

# Slate User Guide

Updated August 2026

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## Definitions

**Admit:** The status in Slate that a student enters if they receive an offer of admission from CSU. A letter is sent to their CSU Student Applicant Portal where they can read their admission decision and then accept their offer of admission.

**Applicant:** The stage a student enters as soon as they start an application—even if they have not submitted it yet! An applicant can be your hottest possible lead since they “awaiting submission” of an application and have taken the big step of starting one, or, they could be a student who submitted an application and is currently finishing any other required action items for a complete application checklist.

**CRM:** a CRM is a Customer Relationship Management system used to track “customers”. When used in the context of higher education, it tracks prospective students through to enrolled students.

**Inquiry:** A student who has indicated interest in CSU through some channel, such as an online form, clicking on ad, or by simply starting an application. Inquiries are your hard leads that may result in enrolled students.

**Matriculated:** The status a student enters after they select yes to an offer of admission. This status in Slate does NOT mean they enrolled in classes. Only the field “CSU Credit Hours” will indicate if a student is enrolled and is visible from the student’s dashboard under their application for the term below their “applied program”. A number between 1-12 will appear to indicate credit hours.

**Non-Degree Seeking Graduate:** An application-type that a student can select and then a status they can hold to be able to graduate classes but not be enrolled in a current program of study. This may be the right application type and status for a student interested in your program, but who needs a number of graduate-level prerequisite courses to qualify for admission. Non-degree students are automatically admitted as long as they have proof of a bachelor’s on file and may require assistance with course enrollment if classes have enrollment rules that must be waived.

**Post-Baccalaureate Applicant:** Students can apply to CSU as a post-bachelor’s applicant seeking to take undergraduate courses. This is usually done to improve a GPA or to fulfill prerequisites for a program of study at the graduate level. Sometimes students had a narrowly tailored undergraduate degree and taking post-bacc classes can help align them with a new career focus that they’d like to pursue at the graduate level. Some pathways are clearly defined like a pathway to nursing while others are similar to non-degree seeking and undefined.

**Recruitment Pipeline:** The flow of students from exploration/interest to enrollment. They go through stages from **inquiry** to **applicant** to **admit** and finally enrolled student.

**SIS:** a SIS is a Student Information System or database

**Slate:** The CRM currently used by CSU to track prospects through to enrollment for both undergraduate and graduate programs. Exceptions to this process are any program that use CAS or are working with external recruitment partners though all students are eventually placed in Slate for import into our Student Information System (SIS).

## What is Slate

Slate is the **Customer Relationship Management (CRM)** system and database that is used by CSU to manage the recruitment process for the University. A CRM tracks a “customer” from prospect to purchaser. In a higher education context, we track prospective students through to enrollment in the CRM.

We use the CRM to build our **recruitment pipeline**, or the pool of interested students through application to the enrollment stage.

## What can Slate do

Both graduate and undergraduate teams use Slate for many purposes. Slate can:

- 1) **Track student** leads from point of interest
  - a. They may complete an interest form on our website
  - b. They may call us and ask to be put in contact with a program; enter as lead
  - c. They could simply start an application and thus are now a ‘lead’
  - d. As more information is collected, it is stored in Slate
  - e. Notes on outreach to a student can be kept on the student for all on campus to see so everyone can know where student is in outreach/pipeline
- 2) **Communicate** with students via email or text
  - a. While they are exploring or “inquiring” about CSU
  - b. While they are applying
  - c. After they are admitted
  - d. Until they enroll and up until the start of classes
  - e. Automation of communications is possible
- 3) **Collect Applications** and related materials
- 4) **Provide** checklists to students for application materials
  - a. They also get post admission checklists, if admitted
  - b. Checklists can be tailored to each program

## 5) **Process Applications**

- a. Graduate applications can be viewed in a “reader” by those who are making admission decisions
- b. This process can be automated at the request of the program

## 6) **Host event registration forms**

- a. In-person or virtual
- b. Can track registrations, set automated communications pre-and post-event, and can create check-in processes and/or printable badges

## 7) **Host Forms** that collect information for other purposes

- a. Scholarship applications
- b. Getting to know you forms
- c. Quick surveys

## What Slate is not

Slate is not the tool used to manage students once they are here and taking classes. Slate is a snapshot of the student right before the start of term.

If a student enrolls by registering for classes but then drops all of their classes at a later date—Slate cannot see this. We capture data on the student that is fed back from Peoplesoft (CampusNet) one time as of 2026-2027—this means we get a picture of what the student did all the way until they enroll and then the data stops.

After that, the student is considered “current” and now lives in a **Student Information System (SIS)**. To review current students in your program, you would use CampusNet or Starfish, or any other method your college deploys to track current yield or returning student data and information.

## Using Slate

To access Slate, you need to be added to the CRM by Graduate College or Enrollment Management. Please email [come2csu.grad@csuohio.edu](mailto:come2csu.grad@csuohio.edu) if you are planning to use Slate for application decisions or to monitor your recruitment pipeline.

## Weblink for Slate CRM

<https://go.csuohio.edu/manage>

Your login would be your CSU email and then the password will either be sent to you as a temporary login from Technolutions OR, you can select to reset your password.

Please consider bookmarking this page for future access to Slate.

## Your Role and Slate

Your role and how you use Slate will vary based on your colleges or programs assigned structure. In some colleges, vendors are used to assist with recruiting processes. Be sure to understand **what roles the vendor you use plays in recruiting, and what you play within that structure.**

Vendors may have full pipeline management under their purview—they may recruit to build your inquiry pipeline, connect with inquiries to move them to the admit phase, confirm their next steps to complete an application, and then they may even push them to enroll or help with getting them into their classes.

Vendors may also only do the outreach once they are inquiries and then manage the relationship from there.

Do note that currently, The College of Graduate Studies works with a vendor to do general outreach along the pipeline for **all non-vendor supported programs**. This outreach though is NOT program-specific—your effort then to do program-specific outreach, is encouraged.

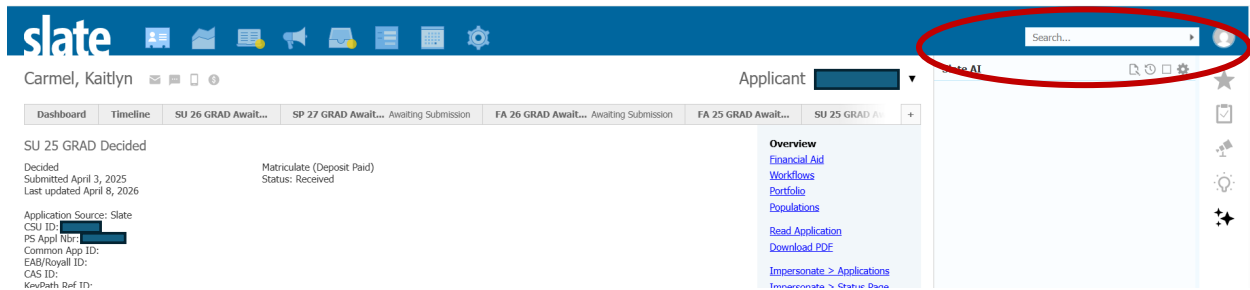
Some offices have **different staff roles for the student lifecycle**. Confirm with your leadership if you have someone who does outreach or an office that does outreach while students are inquiring. Then confirm if someone is doing outreach for admission decisions and enrolling students.

