Low-Fidelity Concept Testing

Research Report

Insights Summary

Applicant Dashboard
- The quick stats box was well-received.
- Users found the concept of summary statistics and graphs useful but most requested different data be graphed (such as TOEFL) and greater flexibility and interactivity. GPA, test scores, and gender graphs received mixed to positive feedback, while test scores and demographic received mixed to negative feedback.
- The applicant table was well-received but some participants struggled with default columns, particularly GPA (because of self-reporting and conversion issues) and status. Some users highlighted the need to preserve privacy on average ratings during the review process, while others had the opposite need.
- Applicants found it easy to click into an application packet.
- Color-coding across the graphs and table was well-received but users highlighted the need for coordination across the two.
- The ability to apply admissions decisions was generally received positively, particularly deny.
- The ability to mark applicants received mixed reviews.
- Assigning received positive reviews with some caveats around permissions models.
- Filters were generally well-received, particularly their easy access and reduction of options.

Reader
- Users reacted positively to the vertical scroll redesign and bi-columnar design.
- Users described inline commenting functionality as intuitive and easy to use but some expressed reservations about its utility.
- Users were split on comments being for private vs. public use. Overall, users were uncertain if comments are public or private, and felt a need to know.
- Most users had positive reactions to the 5-point rating scale and persistence of the review form but some users shared complications around rating applicants and making exceptions.
- Many users had positive reactions to the review assignment feature.

SIR Dashboard
- Graphs were viewed as a value-add for quick reference and demographic data was seen as valuable but terminology for the SIR status tabs didn't fully map to participants' lexicon.
- Participants had a positive view of being able to set a target but multiple destinations around its articulation.

- Participants were unanimous in their interest in using the SIR dashboard to access applicant contact information but varied on how they would use the information. Participants continued to express their interest in developing a relationship with applicants and placing a "personal touch" on communications.
- Most participants didn't notice the CSV icon without prompting.
- The ability to switch between programs was received well by nearly all participants.
- Dividing the SIR lists into the three status-based categories resonated with participants.
- Nearly all participants viewed the SIR Dashboard to be valuable to their admissions process.

Recommendations

Slate Section, Subsection	Recommendations / Proposed Solutions
Applicant Dashboard, Quick Stats	Roadmap: utilize Quick Stats to highlight outstanding work
Applicant Dashboard, Graphs	- Need to ensure that X/Y axes on graphs are appropriate - Roadmap: explore user-configurable graphs to compare any two metrics - Roadmap: drill-down from graphs - Roadmap: add ability to collapse graphs at the top to be more efficient during the application review - Sponsor: need to build trust with converted GPAs - When mousing over a dot on a graph then display the applicant's name and related figures - When clicking on a dot on a graph then open the applicant packet in a new tab - Ensure that all locations that display gender have an "Other" category - The term "Demographic" should get changed to "Region" - Roadmap: explore ways to expand the display of applicant residence to

	include CA Resident Status and Geo Region ● Graph colors and scales should match Grid List color coding

Applicant Dashboard, Buttons	● Move forward with "apply admissions decision" and "assign" buttons/functionalities
	   ○ Roadmap: explore permissions setting for who has access to these functions
	● Remove the "mark as" button for now
	   ○ Roadmap: explore how the associated flagging functionality intersects with Bins

Applicant Dashboard, Grid List	● Remove ability to select top X applicants ● Display both Raw and Unconverted GPAs ● Remove Average Faculty Rating ● Roadmap: explore ways to perform multi-level sorts on columns ● Roadmap: after clicking on an applicant, ensure that there are breadcrumbs to get back to the previous Applicant Dashboard state ● Update the column "Status" to match the slate term "Bin" ● Color coding in the table should match the graphs
Filters	● Ensure that graphs update with filter use. ● Add filter for status, i.e. awaiting materials. ● Separate out filter by program and add to top of page. ● Roadmap: Explore filtering outstanding reviews.

