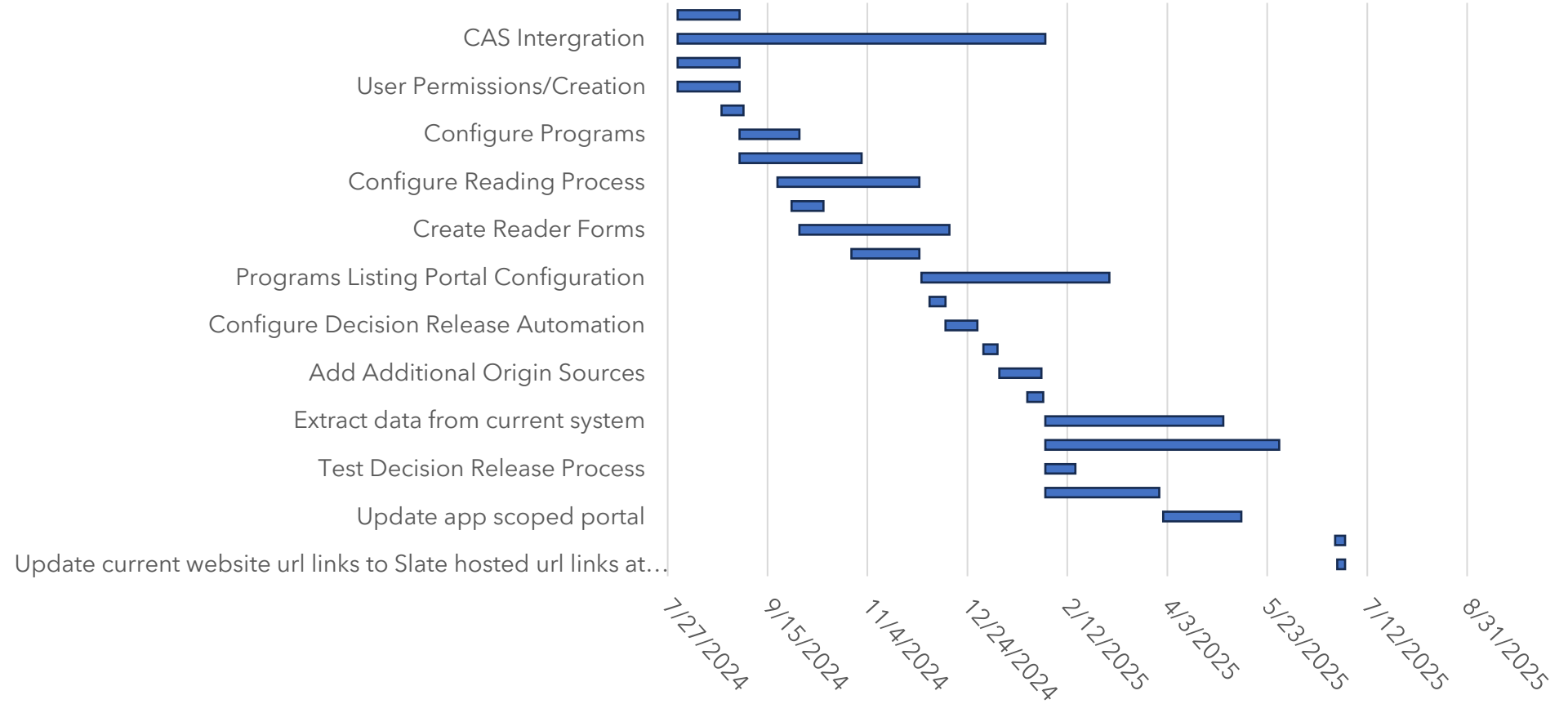
THE GEORGE WASHINGTON UNIVERSITY
WASHINGTON, DC

Slate CRM Implementation Update Phase II

Office for Student Success

September 13, 2024

George Washington University Slate Implementation



Portal Update

- Parent Portal
  - The UGA team is collaborating with HCRC on the design and components of the portal.

- Financial Aid Portal
  - The UGA team met with the Financial Aid team on 9/12, following the kickoff meeting earlier this week.
  - The teams discussed how the process would function between the two portals: Slate and Banner.
  - It was decided that checklist items and automated communications would be managed through Slate, while all other processes would be handled in Banner.
  - Next steps include reaching out to other schools with Slate Financial Aid portals and following up with HCRC to discuss our specific needs.

Communications Update

- **College Signoffs**
  An email was sent to Associate Deans regarding the sign-off process. As of today, no responses have been received.
- **Slack**
  Diana has created a Slack portal to facilitate team collaboration. Slack invitations will be mentioned in today's update email.
- **Inner Core – New Email**
  A Slate Admin group email has been created. Phase II participants have been asked to direct all correspondence to this address.

Executive Summary

Completed Tasks for the Overall Project:

Our collective efforts have resulted in 54 completed tasks.

Incomplete Tasks for the overall Project:

While celebrating our successes, it's crucial to acknowledge the 139 tasks that still require our attention.

Executive Summary

There are 31 parking lot items, representing 23% of the incomplete tasks.

