Review Process Administration

(1) Prepare for Reviews

Define Application Readiness

Update the *Application Verification Checklist* to determine when apps are ready for review.

Identify Reviewers

- **Reviewer-only Role**: Access to assigned reviews & applicant docs.
- **Custom Role**: Grant add'l access.

Create Review Groups & Conditions

Conditions: The group review ends after "n" number of "x" recommendations OR "n" number of reviews.

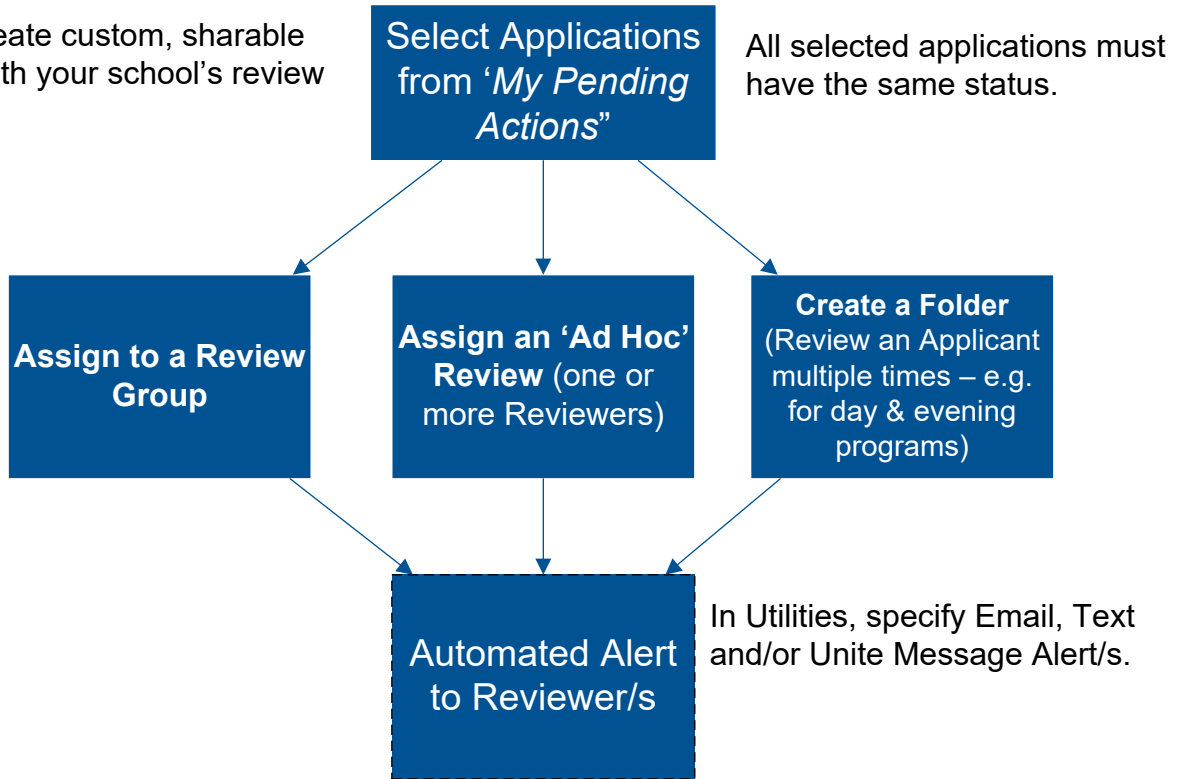**Committee**: Multiple reviewers, one recommendation