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	- Roadmap: Explore domestic vs. international and in-state vs. out-of-state filters. - Roadmap: Explore filters by school. - Roadmap: Explore filtering for-profit and online schools. - Roadmap: Group all applicants with below 3.0 GPA. - Roadmap: Explore filters by URM status. - Roadmap: Explore filters by gender. - Move keyword search from filter to search bar.
Reader: Application Packet	- Roadmap: Better understand user priorities for application packet information in order to explore a potential reordering. - Roadmap: Explore multi-columnar displays in the reader.
Reader: Inline Comments	- Disambiguate whether comments are public or private. - Remove visible zoom buttons. - Add search bar.
Reader: Comment Visibility	- Disambiguate whether comments are public or private. - Explore allowing programs or departments to control public or private modes, either in the Reader or in Settings.
Reader: Review Form	- Roadmap: Explore better definitions of the 5-point scale. - Roadmap: Explore staff permissions for review form visibility while faculty review - Explore adding exception request functionality
Reader: Assigning Reviewers	Roadmap: Explore assignments by program in addition to by assignee.

SIR Dashboard, Tabs	● A positive-negative SIR binary with outstanding option ● Switch ordering to Outstanding, Positive, Negative
SIR Dashboard, Target Component of Graphs	● Remove target for now ● Roadmap: explore permissions and visibility

SIR Dashboard, Graphs	● Add in yield stats to compare offers relative to SIR status
	● Roadmap:
	  ○ Consider layering GPA and demographic data layer on top of yield stats
	  ○ Funnel that includes *potential* applicants, on top of yield stats

SIR Dashboard, Contact/CSV	● Update CSV icon button to a standard rectangular button, aligned with other action-based CTAs ● Move forward with both email and phone number data in the table ● Roadmap: allow for custom data export functionality ● Roadmap: explore applicant communications flow initiating within the dashboard
SIR Dashboard, Program Selection	● Move forward with program search function, with PhD and Masters default for MVP ● Roadmap: explore program or role based defaults

SIR Dashboard, List View	● Move forward with list view categories as-is
	● Roadmap: layering in data views such as:
	  ○ Whether the applicant is a CA resident
	  ○ Whether the applicant applied to other programs
	  ○ Whether the applicant applied in previous years

General Feedback	- Continue to address privacy concerns at key visibility points: commenting, recommendations, etc. - Roadmap: explore support of custom intake forms for applicants that can feed into a department-specific applicant review packet, with the ability to organize the packet accordingly - Roadmap: explore offline viewing functionality of applicant packets - Roadmap: explore providing in-context definitions of certain stat criteria (e.g., URM) - Roadmap: explore utilizing notifications to draw users into Slate - Roadmap: explore automating the exception process around low GPAs

