

From Chaos to Cadence:
**Real-World Assignment Lists That
Power Our Daily Slate Workflows**



- 3 years in Higher Education
- Pursuing Master's in User Experience
- Enjoy running, reading, snuggling my kitten

Kaitlyn Campbell

Admissions Counselor

Ouachita Baptist University



Slate Certified Professional 2026

May 2026 – January 2028

About Ouachita



Small, Private, Christian

1,600 undergrad enrollment
1,800 total enrollment

Arkadelphia, Arkansas



Jon Rowand

Founder & CEO

- 20+ Years in International Higher Education
- Been Slate'n since 2019
- Love traveling with my family of four, distance running, eclectic music, and all things Seattle sports

ReWorkflow



 Slate Support Service Provider

 US & Vietnam Offices

 Rooted in Service. Cultivated with Care.

<https://www.reworkflow.com/about/>

We collaborate with education institutions to design and steward
Slate ecosystems that replace reactive work with sustainable
operations that thrive in every season.

ReWorkflow

Slides & ReSources



Here's the loot!

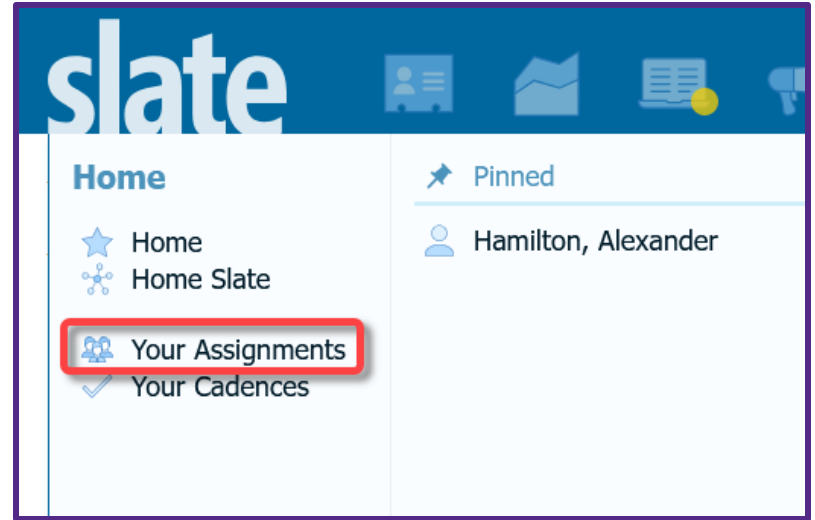
- **Slides**
- **Suitcase Links**
- **Related ReSources**

Assignment List:

an interactive, AI-enabled visualizer for an assigned population

Cadence:

groups of time-separated tasks that you can add to an assigned record as a block with a click



NEW FEATURE ALERT:
released at Slate Summit 2025

Prerequisite Skills

Necessary

- Configurable Joins Queries
- Portal Widgets

Helpful

- Slate AI
- Forms

NOT REQUIRED

advanced coding skills

SKILL LEVEL

Intermediate



Agenda

1. The Opportunity
2. The Build
3. Other Uses
4. Questions

The Opportunity

- **Clarify** the current process
- **Map** the workflow
- **Organize** key information
- **Improve** before building
- **Define** what success looks like
- **Plan** for sustainability

ReWorkflow

Ouachita Admissions



Extremely Personal

Valuable Connections:

- Campus Visits
- Phone Calls

6 undergrad counselors
4 NEW this year

The Process

Financial Aid Offer Call Process

- Pre-call Research
- Call Parents & Students
- Walk Through Offer Letter Line by Line
- Talk Through:
 - Current Payment Plan
 - Other Financial Options
 - ALL Outstanding Checklist Items
- Update Status Fields
- Answer Questions



The Chaos

The Main Problems

- Heavy Mental Load
- List Prioritization/Management
- Widespread Information
- Intimidating Nature of Calls

The Goals

- Guide Process Steps
- Consolidate Information
- Simplify Data Updates
- More Confidence, Less Mental Load

Offer Letters - SUMMIT

Last updated just now. [Refresh](#)

Hey Kaitlyn!