Concurrent: Reviews assigned simultaneously

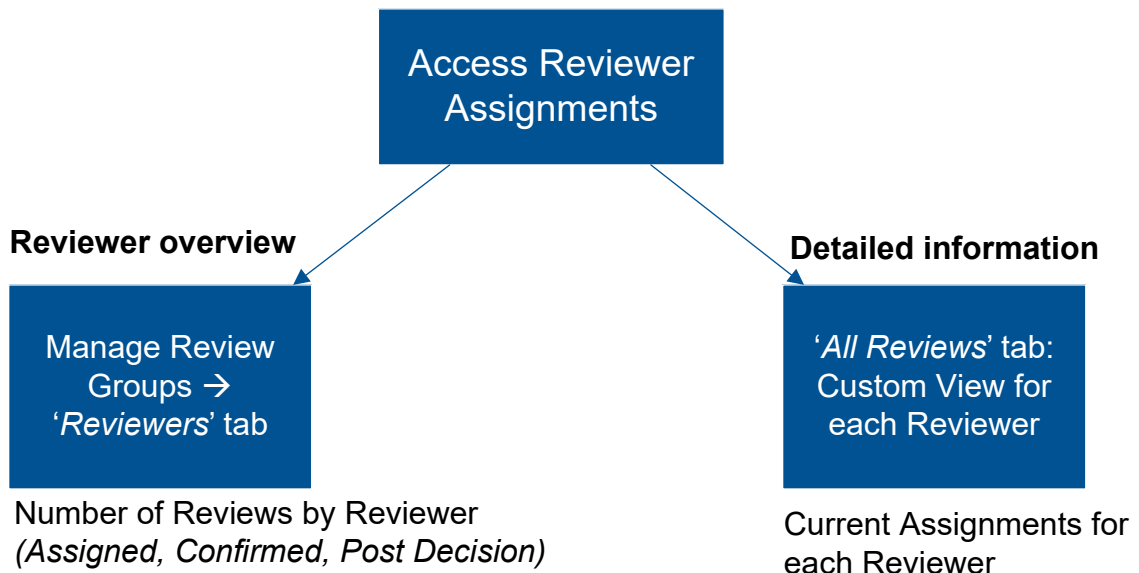**Sequential:** Reviews move from reviewer to reviewer

Review Process Administration

(2) Assign Reviews

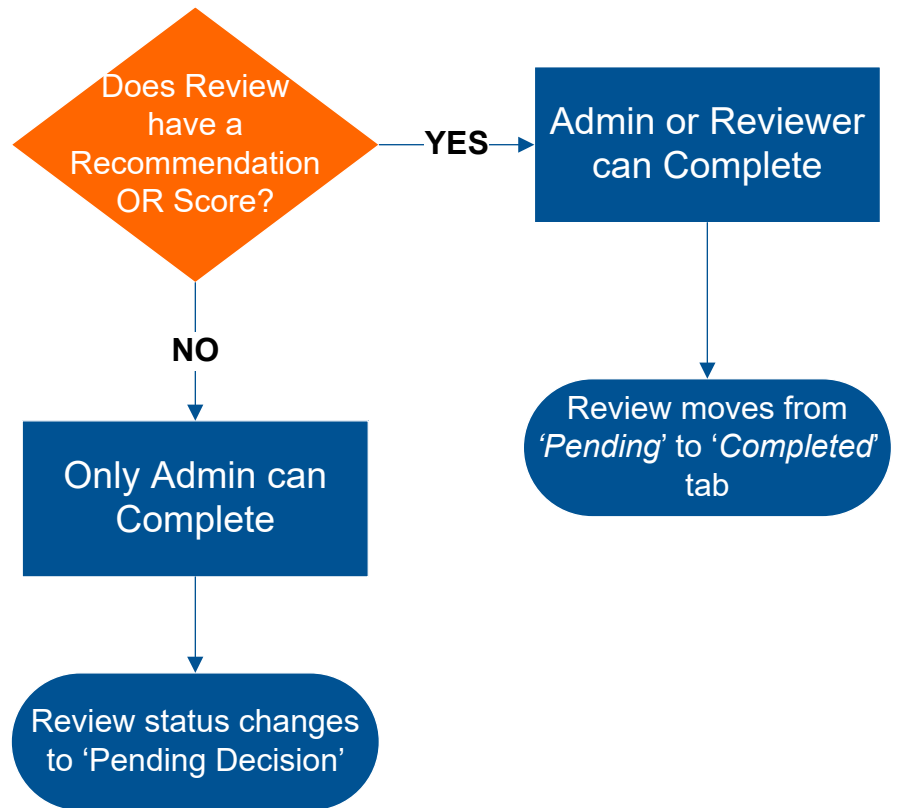**Tip**: Create custom, sharable views with your school's review criteria.

Select Applications from '*My Pending Actions*"

All selected applications must have the same status.

