SLATE ENROLLED STUDENT PROCESSING
HOW TO GUIDES

Accessing and Navigating Slate
  Video Tutorials
  How to log into Slate
  How to find a student record in Slate
  Slate Record Overview – The Dashboard Tab
  Slate Record Overview – The Timeline Tab
  Slate Record Overview – The Student Tab
  Slate Record Overview – The Petition Tab
  Slate Record Overview – The PER Tab
  Slate Record Overview – The FER Tab

Graduate Student Petitions
  How to access a petition
  How to edit a petition
  How to add supporting materials to a petition
  How to assign a petition
  How to sign off on a petition
  How to assign a curriculum change petition to the proposed new department
  How to submit a petition to the Graduate College
  How to return a petition to the Graduate College after it’s been made incomplete
  How to view a Graduate College petition decision

Graduate Student PER Requests
  How to access a PER
  How to edit and review a PER
  How to add supporting materials to a PER
  How to reject a PER
  How to approve a PER and submit to the Graduate College
  How to view a Graduate College PER decision and committee documents

Graduate Student FER Requests
  How to access a FER
  How to edit and review a FER
  How to add supporting materials to a FER
  How to reject a FER
  How to approve a FER and submit to the Graduate College
  How to view a Graduate College FER decision and committee documents
VIDEO TUTORIALS

We have posted video tutorials to take you step by step through the petition and PER/FER review process. In addition, we have posted videos for your graduate students to show how to log into the new Graduate College Student Portal, as well as submit a petition or an examination request. We recommend watching the student videos as well to have a better understanding of what the process will look like for your students.

Graduate Program Faculty/Staff Videos
https://grad.illinois.edu/faculty-staff/contacts-resources
• Slate Enrolled Student Module: Student Record Overview
• Slate Enrolled Student Module: Petition Processing for Administrators
• Slate Enrolled Student Module: Petition Processing for Faculty
• Slate Enrolled Student Module: PER/FER Processing

Graduate Student Videos
https://grad.illinois.edu/academic-support
• Using the New Graduate College Student Portal: Submitting a Petition
• Using the New Graduate College Student Portal: Submitting a Preliminary Exam Request Form
• Using the New Graduate College Student Portal: Submitting a Final Exam Request Form

HOW TO LOG INTO SLATE
• Go to https://choose.illinois.edu/manage
• Use your Net ID and Password to login.
• You will be prompted to 2FA.

HOW TO FIND A STUDENT RECORD IN SLATE
• Click on the Records Icon or Use the Search Omni Box to Search for individual students.
• Partial Match – You can search by Name, Date of Birth, REF, UIN, or Email.
• For Name searches –
  o Search by first, last, middle, former last, or preferred first name.
  o No Wildcards, only searches from the beginning of each name.
• Date of Birth searches – search mm/dd/yyyy.
• REF and UIN searches – search for one REF or UIN at one time (Ref is the Slate Person ID).
• Email searches –
  o Search by full or partial email address.
  o No Wildcards, only searches from the beginning of email address.

Records Icon

Search Omni Box
SLATE RECORD OVERVIEW – THE DASHBOARD TAB

- At the top right, you’ll see their 9 digit Slate ID.
- You’ll find information about the student’s general student record, their program, and their academics.
- On the right, you’ll see email, phone, and address information.
- To view the student’s complete student record in Slate, click on the orange “Enrolled Student Data” button.

SLATE RECORD OVERVIEW – THE TIMELINE TAB

- The timeline tab shows a log of all interactions for a student, such as login information, emails received/opened/links clicked, etc.
SLATE RECORD OVERVIEW – THE STUDENT TAB

- The Student tab includes all data from our interface with Banner including curriculum, registration status, time to degree, academic standing, and doctoral examination data.
- We've also included sections for Qualifying Examinations and Advising that departments can choose to use to record information. This is completely optional.