Additionally, we recommend confirming if your program or college has a specific **GA/TA/RA or scholarship process or processes**. Students generally have LOTS of questions about aid and so understanding who to send them to for questions or what timeline to point them to for understanding aid, is important.

**If you are responsible for inquiries, applicants, and admits, this guide should assist with clarifying how to use all of Slate along this pipeline.** You can jump through the guide as-needed depending on your role with Slate!

## Accessing Student Records

To review a student record, you can search by name, CSU ID#, email, or phone if written in xxx-xxx-xxxx format.



A student record is comprised of a dashboard, timeline, materials, and their application or applications. The dashboard will show you basic details (see below):

- Full Name
- Citizenship
- Address
- Phone
- SMS Opt-In Status
- Most Current App Status
- Anticipated Program (NOT applied)
- Email
- 1<sup>st</sup> Date of contact
- CSU ID #
- Student Type
- Opt Out/Fraud Denotations

Carmel, Kaitlyn Applicant

| Dashboard                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Timeline                                                                                                                                                                                                                                                                                                                                                                                                                                                   | SU 26 GRAD Await... | SP 27 GRAD Await... Awaiting Submission | FA 26 GRAD Await... Awaiting Submission | FA 25 GRAD Await... | SU 25 GRAD A... |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-----------------------------------------|-----------------------------------------|---------------------|-----------------|
| <p><b>Person Dashboard</b></p> <p>Staff Assigned:<br/>Student Type: Graduate<br/>CSU ID: [REDACTED]<br/>First Generation: Yes<br/>CSU Alumni Parent: No</p> <p><b>Prospect Information</b></p> <p>FAFSA Year: FAFSA Received - 04/18/2022 - 2022<br/>Anticipated Start Term: Summer 2026<br/>RaiseMe Scholarship Earnings:<br/>Anticipated Program: D.B.A. Business Administration - Management: Labor Relations<br/>Campus Visitor: N</p> <p><b>Additional Contact Information</b></p> <p>SMS Opt-In: Yes<br/>CSU email:</p> <p><b>Biographic</b></p> <p>Female<br/>Born [REDACTED]<br/>Citizen of United States</p> <p><u>SU 26 GRAD Awaiting Submission</u></p> <p>Awaiting Submission<br/>Started 04/07/2026</p> <p>Application Review Evaluation Committee Review Application Decision</p> | <p>[REDACTED]</p> <p>OH-03 City of Cleveland (West)</p> <p>Chicago</p> <p>PENNSYLVANIA</p> <p>[REDACTED]-4533</p> <p><b>Connect</b></p> <p>Email [REDACTED]<br/>Mobile [REDACTED]</p> <p><b>Tags</b></p> <p>FERPA Record Restriction Fraud Record Opt Out<br/>Test Record Top Prospect</p> <p><u>Unsubscribes</u></p> <p>No unsubscribes for email or mobile devices.</p> <p><b>Status History</b></p> <p>06/15/2021 Prospect<br/>04/03/2025 Applicant</p> |                     |                                         |                                         |                     |                 |

## Accessing Student Applications: Student Record View

When you are in a student's Slate record, you can see if they have submitted one or more applications to Cleveland State. Prefixes FA, SP, and SU represent fall, spring, and summer terms, respectively. The term year that the application is valid for, follows. After that, you

should see GRAD to indicate they have started or completed a graduate application. Finally, you can see a summary of the status of that application such as awaiting materials, submitted, etc.

Students may have more than one application for a term. They may also have duplicate applications for the same program in other terms—we hope to keep their record clean by closing any unintentional duplicates or applications that are left open but incomplete. This is a manual effort so if you see a record with many applications, but you know the student is interested in only x program for y term, send the Graduate admission team an email to try to get the record cleaned up.

## Slate Application Tab Details

Inside the student record are application tabs. These application tabs, when clicked on, show you:

- Status of application
- CSU ID #
- Submitted Date
- Decision
- Applied Program
- CSU Enrolled Hours
- Applicant Checklist
- Submitted Materials

Dashboard
Timeline
SU 26 GRAD Await...
SP 27 GRAD Await... Awaiting Submission
FA 26 GRAD Await... Awaiting Submission
FA 25 GRAD Await...
SU 25 GRAD Await...
SU 25 GRAD Decid...
Profile
Materials
Details
Dash

SU 25 GRAD Decided

Decided  
Submitted April 3, 2025  
Last updated April 8, 2026

Application Source: Slate  
CSU ID: ██████████  
PS Appl Nbr: ██████████  
Common App ID: ██████████  
EAB/Royal ID: ██████████  
CAS ID: ██████████  
KeyPath Ref ID: ██████████

Applied Program: M.L.R.H.R. Labor Relations & Human Resources - Online  
Admitted Program: -  
CSU Enrolled Hours: 6

Self-reported GPA:  
Self-reported GPA Scale:  
Transfer Cumulative GPA:

FERPA Restriction Status: BLOCKED  
Prior CSU UGRD Dismissal: N

Ohio Resident: Yes  
Ohio Resident Years: 13

Request to Waive Checklist Item

Matriculate (Deposit Paid)  
Status: Received

Overview  
Financial Aid  
Workflows  
Portfolio  
Populations  
Read Application  
Download PDF  
Impersonate > Applications  
Impersonate > Status Page  
Edit Application Details  
Application Details  
Applicant Data Request  
Update Major  
Gap Year Request  
Scholarship Appeal  
Triage

Checklist

| Date                          | Subject                     | Section | Status   |
|-------------------------------|-----------------------------|---------|----------|
| <a href="#">New Checklist</a> |                             |         |          |
| ✓ 04/04/2025                  | Transcript ██████████       |         | Received |
| ✓ 04/04/2025                  | Transcript ██████████       |         | Received |
| ✓ 04/03/2025                  | GRE or GMAT Test Scores     |         | Waived   |
| ✓ 04/03/2025                  | Transcript ██████████       |         | Received |
| ✓ 04/18/2025                  | Reply to Offer of Admission | Form    | Received |

Materials

| Date                         | Description                      | Record | User          |
|------------------------------|----------------------------------|--------|---------------|
| <a href="#">New Material</a> |                                  |        |               |
| 04/04/2025                   | Transcript (Official) ██████████ | Folio  | Sharon Deaton |

Inside each application tab, you can view the student's current applicant checklist, as well as any additional checklist items that are added once they are admitted (if admitted). You can see if they were received, awaiting, or waived

## Waiving Checklist Requirements

As a note, waiving items is the responsibility of enrollment services or graduate studies. Place all requests to waive items either view the “request to waive checklist item” form located above the checklist, or send the request to [come2csu.grad@csuohio.edu](mailto:come2csu.grad@csuohio.edu).