166

Offer Letter Sent

169

FAFSA Received

0

In FAFSA Verification

Assignment List: students whose offer letters have been sent

Cadence: steps to take once an offer letter is sent

NOTE:

Add Cadences to EACH STUDENT

NOTICE:

*External Links **MUST** be opened in a new tab*

New Tab Shortcuts:

- hold 'command' key while clicking the button to open it in a new tab
~ OR ~
- right click the button and select 'Open Link in New Tab'

[QUERY VERSION OF LIST](#) - for text segments/mass bin movement

Quick Links:

- [OBU Finaid Website](#)
- [Work Study Jobs](#)
- [AR Challenge](#)
- [Private Aid](#)

15 entries per page

Search...

Columns

Reset

Current Bin Round Pref Last GPA Superscore(s) Offer Packaged Offer Email Sent Work Study Eligible

[Home](#)

[Resource Center](#)

Your Assignments

[Your Cadences](#)

[Overview](#)

[Housing](#)

[Offer Letters](#)

Offer Letters - SUMMIT

[Travel Planning TEST](#)

Assignment Lists: **2 PARTS**

The Query

*The actual
assignment list*

The Portals

- *List*
- *Summary*
- *Details*

TEST

Status Inactive
 Base Configurable Joins - Person
 AI Recommendations Not Configured

Edit ▾

Preview Results

Portals

List	Active	User-scoped portal to display above assignments.
Summary	Active	Record-scoped portal to display when first clicking into a result.
Detail	Not Configured	Record-scoped portal to display in a full-page result view.

The Portals

All Assignment Lists > Assignment

List Edit

Status Active
 Layout One Column

View as List
 Collapse All
 Edit Exports

Static Content Scheduler
 Events Form
 Component Dashboard

Exports

Export Literal

Rename Exports

Filters [Query_Profiler](#) Matching Rows: 470,329

Filter OR NOT ()