FINDINGS DETAIL

Applicant Dashboard
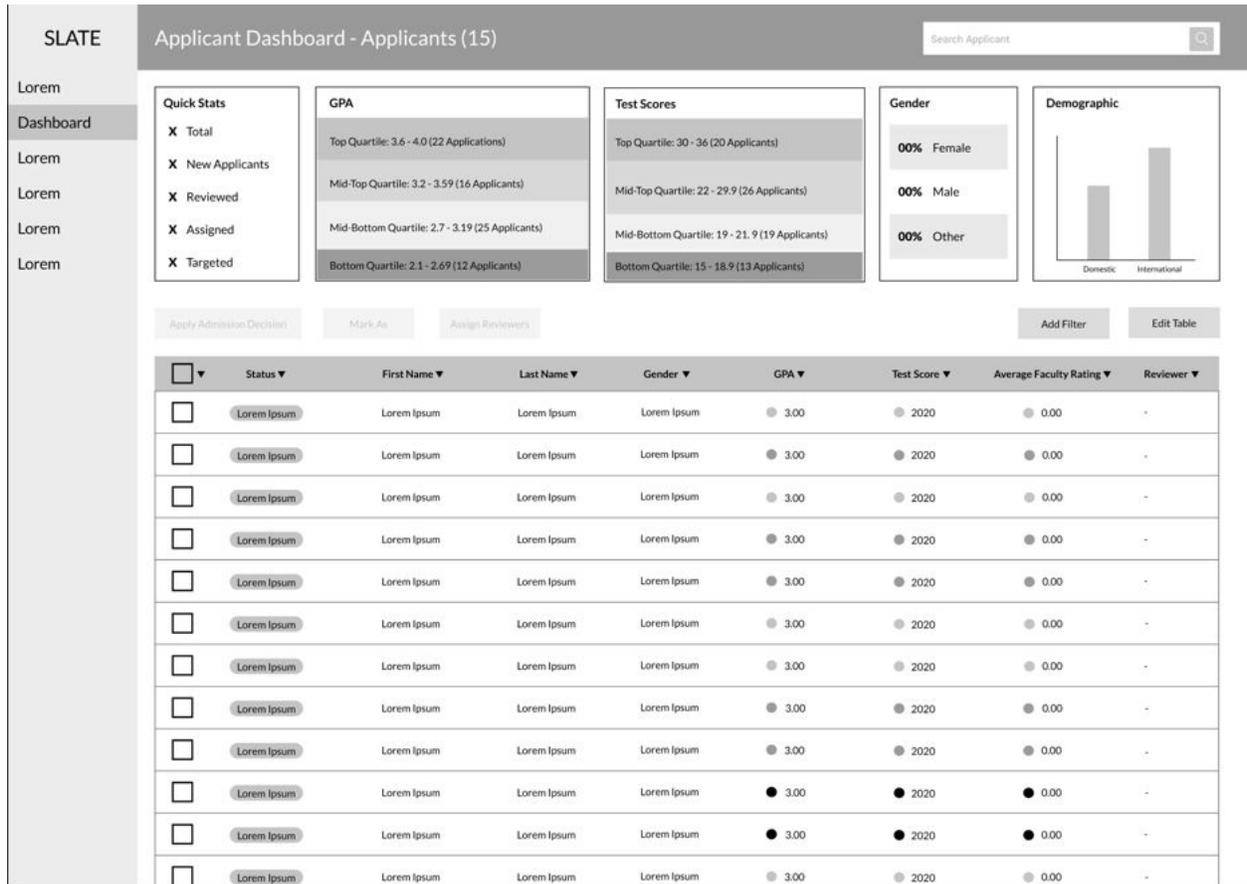
Top Section
- Quick Stats
    - Participants stated that they liked the Quick Stats
    - A participant wanted to quickly see how many applications that were left to review
- Graphs
    - Generally the participants like the concept of summary statistics and graphs at the top but most participants requested different data
    - GRE scores are getting phased out as an admissions factor and were lower importance than GPA, gender, URM, and domestic/international
    - Graphing a statistic against the application date was not interesting to any participant

- ○ Participants wanted to be able to graph the data from multiple different angles. GPA/Gender, GPA/URM, Gender/URM, etc.
- ○ For international candidates the TOEFL score was important
- ○ Displaying the stats was interesting but the participants asked how to drill down into the data
- ○ There were questions on whether or not the graphs were clickable to filter the candidates
- ○ One participant highlighted that there were two uses for the page. 1) Reviewing Summary Stats 2) Reviewing Applicants. The participant mentioned that it would be good to either have the summary statistics on a different page or be able to collapse it when not needed
- ○ Participants expressed concern over the validity of converted international GPAs as different countries have different scales
- ○ There was a need to be able to correlate candidates across graphs using color
- ○ Participants expected to be able to mouse over an individual dot on the graph and see their name and quickly navigate to their application packet
- Gender
  - ○ Gender was generally liked but there were some concerns around how it would be used
  - ○ One participant wanted to only view gender after the reviews were completed
- Demographic
  - ○ The term "Demographic" was not understood by most participants
  - ○ Some participants liked just Domestic/International but some wanted more detail
  - ○ A participant wanted to know the breakdown of Domestic candidates by CA Resident/Other
  - ○ A participant wanted to be able to break down International by some larger geographic regions