A few examples include:

- Linking Slate queries to Tableau for streamlined reporting and dashboards
- Adding current enrollment information to person records
- Processing Milken deposits through GWeb
- Establishing a new process for test scores—loading them into Slate instead of Banner
- Resolving duplicate records
- Developing a leads dashboard

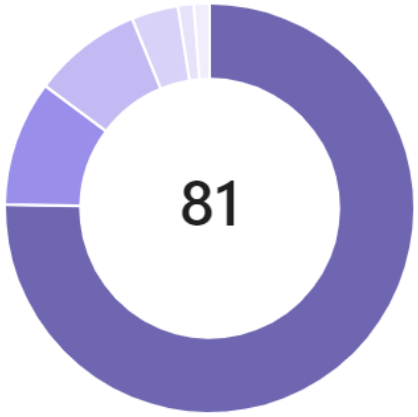
August Dashboards By College (Week of September 13th)

Pre- College & Non- Degree

Total tasks by completion status

Pre- College & Non- Degree

Incomplete tasks by section



- Backlog of Tasks: 61 tasks (75%)
- In Progress: 8 tasks (10%)
- Done: 7 tasks (9%)
- Resources: 3 tasks (4%)
- To Do: 1 task (1%)
- Sign-Offs: 1 task (1%)

Public Health

Total tasks by completion status

Public Health

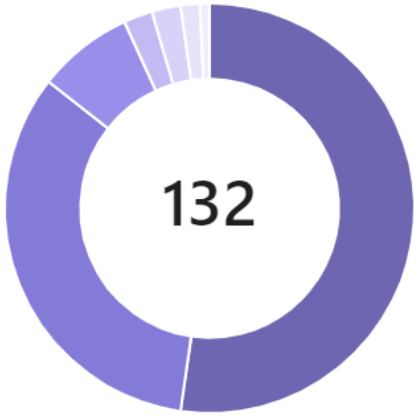
Incomplete tasks by section

School of Nursing

Total tasks by completion status

School of Nursing

Incomplete tasks by section



- Backlog of Tasks: 69 tasks (52%)
- Not Needed: 44 tasks (33%)
- Done: 10 tasks (8%)
- Resources: 3 tasks (2%)
- To Do: 3 tasks (2%)
- In Progress: 2 tasks (2%)
- Sign-Offs: 1 task (1%)

Med & Health Sciences

Total tasks by completion status

Med & Health Sciences

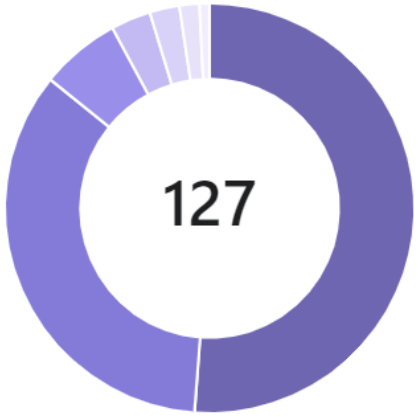
Incomplete tasks by section

Elliot School

Total tasks by completion status

Elliot School

Incomplete tasks by section



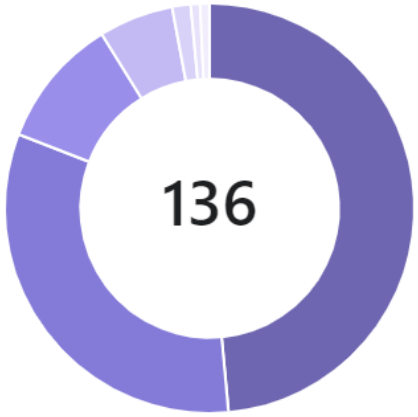
- Backlog of Tasks: 65 tasks (51%)
- Not Needed: 44 tasks (35%)
- Done: 8 tasks (6%)
- To Do: 4 tasks (3%)
- Resources: 3 tasks (2%)
- In Progress: 2 tasks (2%)
- Sign-Offs: 1 task (1%)

Columbian College

Total tasks by completion status

Columbian College

Incomplete tasks by section



- Backlog of Tasks: 66 tasks (49%)
- Not Needed: 44 tasks (32%)
- To Do: 14 tasks (10%)
- Done: 8 tasks (6%)
- Resources: 2 tasks (1%)
- In Progress: 1 task (1%)
- Sign-Offs: 1 task (1%)

CPS

Total tasks by completion status

CPS

Incomplete tasks by section

GSEHD

Total tasks by completion status

GSEHD

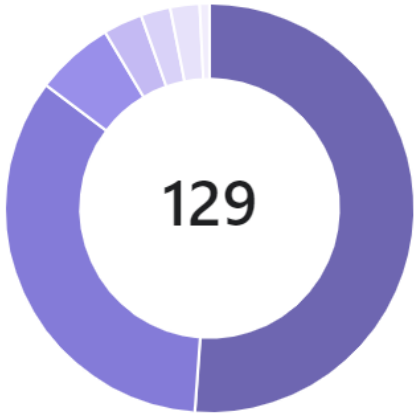
Incomplete tasks by section

SEAS

Total tasks by completion status

SEAS

Incomplete tasks by section



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- In Progress: 3 tasks (2%)
- Sign-Offs: 1 task (1%)

Upcoming Sign-Offs

- Elliott- Entity Date Input
- SOC- Entity Data
- SEAS- Entity Data
- Columbian
- GSEHD- Entity Data and Term Deadline
- Pre-College- Review Supplemental Questions

THANK YOU!