<table>
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<tr>
<th>Spark, Elizabeth</th>
<th>Enrolled Student</th>
<th>135313935</th>
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### Current Curriculum
- **Catalog Term:** Fall 2020
- **Program:** Education Policy, Organization and Leadership PhD
- **Concentrations:**
  - Concentration 1:
  - Minor 1:
  - Minor 2:
  - Secondary Curriculum:
  - Secondary Curriculum Concentration:

### Student Status
- **Registration Status**
  - Current Term: Fall 2021
  - Current Term Status: Enrolled
  - Previous Term: Spring 2021
  - Previous Term Registered: Yes
  - Student Holds:

### Time to Degree
- **EGD:**
- **EGD Status:** Admit
- **EGD Due:** 08/15/2020
- **Current Doctoral Stage:** Admit Doctoral Stage

### Academic Standing
- **Academic Standing:**
- **Cumulative Grad GPA:** 3.24
- **Total Grad Hours:** 24

### Qualifying Examinations
- **Qualifying Exam 1**
  - Exam Date:
  - Decision:
  - Title:
- **Qualifying Exam 2**
  - Exam Date:
  - Decision:
  - Title:
- **Qualifying Exam 3**
  - Exam Date:
  - Decision:
  - Title:

### Doctoral Examinations
- **Prelim Exam 1**
  - Exam Date: 12/1/2020
  - Decision: Pass
  - Prelim Status: Passed
  - Prelim Registration Date: 07/13/2013
  - Prelim Exam Status: Not Completed

### Advising Notes
- **Student Advisor:**
- **Co-Advisor:**
- **Dept Advising Notes:**
SLATE RECORD OVERVIEW – THE PETITION TAB

- You’ll see some brief information about the petition.
- You can add supporting documentation needed for a petition in the Materials section.
- You can Download the Petition PDF and View the Decision here if you’d like.

### Student Information:

**Current Degree Program:** Education Policy, Organization and Leadership-PH
d

**EGD:** 08/15/2025  
**Status:** Active  
**Catalog Term:** Fall 2020

### Petition Information:

**Petition Type(s):** Transfer Credit

**Request:** Transfer EDU 501 from Purdue University.

**Student on Degree List:** No

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<tr>
<td></td>
<td>Transcript (University of Illinois Urbana Champaign)</td>
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**Materials can be uploaded here!**

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<tr>
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SLATE RECORD OVERVIEW – THE PER TAB

- You'll see some brief information about the preliminary examination request form (PER).
- You will use the Dept PER Review form on the right to review and submit the PER to the Graduate College.
- You can use the Materials section to upload an external committee member’s CV to the request.

SLATE RECORD OVERVIEW – THE FER TAB

- You'll see some brief information about the final examination request form (FER).
- You will use the Dept FER Review form on the right to review and submit the FER to the Graduate College.
- You can use the Materials section to upload an external committee member’s CV to the request.
PETITION WORKFLOW OVERVIEW

Step 1: Student Submits Petition
• The petition is automatically placed in the “Program 1 Review” bin.
• An email notification is sent to the program that the petition needs to be reviewed.

Step 2: Program Initial Review
• Graduate Program Contact reviews petition to make sure all information is correct.
• Contact can choose to edit petition or upload additional documents.
• Contact can sign off on the petition or assign petition to other administrators and/or faculty to review.
  o When assigning to another administrator, petition should remain in the “Program 1 Review” Bin.
  o When assigning to a faculty member, petition should be moved to the “Program 1 Faculty Review” Bin.

Step 3: Program Administrator or Faculty Review
• Administrator can sign off on the petition and route to the “Program 1 Final Review” bin for additional signatures.
• Faculty can sign off and route to the “Program 1 Final Review” bin. This is their only option.

Step 4: Program Final Review
• When a petition is placed in the “Program 1 Final Review” bin, an email notification is sent to the program that the petition needs to be reviewed again.
• If the petition needs additional signatures, the Contact can move the petition to the appropriate bin and assign the next reader.
• If the petition review is complete, the Contact can move the petition to “GC Under Review” to officially submit it to the Graduate College.
  o IMPORTANT: If the student is petitioning to change curriculum to a new program in a NEW department, the Contact must choose Program 2 Review to allow the second program to review.
  o The second program will follow the same steps as above and when complete, they will move the petition to “GC Under Review” to officially submit it to the Graduate College.