Grid List

- Filtering
  - ○ No need to "Select top X" applicants
- GPA/Test Scores
  - ○ GPA is not widely trusted due to self reporting and conversion errors. Most participants said that they would manually review each applicant to ensure that the data was accurate.
  - ○ Participants stated that they wanted to see both the converted and unconverted GPA scores in the table
  - ○ Question around whether raw test scores or percentile would be better
- Faculty Rating
  - ○ Some participants do all review correlation outside of Slate
  - ○ Most participants had concerns around seeing the average faculty rating as it would bias decisions

- Sorting
  - Participants talked about need to do 2-level sorts (School/GPA)
- Viewing Application
  - Clicking on an applicant to get to the application packet was intuitive
  - One participant want the application to open in a new tab
  - One participant requested breadcrumbs on the application to get back to the Grid List view so they wouldn't have to reset filters
- Status Column
  - General confusion around what Status means
- Color Coding (GPA, Test Scores, Avg. Faculty Rating)
  - General feedback on color coding was positive but not necessary

Buttons

- Apply Admissions Decision
  - Nearly all participants found the bulk deny function to be valuable
    - There was one concern around still needing to validate application material accuracy prior to engaging with this functionality, however
  - Bulk admit received more mixed reviews, with concerns centered around:
    - Where the applicant would go from there (similar to legacy concerns with applicants "disappearing")
    - That admissions decisions should be managed by Program Directors
    - Applying this decision in bulk doesn't map to mental models in that the decision should only be applied *after* reviewing individual applicant materials
    - Note: Staff participants were thrilled with the concept of batch admit
  - One participant mentioned that they would still prefer to admit students one-by-one
- Mark As
  - This function appeared to provide most value for denoting specific "flags" on an individual reviewer basis (i.e., but public or viewable by other Faculty members)
  - That said, this functionality was received fairly neutrally, with a few participants stating that they didn't see themselves engaging with it at all
  - One mental model that came up across participants was the "mark as" functionality as a flow that closely mirrors how they use bins to organize their workflow, which seemed to be a silver lining in how this feature could provide value in the future
  - From a usability perspective, the "mark as" button label didn't perform well relative to comprehension without participants expanding the drop-down menu to learn more
- Assign
  - Assigning reviewers here generally made sense across participants

- ○ There was some concern about *who* could assign reviewers from a permissions perspective, with participants indicating that this should be reserved for the Program Director and admins
- ○ One participant mentioned that their program has multiple review cycles and that they'd need to understand which cycle they were in to inform who would be assigned at that period

Other

- There is a need to not leave Slate to perform the admissions process but there are currently large gaps
- The concept of bins is generally confusing
- Would be interested to see how applicants are being rated by reviewer
- When adding a reviewer they would expect that a notification would get sent
- Whatever gets designed needs to be simple for less tech-savvy faculty
- Admissions exceptions need more visibility
- General distrust of the applicant data which increases manual reviews
- There is currently no clear visibility into what needs to get worked on
- Some faculty don't understand the use of queues
- Historical slate oddities still confuse faculty.
  - ○ Can the applicant see the reviewer's comments?
  - ○ Can more than one person have the applicant in their queue?
- Visibility of reviews and comments differs between participants

Filters

- Users found filters to be useful and intuitive, particularly their easy access and reduction of options
- Users drawn to filters wanted to reduce the number of rows in the table, be able to easily click and unclick filter parameters, and narrow down within columns
- Users were split on their current usage of filters, with most reporting that they don't use filtering in Slate because of its unintuitive design, but others reporting heavy use
- Some users expressed reservations or had outstanding questions about filter functionality around whether filters appear before the applicant dashboard page, whether graphs update after filters are applied, status and filterability of applicants with outstanding materials, the ability to easily filter by program
- A few users shared feature requests like a way to display outstanding reviews and GPAs/scores in an adjustable bar
- Several users expressed the importance of location, particularly domestic vs. international and in-state vs. out-of-state. However, some users had reservations around filtering by specific country