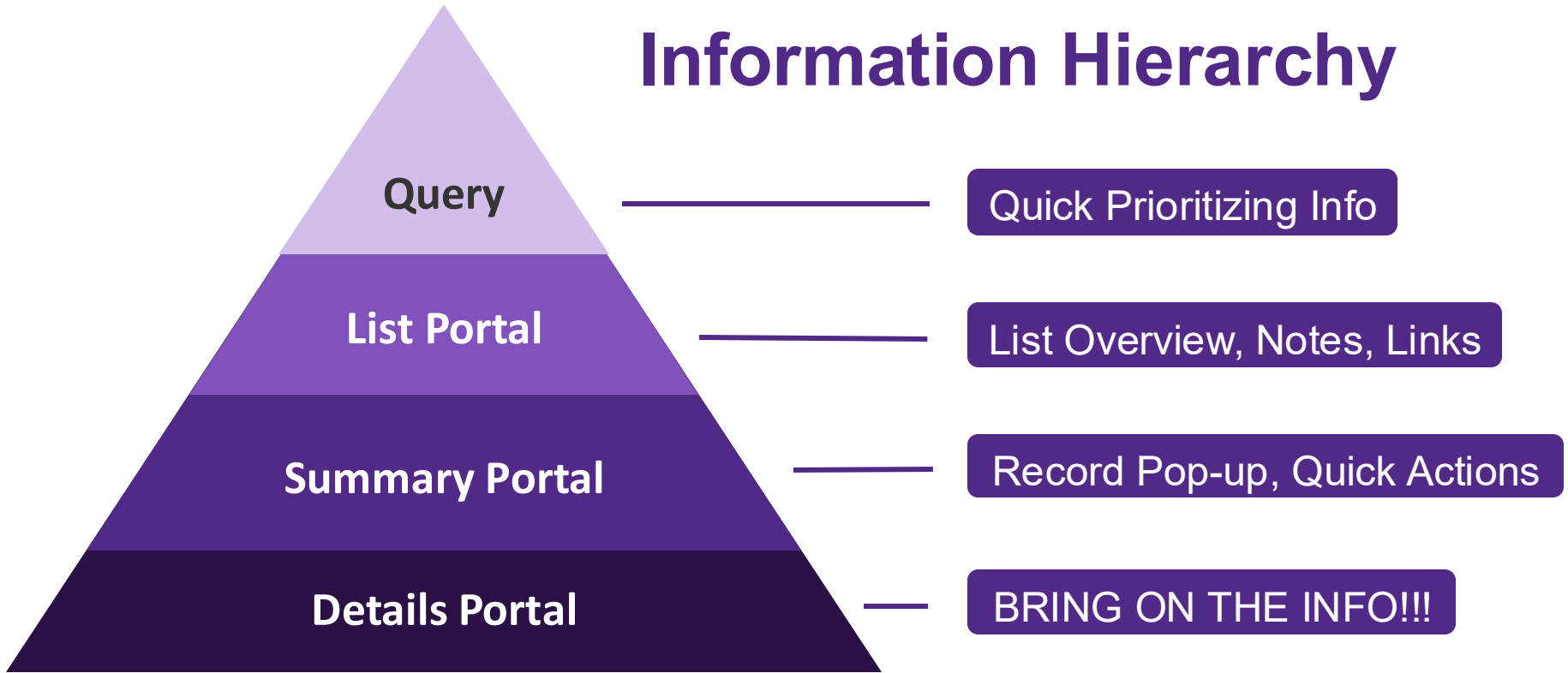
Sorts

The Query

Here's a look at a new assignment list!

Where do we start?

Information Hierarchy



The Query

Build as Usual

Exports

Filters

Sorts

Joins

Exports


Current Bin	Rank	Row Offset: 1	Export
Round			Literal
Pref			Rename Exports
Last			
GPA			
Superscore(s)	Concatenate		
FAFSA Received			
Offer Packaged			
Offer Email Sent	Rank	Row Offset: 1	
Work Study Eligible			
FAFSA Received	Rank	Row Offset: 1	
Interest Status			
SFS Satisfaction			
App Status			
Scholarship Name			
Scholarship Amount			
Other Offered Scholarships			
RNL Rating			

Prioritize Your List

Think About...

- Who should be in the list? When?
- Where do I start each day?
- How do I prioritize my list?

Set up your team for success!



**Customize
& Sort in
real-time**

15 entries per page

Search... Columns Reset

Current Bin	Round	Pref	Last	GPA	Superscore(s)	Offer Packaged
Student Offer Letter	2026 Fall Res	Kaitlyn	Campbell		TOEFL - 58	
	2025 Fall Res	Penny	Lane (TEST)	4.0	ACT - 10	

Current Bin Round

Select all (5) Deselect

Search...

- 2021 Fall
- 2023 Fall
- 2025 Fall Res
- 2026 Fall Res

LIVE EDITS

- Arrange
- Expand
- Filter
- Search
- Sort

Show/Hide Columns

- Current Bin
- Round
- Pref
- Last
- GPA
- Superscore(s)
- Offer Packaged
- Offer Email Sent
- Work Study Eligible
- FAFSA Received
- Interest Status
- SFS Satisfaction
- App Status
- RNL Rating

Update Cancel

Prioritize Your List

Practical Tips:

- Consider how records are assigned to users
 - Filter by 'Current User' in some way
- Utilize existence/bit (y/n) exports for quick statuses
- Be careful with subquery list exports
 - No 'Row Preview' expansion

Current Bin	Round	Pref	Last	GPA	Superscore(s)	Offer Packaged	Offer Email Sent	Work Study Eligible	FA
Student Offer Letter	2026 Fall Res	Kaitlyn	Campbell	4.0		01/01/2026	05/11/2026	Yes	12
	2025 Fall Res	Rob TEST	Hinger TEST	4.0		01/01/2026	01/07/2026		12