Step 5: Graduate College Review
• The Graduate College will complete their review.
• If the petition is made incomplete, email will be sent to the student and the program.
  o The petition will move to the “GC Incomplete” bin.
  o If additional signatures are needed, the program can move the petition back to the appropriate bin and assign it.
  o If additional information or documentation is needed, the program can upload documentation or information.
  o Once the petition is ready to be re-reviewed, the program will need to move the petition to the “Resubmitted to GC for 2nd Review” bin.
• Once the GC review is complete, the petition will move to the appropriate bin (Approved, Denied, etc.) and an email notification will go to both the student and the program with the decision information.
HOW TO ACCESS A PETITION

Option 1: Petition Notification Email for Individual Petition

- When a student submits a new petition, an email notification will be sent to the graduate program.
- Click the link in this email.
- Log into Slate.
- This will take you to the Petition Workflow.
- Click on the “Program 1 Review” bin.

- On the student’s row, click the pages icon to the far right.
- Here you will see the petition PDF and any supporting documents the student included in their request.

Option 2: Access Petition Workflow

- Log into Slate.
- Click the Reader Icon.

- Click on the Petitions Workflow.
- Click on the “Program 1 Review” bin.
- On the student’s row, click the pages icon to the far right.
- Here you will see the petition PDF and any supporting documents the student included in their request.
HOW TO EDIT A PETITION

- Access the petition within the Petition Workflow.
- Click Add to Queue at the bottom left.
- Click Review Form at the bottom right.

- The first section will list all the fields the student completed.
- Edit the fields as appropriate.
- Scroll to the bottom and click “Send”

Note that the fields are dynamic, so if you change the petition request type, additional or different fields may appear.
HOW TO ADD SUPPORTING MATERIALS TO A PETITION

Option 1: From within the Petition Workflow

- Access the petition within the Petition Workflow.
- Click on the student’s name in the upper left.

- Click Lookup Application

- This will take you to the petition tab on the student’s record.
- In the Materials section, click on “New Material.”
- Material – Petition Supporting Docs.
- Memo – Brief description of the document (optional).
- Choose your file.
- Click “Upload.”

Option 2: Search for the Student Record

- Find the Student.
- Click on the Petition Tab.
- In the Materials section, click on “New Material.”
- Material – Petition Supporting Docs.
- Memo – Brief description of the document (optional).
- Choose your file.
- Click “Upload.”
HOW TO ASSIGN A PETITION

• Access the petition within the Petition Workflow.
• Click on the student’s name in the upper left.

• Click on “Edit Bin/Queue.”

• Bin –
  o If assigning to another administrator, select “Program 1 Review” or “Program 1 Final Review.”
  o If assigning to a faculty member, select “Program 1 Faculty Review.”
• Add Reader – enter in the administrator or faculty member’s name.
  o You can assign it to multiple people here. Just select one person, then search/select another, etc.
• Click “Save.”
HOW TO SIGN OFF ON A PETITION

- Access the petition within the Petition Workflow.
- Click Add to Queue at the bottom left.
- Click Review Form at the bottom right.

- This will open the review form on the right.
- In the first open “Program Signatory” section, you will need to complete all fields –
  - Name – Enter your name.
  - Today’s Date – Enter today’s date.
  - Department – Select your department.
  - Signatory Role – Select your role for this petition.
  - Recommendation – Select your recommendation.
  - Justification – Provide comments to support your recommendation.
- Complete Send to Bin Section –
  - Next Bin – if the petition is in your queue and someone else’s, this question will not appear.
  - Next Bin – if you need to assign this petition to another administrator, select “Program 1 Review.”
  - Next Bin – if you need to assign this petition to a faculty member, select “Program 1 Faculty Review.”
  - Next Bin – if the program review is complete for this petition, select “GC Under Review” to submit it to the Graduate College.
    - IMPORTANT: If the student is requesting to change curriculum to a new program in a NEW department, select “Program 2 Review” so that they may review before submitting to the Graduate College.
  - Next Reader – if assigning this petition to another administrator or faculty member, enter and select the name of the person. Note that you can only assign one person with this method. To assign multiple people, read the instructions in the section above about assigning petitions.
- Click “Send”
HOW TO ASSIGN A CURRICULUM CHANGE PETITION TO THE NEW DEPARTMENT

