



Managing the Review Process in Unite

Frequently Asked Questions

STANDARD REVIEW GROUPS

- Use Standard review groups when you expect to have a consistent set of members throughout the review process. If needed, you can modify the membership and conditions of standard review groups after they are set up. There are three types of Standard review groups:
 - **Committee:** When a recommendation is confirmed by one member of the committee, the review is complete.
 - **Concurrent:** The review is sent to all reviewers in the group simultaneously. The review is complete when your school's conditions (e.g., number of admits, number of total reviews, etc.) are met.
 - **Sequential:** reviews are sent to the reviewers in the group one at a time. You can specify the order. The review moves to the next reviewer after the first reviewer has confirmed their recommendation or score. The review is complete when your school's conditions are met.

Q: When adding a reviewer to an existing review group, what is the effect on previously assigned reviews?

A: Reviews that have already met the criteria for completion are unaffected by the addition of a new reviewer. Reviews that are still in progress will be forwarded to the new reviewer.

Q: Can an email be automatically sent to notify a reviewer when a review is assigned to them?

A: Yes, email alerts will notify reviewers when applications are assigned to them for review. When this feature is enabled, it is turned on for all reviewers; it is not controlled at the individual reviewer level.



STANDARD REVIEW GROUPS *(continued)*

Q: Is it possible to create a sequential group where the outcome is dependent on one person voting admit or deny before the review flows to a larger concurrent group (i.e., faculty reviewers)?

A: This is something we are working on. It is a good example of a routing rule that can be customized for each school's review process.

TEMPORARY REVIEW GROUPS

You can use temporary (ad hoc) groups to assign reviews 'on the fly'. Temporary review groups are created on a one-time basis by selecting one or more applications from the Review grid and assigning them to one or multiple reviewers.

Q: Can we change the sequential order of reviewers in the temporary group?

A: No, temporary groups are created spontaneously. If you wish to change the order, you can unassign the review and create another ad hoc group with a different sequence of reviewers.

REVIEW FOLDERS

Folders enable you to assign a review to the same the same reviewer for multiple purposes. Folders can be used for individual reviewers or Ad Hoc temporary groups. Folders are not available for standard review groups.

Example: A school has day and evening programs. An application can be assigned twice to the same reviewer: once for the day program and again for the evening program.



THE REVIEW GRID: VIEWS AND FIELDS

Views can be very helpful to group related information and find specific data, as well as for assigning reviews. We suggest creating views on each tab ('All Reviews', 'My Pending Actions' and 'All Decisions') with the fields that are useful for your school's process.

Q: Do we need permission to share views?

A: No, views are not permission based. Select the desired view and then 'Update Current View' to see the Share option.

Q: Can I set a shared view as a default for all users at my school?

A: You can share the view with other users, but they will need to designate it as a default.

Q: Can I share a view with just one (or several) people instead of all users?

A: Currently shared views are visible to all users. We will consider allowing admins to selectively share views as a future enhancement.

Q: Is it possible to Preview a View? This would allow us to organize the view before it is saved.

A: We will discuss this enhancement request with the development team.

Q: What happens if a field we want to include is not an option in the grid setting?

A: Please contact your Support Analyst. We are continuing to add fields to the grids, so it is helpful to know which fields schools would like to use.

Q: Is it possible to add all Unite fields to all the grids?

A: We have done analysis and are planning to add fields incrementally. We will evaluate field availability in the grids and consider a more systematic way to add them.



THE CANDIDATE ANALYSIS SUMMARY – *FOR JD PROGRAMS*

The Candidate Analysis Summary consolidates review data in one location. You can choose how to display the information (scrolling, panels, tabs or columns) and whether to view the data in graphic or tabular formats. There is also a vertical slider that opens up the entire screen.

Q: Should the Candidate Analysis Summary be available from the Person record?

A: There is no specific plan at this time, but this topic has been discussed.

Q: If a school uses the Graduate Record Exam (GRE), where is that displayed?

A: The GRE is not assembled in the Candidate Analysis Summary. You can add it to the Evaluation Summary at the top of the screen.

Q: Can the default Zoom for PDFs (e-apps / CAS) be increased? The documents open at 17% and we have to expand each document individually.

A: We are investigating ways to correct this.