Query Row Preview

Row Preview

Record	Lookup Record
Current Bin	Student Offer Letter
Round	2026 Fall Res
Ref/OBU ID	12345
Preferred	Kaitlyn
Last	Campbell
Offer Packaged	
Offer Email Sent	

Summary Portal

Display Record

Kaitlyn Campbell (12345) [Lookup Record](#)

Email

SMS

Mobile

Alumnus Test Record

2026 Fall Res Deposited **Cadences**

Offer Packaged: **Offer Email Sent:**

FAFSA Received:

Last Successful Call: -

[SFS Offer Letter](#)

Offer Letter To-Do

- [Move to Offer Letter Bin](#)
Due 04/02/2026
- [Student Offer Letter Call](#)
Due 04/09/2026
- [Parent Offer Letter Call](#)
Due 04/09/2026
- [Update Status: SFS Satisfaction](#)
Due 04/16/2026
- [Update Status: Likelihood to Enroll](#)
Due 04/16/2026
- [Update Status: Talking Points](#)
Due 04/16/2026
- [Update Status: Work Study Eligibility \(if applicable\)](#)
Due 04/16/2026
- [Check: Applied for State Aid? \(A\)](#)

Counselor Touchpoints
(refresh to update after edits)

Current Bin: Student Offer Letter

[Display](#) [Close](#)

List Portal: 1st thing we see!

QUICK TIP:
Ask Slate AI to
set up a quick
layout for you

Hey Kaitlyn!

166

Offer Letter Sent

169

FAFSA Received

0

In FAFSA Verification

Assignment List: students whose offer letters have been sent

Cadence: steps to take once an offer letter is sent

NOTE:

Add Cadences to EACH STUDENT

NOTICE:

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Quick Links:

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- [Work Study Jobs](#)
- [AR Challenge](#)
- [Private Aid](#)

[QUERY VERSION OF LIST](#) - for text segments/mass bin movement

Hey {{User-First}}!

{{Count-Award-Letters}}

Offer Letter Sent

{{Count-FAFSA-Received}}

FAFSA Received

{{Count-In-FAFSA-Verification}}

In FAFSA Verification

description

Assignment List: students whose offer letters have been sent

Cadence: steps to take once an offer letter is sent

guide

[Instruction Guide](#)

notes

NOTE:

Add Cadences to EACH STUDENT

space

View as List

Collapse All

Edit Exports

NOTE:

Add merge fields for each portal in 'Edit Exports'

**new each portal*

Summary Portal

Pop-Up Box

1. Action Items/Updates
2. Most Crucial Info
3. Links

**1st view of Cadences*

Display Record ✕

Kaitlyn Campbell (12345) [Lookup Record](#)

Email

SMS

Mobile

Alumnus **Test Record**

2026 Fall Res **Deposited**

Offer Packaged: 01/01/2026 **Offer Email Sent:** 01/07/2026

FAFSA Received: 12/12/2025

Last Successful Call: TTS - Finaid Questions - 04/18/26

SFS Offer Letter

Counselor Touchpoints
(refresh to update after edits)

Current Bin: Student Offer Letter

Display **Close**

Cadences ⌵

[Offer Letter To-Do](#)

- ✓ [Move to Offer Letter Bin](#)
Due 05/10/2026
- ✓ [Student Offer Letter Call](#)
Due 05/17/2026
- [Parent Offer Letter Call](#)
Due 05/17/2026
- [Update Status: SFS Satisfaction](#)
Due 05/24/2026
- [Update Status: Likelihood to Enroll](#)
Due 05/24/2026
- [Update Status: Talking Points](#)
Due 05/24/2026
- [Update Status: Work Study Eligibility \(if applicable\)](#)
Due 05/24/2026
- [Check: Applied for State Aid? \(AR\)](#)