• Access the petition within the Petition Workflow.
• Click on the student’s name in the upper left.

• Click on “Edit Bin/Queue”

• Bin – Select “Program 2 Review.”
• Add Reader – If the petition is currently listed in someone’s queue, remove the petition from their queue by clicking the “x” by the person’s name.
• Click “Save.”
• Note that you can also select “Program 2 Review” as the “Next Bin” when completing a review form.

HOW TO SUBMIT A PETITION TO THE GRADUATE COLLEGE

• Access the petition within the Petition Workflow.
• Click on the student’s name in the upper left.

• Click on “Edit Bin/Queue”

• Bin – Select “GC Under Review.”
• Add Reader – If the petition is currently listed in someone’s queue, remove the petition from their queue by clicking the “x” by the person’s name.
• Click “Save.”
• Note that you can also select “GC Under Review” as the “Next Bin” when completing a review form.
HOW TO RETURN AN INCOMPLETE PETITION TO THE GRADUATE COLLEGE FOR REVIEW

- Access the petition within the Petition Workflow.
- Click on the student’s name in the upper left.

![Image of Petition Workflow]

- Click on “Edit Bin/Queue”

![Image of Edit Bin/Queue]

- Bin – Select “Resubmitted to GC for 2nd Review.”
- Add Reader – If the petition is currently listed in someone’s queue, remove the petition from their queue by clicking the “x” by the person’s name.
- Click “Save.”

Note that you can also select “Resubmitted to GC for 2nd Review” as the “Next Bin” when completing a review form. You can also email us at grad@illinois.edu to let us know you are ready for us to re-review.

HOW TO VIEW A GRADUATE COLLEGE PETITION DECISION

- Once the Graduate College has completed the petition review, an email notification will go to the student and the department with the decision information.
PER WORKFLOW OVERVIEW

Step 1: Student Submits PER
- An email notification is sent to the program that the PER needs to be reviewed.

Step 2: Program Review
- Graduate Program Contact reviews PER to make sure all information is correct.
- If there are any external members, Contact provides justification and CV for external member.
- Contact enters in graduate program decision and routes to the Graduate College.

Step 3: Graduate College Review
- Most PERs are automatically approved if they meet all the standard requirements.
- Some PERs need manual review (example: if the student has an external member).
- GC assigns approval and committee start and end dates.

Step 4: Approval Notification
- When a PER is approved, an email notification is sent to the student (with a copy to the program). This includes a link to their PER status page where they can download their exam documents.
- An email is also sent to the program with instructions on how they can download the exam documents.
- A final email is sent to all committee members from the Graduate College Dean formally asking them to serve on the committee.

HOW TO ACCESS A PER
- When a student submits a new PER, an email notification will be sent to the graduate program.
- Click the link in this email.
- Log into Slate.
- This will take you to the PER tab.
HOW TO EDIT AND REVIEW A PER

- Access the PER.
- Click on the Dept PER Review Form on the right.
- To get started, click the edit button.

Review all fields within the form and make any appropriate edits.

If there are any external members, provide justification at the bottom of the form and a URL for their CV.
- You can also upload the CV by using the link provided for the materials section.
- This link will open a new window showing the overview of the PER tab.
- In the Materials section, click on “New Material.”
- Material – FER/PER External Member CV.
- Memo – Brief description of the document (optional).
- Choose your file.
- Click “Upload.”
- Return to your open browser tab with the Dept PER Review Form open.