Keep in mind, waiving items should be done sparingly and with consideration for meeting admission criteria—if items are consistently waived for all applications it no longer meets the threshold of an admission requirement and would need to be removed as a required item from your process.

## Viewing Submitted Materials Outside of an Admission Decision

Below the checklist is the student’s submitted materials. You can view recommendation letters, transcripts, and any other required items submitted for the checklist. Student’s may also choose to submit additional items that are not required, such as a CV or resume—you will see this appear in materials along with the submit date, in the materials section. Another way to access this information is via the “materials” tab within the student’s record.

## Accessing Student Applications: Reader View in Slate

If you are responsible for decision-making via a recommendation on applications, you will have access to Reader in Slate. Reader is a function of slate that you must open to access. The link to directly access reader is here: <https://go.csuohio.edu/manage/reader/>.

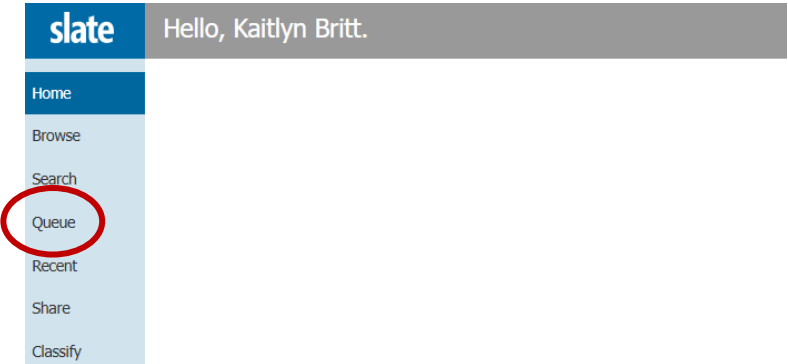
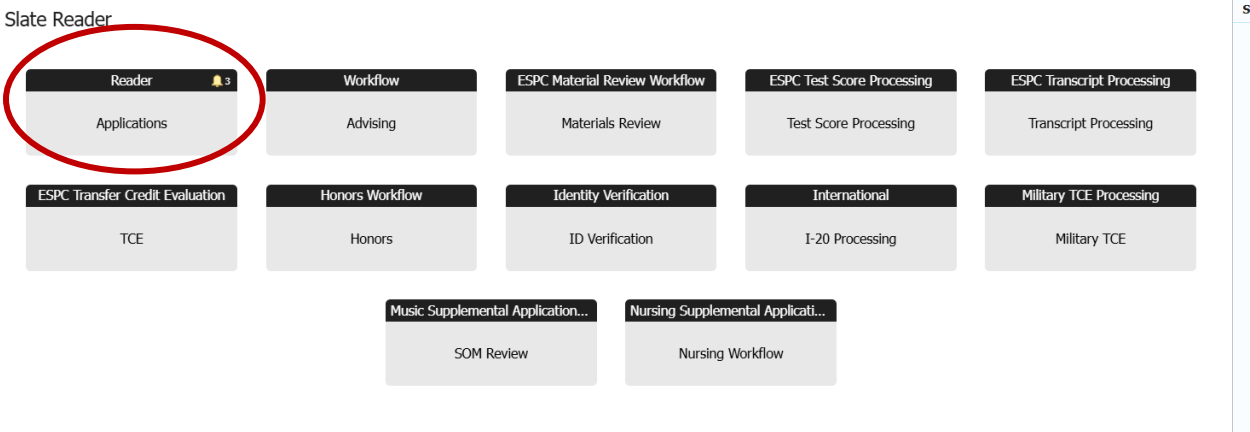
You can also access reader via the reader icon:



A yellow dot on the reader icon means you have applications that are sitting in your reader queue. Your reader queue only populates with completed applications that are ready for a decision. It updates each term to only show you applications for terms that are active in Slate.

# Slate Reader: Accessing your Queue

You can access your queue by clicking on “applications” or, if already in the reader view, by clicking on “queue” in the side bar.



Your queue indicates the name of the applicant, the round they have applied which is the season and then year of term, as well as the applied program, and bin entry timestamp, or the time in became available for a decision.

| Queue (3) |            |                                     |                   |            |      |                     | Build Query |
|-----------|------------|-------------------------------------|-------------------|------------|------|---------------------|-------------|
| Name      | Round      | Applied Program                     | App Status        | App Source | Tags | Bin Entry Timestamp |             |
|           | FA 25 GRAD | M.M. Music Performance              | Awaiting Decision | Slate      |      | 02/27/2025 03:50 PM |             |
|           | FA 25 GRAD | M.M. Music Education                | Awaiting Decision | Slate      |      | 07/10/2025 04:04 PM |             |
|           | FA 26 GRAD | Certificate - Urban Health - Online | Awaiting Decision | Slate      |      | 07/28/2026 10:25 AM |             |

Once you click on a record, you can see their demographic information, as well as any required testing results such as the GRE, GMAT, or English language proficiency scores. Additionally, you will see all listed schools and the GPA of any school where a GPA was

awarded—you will also be able to see if a degree was conferred as sometimes students do transfer or attend a school just for Pass/Fail grades. An example is below:

FA 25 GRAD Awaiting Decision

CSU International

Student Info

Name:

Citizenship:

Foreign National

Email:

Mobile Phone:

Text Msg OK:

No

City:

State:

South Chungcheong

Country:

South Korea

CSU ID:

State ID:

Application Info

Round:

Graduate Student - Fall 2025

Source:

State

Submitted:

2025-02-19T06:31:53

Applied Program:

M.M. Music Performance

Admitted Program:

Tests

| Type                                                 | Subtype | Date | Total | Score 1 | Score 2 | Score 3 |
|------------------------------------------------------|---------|------|-------|---------|---------|---------|
| There are no test scores to display for this record. |         |      |       |         |         |         |

Schools

| Name | Location      | Category      | Conferred/Expected | GPA  |
|------|---------------|---------------|--------------------|------|
|      | United States | Undergraduate |                    | 3.79 |

## Reviewing the Application and Submitted Materials

Use the lefthand sidebar to view the application, transcripts, and any additional required submitted materials for you to make an admission decision.

