

An aerial photograph of a university campus, likely UC Irvine, showing several large, modern academic buildings and extensive greenery. The image is overlaid with a semi-transparent blue filter. In the center, there is a dark blue rectangular box with a thin yellow border containing the text 'UCI Graduate Division'.

**UCI** Graduate  
Division

UCI MHCID Capstone Project 2020



# MEET THE TEAM

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# INTRODUCTION

## EXECUTIVE SUMMARY

In March 2020, our team of MHCID graduate students kicked off a **user experience evaluation** initiative in partnership with UC Irvine's Graduate Division.

**Our focus was on the Graduate Division's admissions software program: Slate.** Launched in 2018, the Slate program has since received mixed reviews, and it is now an imperative to improve the program to provide a better user experience during the annual admissions cycle.





For the project's first of two phases, we conducted **four research methods** to understand the landscape and to uncover opportunities for improvement. We then created **three design artifacts** to help visualize and bring our findings to life.

Given the breadth of our approach, we were able to uncover a robust number of insights, which are distilled into the **key recommendations**.

### STRATEGIC RECOMMENDATIONS

- Incorporate applicant pool insights
- Improve overall visibility into the applicant lifecycle
- Incorporate more robust collaborative functionalities
- Overall design and content revamp

### TACTICAL RECOMMENDATIONS

- Improve Filters capabilities
- Usability improvements to the Reader View
- Provide increased visibility into applicant SIR status

For our project's second phase, we took the key recommendations that were identified in the first phase and turned them into design concepts. Our design process started off broad and became more refined throughout the quarter. We created low-fidelity and then high-fidelity wireframes for the following areas:

### APPLICANT DASHBOARD

A central hub that provides a birds-eye view of the applicant pool, with the flexibility to sort and filter the candidates based on user needs

### APPLICANT PACKET

A redesign of the Reader that allows Faculty to more efficiently review, comment, and make applicant decisions

### SIR DASHBOARD

A central hub that provides easy access to SIR information to improve positive admissions yields at the final stages of the admissions cycle

These designs concepts went through 2 rounds of design testing to get users' validation and feedback on our design solutions. We were able to uncover a robust number of insights, which are distilled into the final designs and roadmap.





## **OUR PROCESS**

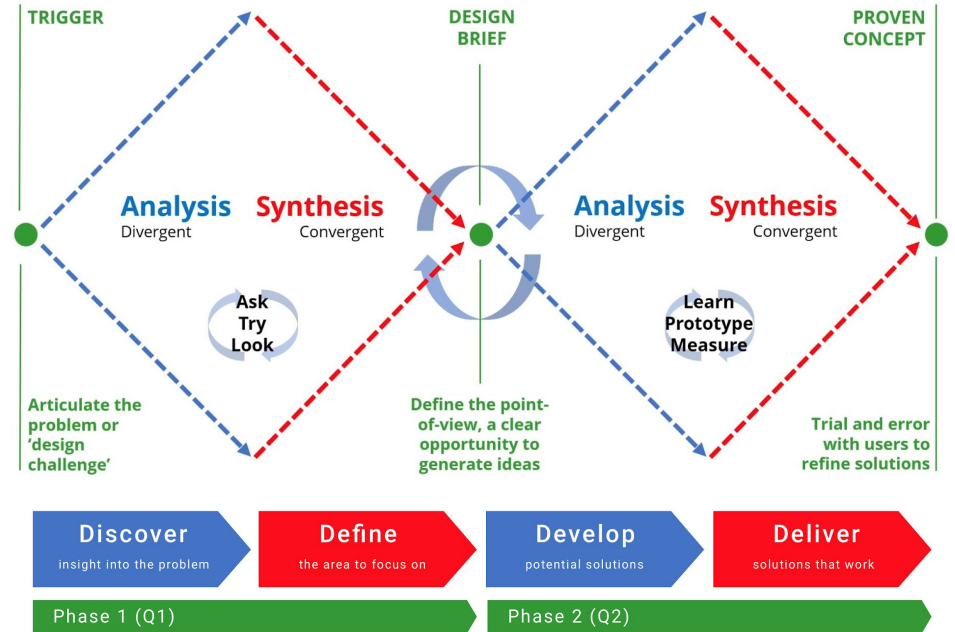
# PROCESS

## Phase 1 - Research: Discover & Define (Q1)

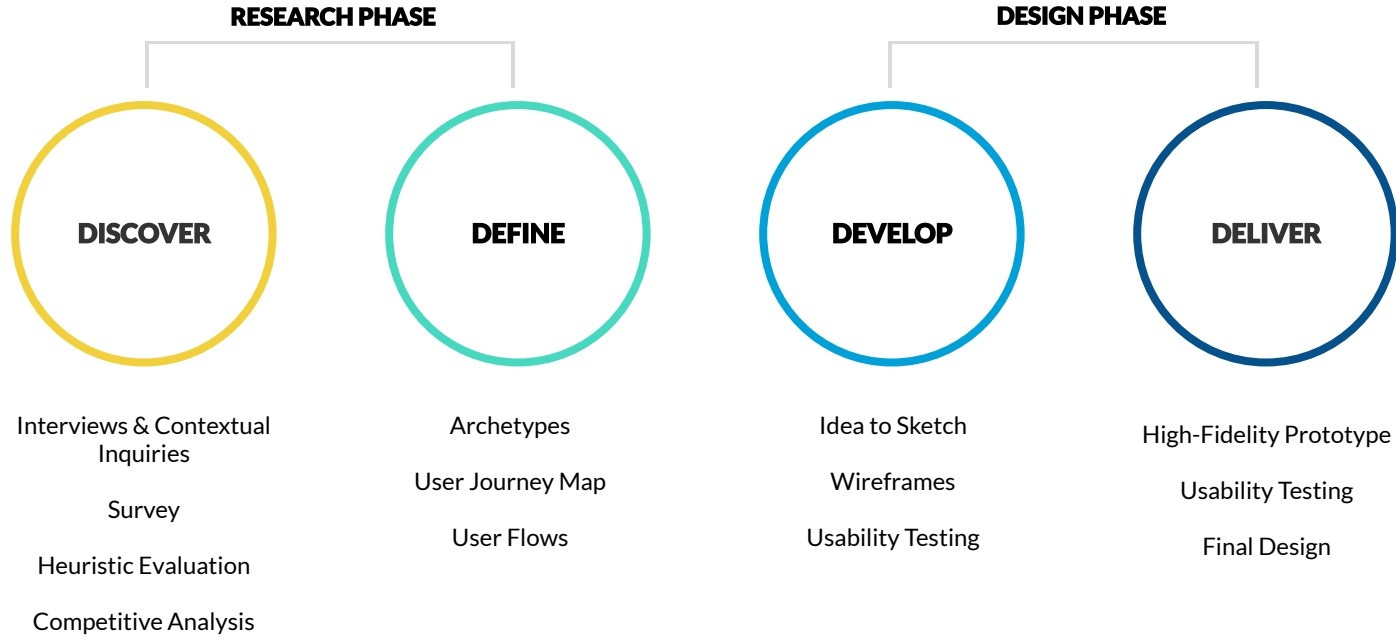
This phase was used to gain a better understanding of the problem space by utilizing divergent thinking to generate ideas around the user's need and pain. By the end of this phase, the team had a good understanding of the users with enough information to start refining the feedback to actionable ideas.

## Phase 2 - Design: Develop & Deliver (Q2)

This phase was focused on taking the user research findings and recommendations from Phase 1 to create a design solution. The team work on designing, user testing, and iterating on the prototype throughout Q2 to ensure that the finished product meets the user needs and expectations we uncovered in Phase 1. By the end of this phase, the team created a high fidelity prototype that has been user-tested and refined.



# FRAMEWORK





**3**

**RESEARCH PHASE**

# DOUBLE DIAMOND: DISCOVER & DEFINE

## OVERVIEW

The software program they were using, Slate, was receiving lots of feedback from Faculty members that it was both challenging to use and not meeting many departmental needs. In an effort to address these challenges and improve Slate, the Grad Division tasked *us* – a group of Master of Human Computer Interaction and Design students at UCI – with understanding where and *why* these breakdowns were taking place, and to propose a better way.

This process began with foundational research. We knew that a better system would require a deep understanding of Faculty needs, so we embarked on a months-long research exploration – conducting in-depth interviews with Faculty members, administering tailored surveys, performing UX audits of the existing Slate system, and investigating competing software programs.

## OUTCOME

Through these efforts, we were able to uncover the most pertinent pain points and opportunity areas, and thus understand where to focus our subsequent design solution endeavors.



# INTERVIEWS & CONTEXTUAL INQUIRIES

## GOAL

To gain detailed qualitative insight into how users handle graduate admissions, comprising how they see and interact with UCI Slate (focusing on pain points and positives), as well as outside processes and workarounds (focusing on utility and rationale for adopting them), for a comprehensive understanding of their mental model and workflows.

## METHODOLOGY

Half of the allotted 1-hour time was spent on a semi-structured interview of the user based on a selection of areas of interest, including usage and perceptions of Slate, challenges and workarounds, other admissions tools, collaboration, and training. The other half of each session was spent on a contextual inquiry-type exploration where the user shared their screen and talked through their workflow, focusing on the areas of home, browse, queue, reader, and review process.

## USERS

9 faculty who are current active users of Slate for graduate admissions and our primary user group. They range in school and department but most have 2 years of experience with Slate, corresponding with the length of time it has been implemented at UCI.

