th>Matching Rows: 0</th>
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<tbody>
<tr>
<td>Round</td>
<td>IN Application for Graduate Admission and Fellowships</td>
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</tr>
<tr>
<td>Workflow Bin</td>
<td>Workflow Bin IN Fellowship: Fellowship - FA Evalua</td>
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<td>Tag</td>
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<tr>
<td>Graduate Program</td>
<td>PINNED IN</td>
<td></td>
</tr>
</tbody>
</table>
Prospective Student Fellowship Process

Coordinator Process

- Fellowship offer letters and fellowship decisions

  o Go to the Fellowship Workflow in Slate Reader
    o Select “Browse” in the left hand column
    o Select the “F: Yes” bin
    o Open the student’s application
    o Click on “Offer Letters” in the left hand column
    o Here you will see their SIR Form, Admission Letter, Fellowship Letter, and Fellowship Decision Form

  o Go to the Admission Workflow in Slate Reader
    o Do a search for the student
    o Open the student’s application
    o Click on “Decision Letters” in the left hand column
    o Here you will see their SIR Form, Admission Letter, Fellowship Letter, and Fellowship Decision Form
Prospective Student Fellowship Process

Process Flow

Admission process continues…
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Overview

Continuing Student Fellowship Process

1) Assign fellowship roles to faculty in PRM

2) Encourage and assist students to complete their applications.
   a) Letters of recommendation are the only outstanding materials

3) Implement a process to determine a sub-set of students you want to consider for fellowship nomination.
   a) Add any fellowships the students didn’t choose
   b) Move these students from the “F: Program Review - CF” bin to the “F: Program Ranking - CF” bin

4) Implement a process to confirm the final list of students you want to rank and nominate.
   a) Rank the students
   b) Move the ranked students to the “F: Fellowship Chair Sub - CF” bin

5) Confirm your ranked list and have your Fellowship Chair move the ranked students to the “F: Grad Studies” bin

6) Graduate program process is complete
Continuing Student Fellowship Process

Accessing the Continuing Student Fellowship Workflow

- **F: Program Review – CF bin**
  - To access the applications in the Fellowship Workflow, you have to exit out of the Admission Workflow and enter the Fellowship Workflow.

- When you enter Reader, it starts on the “Home” tab (nothing displays), click on the “Browse” tab to see the bins.
- Click on a bin, or the “Search” tab, to see the list of applications from the graduate programs you’ve been given access.
Continuing Student Fellowship Process

Faculty fellowship review in the Continuing Fellowship workflow

- Faculty can filter the list using various queries on the right side.
- Click on the “display copy” icon to open and review an application.

- The default filter is set to “F: Display Continuing Students”. If you have access to multiple programs and only want to display students from one, don’t forget to add the graduate program major to the Pinned filter section.
Continuing Student Fellowship Process

Faculty fellowship review in the Continuing Fellowship workflow

- **Only add to your queue when ready to Rate & Comment!**
  - Once application is open, click on “Add to Queue” (lower left of screen) to access the Rate & Comment Reader Review Form. Finish ASAP as applications can only be in one bin at a time.

- Click on “Review Form / Send to Bin” (lower right of screen) to open the Reader Review form
• Check “CF - Rate & Comment” to expand (open) the form

un-expanded view:

- This field is required. Your program should develop a rubric to ensure ratings are on the same scale.
- This field is not required. May be used to record any comments about the applicant.
- This field can be used to communicate to the program if you think the student would be a good fellowship nominee. This field is not required and selecting “Yes” will not guarantee the student is nominated.
- This defaults to the current bin and faculty will not be able to change this field.
- Click “Send” to save the form and move the application out of your Queue.
Continuing Student Fellowship Process

Coordinator Process

- Tools (queries) to help you identify students and organize reviews
  - Choose the “Cont Student Fellowship” folder
  - For “PINNED” filters, you must add the graduate program(s). (choose multiple programs by pressing the control key while selecting programs)

Queries

<table>
<thead>
<tr>
<th>Name</th>
<th>Folder</th>
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<tbody>
<tr>
<td>CF: Applications in Program Ranking Bin</td>
<td>Cont Student Fellowship</td>
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<tr>
<td>CF: Apps in Chair Submission Bin</td>
<td>Cont Student Fellowship</td>
</tr>
<tr>
<td>CF: Fellowships by Student</td>
<td>Cont Student Fellowship</td>
</tr>
<tr>
<td>CF: Grad Coordinator Faculty Assignment &amp; Comments</td>
<td>Cont Student Fellowship</td>
</tr>
<tr>
<td>CF: Missing Checklist Items Query</td>
<td>Cont Student Fellowship</td>
</tr>
<tr>
<td>CF: Rate &amp; Comment Query</td>
<td>Cont Student Fellowship</td>
</tr>
<tr>
<td>CF: Student Basic Information</td>
<td>Cont Student Fellowship</td>
</tr>
</tbody>
</table>

Folders

- All Folders
- *Graduate Program Queries
- Audit
- Integration
- Prosp Student Fellowship
- Reader
- Reader-Reports
- Shared
- System
Continuing Student Fellowship Process

Coordinator Process

- Tools (queries) to help you identify students and organize reviews
  - CF: Fellowships by Student
Optional: Coordinators can use the “Major Professor” and/or the “Assigned Faculty Reviewer” fields to help identify and organize reviewer assignments.