Dashboard

Application

Transcripts

References

Resume

Writing Sample

## Opening the Slate Reader Decision Form

To open a decision form, move your cursor to the bottom and righthand side of the screen and click on “review form / send to bin”.

**Program Coordinator Review Form**

Recommended Decision  
No Decision/Other

*Race / Ethnicity cannot be used as a consideration for admission.*

Reason for 'No Decision/Other'

**Send to Bin**

Current Bin  
Program Coordinator Review

Next Bin (required)  
Application Processing

**Send** Draft Saved

Review Form / Send to Bin

Decisions that are available to you include:

- Admit
- Admit with course prerequisites
- Admit – Provisional
- Deny
- No Decision/Other

When entering a decision, there will be a “comments” box. You *may* write in this box **ONLY** if you feel you are able to follow strict adherence to fact-based statements that are related to required admission criteria, only.

## The Slate Reader Comment Box

Slate reader admission decisions of admit, admit with course prerequisites, admit – provisional, and deny all are public record. Students may make public records requests and read their admission decision, which includes reading whatever is type in the Comments box.

**If you choose to write in the comments box, your statement is subject to legal ramifications and consequences.** If you believe you are capable of making admission comments that are fact-based and related only to required application materials, you are welcome to write in the comments box.

**If you do not feel you can handle the responsibility of monitoring what you write in the comments box, our team advises against writing comments.**

## Unacceptable Fact-Based Comments Box Statements in Slate Reader

Just because something is a fact does not mean it is acceptable to write in the comments box. Race, gender, or ethnicity could be considered facts. It is **never** acceptable to note a student's race, gender, or ethnicity for any purpose in an admission decision. See the Office of Civil Rights for information about discrimination in educational admission processes: <https://www.ed.gov/laws-and-policy/civil-rights-laws>.

It may be a fact that you have met this student before. As long as meeting you is not a requirement of admission, referencing that you have met this student before and whether that interaction was positive or negative is considered beyond our admission policy and thus is not a fact that would be deemed appropriate for the comments box as it is extraneous to our admission criteria—if an interview is part of your admission process, you could note that you met the student and have no concerns and/or they met your expectations for the interview requirement.

**Opinions are never acceptable in the comments box.** Noting that you did not like their essay, or that you did not think their work experience was “relevant” or that you believe them to be unethical or untrustworthy, should never be noted in the comments box as these are your opinions—even if they are based on some kind of fact you feel is notable in the application. If you require a writing sample as part of your admission criteria and discover an AI watermark—you can note this, but only in a fact-based manner—“student was required to submit example of writing. Writing sample was AI-generated per watermark in submission. Did not meet minimum expectations of this admission criteria”. Exclude opinion-based language about how this made you feel or how you felt this showed poor character.

## Acceptable Fact-Based Comments Box Statements in Slate Reader

You may keep track of fact-based admission items for yourself in the comments box. A minimum GPA is a requirement of admission—you are welcome to note “met GPA minimum” or even “GPA 2.75—meets min”.

You may note that recommendations met expectations or did not meet expectations—no further elaboration is encouraged. You are welcome to note that one letter met expectations while the second letter did not meet expectations—this can help you track that one was positive while the other was not. If you list what the recommender wrote in their letter, you open that person up to negative repercussions from the student—it is best to consider protecting the recommender’s anonymity in the process for safety.

You may note that a major aligns with minimum admission expectations for admit without requirements, or you can note that the degree of biology for an MBA will require admission with requirements to ensure academic preparedness.

You may note that a writing sample met expectations or did not meet expectations. If you note that the student did not provide citations and thus had a writing example that would not pass plagiarism minimums set by CSU, this can be fact-based and is okay to state. Simply avoid elaborating with adjectives like “unethical, wrong, stupid, careless”, etc.

You may note that they meet all minimums but because of a large applicant pool, did not exceed expectations and thus was not admitted for this round—just keep in mind that if you state more specifics, you must be sure that this is 100% accurate so in this case, less is more. This could help you in the future if they apply again as you may wish to admit them when you have space available. If you’d like to explore **introducing the waitlist function for your program, please contact [come2csu.grad@csuohio.edu](mailto:come2csu.grad@csuohio.edu)**.

## Application Comments Box: Denial

If you are going to deny, remember, your comments will remain readable as public record. You can note things like “did not meet GPA minimum”. You may note “class-filled 2026-2027” or “missed admission deadline of xx/xx for x term”. Writing that you did not like the candidate, that you questioned their transcript, or that you feel they used AI are not acceptable.

## Application Comments Box: When in Doubt, Leave it Blank

Writing in the comments box increases our legal liability. Many institutions train staff for many weeks or months on how to write admission decision comments, especially at highly competitive institutions. It is reasonable to feel some hesitation in using the comments

box. Thus, we recommend that if you doubt that you are able to keep comments fact-based and neutral, it is best to avoid writing in the comments box.

**You are responsible for understanding expectations of the Office of Civil Rights when it comes to discrimination in admission decisions as a person responsible for issuing a decision or recommendation**—the institution and our office have this responsibility, as well. You can learn more about Civil Rights that apply to admission decisions here: <https://www.ed.gov/laws-and-policy/civil-rights-laws>. This can help shape your decision to use or not use the comment box and what is or is not appropriate for the basis of a decision or recommendation.

### Reason for “No Decision/Other” vs. the Comments Box

If you are choosing the decision-type “No Decision/Other” which you can read below for when to select, you no longer will see a comments box. This is because you are NOT making a decision.

Instead, you are passing the application on to a reviewer for assistance or triage. In this instance, you can write as much as you would like in the reason box—this is NOT part of a decision record for the student.

## Slate Reader: Decision Types

There are 5 active decision-types in Slate currently for graduate admissions:

- Admit
- Admit with course prerequisites
- Admit – Provisional
- Deny
- No Decision/Other

### Decision Type 1: Admit

If you select Admit as your decision type, you are indicating that you have determined that the applicant either meets or exceeds all required admission criteria and you would like to offer admission without any academic requirements.

This admission type is available to all applicant types.

### Decision Type 2: Admit with Course Prerequisites

If you select Admit with Course Prerequisites, you are indicating that you recommend admission, but that the student should take a series of selected courses to be adequately prepared for the program of study.

This admission type is available to all applicant types and is the only other admit type acceptable for international students.

**Please keep in mind that these prerequisite courses cannot count toward degree completion for the student**—instead, these courses must be completed in addition to the rest of the curriculum for a graduate degree to be conferred.

**If you are assigning more than 2 required prerequisite courses, it might behoove you and the student to engage in a conversation about readiness** and taking classes non-degree graduate or as a **post-baccalaureate** and then applying once more after successfully getting a B or better in the courses. This is because more courses means the student is not prepared and they would then be extending their time to degree beyond a term. Post-Baccalaureate allows them to take undergraduate-level preparatory classes while non-degree graduate allows them to take graduate-level prerequisites.