Q: Is an LLM version available?

A: Currently, the Candidate Analysis Summary is only available for JD programs. We are considering the addition of an LLM version in the future.



CONFIRMING REVIEWS AND DECISIONS

Q: How can we notify a Reviewer when an applicant withdraws while their Review is pending?

A: Once the applicant's status is changed to 'withdraw', any unconfirmed reviews are removed. A notification to reviewers will be part of the Routing Rules that are planned for a future release.

Q: Our school uses scores (not recommendations) when evaluating applicants. Can we include scores in the filter?

A: You can add the 'Confirmed Score 1' and 'Confirmed Score 2' fields to your review grid. The scores are displayed numerically separated by '|' in the order they were reviewed. The Evaluation Score (Eval Score) is a reportable field that allows you to average the scores, total the scores, or do no calculation with the scores. You can set the 'Eval Score' calculation in Global Settings / General Settings / Eval Score.

Tip: Reviewers can add scores and recommendations after saving a review. The review is still considered to be in Progress. (i.e., 'Pending Decision') after saving and before it is confirmed.

IMPORTANT: If your reviewers confirm a review and plan to revisit it later, make sure your Applicant Status Online (ASO) targeted messages and/or application status and application sub-statuses convey your desired message to the applicant.



BATCH CONFIRM / COMPLETE

Reviewers can confirm a batch of reviews that have a recommendation and/or a score. The status of these reviews will change from 'Pending Review' to 'Pending Decision'.

Administrators can complete (confirm) reviews in bulk If the reviews have a recommendation and/or a score.

Q: Can the Administrator complete a file if the reviewer has not started it?

A: Yes, the system will unassign the file from that reviewer. Unassigning is not completing the review. If the admin wants to complete the review, they can complete it. The review will show that it was completed without a recommendation or score.

Q: Why are some applicant records on the 'All Decisions' tab not clickable?

A: If the applicant was ever assigned to a reviewer, their link should be active except in the following circumstance:

When an applicant withdraws before the review is complete, there is no link because the review is no longer active. As a workaround, the administrator can access information from the Review tab in the Person's record before changing their status to 'Withdraw during Review'.

We are exploring options to keep the applicant's link active after the final decision to withdraw and to send an automated email to notify the reviewer of the withdrawal.



POST DECISION REVIEWS

Post decision reviews allow you to assign an application that has a decision to someone (perhaps a mentor for the future student). Post decision reviews do not change the person's status.

Q: When assigning an application for a post-decision review, does the assignee need the status of Reviewer or just a Unite user?

A: The assignee must have the Reviewer permission.

Q: How do Post-decision Reviews compare to Review Folders?

A: Folders and Post-decision Reviews both create multiple review records for an applicant.

- **Folders** enable multiple reviews by the same reviewer for the same applicant prior to a decision.
- By contrast, Post-decision Reviews enable multiple reviews by different people for the same applicant after a final decision



MANAGING REVIEWERS

Q: How can we see a list of all our reviewers and their assignments?

A: You have two options:

- (1) On the 'My Pending Actions' tab, select 'Manage Review Groups and Folders', then go to the 'Reviewers' tab. This will give you an overview of all your reviewers and the number of reviews at each stage.
- (2) For detailed information about Reviewer assignments, you can go to the 'All Reviews' tab and create a view for each Reviewer. The view will automatically update as the reviewer's assignments change.

Q: Does the Reviewer-only role include access to the Decisions tabs?

A: No. Reviewers are limited to the 'My Pending Reviews' and the 'My Completed Reviews' tabs.

Q: How can we remove Reviewers from Unite?

A: You can deactivate Reviewers in Unite. If you want to permanently remove them from the system, please contact your LSAC Support Analyst. Reviewers can only be removed if they have no associated assignments.

GENERAL QUESTIONS

Q: Is the 'Document Upload' feature available in Reviews?

A: Not at this time. Documents can be added manually to the Documents area if you have the permission.

Q: Can we hide the Scholarship fields so that reviewers do not see them?

A: The Proposed Scholarship and Amount fields are standard for the Reviewer role. If your school has custom scholarship UDFs, those fields can be de-activated. However, any de-activated fields will be hidden for all users, not just reviewers.