Assign to a Review Group

Assign an 'Ad Hoc' Review (one or more Reviewers)

Create a Folder (Review an Applicant multiple times – e.g. for day & evening programs)

Automated Alert to Reviewer/s

In Utilities, specify Email, Text and/or Unite Message Alert/s.

(3) Track Reviews

Access Reviewer Assignments

Reviewer overview

Manage Review Groups → '*Reviewers*' tab

Number of Reviews by Reviewer *(Assigned, Confirmed, Post Decision)*

Detailed information

'*All Reviews*' tab: Custom View for each Reviewer

Current Assignments for each Reviewer

(4) Complete Reviews in Bulk *(optional)*

All reviews in a batch must have the same status.

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Does Review have a Recommendation OR Score?
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— YES → **Admin or Reviewer can Complete**

↓ (from Admin or Reviewer can Complete)

Review moves from *'Pending'* to *'Completed'* tab

NO ↓

Only Admin can Complete
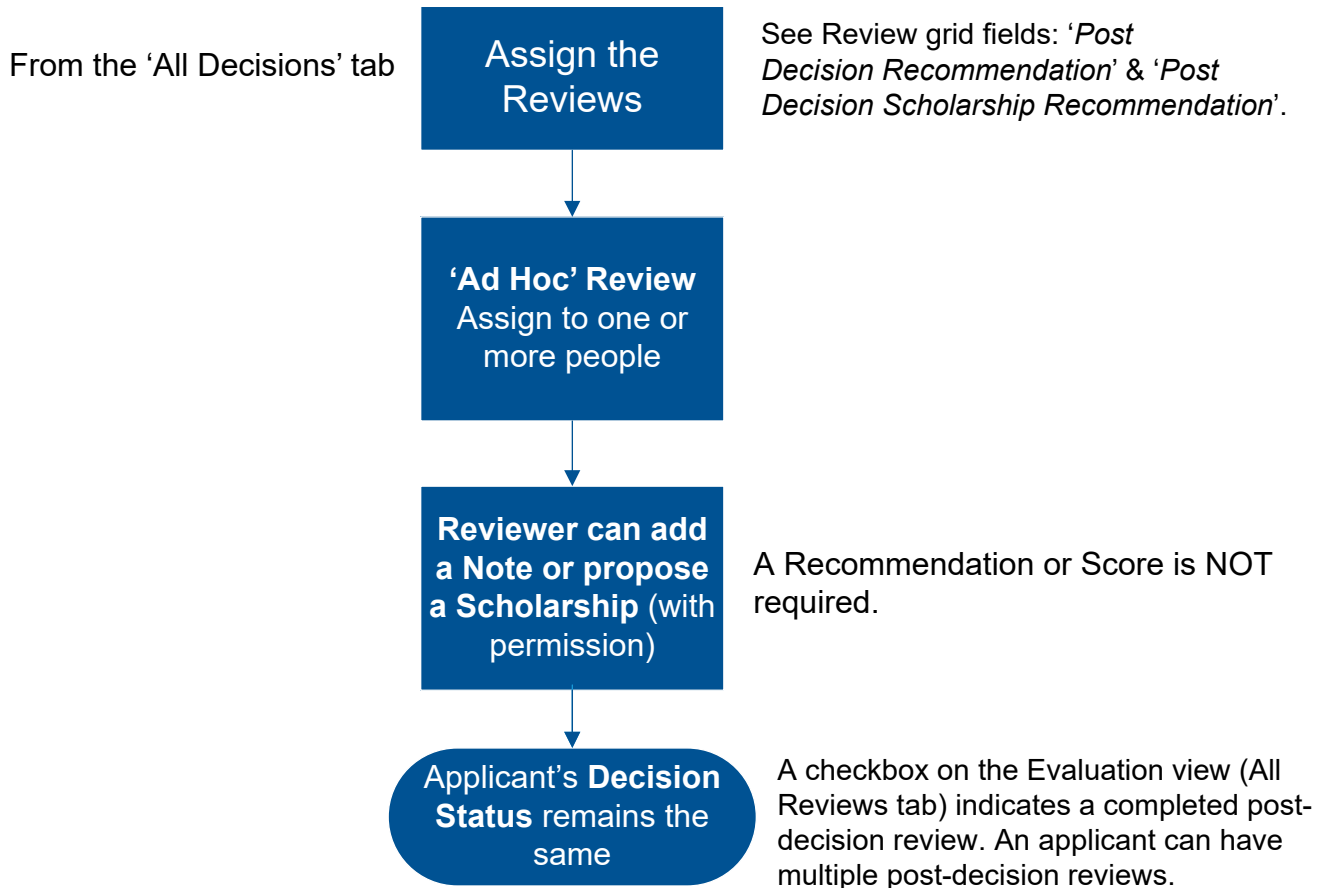
↓

Review status changes to 'Pending Decision'