### Decision Type 3: Admit – Provisional

This admission type is for students that you would like to recommend for admission, but they did not meet the GPA minimum requirement for admission, but may have demonstrated other readiness that you feel fills this academic gap and thus giving them a chance to start is worth the investment and will likely yield a graduate.

This admission type is **not acceptable for international students**. This admission type will result in no visa being awarded so keep this type limited to domestic or permanent resident applicants.

**Additionally, you cannot assign prerequisites for this admission type.** If you feel this student does not meet GPA minimums AND needs remedial coursework, it is likely they are not admissible—you may want to reach out to the student to recommend they take non-degree graduate or post-baccalaureate courses to lift their GPA eligibility and ensure they are prepared for the course of study, moving their application to one of these types.

### Decision Type 4: Deny

Choose this if you feel the student does not meet the minimum eligibility criteria for admission based on your required admission items. You can also choose this admission decision type if you have limited space available and had to make decisions based on a holistic view of the app that required applicants not only meet but exceed admission minimums.

This admission type is acceptable for all applicant types.

## Decision Type 5: No Decision/Other

Use this admission type if you are unable to make a decision and want to notify the graduate college of why so that an action can be taken on your or the student's behalf.

For example, if you are missing a data point, like GPA, please select “no decision” and then provide details in the “reason” box so the team can fix a data error.

If you note that the student applied multiple times to the same program in different but near terms, or even the same term, let graduate studies know and they can close duplicate applications or reach out to the applicant to confirm their preferred admission term.

Here is a list of times to use the “No Decision/Other” decision-type:

- Missing a data point or required admission item
  - GPA not included
  - Missing a recommendation letter
  - Something is appearing blank/not appearing for you and it should be
- Student applied multiple times to same program
  - Same term or future terms
  - Want to get clarity from student on what they are trying to do so not wasting your time/decisions
- Student missed deadline for admission
  - And you want grad studies to follow-up with them to see if they'd like to consider a future term
  - You followed up with the student and will forward written correspondence between you and the student to [come2csu.grad@csuohio.edu](mailto:come2csu.grad@csuohio.edu) to append to their record indicating they would like to move terms for a decision
- Student needs too many prerequisites so you would like grad to connect with student to change application to post-baccalaureate or non-degree graduate
- Some other concern/issue with app that you need help troubleshooting

The “reason for no decision/other” box is NOT a comments box. It is NOT recorded on the student's permanent admission record. Instead, this box is sent to graduate studies for greater understanding of the issue. **Please write a robust statement for why you are returning this application to the graduate college so that our team can quickly assist you.**

## Slate Statuses

Within state, students will hold specific statuses. The statuses in slate have two levels: Person status, and then Applicant Statuses. The person statuses in Slate are as follows:

- **Prospect:** If we are missing key details that explain how we got this lead, it will enter our system as a prospect to ensure they only receive outreach in a controlled way since they may not have fully consented to outreach (manual add/limited contact lead). **We rarely use this status, ever, except when truly needed.**
- **Inquiry:** When someone has NOT started an application EVER with us—they can never return to this status if at ANY TIME started an application
- **Applicant:** The student has started an application at ANY TIME in their lifetime in our database (even as an undergraduate), they will hold this status. Even if they never submit an application, they will live in this status and can never go backwards to an inquiry, again.
- **Admit:** When a decision of “admit” of any time is made, they will move to this status. If a student is denied, they will stay as an “applicant” in the system. An admit can move back to an applicant if they have additional open applications, but they can never move down farther in the system to inquiry or prospect.

The person-type Slate field is the higher-level status that is assigned to their record. Once they start an application and enter into applicant stage, they then have statuses that are more nuanced:

- **Awaiting Submission:** This status is for any student that starts an application, but doesn’t submit it—they can hold this status on a specific application that was never submitted but then their person status will be “applicant”
- **Awaiting Materials:** This means the student completed an application, submitted it, and now they have their checklist that has required items that need to be submitted. The checklist is dictated by the programs admission requirements as filed in the catalog. All changes to checklists must go through modern campus with full approval to be implemented in Slate.
- **Awaiting Decision:** All materials that are required for a decision have been received and the application is now moving to the workflow bins for decision steps. Awaiting decision should align with “Program Coordinator Review Bin” for it to be in the correct workflow—if you ever have an error where this does not align and the bin still says “Awaiting materials” this is a good time to reach out to Graduate Studies for correction!
- **Awaiting Confirmation:** The student has a decision that was made by a Program Coordinator or the assigned staff for Slate Reader, and now the system is holding that decision release until it goes through the next bins, which includes academic/personal conduct review if the student reported a crime or academic conduct concern. All application decisions are manually released on Mondays, Wednesday, and Fridays.

- **Decided:** When the decision has been released, this status will appear, followed by the decision type such as admitted, admitted provisionally, denied, or withdrawn if withdrawn along the pipeline

Once a student is admitted, they have additional **Decision Statuses or Reason Codes**

That you will note:

- **Administrative Withdraw:** The application was removed for a specific reason and is no longer active
- **Matriculated:** The applicant decided to **Accept their offer of admission** formally by completing the checklist item in their student portal—at this time, the step is NOT required, but highly encouraged. This does NOT mean the student has actually enrolled in classes
- **Declined Offer:** On their offer of admission form, they stated they will not be enrolling OR, they communicated to staff at CSU they will not be enrolling and this was noted on their record
- **Admitted, did not enroll:** Posts after add/drop if the student was offered admission but never enrolled per a pull from PeopleSoft or our SIS system in use
- **Deferred:** Student has a new application opened for a future term with an admission decision; they can defer up to 1-year and each program may allow deferral based on their admission terms (can't defer to spring if only admit in Fall, for example)—Mistakes do happen since this is manual, so report any concerns to Graduate Studies!

All of this creates a very complex layer of decisions. Basically, a student has a person status that allows us to identify them as one record. After that, they may have many applications in different statuses, like awaiting submission, awaiting materials, and even decided, all at the same time! And then for all decided applications, the student then can take actions to indicate their intent and we try to keep this as correct and accurate as possible and you staying on top of your student admission lists (or the appropriate staff member in your department) ensures this is up-to-date. This is the reality of a “one-to-many” database when we allow multiple applications for graduate study from one student in any given term or terms!