- Several users expressed their interest in filtering by school, particularly clustering by university and filtering for-profit and online schools
- Users pointed out caveats around quantitative fields like applicants with GPA below 3.0 being inadmissible and test scores being less informative because the program wasn't using GRE anymore
- Other filters of interest include URM status and gender
- Orthogonal to filtering, users expressed interest in sorting during applicant assessment, with some sharing that sorting by average rating is useful, and that historically, sorting by GRE was useful, but is currently discouraged as a practice
- Orthogonal to filtering, some users shared the importance of text search on specific documents for name, keyword, and subject area

Reader

Application Packet

- Users reacted positively to the vertical scroll redesign, with one adding that she appreciates the visible scroll bar
- Most users didn't comment on the bi-columnar design, with one stating he loved it, but no users were put off or confused by the design

- One user shared additional feedback that he might want the ability to show more than a single column for applicant materials, and that he dislikes the default order of the materials in application packets

Inline Comments

- Users described inline commenting functionality as intuitive and easy to use
- However, some users expressed reservations about its utility, stating that they've never seen faculty take the time to make inline comments
- Users described inline commenting as useful for highlighting unusual or specific elements of applications for purposes like fellowships and awards, and to prevent applicants from being overlooked
- Users were split on comments being for private vs. public use. Some users described inline commenting as useful for personal note-taking, tracking their own follow-up with applicants, and other action items. Other users were interested in seeing other faculty comments in one place or a summary of other comments

Comment Visibility

- Some users had concerns around public comment visibility, postulating that it might be useful, that it could cause unnecessary conflict, and that they were uncertain about the rules around comment visibility and permanence
- Some users felt strongly that comments should be private until their review is submitted, adding that they can be public after that point; the implicit desire is for non-bias
- Other users felt that comments should be public to encourage collaboration, adding that public commenting is conducive to assessing a large applicant pool, seeing others' notes and scores is useful, and that they don't get swayed by others' reviews
- Overall, users are uncertain if comments are public or private, and feel a need to know
- One user expressly asked for the option to choose whether comments are public or private

Review Form

- Most users had positive reactions to the 5-point rating scale, with some stating that it matches their mental model. One user preferred to state what each point corresponds to, referencing his scale of strong admit, probable admit, not sure, probable deny, to strong deny
- Some users shared complications around rating applicants, with one pointing out that individual reviews require a finer scale than committee reviews that go by admit or deny, and another stating that she doesn't use the recommendation area until after a committee review

- Users had positive impressions on the persistence of the review form
- Some users felt reservations around faculty vs. staff permissions for the form, for example ensuring staff have full access while faculty are completing reviews
- Some users pointed out that the form isn't inclusive of making exceptions, which must be requested through a formal process

Assigning Reviewers

- Many users had positive reactions to the review assignment feature, citing that it makes sense, is helpful, is in a logical place, and is useful for passing applicants to other programs
- However, some users had reservations about it, stating that they felt concerned that using the feature would move the application elsewhere, that it's applicable only for some programs, that seeing who else is reviewing isn't informative, that faculty assignments are random instead of expressly given, and that it may be missing a comment field to state which program to forward to

SIR Dashboard

Graphs

- Participants found demographic data to be valuable here
    - Gender and domestic vs. international specifically received mention
- Graphs were viewed as a value-add for quick reference
    - Percentage breakdowns fit the mental model of Faculty
- Terminology for the SIR status tabs didn't fully map to all participants' own lexicon and should be reassessed
    - A positive-negative binary with outstanding option performed relatively well conversationally during the sessions
- Requests for future iterations included:
    - Yield stats to compare offers relative to SIR status
        - Layering demographic data on top of this
    - One participant in particular was interested in:
        - GPA and demographic data layer on top of yield stats
        - Zoomed out, a funnel that includes *potential* applicants, on top of yield stats