## INTERVIEW INSIGHTS

- Partitioning is confusing and off-putting
- Real-time collaboration is central
- Admissions is relativist, not absolutist
- The larger the program, the more they struggle
- There are two review stages--macroscopic and microscopic
- Macroscopic stage comprises high-level weighting across many applicants to eliminate and sort
- Heavy reliance on admissions processes, workarounds, and communications outside Slate at the macroscopic phase
- Slate is a database of information to query and extract from
- Microscopic phase comprises drilling down into select individual applications to seek detailed information
- Output of the combined phases is an admit/waitlist/deny list
- There's complexity around estimating the target numbers of applicants to admit
- Users have difficulty finding key features, believe they don't exist. Often multiple possible paths exist for a single action
- UX writing and design elements do not match user expectations and don't evoke actual usage
- Flexibility of Slate is lacking
- Users are forced to do a multitude of limited actions in a set order, incurring repetitive stress
- Privacy concerns around protecting data from being seen
- Slate takes a maximalist design philosophy

# USER ACTION TABLE

Admissions step	Slate "happy path" actions based on conceptual model	User actual actions based on mental model
Getting started	<ul style="list-style-type: none"> <li>• Open Slate bookmark</li> <li>• Log in</li> <li>• Look at home page</li> <li>• Go to reader</li> <li>• Look at reader home</li> </ul>	<ul style="list-style-type: none"> <li>• Google UCI Slate and open URL</li> <li>• Log in</li> <li>• Go to reader</li> </ul>
Seeing applicant list	<ul style="list-style-type: none"> <li>• Open faculty review or other appropriate bin</li> </ul>	<ul style="list-style-type: none"> <li>• Run query</li> <li>• Export query to CSV/Excel</li> </ul>
Selecting which applicants to review	<ul style="list-style-type: none"> <li>• Select applicants at random or by memorized criteria</li> <li>• Add to queue</li> </ul>	<ul style="list-style-type: none"> <li>• Filter/sort/conditional format appropriate applicants</li> <li>• Add notes and rank columns in spreadsheet</li> <li>• Assign to faculty</li> </ul>
Looking at application materials	<ul style="list-style-type: none"> <li>• Open applications one by one from queue</li> <li>• Scroll through reader pages</li> <li>• Make notes/highlights</li> </ul>	<ul style="list-style-type: none"> <li>• Look at spreadsheet for majority</li> <li>• Only when needed, look at application by searching name and looking through search preview at reader</li> </ul>
Leaving review	<ul style="list-style-type: none"> <li>• Fill out reader sheet</li> </ul>	<ul style="list-style-type: none"> <li>• Fill out rank and comment box in spreadsheet</li> <li>• Adjust if needed based on applicant pool and faculty review</li> </ul>
Collaboration with faculty	<ul style="list-style-type: none"> <li>• (optional) pass to colleagues by recommending in reader sheet</li> </ul>	<ul style="list-style-type: none"> <li>• (done above)</li> </ul>
Making admissions decisions	<ul style="list-style-type: none"> <li>• Submit reader sheet</li> <li>• (no further visibility into actual status)</li> </ul>	<ul style="list-style-type: none"> <li>• Meet to decide admit list</li> <li>• Pass list to staff</li> </ul>
Seeing SIRs	<ul style="list-style-type: none"> <li>• Open appropriate bin</li> <li>• Filter if needed</li> </ul>	<ul style="list-style-type: none"> <li>• Get list from staff</li> </ul>
Secondary admissions	<ul style="list-style-type: none"> <li>• (no formal process)</li> </ul>	<ul style="list-style-type: none"> <li>• Look through spreadsheet for top candidates not accepted in first pass and pass to staff</li> </ul>

## USER MOTIVATIONS TABLE

Admissions step	As a faculty reviewer, I want ___ (what) so ___ (why)	
Getting started	Find my relevant page quickly	Save time and effort for the actual application review
Seeing applicant list	See all applicants by program and degree level regardless of stage	Keep tabs on applicant volume and status
Selecting which applicants to review	Filter/sort top applicants to fast-track and bottom-tier to mass deny	Focus decisions on middle tranche of applicants who are hardest to assess
Looking at application materials	Only look at relevant areas of applications in a user-friendly, scrollable, searchable, jumpable way	Efficiently look for qualitative aspects that make up for lower quantitative aspects for a better overall picture
Leaving review	Fill out a rank and comment and be able to see my colleagues' ratings concurrently; change my mind easily	Comparatively rank applicants against each other on a high level with a number and minutely with dialogue
Collaboration with faculty	Have consistent connection with colleagues, working together simultaneously	Coordinate complex department admissions processes while facilitating visibility, and without blocking anyone
Making admissions decisions	Come up with an admit/waitlist/deny list in concert with colleagues and easily submit it	Be on the same page as colleagues and conclude the primary admissions process
Seeing SIRs	See positive SIRs as they come in and always be aware of the count	Track SIRs to see if I need to pursue secondary admissions
Secondary admissions	Efficiently admit the top "maybes" in case of a shortfall	Hit the target for program attendance

## CHANGE PRIORITY TABLE

Admissions step	Priority
Getting started	low
Seeing applicant list	moderate
Selecting which applicants to review	high
Looking at application materials	high
Leaving review	high
Collaboration with faculty	moderate
Making admissions decisions	low
Seeing SIRs	moderate
Secondary admissions	low

# SLATE FACULTY SURVEY

## GOAL

To understand the scale and magnitude of the insights uncovered during our interview and contextual interview phase, as well as validate various hypotheses centered on the utility, frequency of use, and overall satisfaction of Slate's most prominent applicant review features: Widgets, Bins, Queue, Review Form, and Queries.

## METHODOLOGY

Our survey was designed and administered through Qualtrics, using a series of predominantly closed-ended questions and Likert scales. The survey included a total of **30 questions** (including an optional email address collection question at the survey close), and was broken into sections centered on feature use and out-of-Slate workarounds. These process-based questions (three in total) were not captured in our initial survey deployment, but will be analyzed separately in the coming weeks. We received a total of **43** completed responses, with as many as 57 recorded responses for questions at the beginning of the survey. The completion rate was 75%.

## USERS

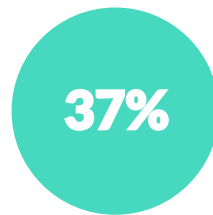
43 faculty who are current active users of Slate for graduate admissions and our primary user group. The plurality of respondents worked within the Information & Computer Sciences department, although 11 schools in total were represented.

## SURVEY FINDINGS



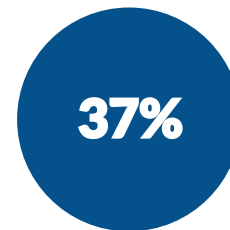
### Dissatisfaction

70% of respondents had a **less than favorable** experience for the 2020 admissions cycle. **Zero** respondents reported being very satisfied.



### Mastery

37% of respondents felt *somewhat to highly confident* in their mastery of Slate.



### Learning

**Learning by doing** was the most valuable educational resource for Faculty learning Slate.

# KEY INSIGHTS

## 1 Contextual Learning

Regarding respondents' Slate learning process, **learning by doing was their most valuable resource**, with attending training and working with departmental staff tied for second.



This could indicate that ***a more tailored approach to learning Slate by departmental needs may increase overall mastery and confidence in the platform.***

## 2 Frequency as a Magnifier

**Lack of feature utility is strongly correlated to lack of overall satisfaction** with Slate for the 2020 admissions cycle. In particular, beliefs that Filters, Bins, and Widgets were **not useful** to respondents applicant review process were most strongly tied to diminishing satisfaction with Slate.



When combined with usage metrics, this data could indicate that ***features which are accessed more frequently (even if by necessity) should require increased utility over other features.***

## 3 Don't Know How to Use & Workarounds

Respondents who had **"no opinion" of the features are strongly correlated to lack of use** (either never or rarely). For Queries and Bins this was 100% and 71%, respectively. In addition, there's a secondary **correlation between never using a feature and finding it very unuseful.**



Together, these data could indicate that ***respondents either don't know how to use the feature or that they've found another workaround that suits their needs.***



## 4

## Don't Need To Use

Respondents who had **“no opinion” of the features are strongly correlated to lack of use** (either never or rarely). For Queries and Bins this was 100% and 71%, respectively. In addition, there's a secondary **correlation between never using a feature and finding it very unuseful**.



*There could be a lack of perceived “need to know” how to use the feature in question.*

For example, respondents who had “no opinion” of Queries were most likely to **never** have used the Queries feature, and were more likely to be somewhat satisfied with Slate. Departmental roles and permissions likely plays a role here.

## 5

## Efficiency & Process Challenges

The following feature **challenges** were most strongly correlated with **lack of overall satisfaction** (neutral to negative sentiment) with Slate for the 2020 review cycle:

- The Queue's lack of support for cross-faculty collaboration (58%)
- Having to reset Filters with every browse or search activity (76%)
- Review Forms do not reflect the departmental ratings criteria used by faculty (74%)



*The Slate system's conceptual model doesn't reflect Faculty needs for efficiency, collaboration, or ratings within the applicant review process.*

# HEURISTIC EVALUATION

## GOAL

To discover and understand any potential issues behind the user experience and user interface design of Slate. By doing so, we can provide recommendations on how to improve these issues and create a better environment for users.