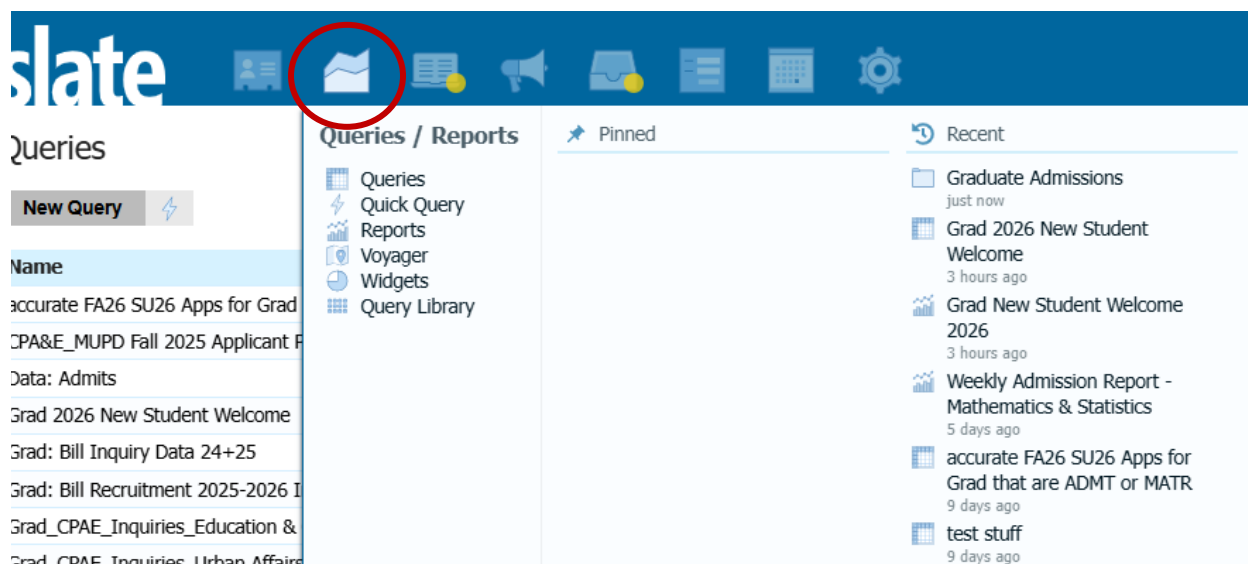
## Slate Reporting

Slate has the ability to build queries from the many fields inside the system. These queries are the foundation for reports. Reports can provide raw data, or could include charts and graphs or counts.

All Program Directors or those responsible for monitoring their inquiries and applicant to admit pool are sent two reports weekly: an inquiry report and an applicant/admit report.

## Accessing Slate Queries and Reports

Slate reports are sent to the identified decision-maker(s) for your program weekly as a PDF email. Additionally, when you login to Slate, you can access reports built by Graduate Studies.



Reports that are emailed weekly are stored under reports in the queries/reports tab in Slate. Reports can be downloaded as excel files if you click on the report and then select “export to query” on the righthand side of the report.

### COB\_MBA\_Apps and Admits\_Active Terms

|               |                                           |
|---------------|-------------------------------------------|
| Folder        | Graduate Admissions / College of Business |
| Current as of | 08/17/2026 at 12:49:48 PM ET              |
| Status        | Completed successfully.                   |

Edit Report  
Export to PDF  
Export to Query

Reports are live-updated when opened from Slate. This means, at the time the report is generated when you click on it, that is the most up-to-date data in slate. The emailed report is a snapshot in time, you can access the report in Slate via the email if you scroll to the bottom of the message and click on “display report in Slate”. If you are denied access, contact [come2csu.grad@csuohio.edu](mailto:come2csu.grad@csuohio.edu) for access permissions.

## Slate Report Notification: College of Graduate Studies - Graduate Enrollment Funnel -...

Summarize



Technolutions <no-reply@technolutions.com>

To Kaitlyn Britt; k.mazenetz@csuohio.edu



Reply



Reply All



Forward



...

Mon 8/10/2026 12:08 PM

This sender no-reply@technolutions.com is from outside your organization.



College of Graduate Studies - Graduate Enrollment Funnel - FA 26.pdf  
128 KB

...

[Display Report in Slate](#)

## Slate Reporting: Functions that Can be Explored

If you would like additional data sent, or would like us to explore creating a report or an addition to your emailed report that displays data in a visual way or by counts, contact [come2csu.grad@csuohio.edu](mailto:come2csu.grad@csuohio.edu). While we may need to confirm what we can and cannot report out to you, or what we can or cannot build from a database functionality standpoint, we are happy to be partners in thought and improving your deliverables!

## Query vs. Report in Slate

A query is the most basic function that can be built into a report. It is a search performed within the database to pull out rows of data. The query must be built on the correct “base” or joined in the correct way across the many tables that exist inside the database.

A query can be run to pull out data at any time and can be viewed to access data straight from the query while a report generates a list, but may not allow you to click on each record for review.

A report can have lots of tables or components while a query is just base data presented in rows—ask Graduate Studies for assistance if you want a report or query built—generally our office builds reports so that you can get the data emailed, but a query could also do the trick if you do NOT need to data emailed every week or biweekly, etc.

## Slate Report and Query Structure/Foundation

Slate is a **one-to-many database**. It is built off of a person or organization, and then all other data is stored in tables from there. This means, for every person, there may be many applications, many addresses, many emails, many admission decisions, but they, the person, are the one datapoint that is at the center of it all.

When we build reports from the person-base, we get one person row back and then one row of whatever data we requested. When we build reports from the application base, we are pulling all applications that exist and this may pull the person in more than once, if they have multiple applications. Each approach has data implications and value—we do our best to make the right decision from the base to ensure accurate reporting, but our team is ever-learning!

Slate is a **Configurable Join** database—we can configure the query to join to many other bases as-needed. Where we build that join matters—it determines how the data is limited. There is both science and art to building reports—the more complex or nuanced a database, the harder it becomes to get out basic data.

Allowing multiple applications per term and allowing the same application for a term does lead to some duplication in data that increases reporting complexity and therefore can impact reporting accuracy. We do our best as a team to consider all of the limitations of how we have allowed our students to apply as graduates and how this impacts data collection and reporting.

At the end of the day, our goal is to provide you with an accurate list of who is in your pipeline for the recruitment cycle. If at any point you feel this data may not be accurate—let us know! We are happy to review a report to ensure its accuracy.

## Slate Report Data Points

As a reminder, if you are responsible for inquiries or applicants/admits and connecting with them in your pipeline, you should be receiving 1-2 reports at a minimum to track your active recruitment pool.

If you are **working with a vendor for recruiting**, it is important to know what your role is in the process versus what the vendor does to support your program. We do NOT want to do outreach on two fronts that confuses the student—be sure to check with your college leadership to confirm what your role is in the recruitment processes

If you are reviewing reports, whether just to be in the know or to act on the data you are receiving, please ensure that your report has the minimum data points for each report type.