(5) Assign Post-Decision Reviews *(optional)*

Why post-decision reviews?
Some ideas:
- Propose scholarships for admitted applicants.
- Take a second look at waitlisted applicants.
- Familiarize prospective mentors

From the 'All Decisions' tab

Assign the Reviews

See Review grid fields: '*Post Decision Recommendation*' & '*Post Decision Scholarship Recommendation*'.

'Ad Hoc' Review
Assign to one or more people

Reviewer can add a Note or propose a Scholarship (with permission)

A Recommendation or Score is NOT required.

Applicant's **Decision Status** remains the same

A checkbox on the Evaluation view (All Reviews tab) indicates a completed post-decision review. An applicant can have multiple post-decision reviews.

(6) Track Post-Decision Reviews *(optional)*

Manage Review Groups/ Reviewers

On the screen grid in the 'Reviewers' column, filter on '*post-decision*'.

Review Process Administration

Step 1: Prepare for Reviews

When you prepare for the review process, the first step is to decide when applications are ready for review. You can do this by updating the Application Verification Checklist. You will also need to identify your school's reviewers. Unite has a Reviewer-only role that gives reviewers access to their assigned reviews and applicant documents.   You can also create a custom role to grant additional permissions to reviewers.

Next, you can create review groups for your school. There are three types of review groups: Committees, with multiple reviewers and one recommendation; Concurrent reviews that are assigned simultaneously, and Sequential reviews that move from reviewer to reviewer. For each review group, specify the conditions that will indicate when a review is complete.

Step 2: Assign Reviews

The second step is to assign reviews. Select the applications you wish to assign from the 'My Pending Actions' tab on the Review screen. All selected applications must have the same status. You can create custom views based on your school's review criteria and share them with other users at your school. You can assign the applications to a review group or an 'ad hoc' review for one or more reviewers. Another option is to create a review folder for applicants who will be reviewed multiple times, perhaps for day and evening programs at your school. If you have set up email, text, and/or Unite message alerts, reviewers will be automatically notified of their upcoming reviews.

Step 3: Track Reviews

There are two ways to track reviews in Unite. The first way is on the Pending Reviews tab, in the Manage Review Groups and Folders area, where the Reviewers tab shows the number of assigned, confirmed and post-decision reviews for each reviewer. The second way is on the All Reviews tab, where you can see the current assignments for each reviewer. This information is continually updated.

Step 4: Complete Reviews in Bulk (optional)

In Unite, it is possible to complete reviews in bulk. All reviews in a batch must have the same status. Reviews that have a recommendation or score can be completed in bulk by administrators or reviewers. The completed reviews move from the Pending to the Completed tab. Reviews that lack a recommendation or score can only be completed by an administrator. In this instance, the review status remains at pending decision.

Step 5: Assign Post-decision Reviews (optional)

You have the option to assign ad-hoc reviews after a decision has been rendered. Schools sometimes assign post decision reviews to propose scholarships for admitted applicants, to take a second look at waitlisted applicants, or to help mentors familiarize themselves with prospective applicants. To assign post-decision reviews, go to the All Decisions tab. You may want to filter on the post-decision recommendation or post-decision scholarship recommendation fields.   With proper permissions, the post-decision reviewers can add a note or propose a scholarship. Recommendations or scores are not required. Post decision reviews do not change the applicant's decision status.

In evaluation view, a checkbox on the 'all reviews' tab indicates a completed post-decision review. An applicant can have multiple post decision reviews.

Step 6: Track Post-decision Reviews

To track post decision reviews, go to the 'My Pending Actions' tab and select 'Manage Review Groups and Folders'. On the screen, filter on the Post Decision Assigned ' or Post Decision Confirmed columns.