## METHODOLOGY

A heuristic evaluation is a method for finding usability problems in a user interface. The method involves user experience experts to evaluate and examine the interface based on Nielsen's 10 Usability Heuristics principles. This method allows us to find both major and minor problems within the interface.

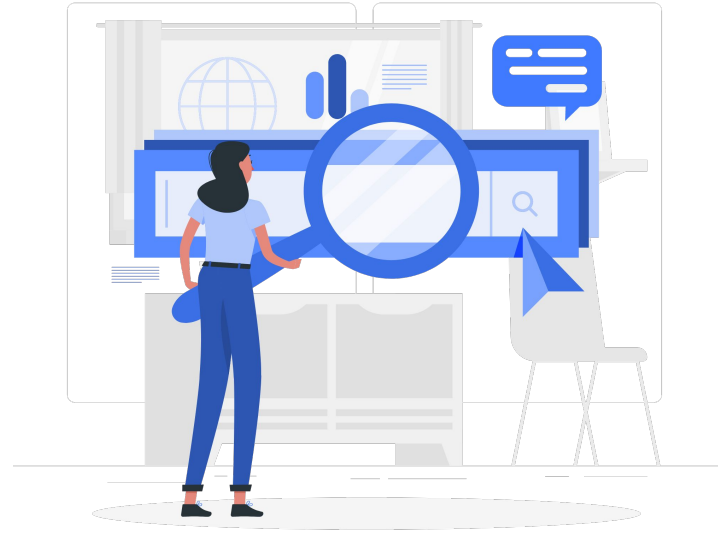
## EXPERTS

We ran a four person individual heuristic evaluation of Slate. After the individual sessions; we gathered, reviewed, and compiled our findings to narrow down the key usability issues of Slate.

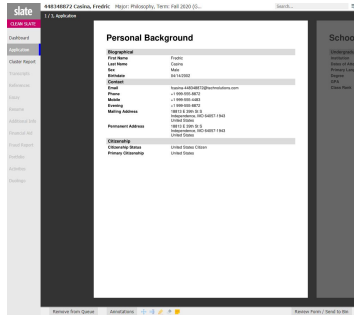
## FINDINGS

There were a total of **64** findings across the different pages of Slate.

- Application Review: **21** issues
- Filters: **11** issues
- Home: **3** issues
- Queue : **12** issues
- Reader: **10** issues
- Universal: **4** issues



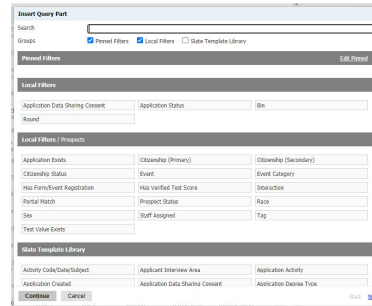
# KEY INSIGHTS



1

## Application Review

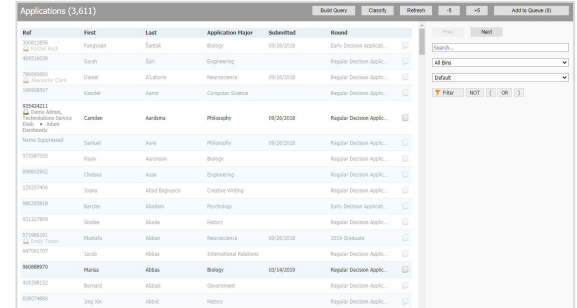
Most of the issues relates to problems with the navigations, interactions with the annotations, and other documentations.



2

## Filters

Most of the issues relates to problems with visibility, search, and list of the available filters.



3

## Queue

Most of the issues relates to problems with the user experience of the queue: the way it works and the functionality of it.

The screenshot shows the 'Slate Reader' interface. At the top, it says 'Hello, TinSuen Chan.' Below that, there are tabs for 'Reader Instructions' and 'Reads by Bin'. The 'Reads by Bin' tab is active, displaying a pie chart with two segments: a blue segment representing 77.9% and a green segment representing 21.7%. Below the chart, there is a small text: 'View use of 0/2/20/200 on 6/10/46/46/17 | Refresh | Show All...'. To the right of the chart, there is a section titled 'The Slate Reader' with sub-sections for 'Navigating the Interface' and 'Using the Keyboard'. The 'Using the Keyboard' section lists various keyboard shortcuts such as 'Arrow Keys: move up/down/left/right', 'Pg Up/Pg Down: page up, page down', 'Tab: next section in index', etc.

4

**Reader**

Most of the issues relates to problems with visibility, search, and list of the available filters.

The screenshot shows the 'Slate Universal' interface. At the top, it says 'Welcome, TinSuen.' Below that, there are several widgets. On the left, there is a 'Slate School Site List' with a search bar and a list of items. In the center, there are several article cards with titles like 'Slate School Site List' and 'Slate School Site List'. On the right, there is a 'Entry Form' section with a bar chart showing data for various categories. The bar chart has a y-axis ranging from 0 to 40,000 and an x-axis with categories like 'Slate School Site List', 'Slate School Site List', etc. Below the bar chart, there is a text box that says 'The database is used to support participants attending a Slate Launchpad 200 training. For more information about the program and a list of upcoming courses and locations, visit the Slate Launchpad 200 website. This website database can also be accessed via the Slate Administrator from the production database via Database => Launch Open Slate.'

5

**Universal**

Most of the issues relates to problems with the visibility and controls of the interface.

# COMPETITIVE ANALYSIS

## GOAL

To understand the pros and cons of certain features and implementations to help make informed decisions when improving the Slate platform.

## METHODOLOGY

A competitive analysis is a strategy where we identify the major competitors and understand their approach to the same type of product. We evaluated 1 home grown platform, 2 direct competitors, and 3 other schools who are using Slate. Within each evaluation, we looked at their existing features, user interface, and structure.



## **HOMEGROWN (1)**

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### **GATS**

The system allows users to compare applicants' information in batches. Having a spreadsheet style interface allowed users to sort and rank applicants on a high level.

## **DIRECT COMPETITORS (2)**

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### **Target X**

They offer a feature that allows users to review the applications. It has a similar style as Slate but with a modern user interface.

### **Element 451**

Element 451 most important features are their automation and analytics tools along with their clean user interface design , which uses up to date design trends to display the information.

## **OTHER SCHOOLS USING SLATE (3)**

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### **Baylor University**

### **Johns Hopkins University**

### **UC Merced**

Baylor university and Johns Hopkins University implemented their Slate platform similarly to UCI. On the other hand, UC Merced made interesting implementations that stood out amongst the rest of the schools.

## KEY TAKEAWAY

- 1 User interface update would **enhance** the presentation of information.
- 2 GATS was working well due to the simplicity of it. Slate has more features but **failed** to capitalize on them by not catering to the users and their needs.
- 3 Other competitors have a **clearer** organizational structure for displaying list information compared to Slate.
- 4 UC Merced broke down their faculty role into 4 sub-roles to assign specific Slate permissions into **finer detail**.





# MEET THE USERS

## Faculty A : Assigners

*"I'd rather do it manually, I don't trust the system to do it properly due to previous mistakes."*

*"Slate needs to be more efficient; it's a too many step process."*

*"Too much time is spent on figuring out the BIN structure in Slate."*

### Goals & Actions

- View applicant information quickly
- Assign applicants to faculty members to review
- Review applicants after approval of faculty members
- Filter/sort top applicants to fast-track and bottom-tier to mass deny
- Use filters to sort out applications based on departments and specialization
- Come up with an admit/waitlist/deny list in concert with colleagues and easily submit it
- Communicate with other faculty members

### Needs

- Access to high-level applicant information
- Ability to compare applications
- Decide among faculty members on applicants
- Ability to sort and filter applications
- Sort applicants by faculty review scores

### Pain Points

- Too many applications to review, no roles or permission levels to sort out different applicants
- Comparison between applications in Slate is difficult
- Lots of features but are not useful, like Queue - too many steps

## Faculty B: Reviewers

*"If there's too many steps, I give up and assume I can't do it or it's too hard to do."*

*"Slate has a deep learning curve. I have to re-learn it each year due to gap in use."*

*"I think it was designed with the mindset that there are few students applying and few faculty reviewing...not realistic for us"*

### Goals & Actions

- Find relevant pages quickly
- Fill out a rank and comment and be able to see my colleagues' ratings concurrently
- Build and run query to export applicant list to CSV/Excel
- Create own way to filter/sort/conditional format appropriate to applicants in spreadsheet
- Look through spreadsheet for top candidates and forward to staff rather than submitting in reader
- Look through queue and review applications

### Needs

- Save time and effort for the actual application review
- Comparatively rank applicants against each other
- See all applicants by program and degree level regardless of stage
- Easier access to statistics and reporting
- Coordinate complex department admissions processes while facilitating visibility, and without blocking anyone

### Pain Points

- Slate features are too complex and is not easy to understand or use
- The flexibility of Slate is lacking, often tied to the fact that permissions are opaque, and not granular or customizable
- Hard to look through applications when there are more than 50 applicants and even over 300 applications is possible

# USER JOURNEY MAP



## SLATE'S CONCEPTUAL MODEL

- Go to Reader.
- Open Faculty Review / Bins.
- Select by random or memorize filter criteria then add to Queue.
- Scroll through Reader Page.
- Fill out Review Form.
- Submit Review Form.
- Open appropriate bin or Filter if needed.