## Minimum Inquiry Data Points

- First and Last Name
- CSU ID (though may be blank)
- Citizenship (though may be blank)
- First Inquiry Date
- Anticipated Program
- Anticipated Term (May be blank)
- Phone (may be blank)
- Email
- SMS opt-in/Out (may be blank)

Inquiry reports only pull in students who have NO APPLICATIONS ON FILE with CSU. This is how they get the status “inquiry” in the database.

## Minimum Applicant/Admit Data Points

- First, Last Name (preferred may be included)
- CSU ID#
- Citizenship
- App Submit Date (May be blank if “awaiting submission”)
- Program (actually applied to)
- Term (actual)
- App Complete date (May be blank if “awaiting submission” or “Awaiting materials”)
- Decision (where the app is currently, did student accept offer?)
- Decision Details (specifics, if provided)
- Admission Decision (what you decided)
- CSU Enrolled Hrs (only field that indicates enrolled at CSU)
- Phone
- Email
- SMS Opt in/out (may be blank)

Applicant/Admit reports pull in any student for the active terms that you are recruiting for that have started an application, even if they haven’t submitted it.

Applicants that are “awaiting submission” are really “hot leads” because they haven’t actually submitted the app, but they were at one point thinking about it! These could be a good audience to connect with to see what more they’d like to know to make the plunge! Or, open their record to see if they finished an application for a different program—this is quite common! Students don’t realize they don’t have to open a new application each time

they want to explore something new, and thus this can lead to multiple open but awaiting applications—let us know what we can close if you can get that information confirmed in writing with the student!

## Slate Communications

We use Slate Deliver to send marketing communications to prospective students. At this time, we send emails to inquiries, applicants, and admits. Below is the outline of what we send:

- **Inquiry Emails (3 total)**
  - 1 sent the day they inquire for a specific program that has a content block with program-specific information
  - 1 sent 2-weeks later to students who remain inquiries to a specific program with a content block with program-specific information
  - 1 send after 45 days as an inquiry if they have indicated a specific program reminding them to reach out if they have questions about their program of interest
  - **If you are working with a vendor to assist with outreach to inquiries, they DO NOT receive these emails in an effort to not overwhelm them with messages**
  - Entered into College of Grad Studies general outreach campaign structured by vendor to push to apply; **except vendor inquiry-supported programs**
- **Applicant Emails**
  - 1 System email that thanks them for submitting an application to CSU and gives them access to their CSU Applicant Portal
  - 1 Program-specific email that thanks them for applying, sent 2-days after submit
  - 1 Program-specific email send 2-weeks later if app remains incomplete
  - Continuous bi-weekly system reminders of incomplete application items sent for 2-months
    - After that sends every 3 weeks until close of app window
    - Mailed a postcard with incomplete items after 36 days pending
  - **If you are working with a vendor to assist with outreach to applicants, they DO NOT receive these emails in an effort to not overwhelm them with messages (CAS, Collegis, Keypath, etc)**

- Entered into College of grad studies general outreach campaign to finish app and enroll structured by vendor; **except vendor applicant-supported programs**
- **Admit Emails**
  - 1 Admission letter with decision, system sent and stored in CSU Applicant Portal for the student
  - 1 system-based email on activating your student account/email for CSU, if admitted (sent after admission decision released and viewed)
  - 1 welcome to CSU letter from college/dean/program designed by the program or college
  - 1 next steps email based on program next steps
  - 1 start of term reminder email of things to do, program based, such as orientation or meeting with an advisor, as required/recommended
  - 3 general emails from Graduate Studies reminding students about on-campus services, activating your student accounts, tuition and financial aid
  - 1 invitation to new student welcome reception if admitted summer/fall
  - Emails to student email account from bookstore and CSU about transportation that start 2-weeks before classes start
  - **If you are working with vendor to assist with outreach to admitted students, they DO NOT receive most of these messages to avoid over saturating them with comms via email**
  - Entered into College of Graduate Studies general outreach campaign to finish enrollment/confirm plan to enroll; **except vendor admit-supported programs**

Additional communications can be built, but preference is given to email templates that can be used for all terms and start dates and entered into a cycle of communication. One- of emails sent at specific times of the year can be sent via Slate for you, but the COGS will not maintain a calendar or reminders to send these—you will need to be proactive to request that these be sent and will need to provide the specific one-time content.

## Content Blocks: Program-Specific Information

We manage 3 inquiry, 2 applicant, and 2-3 admit emails that are program-specific, for each program. Instead of creating individual emails which would result in a minimum of 7 emails for each program x 150 different pathways, we use content blocks to create a specific section of content within an email that is narrowed to your program.

## Content Block Best Practices

We recommend that you point to some action for the reader to in your content block. This tells us that they interacted with your message, so your message had impact that drove engagement. This best practice is what our current marketing partner, EAB, does in their general email campaigns.

Some ways you can drive your recipient to engage with the emailed content are below:

- 1) Give them a link to a calendar to meet with you or someone on your team if they have questions
  - a. Consider using Microsoft Bookings: <https://www.csuohio.edu/messaging-services/microsoft-bookings>
  - b. While you can always offer your email and/or phone for direct outreach, this is not best practice as it will require careful monitoring of your inbox since most students expect a reply within 24-hours with our marketing partner stating over 48-hours ineffective
- 2) Invite them to explore your Program Page to learn more about something special about your program (where your graduates work, career outcomes, research expertise, scholarships)
- 3) Invite them to look at events taking place in your college
  - a. Recommend having a college calendar or event page
  - b. Something that is maintained and updated annually so link stays active
- 4) Invite them to apply for GA/TA/RA/Scholarships
  - a. Link to page that is always available to learn more
  - b. Make sure this link works year-round; don't link to a form that shuts off or gets replaced each year
- 5) Drive them to view faculty highlights or profiles
- 6) Share your social media page with them to follow
- 7) Have them sign-up for your newsletter or magazine
- 8) Have them complete a special survey that tells you more about their interests
  - a. Have grad studies build in slate
  - b. Can set up an automatic flow to send results to someone
  - c. Can send auto-communications from form to thank them and tell them someone will follow-up
  - d. If you aren't actually going to follow-up, don't do this!!!

## Content Block Email Templates

The Office of Graduate Studies has created some email template guides to help you see what your sending email will look like, and what content block material is most appropriate for the email that was built.

You can send your content block edits to graduate studies for update. Graduate Studies is updating content blocks based on existing outgoing communications and will reach out to each program to ensure the content blocks match expectations as they move through the list for this update. The estimated date this project will be complete is December 15, 2026.

After that, content blocks will be maintained on an excel sheet and can be updated whenever you desire, or as program directors change or contact information changes for the college.