{{Person-Preferred}} {{Person-Last}}

{{Person-Reference-ID}}

[Lookup Record](#)

tags

```
{% if {{tags}}.size > 0 %}
```

```
{% for tag in tags %} {{tag.name}} {% endfor %}
```

```
{% endif %}
```

bin update

Counselor Touchpoints

(refresh to update after edits)

Current Bin: {{current_bin}}

[edit](#) [read](#)

status update

Update Status

First Name

Last Name

Email Address

Birthdate

Interest Status

talking points

Talking Points

First Name

work study

Work Study

First Name

Portal Parts

Static Content

Important Information

- Tags
- Lookup Record link
- Finaid Info merge fields

Forms

Status Updates

- Workflow Bin (*semi-custom*)
- Custom Status Fields

Edit Form

Folder Assignment List
Scope Person

Update Status

First Name

Last Name

Email Address

Birthdate

Interest Status

SFS Satisfaction

Folder & Scope

- *Recommended: Specific Assignment List Folder*
- *Scope: should match scope of Assignment List*

Standard Matching Criteria

- *Set to "Hidden / accessible through script"*
- *Pre-filled Standard Fields*

Custom Status Fields

- *Pre-filled if already stused*

Edit Properties ✕

General Merge Fields

Scope

Multiple

Unsafe

Security Require secure link/login Allow secure link/login filters

Update Only

Notes Form

Layout

Export Value

Edit Scripts / Styles

Custom Scripts Custom Styles

Note: To make a CSS rule only apply within this form, begin the rule with `#form_f0b75e4f-b7e1-4844-89a7-a7208c9b19da_container`

```
1 #form_f0b75e4f-b7e1-4844-89a7-a7208c9b19da_container {  
2   border: solid #532987 3px;  
3   border-radius: 10px;  
4   padding: 1rem;  
5 }  
6
```

Form Settings

Edit Properties

- *Set Scope*
- *Allow Multiple*
- *Update Only*

Edit Scripts / Styles

- *Add purple border*

Quick Tip: use Slate AI here too!

Assignment List Portal Standards

Right Side Bar

included & non-editable

- Contact Methods
 - Email, SMS, Mobile
- Cadences
- Interactions

**Same
in Detail
Portal**

Email

SMS

Mobile

Cadences ⊕

Interactions ⊕

05/09/2026 Event Notes CAMPUS T...

04/18/2026 Phone Call - To Student...

03/01/2026 Phone Call - Left Voice...

01/20/2026 Flag TEST RECORD

11/07/2024 Mailing - Acceptance Bo...

Detail Portal

BRING IT ON!

- ALL the important info
- Expand on info in query & summary pop-up

no detail portal? → redirect to record

Kaitlyn Campbell (12345)

FLAG: TEST RECORD

Alumnus Test Record

2026 Fall Res Deposited

Offer Packaged: 01/01/2026 Offer Email Sent: 01/07/2026
Last Successful Call: TTS - Finald Questions - 04/18/2026
Last Visit: Personal Campus Visit - 02/13/2025

Student Type: Freshman RNL Rating: 0.7
Major 1: Music Performance - Instrumental
Enrollment Interest: I am 100% planning on coming to Ouachita (as of 01/30/26)

Financial

Merit Award: President's Scholarship - \$84,000
FAFSA Received: 12/12/2025
Instrument: Horn

Academics

GPA: 4.0 Superscores: ACT - 33
Latest Composite Score: ACT - 33 (verified)

Schools

Name	Type	From	To
Benton High School	High School	08/01/2015	05/01/2018
University of Texas at Austin	Undergraduate	08/01/2022	02/01/2023
Ouachita Baptist University	Undergraduate	08/01/2018	05/01/2022

Checklist

03/11/2026	Upload a Photo of Yourself	Admissions	Received
11/26/2024	Submit ACT/SAT Score (only official for admission) or take our Math Placement Test once admitted	Admissions	Received
01/07/2026	Housing Application	Admissions	Received
01/30/2026	Acceptance Confirmation Form	Admissions	Received
01/29/2026	Confirm or Decline Federal Work Study	Admissions	Received
11/25/2025	Official High School Transcript (Benton High School)	Admissions	Received
	Official Final High School Transcript (after graduation) (Benton High School)	Admissions	