Target Component of Graphs

- Generally, participants had a positive view of being able to set a target
    - That said, there was hesitation around *who* should be able to set those targets and the visibility of performance against those targets
        - Of those who indicated this, mention of grad advisors or program directors were most often mentioned as those who should set the targets
        - One mention of fears of how program Deans would use this information and the potential negative political implications
    - There was sentiment that the target should be able to be adjustment by department based on their size and unique admissions goals

Contact / CSV

- Participants were unanimous in their interest in using the SIR dashboard to access applicant contact information
    - That said, they were mixed in *how* they intended to use the contact information, with some participants desiring bulk emailing functionality and others wanting to email applicants individually
    - There were also mixed views on how they wanted this functionality to be supported – either by copying emails from the table itself or by downloading a CSV and copying them there
        - One participant mentioned that if the email were generated from within the Slate platform, they would want to ensure that any responses made their way to their own email vs a messaging platform within Slate

- Most participants didn't notice the CSV icon without prompting
- When exploring the concept of downloading a CSV, some participants mentioned that selecting which columns are included would be valuable
- Contact reasons cited included:
  - Emailing SIR-positive applicants with preparatory information pertaining to the program (acceptance letter and materials)
  - Opening a line of communication to answer individual questions
  - Reaching out to SIR-negative applications to inquire about their decision
- From a motivation perspective, participants continued to express their interest in developing a relationship with applicants and placing a "personal touch" on communications
  - To that end, both email and phone numbers were viewed as essential
  - There was indication for one program that this would be more pertinent for PhD applicants, and not so valuable for Master's applicants

Program Selection

- The ability to switch between programs was received well by nearly all participants
  - The search functionality seemed to support this well, although there was also indication that default preferences were desired – to have consistent access to one or a set of pre-established programs that matter to them, rather than having to search or sift through programs that aren't relevant to their needs

List View

- Dividing the SIR lists into the three status-based categories resonated with participants (note: see insight on nomenclature within the graphs portion of this section)
- These tabs were also viewed as a value-add to aid in managing participants' workflow, and thus should be organized according to *when* they would want to leverage the data within the table relative to the admissions cycle timeline
  - For example, outstanding → positive → declined
- A few feature requests relative to the list view included layering in data:
  - Whether the applicant is a CA resident
  - Whether the applicant applied to other programs
  - Whether the applicant applied in previous years

Other

- Nearly all participants viewed the SIR Dashboard to be valuable to their admissions process
- As seen in our interviews, participants continued to express that typically they rely on Staff to provide them with SIR data via an offline process, but that bringing this process into Slate would be both useful and efficient for them

- One participant brought up a concern regarding a "multiple SIR variables" warning that they've experienced in Slate in the past

General Feedback

- Overall, the concepts within this test received fairly astoundingly positive feedback, especially relative to participants' mental models for the applicant review process
  - One participant remarked: "*This is how my brain works!*"
  - Most indicated that these concepts were a huge improvement from the current implementation of Slate
- As noted in our initial interviews, there continued to be mention across participants that they viewed their program as "unique" or "niche"
  - Across our sessions, however, we found that by and large, our solution fit the needs of a variety of participants and programs
- For Staff participants, a few usability challenges and feature requests arose:
  - Once sending a letter of acceptance, they are redirected to an error page that requires them to renavigate to their last location in order to continue with their workflow
    - The concept of not disrupting the workflow was pervasive across participants, however, with specific mention of not wanting to reapply filters or re-run queries each time they take an action
  - The ability to support custom intake forms for applicants that can feed into a department-specific applicant review packet
- Privacy concerns pertaining to ratings and feedback visibility continued to surface, with participants often referencing word-of-mouth concerns from past years
- One participant indicated that there could be value in allowing for offline viewing functionality of applicant packets in particular
- One participant requested a clearer indication within Slate of how URM is being defined

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.

RAW MATERIALS

Discussion guide, recordings, raw notes, and synthesis data available on request.