### *Inquiry Templates*

The following links connect to our existing templates used for Slate Inquiries—you are welcome to make a copy to edit the “content block” areas of these templates for your own specific content. Graduate studies will have either connected with you to write these already, or written content blocks on your behalf to try to get the process started with a December 2026 launch date for content-block based emails.

[Inquiry Email 1 Template & How-To Write Content Block Guide - Copy.docx](#)

[Inquiry Email 2 Template & Content Block Guide - Copy.docx](#)

[Inquiry Email 3 Template & Content Block Guide - Copy.docx](#)

### *Applicant Templates*

Applicants are sometimes in “awaiting submission” stage, which means they are hot leads who *almost* submitted an application, but haven’t quite finished. We can target these students as well as those “awaiting materials” to try to ensure they feel supported but also so that they know that more is needed to take the next step for CSU consideration. We have not historically emailed this population of student but hope to have this up and running by December 2026. Templates are below:

[Applicant Email 1 Template & How-To Write Content Block Guide - Copy.docx](#)

[Applicant Email 2 Template - Copy.docx](#)

### *Admit Templates*

Once admitted, The College of Graduate Studies does send general emails with reminders about CSU life and things a student can do to get ready for classes, such as how to get a

CSU ID, where to learn more about parking and public transportation, or where to learn how to access online course materials and content, as well as general guides on registering for classes, tuition and financial aid, and other reminders by population group (online/US vs. foreign national student). Admitted International students get system automated outreach designed by CISP to ensure they take any required next steps for Visa's and I-20s, as applicable.

Templates that are sent that are program specific for post-admission, are below. We highly recommend thinking about how you can concisely communicate next steps to admitted students, with templates that can withstand time—do you have a specific course sequence, point person for them to talk to about registering for classes, timelines, or onboarding procedures like an online orientation or some kind of program welcome? What do you always do, no matter the term admitted if you admit at more than one term cycle?

[Admit Email 1\\_Template - Copy.docx](#)

[Admit Email 2\\_Template - Copy.docx](#)

## Slate Events

Slate can host registration forms for events. These events can take place in-person or could be hosted virtually via Teams or Zoom and shared as virtual check-in links to registered attendees. Slate events can create check-in features so you can track attendance, and can create automated communication plans to identify students to invite, thank them for registering, remind them about the event, and send post-event thank you's to attendees and those you missed.

Slate tracks events attended and saves these to the student's record. Slate events can be embedded into website pages for CSU or shared as links. QR codes can be created from Slate to put on flyers or at check-in for self-service, as well.

Contact the College of Graduate Studies to collaborate on moving your events from external form platforms to Slate for a convenient one-stop shop of services that are FREE, including the ability to text reminders and send cancellation updates due to poor weather conditions.

## Building an Event in Slate

Slate allows users to set events as 1 time, recurring, or to copy past events to be edited and reused as-needed. Slate collects basic event data to set the event details page, and then allows users to build a form to collect registrations.

Slate events can take place in-person or virtually. Virtual events

The screenshot shows the 'Edit Event' form in the Slate system. The event is titled 'Maxine Goodman Levin School of Urban Affairs Graduate Open House'. The date is set for Saturday, October 31, 2026, from 12:00 PM to 02:00 PM Eastern Daylight Time (UTC-04:00). The location is Cleveland State University, 1717 Euclid Avenue, Glickman-Miller Hall, Cleveland, OH 44115, United States. The folder is Graduate Admissions, and the status is CONFIRMED. The user is Katie Mazanetz. The form includes fields for Page Title, Internal Name (optional), Template, Folder, Realm, Status, Date, Time, until, Time, Deadline, Activation Date, Time Zone, User, Trip, Admin Notify Email, and Related Records. There are also buttons for Save, Delete, and Cancel.

**Event Details:**

- Title:** Maxine Goodman Levin School of Urban Affairs Graduate Open House
- Date:** Saturday, October 31, 2026 at 12:00 PM until 02:00 PM Eastern Daylight Time (UTC-04:00)
- Location:** Cleveland State University, 1717 Euclid Avenue, Glickman-Miller Hall, Cleveland, OH 44115, United States
- Folder:** Graduate Admissions
- Status:** CONFIRMED
- User:** Katie Mazanetz

**Registration Settings:**

- Page Title:** Maxine Goodman Levin School of Urban Affairs Graduate Open House
- Internal Name (optional):**
- Template:**
- Folder:** Graduate Admissions / Urban
- Realm:**
- Status:** Confirmed/Active
- Date:** 10/31/2026 Time 12:00 PM until 10/31/2026 Time 02:00 PM
- Deadline:** Time Activation Date Time
- Time Zone:** (UTC-05:00) Eastern Time (US & Canada)
- User:** Mazanetz, Katie User 2
- Trip:**
- Admin Notify Email:**
- Related Records:** Search for Record

**Buttons:** Save, Delete, Cancel

## What You Need to Set up a Slate Event

The basic items you need to set up a Slate event through Graduate Studies are:

- 1) Title/Name of Event
- 2) Date and start/end time of event
- 3) Primary contact for event—who will manage questions, be listed as the point of contact on emails, etc
- 4) Short description of event (think 2-5 sentences maximum)
- 5) Audience—who do you want to invite
- 6) Virtual or in-person—if Virtual be sure to set up an EVENT via zoom or teams to ensure a distinct event-specific link is sent (share with Grad Studies)
- 7) What questions you need beyond the basics (name, entry term, program of interest, email)
- 8) Recommend 6-8 week minimum notice for ample promotion and planning

## What Communications Can be Sent via Slate Event

Slate allows users to set up pre-programmed email communications to a number of audiences and for a number of purposes. At a minimum, each event will get:

- 1) A confirmation of registration success screen
- 2) Confirmation of Registration
- 3) At least 1 event reminder email
- 4) A post event thank you
  - a. Can be programmed for those that attended
  - b. Can be programmed for those who did not attend (didn't check-in)

Additional communication options include:

- 1) Audience Invitations
  - a. Can send as many as desired on prescheduled dates
  - b. Can send to a list pulled from Slate database based on your parameters or
  - c. Can be sent from an uploaded list shared with Grad Studies
- 2) Additional Reminder Emails
  - a. Recommend 1 a few days before (2-5), 1 day before, and 1 day of
  - b. Attachments are possible, to include things like maps if you have made one to help with parking or getting to your event location, or a parking pass if you are providing one!
- 3) Texts
  - a. If you collect phone number
  - b. Short statements, can invite to register to attend or remind about event
  - c. Can send check-in code to do scanned check-in if having grad studies help with event
- 4) Targeted messages to specific populations from the questions on your event registration form
  - a. If you want a specific thank you for attending from each program included
  - b. If you want to email PhD students something different from Master's interested students who attended
  - c. Must have right questions on form to create this narrowed outreach
  - d. Survey can be sent to guests if you design one (we will not design for you)