## MOTIVATIONS

- Find the relevant page quickly to save time and effort for the actual application review.
- See all applicants by program and degree level regardless of the stage to keep tabs on applicant volume and status (bird's-eye view).
- Filter/sort applicants to deny in bulk and focus decisions on applicants who are hardest to assess.
- Look at relevant areas of applications that is scrollable and searchable.
- To efficiently review an applicant's qualitative criteria.
- Have the ability to see colleagues' ratings at the same time and change ratings easily.
- Rank applicants against each other on a high level.
- Collaboration: Come up with a list that shows admit, waitlist, and deny applicants together with colleagues.
- See positive SIRs in order to be aware of the volume.
- Track SIRs to see if secondary admissions are needed.

## PAINPOINTS

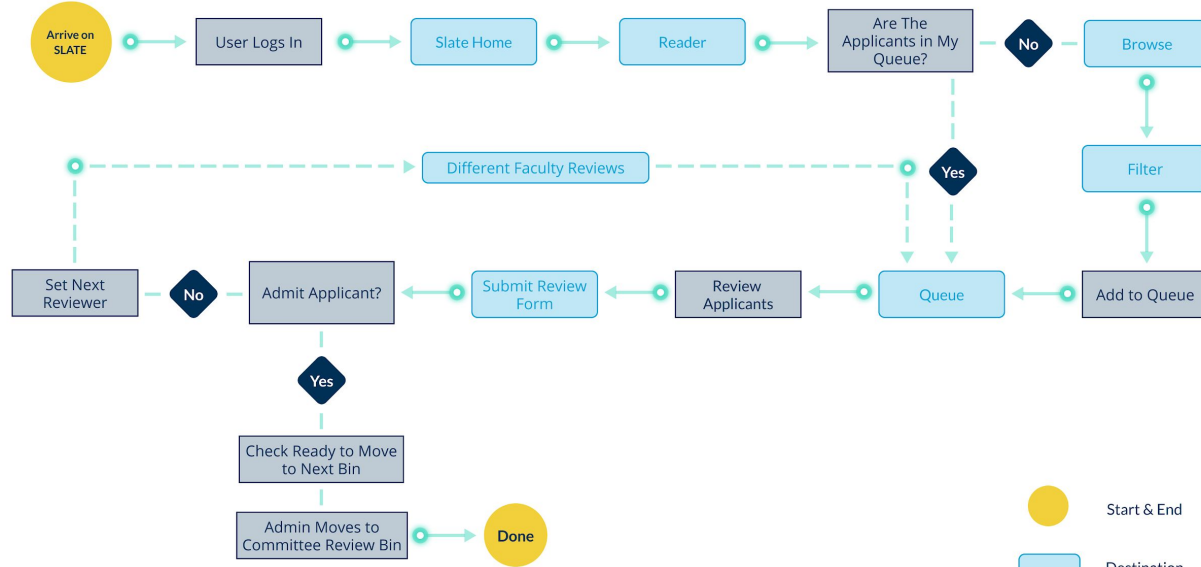
- N/A
- Bins are not organized in a way that makes sense.
- Not being able to see where the applicants are in their review process.
- List of filters is not organized in a way that makes sense.
- Need to reset filters each time when browsing or searching.
- Cannot simultaneously review applicants and keep track of where they are in the process.
- Difficult to view applicants in batches.
- Available ratings don't reflect how department score applicants.
- Limitations of system feature to work collaboratively with colleagues.
- Cannot edit submitted comments without filling out a new Review Form.
- Difficult to see SIR status.
- Unsure if viewing by SIR status functionality even exist.
- Desire to track positive SIRs to make personal contact with admitted students to motivate them to accept their SIR.

## WORKAROUND

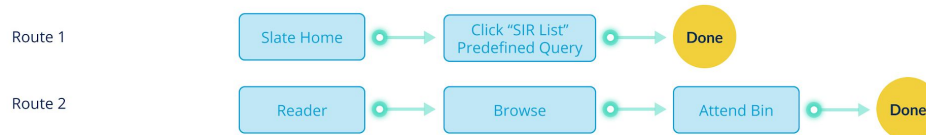
- Google UCI Slate and open URL.
- Run Query in Slate then export Query to CSV/Excel.
- Look at majority of applicants on the spreadsheet by filtering/sorting through appropriate applicants.
- Colleagues add notes and rank columns in spreadsheet and then assign to faculty to review.
- If needed, look at application by searching applicant's name and look through search preview in Reader.
- Fill out rank and comment column in spreadsheet.
- Adjust if needed based on applicant pool and faculty review.
- Set up meetings to decide on admin list or pass list to staff to review.
- Receive a list from staff to see if the amount of positive SIRs is met.

# USER FLOW - SLATE SUGGESTED

## GOAL: Review Applicants

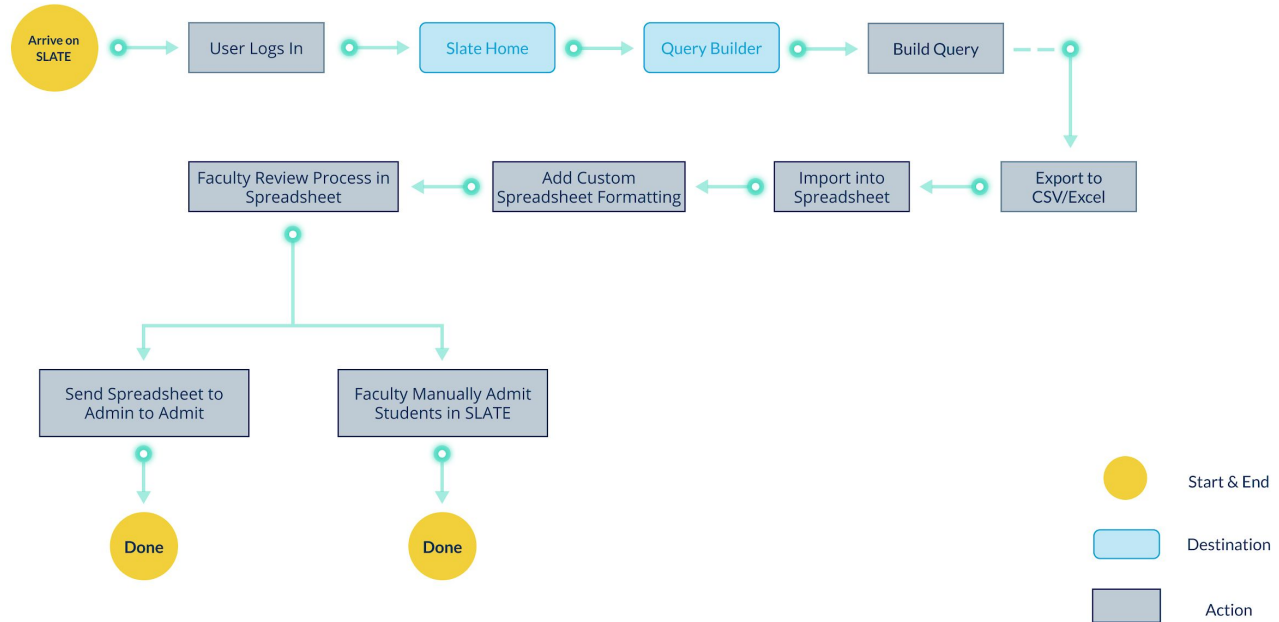


## GOAL: See List of SIR Responses



# USER FLOW - FACULTY'S FLOW

GOAL: Review Applicants



# RECOMMENDATIONS

## GUIDING PRINCIPLES

- Design for the user and their needs
- Simplification and focus over flexibility
- Limit the need for per-user customization
- Balance strategic and tactical recommendations

## STRATEGIC VS. TACTICAL

The following recommendations are a mix of both **Strategic** and **Tactical** which allow the Slate team to create a path forward of continuous improvement. Inside of each **Strategic** recommendation we will identify opportunities for immediate benefit to take steps towards the larger vision.



## APPLICANT POOL INSIGHTS

### Problem

With a large number of applicants it becomes untenable to manually review each candidate. Faculty export the applicant list to a spreadsheet and review outside of Slate to get a birds-eye view of the applicants.

### Recommendation

Provide analytic insights on a per applicant basis that can be viewed, filtered, and sorted at a high level.

### Benefit

Reduce the need to leave Slate to review applicants.

## APPLICANT LIFECYCLE VISIBILITY

### Problem

The separation of applicants into bins makes it difficult to get a holistic view of the applicant pool from initial application through to SIR response.

### Recommendation

Add visibility into the application process from initial application through to SIR response.

### Benefit

This visibility would allow faculty to track applicants through the entire application lifecycle.

## COLLABORATIVE REVIEWS

### Problem

The process of collaborative reviews in Slate has limited functionality and faculty tend to rely on spreadsheets and email for collaboration.

### Recommendation

Create collaborative review functionality in Slate including the ability to assign reviews, see the status of reviews, not see other reviews until you have completed your own, and to provide a consistent rating mechanism for sorting.

### Benefit

Collaborative reviews will add transparency into the review process and give faculty coordinators more confidence that they are picking the right applicants.

## DESIGN & CONTENT IMPROVEMENTS

### Problem

Although the Slate interface is powerful, that power adds complexity that can overload users with unused functionality.

### Recommendation

Perform an audit and update of all heavily used areas of Slate with the goal to reduce complexity and increase the quality of the user experience.

