

Unite Education Program v9.0

Job Aid: 5696

About Customizable Summaries on Records and Windows

Throughout your admissions workflow, there may be specific information your school wants to focus on when looking at a person record or an application record. When verifying or reviewing applications, there may be specific information to focus on so that people do not have to look through the details. To help streamline your work, Unite has a summary section on the person record, the application record, the *Application Verification* window, and the *Evaluation* window with read-only fields to provide quick insights. Your school can configure the fields that display – allowing Unite users to quickly see details.

The following table provides a quick reference of the number of fields you add for summary information based on where you are in Unite.

Location	Quick Navigation	Maximum Fields
Person record	PEOPLE area > [person record]	20
Application record	PEOPLE area > [person record] > [application record]	8
<i>Application Verification</i> window	APPLICATIONS area > <i>All Applications, Pending Verification, or Incomplete</i> tab > [application]	12
<i>Evaluation</i> window	REVIEWS area > [any tab] > [application]	12

Any changes you make to customize the summary section on a record or window apply to all Unite users for your school. Before making changes, consider taking a screenshot of the summary area first. Once you apply your changes, you cannot reset the summary area to the default layout.

Person records

On each person record, you can add up to 10 read-only fields in two columns. The read-only fields are from expandable and collapsible sections on the person record. The following image shows the summary information on a person record.

The screenshot shows a person record for Aaron, Sandra (L28051324). The summary information is displayed in two columns:

- Left Column:** Cumulative GPA (3.39), Graduate Degree (MS), Graduate School (PHILADELPHIA UNIVERSITY), LSAT High Score (160), Graduate Deg. Date (08/2014), Second Major (POLITICAL SCIENCE), Undergrad Degree (BS), Undergrad School (UNIVERSITY OF SOUTH CAROLINA - LANCASTER), and Institution (UNIVERSITY OF SOUTH CAROLINA - LANCASTER | UNIVERSITY OF VALLEY FORGE | PHILADELPHIA UNIVERSITY).
- Right Column:** Current Employment, Disability, Hispanic/Latino (No), Gender (Male | Female), Preferred Name (Dee Dee), Email Address (Primary: qa11622@qatesting.org, Secondary: qa119664@qatesting.org), Preferred Method of Contact, Citizenship Type (US Citizen), and Ethnicity (Caucasian/White).

The **Activities** section includes tabs for All, Communication, Event, Contact Log, and Appointments. It shows a table of activities with columns for Type, Activity, W..., Atten..., Attended Da..., and Status. Below this is the **Applications** section, which includes a table of applications for 2022 Fall A1, 2018 Fall A1, 2017 Fall A9 - closed, and 2017 Fall A9 - closed.

Application records

On each application record, you can add up to two read-only fields in four columns. The read-only fields are from expandable and collapsible sections on the person record and on the application record. The following image shows the summary information on an application record.

The screenshot shows an application record for Aaron, Sandra. The summary information is displayed in two columns:

- Left Column:** Graduate School major, LSAT High Score (160), Graduate Deg. Date (08/2014), Second Major (POLITICAL SCIENCE), Undergrad Degree (BS), Undergrad School (UNIVERSITY OF SOUTH CAROLINA - LANCASTER), and Institution (UNIVERSITY OF SOUTH CAROLINA - LANCASTER | UNIVERSITY OF VALLEY FORGE | PHILADELPHIA UNIVERSITY).
- Right Column:** Gender (Male | Female), Preferred Name (Dee Dee), Email Address (Primary: qa11622@qatesting.org, Secondary: qa119664@qatesting.org), Preferred Method of Contact, Citizenship Type (US Citizen), and Ethnicity (Caucasian/White).

The **Applications** section includes a table of applications for 2022 Fall A1, 2018 Fall A1, 2017 Fall A9 - closed, and 2017 Fall A9 - closed. Below this is the **View Reviews** section, which includes a table of reviews with columns for Graduate Degree, Undergrad Degree, High Index, and Application Status. The table shows that the application for the University of South Carolina - Lancaster was **Admitted**.

Application Verification window

On the *Application Verification* window, you can add up to 12 read-only fields in one column. The read-only fields are from expandable and collapsible sections on the person record and application record. The following image shows the summary information on an *Application Verification* window.

Application Verification	
Back to Applications	
Rosetto, Benjamin	
L29054155	Send Communication
Cumulative GPA	3.80
Undergrad Degree	BS
Undergrad Degree Date	05/2008
Undergrad School	UNIV. OF DELAWARE
High Index	3.70
LSAT High Score	166
Application Status	Application Incomplete
Application Sub-Status	-
Application Fee	Yes
Application Signed	Yes
CAS Report Status	Paper / electronic reports have been generated
Personal Statement	Yes

Application Verification Checklist

Check off all items that are correct and complete, and Continue.
Any items with errors or missing information should be left unchecked and described in notes.

Evaluation window

On the reviewer *Evaluation* window, you can add up to 12 read-only fields in one column. The read-only fields are from expandable and collapsible sections on the person record and application record, as well as from the evaluation page for other reviewers. The following image shows the summary information on an *Evaluation* window.

Evaluation

Alfred, Jonathan
L30054049

Evaluation Summary

Recommendation	Admit
Application Status	Review In Progress
Sub Statuses	-
Scholarship Name	-
Scholarship Type	Dean Merit Merit
Applicant Type	1st Time
Application Type	A1
Degree	JD
LOR Recommender Name(s)	Waheed Hussain Tara Radin Brian Zarallo
LSAT High Score	169
Undergrad School	UNIVERSITY OF PENNSYLVANIA
Undergrad Degree	BA

Person Notes (1)

Application Notes (0)

Documents

Active Review | All Reviews (4)

Reviews In Progress

Assigned: - Due: -

Recommendation Proposed Scholarship

Scholarship Amount Score 1 Score 2

Related resources

- 5697 – Customize the Profile Summary on Person Records
- 5698 – Customize the Application Summary on Application Records
- 5699 – Customize the Evaluation Summary on the Reviewer Evaluation Window
- 5700 – Customize the Application Summary on the Application Verification Window