Relationships

Relationship	Name	Email	Phone	Job	Resides with Record	Alumni	Deceased	Create Family Record
Mother	Mom TEST Campbell, TEST	campbell@obu.edu	+1 870-245-5399	SAHM	Yes		No	

Lookun Record

Counselor Touchpoints

Current Bin: Student Offer Letter
[edit](#) [read](#)

Update Status

Interest Status: Likely to Enroll
SFS Satisfaction: Award is Sufficient to Enroll
[Submit](#)

Talking Points

Completed State Aid? Yes
Talked about Private Aid? Yes
How do they plan to pay for college?
 Family
 Governor's Distinguished
 Loans
 Military
 Myself/No Parental Help
 National Merit
 Private
 Promise/Local Scholarship
 Savings
How Paying - Other/Notes:
[Submit](#)

Work Study

Work Study Eligible: Yes
Work Study Accept/Decline to update, fill out checklist form: Yes, I want work study
Work Study Position:
[Submit](#)

Cadences

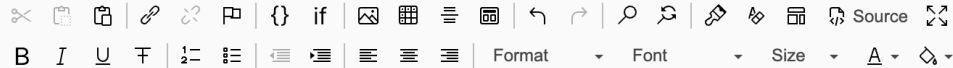
Offer Letter To-Do
[Move to Offer Letter Bin](#) Due 05/19/2026
[Student Offer Letter Call](#) Due 05/17/2026
[Parent Offer Letter Call](#) Due 05/17/2026
[Update Status: SFS Satisfaction](#) Due 05/24/2026
[Update Status: Likelihood to Enroll](#) Due 05/24/2026
[Update Status: Talking Points](#) Due 05/24/2026
[Update Status: Work Study Eligibility \(if available\)](#) Due 05/24/2026
[Check: Applied for State Aid? \(AR residents ONLY\)](#) Due 05/24/2026

Interactions

05/09/2026 Event Notes: CAMPUS TOUR NOTES
04/18/2026 Phone Call - To Student: TTS - Finald Questions
03/01/2026 Phone Call - Left Voicemail for student: LVM - C...
01/20/2026 Flag: TEST RECORD
11/07/2024 Mailing - Acceptance Box

Checklist

✓	03/11/2026	Upload a Photo of Yourself	Admissions	Received
✓	11/26/2024	Submit ACT/SAT Score (only official for admission) or take our Math Placement Test once admitted	Admissions	Received
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		Official Final High School Transcript (after graduation) (Benton High School)	Admissions	



Checklist

```
{% if {{item.status}} ...  
✗  
{% elseif {{item.stat...  
✓ {{item.fulfilled}} {{item.subject}} {{item.section}} {{item.status}}  
{% elseif {{item.stat...  
✓  
{% endif %}
```

Replicate Tables With Dictionary Exports

Edit Part ✕

Status:

Name:

Source: Subquery Export

Type:

Output:

Row Offset: Row Limit:

Exports:

fulfilled

subject

section

status

Filters:

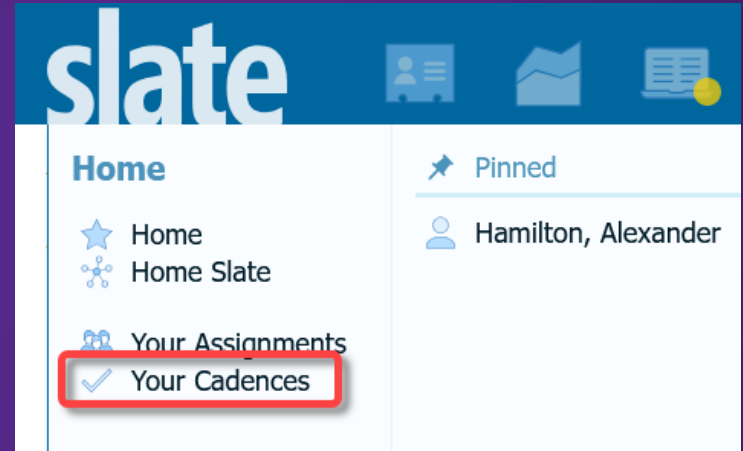
Join: [Applications / Checklists](#)