### Benefit

Reducing the interface load of Slate will allow faculty to confidently achieve their goals.



## FILTER USABILITY REVIEW

### Problem

The existing filter functionality has many usability issues that cause confusion and frustration with users.

### Recommendation

Improve the filter user experience with a goal to decrease complexity and streamline the functionality. This could include implementing filter stickiness and a UI redesign of field selection.

### Benefit

Reduce the need to leave Slate to filter applicants.

## USABILITY OF READER VIEW

### Problem

Although most faculty appreciated that all the applicant data was in a central location, they consistently were frustrated by the user experience of reviewing applicant information.

### Recommendation

Improve the Reader View by bringing it closer to modern standards and user expectations. This could include converting the reader sheets from horizontal scroll to traditional vertical scroll, making search more prominent, and removing unused fields.

### Benefit

By improving the Reader View, the faculty will be better equipped to do in-depth reviews of candidates.

## SIR STATUS VISIBILITY

### Problem

The applicant's SIR status in Slate is difficult to find and is not generally trusted by faculty. Many faculty request a list of their SIR positive applicants from an admin.

### Recommendation

Create an SIR dashboard that provides transparent SIR status and statistics. This could include outstanding SIRs, SIR positive vs. negative, latest SIR responses, and summarized applicant statistics of SIR positives.

### Benefit

Adding this dashboard would reduce load on the admins and provide more direct visibility into an important part of the application lifecycle.







**DESIGN PHASE**

# DOUBLE DIAMOND: DEVELOP & DELIVER

## OVERVIEW

Our research insights showed us that the existing system was inflexible and limited, and that it didn't fit Faculty members' mental models of their actual admissions processes. As a result, many Slate Faculty users were satisfying most of their admissions process tasks *OUTSIDE* of Slate. We also uncovered that department-wide collaboration during the review process was common. However, the importance of certain admissions criteria and applicant characteristics *varied* across departments and programs.

Further, because Slate is a third-party software program, we were immediately constrained by what could be implemented by program administrators within the Grad Division versus what would need to be escalated to Slate's parent company, Technolutions. This meant we had to spend time identifying where we could provide differentiated value for Faculty members *without* full-on customization.

## OUTCOME

We did this by identifying the "big rocks" – those **overarching "process needs"** that were *consistent across departments*, and within those, considering how we could design a new system that was *flexible enough* to solve for multiple departmental use cases.

## REDESIGN FOCUS

Dashboard Applicant

This was a large focal point in our design efforts. We designed a dashboard from scratch to serve as a central hub for Faculty to view, filter, and compare applicant information at a glance.

Applicant Packet

We completely redesigned the Applicant Packet to create a smooth experience in reviewing, commenting, and making applicant admissions decisions.

SIR Dashboard

The SIR Dashboard was also designed from scratch, with the goal of providing a simplified and informational tool through which Faculty can view the status of accepted applicants.

# INITIAL IDEA TO SKETCH

## Applicant Dashboard

Quick stats

- x new applicants
- x reviewed
- x assigned
- x targeted
- x total

Add filter    Edit table (7)

GPA    Test scores    Gender    Citizenship

Status	Name %v	Program %v	Level %v	GPA %v	category %v	category %v	Comment %v	Avg. faculty rating %v
<input type="checkbox"/> <input type="checkbox"/>	New							
<input type="checkbox"/> <input type="checkbox"/>	New							
<input type="checkbox"/> <input type="checkbox"/>	New							
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<input type="checkbox"/> <input type="checkbox"/>								
<input type="checkbox"/> <input type="checkbox"/>								

## Filters

Standard Filters    Advanced Filters

Academic Program

Arts    Program Name    Program Name

Biological Sciences    Program Name    Program Name

Program Name    Program Name    Program Name

Program Type

Masters    PhD    Combined

Citizenship & Residency

U.S. Citizen    CA Resident

Ratings

GRE    TOEFL    GPA

Custom Search Term

Enter Custom Term

Continue    Cancel

Our initial idea was to explore these features to improve the experience: Color coding the grid list, Graphs to indicate applicants, Ability to favorite or select applicants, and Simplified filter



## Applicant Packet

slate

Applicant identification information

Application

Section

Section

Section

Section

Section

Section

Section

Section

Personal Background

**FACULTY REVIEW FORM**

Faculty Assigned:  
John Doe  
Jane Doe  
Etc.

+ Add Faculty Member for Review

My Rating:  
 1  2  3  4  5

My Recommendation:  
 Admit  
 Deny  
 Recommend for another program

Submit

Note: You can view average Faculty rating once you have submitted your rating

Program of Study

## SIR Dashboard

Slate Home

SIR Dashboard

NAV

NAV

NAV

NAV

NAV

NAV

Program Selection

SIR Status

Deny

Accept

Outstanding

Accept Pool Statistics

Accepted Applicants

Our initial idea was to explore these features to improve the experience: Vertical scrolling of packet, Easy review form, Graphs to display accepted applicants in the SIR Dashboard, and Quick statistics of applicants

# LOW-FIDELITY DESIGN CONCEPT TESTING

## GOAL

To qualitatively assess the broad concepts of prototyped designs across 3 key product areas for similarity to user admissions processes and mental models, with the end goal of aligning the prototype according to user needs.

## METHODOLOGY

Each 30-minute session was spent on semi-structured concept testing of the user based on scenarios they'd likely encounter using the redesigned Slate, with attention to utility. Half of the session was dedicated to assessing the Applicant Dashboard, a quarter to the Reader, and a quarter to the SIR Dashboard. Users were asked how they approach relevant stages of their current application process, how they felt about various design concepts, how proposed designs would affect their processes, and shortfalls and unanswered questions in the concepts.

## USERS

3 faculty and 2 staff members who are current active users of Slate for graduate admissions, ranging in school and department.

## **KEY FINDINGS**

### **APPLICANT DASHBOARD**

Most of the broad concepts proposed were well-received by users (quick stats box, summary statistics and graphs, applicant table, color-coding, filters). However, users struggled with articulations around default columns and data graphed. Users had mixed reactions to button-enabled actions such as marking applicants.

### **APPLICANT PACKET**

Users had generally positive reactions to the bi-columnar design with applicant details on the left and a persistent review form on the right, in addition to vertical scroll, assigning reviewers, and inline commenting. However, users had mixed reactions to the idea of public vs. private comments.

### **SIR DASHBOARD**

Many users shared positive reactions to graphs, contact information, switching programs, the 3-tab division, and the general concept of an SIR dashboard. However, users had mixed conceptions of the terminology, targets, and downloading.





# APPLICANT PACKET

## Conceptual Applicant Packet improvements include:

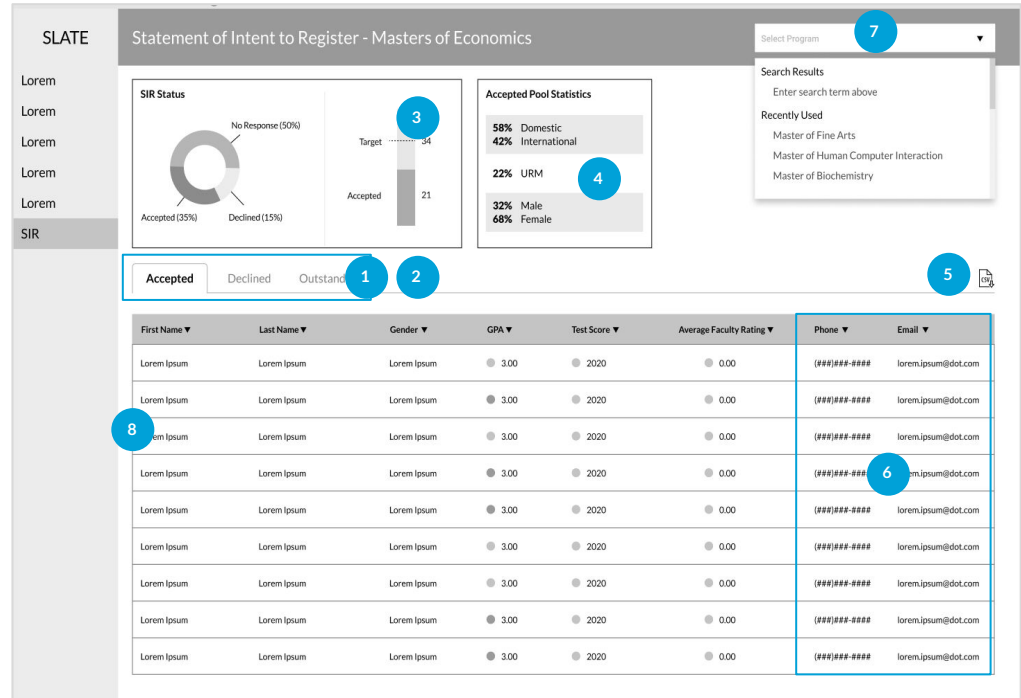
1. Disambiguate whether comments are public or private
2. Remove visible zoom buttons
3. Add search bar
4. Explore allowing programs or departments to control public or private modes, either in the Reader or in Settings
5. Explore adding exception request functionality

The mockup shows a sidebar on the left with the word 'Application' and several 'Lorem' entries. The main content area is titled 'Applicant Identification Information' and contains a 'Personal Background' section with placeholder text. Below this is a 'Program of Study' section. On the right, there is a 'My Review' section with a 'Reviews Overview' link, a warning message, a 'My Comments' section with a text input and a 'COMMENT' button, a 'My Rating' section with a 5-point scale, a 'My Recommendation' section with radio buttons, and a 'Faculty Assigned' section with a search bar and a 'SUBMIT' button. Numbered callouts (1-5) are placed over the interface to indicate areas for improvement: 1 is over the 'My Comment' box, 2 is over zoom icons, 3 is over a search bar in the top right, 4 is over a search bar in the top right, and 5 is over the 'SUBMIT' button.