- Use the “Grad Coordinator Faculty Assignments & Comments” query to review your data.
- Leave in the “Program Review” bin when saving the form for this purpose.
- Comments submitted using the “Comments for Fellowship Committee” form are only visible to faculty with Reviewer Group access.

How to move applications from the “Program Review – CF” bin to the “Program Ranking - CF” bin

- Add applications to your queue to access the “CF: Graduate Program Coordinator” Reader Review form.
- You move the application to the “Program Ranking” bin by choosing “F: Program Ranking - CF” as the “Next Bin”.
- This does not nominate a student for fellowship consideration, you could still choose to not nominate/rank this student in the fellowship processes to follow.
Continuing Student Fellowship Process

Coordinator Process

- Program Ranking bin
- Add applications to your queue to access the “Cont Fellowship Ranking” Reader Review form.
- To expand the form, select “Yes” for “Rank the applicant?”
- Rank the student (multiple Ranking Reader Forms may be submitted to change/correct a previously submitted ranking)
- Option to add fellowships for which the student did not self-nominate.
- Send the form but keep in the same bin until you are finished ranking all students you want to nominate.
- Check your progress by running the filter or the query.
- When finished ranking, send the applications to the “F: Fellowship Chair Sub - CF” bin (individually from Reader or by batch using the “CF: Applications in Program Ranking Bin” query).
  - Choose your chair in the “Next Reader” bin to add the applications directly to their queue.
- You may simply leave un-ranked students in this bin.
To expedite moving your ranked students to your chair bin, you can batch move their applications using a query.

- Choose the “Cont Student Fellowship” folder
- Choose the query: “CF: Application in Program Ranking Bin”

### Queries

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</tbody>
</table>
Continuing Student Fellowship Process

Coordinator Process

- Batch Movement
  - Open the “Pinned” filter and add your graduate program
  - Run the Query
Continuing Student Fellowship Process

Coordinator Process

- Batch Movement
  - In the “Output” dropdown, choose “Bin”
  - Hit “Export”
## Continuing Student Fellowship Process

### Coordinator Process

**Batch Movement**

<table>
<thead>
<tr>
<th>Bin Management</th>
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<tbody>
<tr>
<td>Workflow</td>
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<tr>
<td>Bin Action</td>
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<tr>
<td>Bin</td>
</tr>
</tbody>
</table>

- In “Workflow”, choose “Fellowship”
- In “Bin Action”, Choose “Set Bin”
- In “Bin”, choose “F: Fellowship Chair Sub – CF”

- To put the applications directly into your chair’s queue, search for their name in the “Add Reader” section.

  This query will pull all applications under that major in this bin. You will only want to check the students who you have ranked.

- hit “Update Selected” to move the checked apps.
Continuing Student Fellowship Process

Fellowship Chair Process

- Fellowship Chair Submission bin
- Confirm rankings using Reader filter or Query report
- The Chair should access Reader via the Fellowship Workflow
- To revise the Rankings, send back to the “Program Ranking” bin
- Coordinators can view this bin but only the Chair can submit the Reader Review form
- The Chair needs to add all applications in the “F: Fellowship Chair Sub - CF” bin to their Queue.
  - Coordinator could have already placed them all in the Chair Queue
- To confirm Ranking and Fellowship Nomination for each application, choose “F: Grad Studies” as the “Next Bin” and hit “Send”.
- When all applications have been confirmed, the “Fellowship Chair Submission” bin will be empty.
Continuing Student Fellowship Process

Coordinator Process

- Fellowship offer letters and fellowship decisions
Continuing Student Fellowship Process

Coordinator Process

- Fellowship offer letters and fellowship decisions
  - Go to the Fellowship Workflow in Slate Reader
    - Select “Browse” in the left hand column
    - Select the “F: Yes” bin
    - Open the student’s application
    - Click on “Offer Letters” in the left hand column
    - Here you will see their Fellowship Letter and Fellowship Decision Form
Continuing Student Fellowship Process

Coordinator Process

- Tools (queries) to help you verify your submitted applications
  - CF: Confirm Nomination - Cont

Exports

- Name
- UCD Student ID
- Cont Student Major
- Cont Student Degree Obj
- Cont Student Program Rank

Filters

- Continuing Student Fellowship Major: PINNED IN
- Workflow Bin: IN Fellowship - Fellowship - FA E
- Round: IN Application for Continuing Student Fellowships
- Workflow Bin: IN Fellowship - Fellowship - FA E
Continuing Student Fellowship Process

Process Flow

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