[Checklists / Section](#) IN Admissions

Cadences

Standard Checklist

- Not stored on records
- Custom for your team's needs
- 2 ways to view
 - Per Record
 - Per Cadence Step



Our Cadences

General Process

Offer Letter To-Do

✓ [Move to Offer Letter Bin](#)
Due 04/02/2026

✓ [Student Offer Letter Call](#)
Due 04/09/2026

[Parent Offer Letter Call](#)
Due 04/09/2026

[Update Status: SFS Satisfaction](#)
Due 04/16/2026

[Update Status: Likelihood to Enroll](#)
Due 04/16/2026

[Update Status: Talking Points](#)
Due 04/16/2026

[Update Status: Work Study Eligibility \(if applicable\)](#)
Due 04/16/2026

[Check: Applied for State Aid? \(AR residents ONLY\)](#)
Due 04/16/2026

Call Questions

Offer Letter Call Prompts

[Received email?](#)
Due 04/02/2026

[Looked over letter/talked with family?](#)
Due 04/02/2026

[*Walk line by line through letter together* \(if desired\)](#)
Due 04/02/2026

[*Check GPA* - don't ask student if not able to move up](#)
Due 04/02/2026

[Testing again \(applicable Dec-Feb\)?](#)
Due 04/02/2026

[Applied for State Aid? \(AR Residents ONLY\)](#)
Due 04/02/2026

[Talk Private Aid \(what have they done?\)](#)
Due 04/02/2026

[Questions on loans? \(*gauge if they plan to accept\)](#)
Due 04/02/2026

[Talked with family about budget/how paying?](#)
Due 04/02/2026

[What is the plan to pay for college? \(don't be scared - ask it!\)](#)
Due 04/02/2026

**We use 2
types of
Cadences**

Build Your Cadence

Cadences & Cadence Steps

1. Create your Cadence
2. Create each step
 - Assign to Cadence
 - Name
 - Order in List
 - Day - Relative Due Date

Cadence Steps

[Cadences](#) | [Cadence Steps](#)

Cadence	Order	Name
Insert		
Offer Letter Call Prompts	1	Received em
Offer Letter Call Prompts	2	Looked over
Offer Letter Call Prompts	3	*Walk line b
Offer Letter Call Prompts	4	*Check GPA
Offer Letter Call Prompts	4	Testing agai
Offer Letter Call Prompts	5	Applied for s
Offer Letter Call Prompts	6	Talk Private
Offer Letter Call Prompts	7	Questions o
Offer Letter Call Prompts	10	Talked with
Offer Letter Call Prompts	11	What is the
Offer Letter To-Do	1	Move to Off
Offer Letter To-Do	2	Student Off
Offer Letter To-Do	3	Parent Offer
Offer Letter To-Do	4	Update Stat
Offer Letter To-Do	4	Update Stat
Offer Letter To-Do	5	Update Stat
Offer Letter To-Do	5	Update Stat
Offer Letter To-Do	6	Check: Appl
Travel Planning To-Do	1	Register for
Travel Planning To-Do	2	Claim in Por
Travel Planning To-Do	3	Create/Add t
Travel Planning To-Do	4	Add Travel t
Travel Planning To-Do	5	Confirm Ren

Insert Record in Cadence Steps

Status:

Cadence:

Name:

Order:

Day:

Add Cadences to Records

Cadences



Click '+' from Summary or Detail Portals

New Cadence [Close]

User: Campbell, Kaitlyn [Dropdown]

Cadence:

- Offer Letter Call Prompts
- Offer Letter To-Do
- Travel Planning To-Do

[Save] [Cancel]

- Add to EACH record
 - *no batch add/manage*
- **NEW** - query bases for assignment lists & cadences

Cadence Views

Per Record

Display Record

Kaitlyn Campbell (12345) [Lookup Record](#)

Alumnus Test Record

2026 Fall Res Deposited

Offer Packaged: Offer Email Sent:

FAFSA Received:

Last Successful Call: -

SFS Offer Letter

Cadences

Offer Letter To-Do

- [Move to Offer Letter Bin](#)
Due 04/02/2026
- [Student Offer Letter Call](#)
Due 04/09/2026
- [Parent Offer Letter Call](#)
Due 04/09/2026
- [Update Status: SFS Satisfaction](#)
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- [Update Status: Talking Points](#)
Due 04/16/2026
- [Update Status: Work Study Eligibility \(if applicable\)](#)
Due 04/16/2026
- [Check: Applied for State Aid \(AR\)](#)

Counselor Touchpoints
(refresh to update after edits)

Current Bin: Student Offer Letter

Display Close

Per Step

Offer Letter Call Prompts

Received email? (2)

- [Augustus \(Test\), Virginia \(Nothing\)](#)
Due 04/17/2026
- [Lane \(TEST\), Penny \(TEST\) \(Penny\)](#)
Due 04/15/2026

Looked over letter/talked with family? (1)

- [Drew TEST, Nancy TEST](#)
Due 04/15/2026

Walk line by line through letter together (if desired) (0)

- No records at this step.

Testing again (applicable Dec-Feb)? (1)

- [Campbell, Kaitlyn](#)
Due 04/02/2026

Check GPA - don't ask student if not able to move up (0)

- No records at this step.

Applied for State Aid? (AR Residents ONLY) (0)

- No records at this step.

Talk Private Aid (what have they done?) (0)

Summary & Detail Portals

- *1 record, all steps*
- ## Cadence View
- *all records, sorted per step*

NEW UPDATE – Query Bases for Both

Row Preview

Person Reference ID	12345
Person Name	Campbell, Kaitlyn
Cadence Name	Offer Letter To-Do
Cadence Completed	No
Cadence Created Date	2026-05-10T13:27:56
Steps Statuses	Student Offer Letter Call - Completed Move to Offer Letter Bin - Completed Update Status: Likelihood to Enroll - Due Parent Offer Letter Call - Due Check: Applied for State Aid? (AR residents ONLY) - Due Update Status: SFS Satisfaction - Due Update Status: Talking Points - Due Update Status: Work Study Eligibility (if applicable) - Due

Cadence Base

Category: Related

- *Cadence*
- *Cadence Step*

**query on record*

Category: System

- *Assignment List*
- *Cadence*
- *Cadence Step*

**query on system object*

**Related
Category**

System Integrations

1. Ouachita's Homegrown SIS

SFS OFFER LETTER

2. Banner

Banner Forms

For Submitted Apps

SAADCRV

SAAADMS

SFAREGQ

SGASTDN

SOAHOLD

SPAIDEN

ReWorkflow

Slate Natural Extensions Across Campus



Beyond Admissions

- **Student Success:** early alerts, probation outreach, re-enrollment follow-up
- **Advising:** registration prep, degree progress reviews, graduation readiness
- **Advancement:** donor stewardship, alumni engagement, giving day call lists
- **Financial Aid:** FAFSA follow-up, verification, award letter call campaigns
- **Career Services:** internship placement, senior outcomes, employer event outreach
- **Registrar:** graduation applications, transcript issues, transfer credit queues
- **Athletics:** recruit, eligibility tracking, visit prep, and student-athlete check-ins
- **International Services:** I-20 tasks, visa check-ins, CPT/OPT follow-up

Thank You!

Questions?

Connect with Us



Kaitlyn

[@kaitlyncampbell](#)

Jon

[@jonmaesrowand](#)