# SIR DASHBOARD

Conceptual SIR Dashboard improvements include:

1. A positive-negative SIR binary with outstanding option
2. Switch ordering to Outstanding, Positive, Negative
3. Remove target for now
4. Add in yield stats to compare offers relative to SIR status
5. Update CSV icon button to a standard rectangular button, aligned with other action-based CTAs
6. Move forward with both email and phone number data in the table
7. Move forward with program search function, with PhD and Masters default for MVP
8. Move forward with list view categories as-is



# HIGH-FIDELITY CONCEPT DESIGN TESTING

## GOAL

To qualitatively assess the fine details of prototyped designs across 3 key product areas for fit with user admissions processes and mental models, with the end goal of fine-tuning the prototype according to user needs.

## METHODOLOGY

Each 45-minute session was spent on structured concept testing of the user based on scenarios they'd likely encounter using the redesigned Slate, with attention to usability. Half of the session was dedicated to assessing the Applicant Dashboard, a quarter to the Reader, and a quarter to the SIR Dashboard. Users were asked how they would approach scenarios, how they felt about the proposed solution, and how they would improve it.

## USERS

2 faculty and 1 staff member who are current active users of Slate for graduate admissions, ranging in school and department.



## KEY FINDINGS

Across our designs, we narrowed our focus to updates centered on design and information polish. As such, our final conceptual designs will move forward largely as-is, with many recommendations added to our UX Roadmap for further exploration. High-level insights are as follows:

### APPLICANT DASHBOARD

- Users continued to respond favorably to the Applicant Dashboard concepts, although feature benefits were sometimes constrained by continued concerns around permissioning and customization (e.g., assigning faculty, filters)
- We narrowed the scope of our designs in instances when execution would require additional research and deep design exploration

### APPLICANT PACKET

- Concepts such as the ordering of packet content and paring down the review form fields arose, although pursuing additional articulation of the needs surrounding these requests is recommended
- Updates are focused on completing the build out of functionality for exploratory designs that performed well (e.g., the drop down navigation)

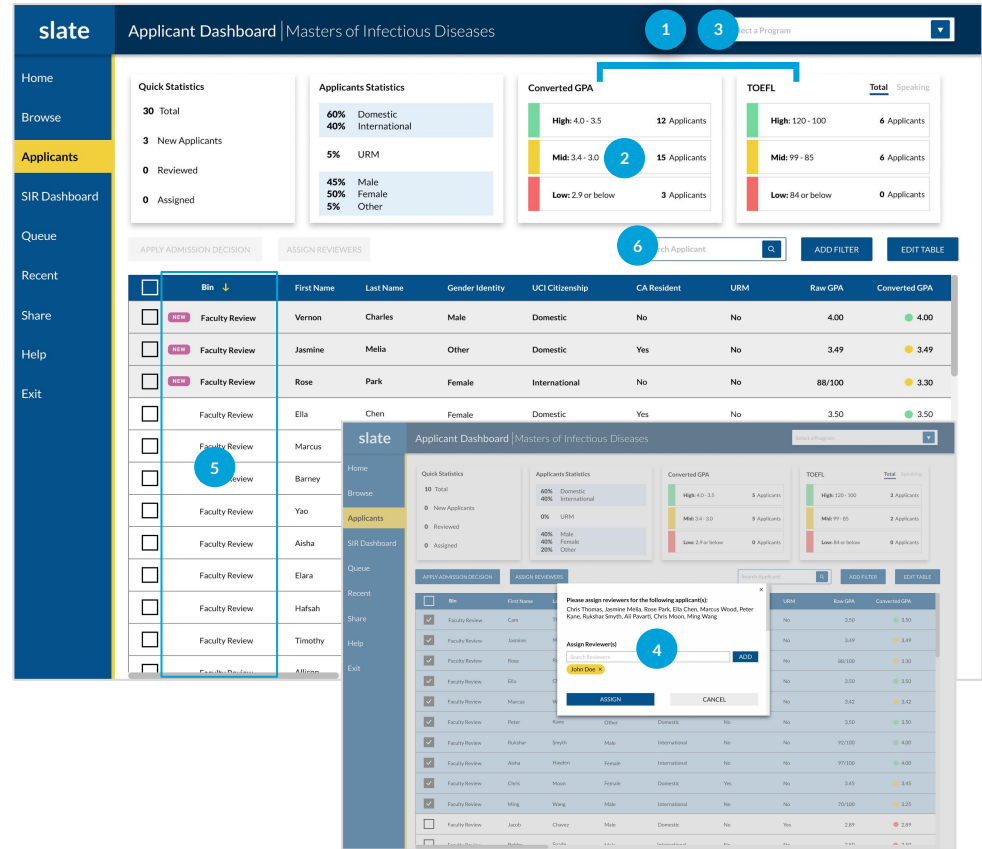
## SIR DASHBOARD

- Roadmap items include design and information polish in instances in which mental models require additional validation, for instance email functionality within Slate and statistics that include a broader funnel, from *could have* applied through acceptance decision

# APPLICANT DASHBOARD

## Conceptual Applicant Dashboard improvements include:

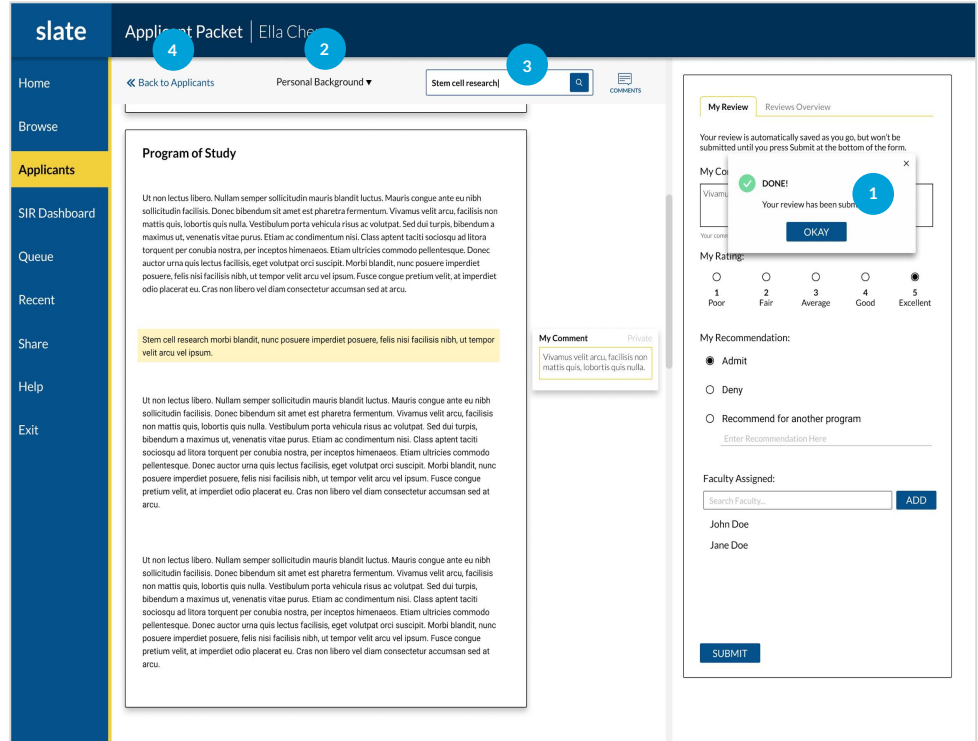
1. Move forward with adding percent to graphs
2. Move forward with updating graph range precision to display hundredths (e.g. 2.99)
3. Move forward with adjusting the ordering of graphical ranges from low to high
4. Move forward with creating confirmation notification after assigning reviewers that states that the assignees will get notified
5. Move forward with replacing Bin column with "Application Date" column as default column
6. Move forward with name-based search functionality