At the top of the form, enter in the graduate program decision.
- Select “Forward to GC to Request Committee Appointment” to submit to the Graduate College.
- Select “Reject” to reject the request and enter the reason. This will be sent by email to the student.

When you are done, make sure to click the Save button to submit!
HOW TO VIEW THE GRADUATE COLLEGE PER DECISION AND EXAM DOCUMENTS

- When the GC has approved the PER, an email notification will be sent to the student with a copy to the program.
- An email will be sent to all committee members from the Graduate College Dean formally asking them to serve on the committee (and a copy will go to the program).
- An email will be sent to the program with instructions for downloading the exam documents.
- To download the documents, click on the link provided in the email.
- This will take you to the PER tab.
- Click on Download PDF on the right.

Format – Select “Omit headers and footers.”
Insert Part – Select “PER PDF” if not already listed under Parts.
Parts – use the “X” to remove any other parts listed.
Click “Download.”

- The first page will include an official committee approval letter for the student.
- The second page will be the exam result form.
- Once the exam is complete, the Graduate Program Contact will need to submit the form to the Graduate College using the Secure Forms Drop Off system.
FER WORKFLOW OVERVIEW

Step 1: Student Submits FER
- An email notification is sent to the program that the FER needs to be reviewed.

Step 2: Program Review
- Graduate Program Contact reviews FER to make sure all information is correct.
- If there are any external members, Contact provides justification and CV for external member.
- Contact enters in graduate program decision and routes to the Graduate College.

Step 3: Graduate College Review
- Most FERs are automatically approved if they meet all the standard requirements.
- Some FERs need manual review (example: if the student has an external member).
- GC assigns approval and committee start and end dates.

Step 4: Approval Notification
- When a FER is approved, an email notification is sent to the student (with a copy to the program). This includes a link to their FER status page where they can download their exam documents.
- An email is also sent to the program with instructions on how they can download the exam documents.
- A final email is sent to all committee members from the Graduate College Dean formally asking them to serve on the committee.

HOW TO ACCESS A FER
- When a student submits a new FER, an email notification will be sent to the graduate program.
- Click the link in this email.
- Log into Slate.
- This will take you to the FER tab.
HOW TO EDIT AND REVIEW A FER

- Access the FER.
- Click on the Dept FER Review Form on the right.
- To get started, click the edit button.

- Review all fields within the form and make any appropriate edits.
- If there are any external members, provide justification at the bottom of the form and a URL for their CV.
  - You can also upload the CV by using the link provided for the materials section.
  - This link will open a new window showing the overview of the FER tab.
  - In the Materials section, click on “New Material.”
  - Material – FER/PER External Member CV.
  - Memo – Brief description of the document (optional).
  - Choose your file.
  - Click “Upload.”
  - Return to your open browser tab with the Dept FER Review Form open.
- At the top of the form, enter in the graduate program decision.
  - Select “Forward to GC to Request Committee Appointment” to submit to the Graduate College.
  - Select “Reject” to reject the request and enter the reason. This will be sent by email to the student.
- When you are done, make sure to click the Save button to submit!
HOW TO VIEW THE GC FER DECISION AND EXAM DOCUMENTS

- When the GC has approved the FER, an email notification will be sent to the student with a copy to the program.
- An email will be sent to all committee members from the Graduate College Dean formally asking them to serve on the committee (and a copy will go to the program).
- An email will be sent to the program with instructions for downloading the exam documents.
- To download the documents, click on the link provided in the email.
- This will take you to the FER tab.
- Click on Download PDF on the right.

FAQ – Select “Omit headers and footers.”
- Insert Part – Select “FER PDF” if not already listed under Parts.
- Parts – use the “X” to remove any other parts listed.
- Click “Download.”

- The first page will include an official committee approval letter for the student.
- The second page will be the exam result form.
- The third page will be the dissertation approval form.
- Once the exam is complete, the Graduate Program Contact will need to submit the forms to the Graduate College using the Secure Forms Drop Off system.