# APPLICANT PACKET

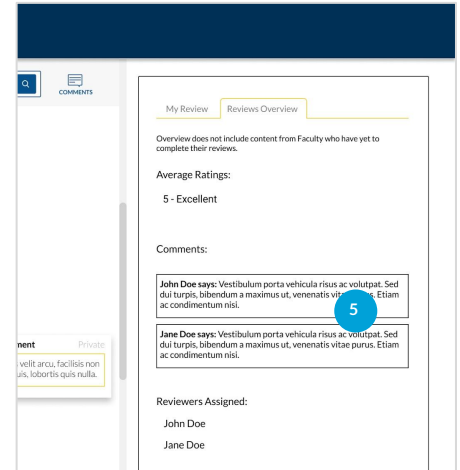
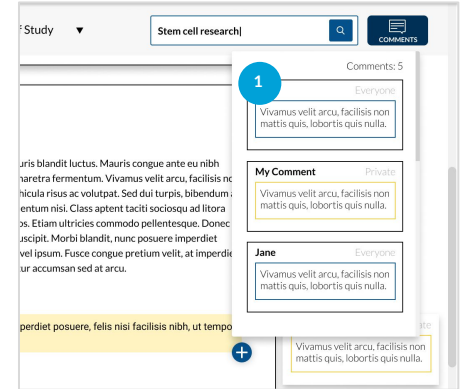
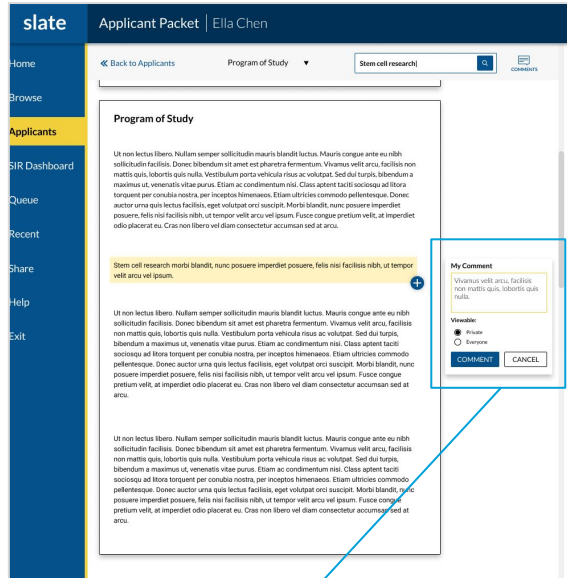
## Conceptual Reader – Overall improvements include:

1. Move forward with confirmation modal once review submitted
2. Move forward with the drop-down materials navigation, build out actual drop-down functionality
3. Move forward with search in the Reader navigation
4. Move forward with the back to applications button



## Conceptual Reader – Commenting improvements include:

1. Move forward with inline commenting functionality, along with general comments via the segmented review form
2. Move forward with adding a timestamp to the published comments, both personal and public
3. Move forward with increasing the size of the inline comment box
4. Move forward with private default for inline comments
5. Move forward with post-submission reviewer comment visibility via the Reviews Overview section of the review form



## Conceptual Reader – Review Form improvements include:

1. Move forward with making the comment box optional, ensuring the optionality vs. required is explicitly stated for all form components
2. Move forward with adding a timestamp to the published comments
3. Move forward with adding individual Faculty rating to Reviews Overview section

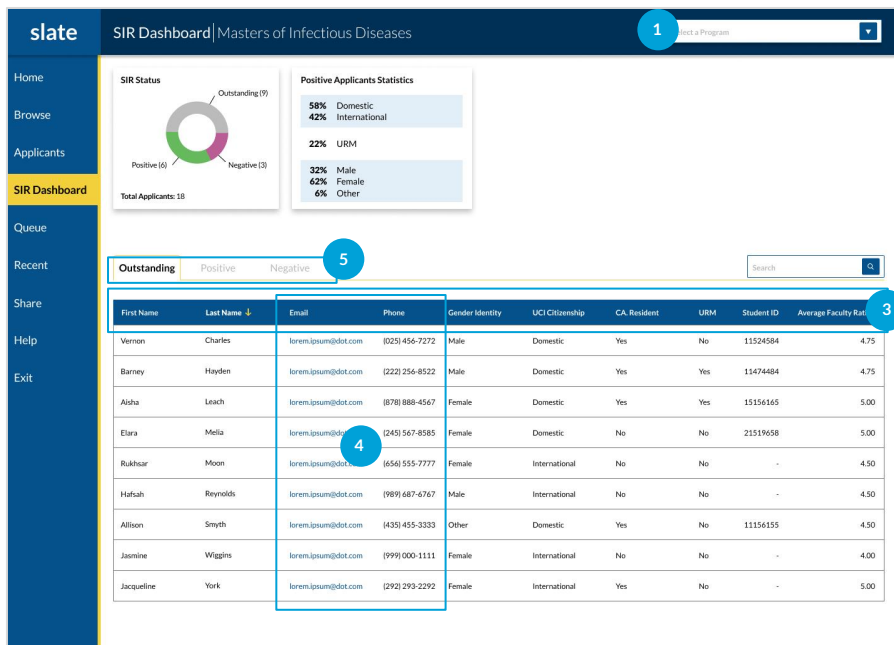
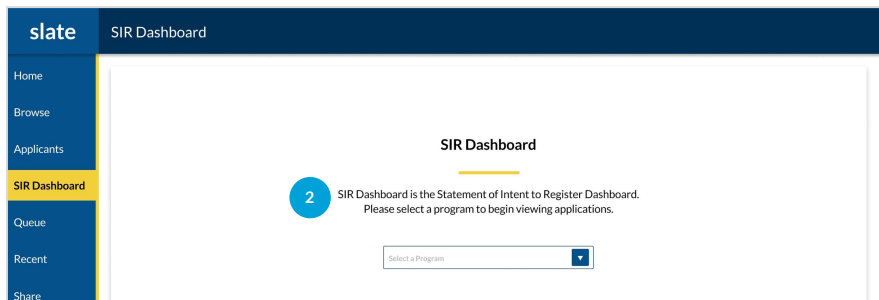
The screenshot shows the 'Program of Study' review form in Slate. The left sidebar includes 'Home', 'Browse', 'Applicants', 'SIR Dashboard', and 'Queue'. The main content area has a breadcrumb 'Back to Applicants', a dropdown for 'Program of Study', and a search bar with 'Stem cell research'. A large text area contains placeholder text. On the right, the 'My Review' section shows a 'Reviews Overview' tab and a message: 'Your review is automatically saved as you go, but won't be submitted until you press Submit at the bottom of the form.' Below this is a 'My Comments' section with a text input field and a '1' callout indicating it is 'viewable by applicants and UCI Faculty members'. A 'My Rating:' section is at the bottom.

The screenshot shows the 'Program of Study' review form in Slate, with the 'Reviews Overview' section expanded. The left sidebar is the same as the previous screenshot. The main content area shows the 'Program of Study' title and placeholder text. A 'My Comment' box is visible with a 'Private' toggle. The right sidebar shows the 'My Review' section with 'Reviews Overview' selected. A message states: 'Overview does not include content from Faculty who have yet to complete their reviews.' Below this is an 'Average Ratings' section showing '5 - Excellent' with a '3' callout. The 'Comments' section lists two comments: 'John Doe says: Vestibulum porta vehicula risus ac volutpat. Sed duis turpis, bibendum a maximus ut, venenatis vitae purus. Etiam mentum nisi.' with a '2' callout, and 'Jane Doe says: Vestibulum porta vehicula risus ac volutpat. Sed duis turpis, bibendum a maximus ut, venenatis vitae purus. Etiam ac condimentum nisi.' The 'Reviewers Assigned' section lists 'John Doe' and 'Jane Doe'.

# SIR DASHBOARD

Conceptual SIR Dashboard improvements include:

1. Move forward with revisiting design to distinguish selector from general search bar
2. Move forward with ensuring SIR acronym is spelled out in the user's first encounter with it
3. Move forward with list view as-is
4. Move forward with contact information as-is
5. Move forward with status tabs as-is



# FINAL DESIGN

## APPLICANT INSIGHTS

Our concept brings Faculty members' external workflows back into Slate with the **Applicant Dashboard** – providing them with a birds-eye view of the applicant pool, with the *flexibility* to sort and edit the data based on their needs.

## COLLABORATION

We provide the ability for Faculty to annotate applicant materials through a revamped **Commenting feature** with the *privacy and control* they need. Faculty are also now able to **Assign Faculty to applicant reviews** at different stages within the process, to enable collaboration and visibility within and across departments.

## SIR DASHBOARD

For Faculty, the admissions process doesn't end with a recommendation. Our **SIR Dashboard** concept provides Faculty with easy access to the information they need to improve positive admissions yields at the final stages of the admissions cycle.



# FINAL DESIGN: APPLICANT DASHBOARD

## Landing Page

## Dashboard

Application ID	First Name	Last Name	Gender	UIC/Division	Scheduled	SIR	Current GPA
02040002	Veronica	Charles	Male	Domestic	No	No	4.00
02040002	Jessica	Michelle	Female	Other	Domestic	No	3.49
02040002	Rose	Park	Female	International	No	No	68/100
02040002	Ellie	Chen	Female	Domestic	No	No	3.00
02040002	Marissa	Wood	Male	Domestic	No	No	3.67
02040002	Ryanne	Loach	Other	Domestic	No	No	2.99
02040002	Yan	Lin	Male	International	No	No	70/100
02040002	Ashley	Hadden	Female	International	No	No	70/100
02040002	Elena	Mason	Female	Domestic	No	No	2.89
02040002	Hannah	Wagner	Male	International	No	No	66/100
02040002	Therese	Prosser	Female	Domestic	No	No	4.00
02040002	Elizabeth	Prosser	Female	International	No	No	66/100

## Filter Categories

Application ID	First Name	Last Name	Gender	UIC/Division	Scheduled	SIR	Current GPA
02040002	Veronica	Charles	Male	Domestic	No	No	4.00
02040002	Jessica	Michelle	Female	Other	Domestic	No	3.49
02040002	Rose	Park	Female	International	No	No	68/100
02040002	Ellie	Chen	Female	Domestic	No	No	3.00
02040002	Marissa	Wood	Male	Domestic	No	No	3.67
02040002	Ryanne	Loach	Other	Domestic	No	No	2.99
02040002	Yan	Lin	Male	International	No	No	70/100
02040002	Ashley	Hadden	Female	International	No	No	70/100
02040002	Elena	Mason	Female	Domestic	No	No	2.89
02040002	Hannah	Wagner	Male	International	No	No	66/100
02040002	Therese	Prosser	Female	Domestic	No	No	4.00
02040002	Elizabeth	Prosser	Female	International	No	No	66/100

## Assign Reviewers

**Assign Reviewers**

Please assign reviewers for the following applicant(s):  
 Chai Thomas, Jonathan Nishi, Ross Park, Eli Chai, Marco Wood, Peter Kani, Roshan Smith, Ali Forouti, Chen Mouse, Ming Wong

Assign Reviewer(s)

Assign

Applicant ID	First Name	Last Name	Res ID	Res ID#	Country of Birth
01/05/2022	Chai	Thomas	No	230	0 230
01/05/2022	Jonathan	Nishi	No	245	0 245
01/05/2022	Ross	Park	No	40130	0 245
01/05/2022	Eli	Chai	No	230	0 230
01/05/2022	Marco	Wood	No	245	0 245
01/05/2022	Peter	Kani	No	230	0 230
01/05/2022	Roshan	Smith	Yes	51230	0 430
01/05/2022	Ali	Forouti	Yes	51230	0 430
01/05/2022	Chen	Mouse	Yes	245	0 245
01/05/2022	Ming	Wong	Yes	70130	0 230
01/05/2022	Chen	Mouse	Yes	245	0 245
01/05/2022	Chen	Mouse	Yes	245	0 245

**Apply Admission Decisions**

Done!

You have assigned Adm Dec to review the following applicant(s):  
 Chai Thomas, Jonathan Nishi, Ross Park, Eli Chai, Marco Wood, Peter Kani, Roshan Smith, Ali Forouti, Chen Mouse, Ming Wong

Done

Applicant ID	First Name	Last Name	Res ID	Res ID#	Country of Birth
01/05/2022	Chai	Thomas	No	230	0 230
01/05/2022	Jonathan	Nishi	No	245	0 245
01/05/2022	Ross	Park	No	40130	0 245
01/05/2022	Eli	Chai	No	230	0 230
01/05/2022	Marco	Wood	No	245	0 245
01/05/2022	Peter	Kani	No	230	0 230
01/05/2022	Roshan	Smith	Yes	51230	0 430
01/05/2022	Ali	Forouti	Yes	51230	0 430
01/05/2022	Chen	Mouse	Yes	245	0 245
01/05/2022	Ming	Wong	Yes	70130	0 230
01/05/2022	Chen	Mouse	Yes	245	0 245
01/05/2022	Chen	Mouse	Yes	245	0 245

## Apply Admission Decisions

**Apply Admission Decisions**

Done!

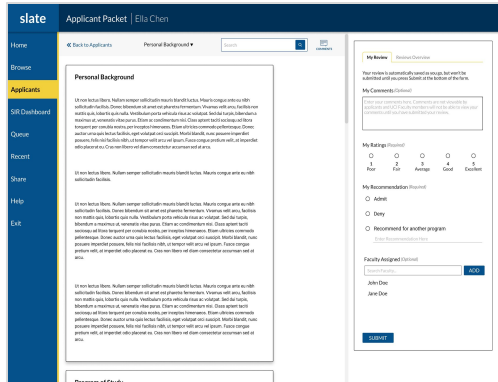
You have assigned Adm Dec to review the following applicant(s):  
 Chai Thomas, Jonathan Nishi, Ross Park, Eli Chai, Marco Wood, Peter Kani, Roshan Smith, Ali Forouti, Chen Mouse, Ming Wong

Done

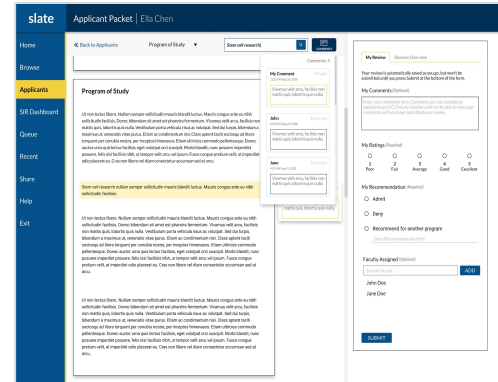
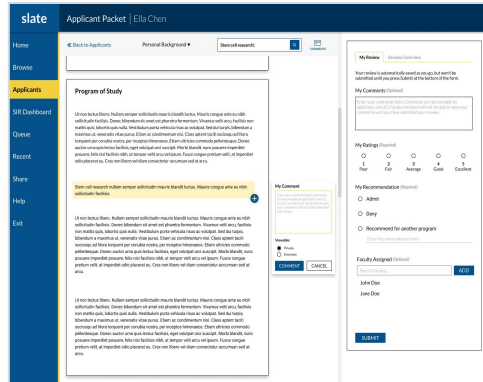
Applicant ID	First Name	Last Name	Gender Identity	UCD Counting	Collocated	UMI	Res ID#	Country of Birth
01/05/2022	Chai	Thomas	Male	Domestic	No	No	230	0 230
01/05/2022	Jonathan	Nishi	Male	Domestic	No	No	245	0 245
01/05/2022	Ross	Park	Male	International	No	No	245	0 245
01/05/2022	Eli	Chai	Male	Domestic	No	No	230	0 230
01/05/2022	Marco	Wood	Male	Domestic	No	No	245	0 245
01/05/2022	Peter	Kani	Other	Domestic	No	No	230	0 230
01/05/2022	Roshan	Smith	Male	International	No	No	70130	0 230
01/05/2022	Ali	Forouti	Female	International	No	No	70130	0 230
01/05/2022	Chen	Mouse	Male	Domestic	No	No	245	0 245
01/05/2022	Ming	Wong	Male	International	No	No	80130	0 230
01/05/2022	Chen	Mouse	Male	Domestic	No	Yes	230	0 230
01/05/2022	Chen	Mouse	Female	Domestic	No	No	245	0 245

# FINAL DESIGN: APPLICANT PACKET

## Landing Page



## Comment Features



# FINAL DESIGN: APPLICANT PACKET

## Review Form

Home | Applicants | Personal Background | **Document**

Program of Study

My Review

My Comments

My Rating

My Recommendations

Faculty Assigned

Submit

Home | Applicants | Personal Background | **Item not reviewed**

Program of Study

My Review

My Comments

My Rating

My Recommendations

Faculty Assigned

Submit

Home | Applicants | Personal Background | **Item not reviewed**

Program of Study

My Review

My Comments

My Rating

My Recommendations

Faculty Assigned

Submit

# FINAL DESIGN: SIR DASHBOARD

## Landing Page

The landing page features a dark blue header with the 'slate' logo and 'SIR Dashboard'. A vertical navigation menu on the left includes links for Home, Browse, Applicants, SIR Dashboard (highlighted), Queue, Recent, Share, Help, and Exit. The main content area displays the title 'SIR Dashboard' and a message: 'The Statement of Interest to Register Dashboard allows you to view the status of applicants that have been granted admission. Please search a program to begin.' Below this is a search input field with a dropdown menu showing 'Masters of Infectious Diseases' and 'Masters of Biomedical Sciences'.

## Dashboard

The dashboard features a dark blue header with the 'slate' logo, 'SIR Dashboard | Masters of Infectious Diseases', and a 'Select Program' dropdown. The vertical navigation menu on the left includes links for Home, Browse, Applicants, SIR Dashboard (highlighted), Queue, Recent, Share, Help, and Exit. The main content area displays 'SIR Status' with a donut chart showing 'Decreasing (%)' and 'Positive (%)'. To the right, 'Positive Applicants Statistics' are shown in a table:

Category	Percentage
Domestic	33%
International	42%
UK/EU	22%
Male	32%
Female	42%
Other	8%

Below this is a 'Total Applicants: 18' label. A search bar is present above a table with tabs for 'Queue/Queue' and 'Positive' (selected). The table has columns: First Name, Last Name, Email, Phone, Gender, Sexuality, US Citizenship, CA Resident, SIR, Status (D), and Average Grade/Pass/Fail. The data rows are:

First Name	Last Name	Email	Phone	Gender	Sexuality	US Citizenship	CA Resident	SIR	Status (D)	Average Grade/Pass/Fail
Eric	Buch	eric@slate.com	(305) 551-6165	Male	Domestic	Yes	No	11520484	5.00	
Indagenned	Burton	indagenned@slate.com	(975) 551-8168	Male	Domestic	Yes	No	11572884	4.75	
Amelia	Carvia	amelia@slate.com	(202) 978-4038	Female	Domestic	Yes	Yes	11570438	5.00	
Erika	Goldner	erika@slate.com	(718) 502-9999	Female	Domestic	No	No	21111609	4.75	
SIR/Health	Winters	winters@slate.com	(856) 311-7512	Female	International	No	No	-	4.75	
Michael	Zook	michael@slate.com	(408) 551-8412	Other	Domestic	Yes	No	12101034	5.00	







## CONCLUSION





# THE IMPACT

## OUTCOME

These design prototypes were tested and refined multiple times over the course of our engagement, and Faculty members across departments were delighted by the improvements they saw.

## TRANSFORMATION

Our redesigned Slate concept will make Faculty members' admissions processes easier and more efficient – working *with* their mental models, and most importantly, *bringing them back into Slate* to accomplish all of their admissions needs. And that's the “big promise” of our Slate redesign: it's designed to not only make Faculty members' work processes easier, but perhaps, even *enjoyable*.





