

STUDENT SUCCESS SLATE

*Overview and guide to viewing and tracking information for
Graduate Program Advisors and Academic Advisors*

UNIVERSITY OF COLORADO BOULDER GRADUATE SCHOOL

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STUDENT SUCCESS MAIN PAGE OVERVIEW

To view the Student Success tab, enter the name of one of your current students in the Search bar at right. (You can also use the Records icon to pull up a search screen.)



Once you are in a student record, you can view commonly needed data that is pulled in from CU-SIS. You can also track information that helps managing your programs support our students in moving toward their academic goals.

Student Success Admins Only

Academic Standing Letter
 Yes = FY
 In Progress = Nspecial
 No = FN

Personal Information

| | | | |
|----------------------|-------------|---|----------------|
| CU-SIS ID: : | 10xxxxxxx | Personal Pronouns | She, Her, Hers |
| HR ID | XXXXXX | Grad Status | 2237 - A |
| Gender Identity | | International Student (if no then domestic) | Yes |
| Office Location | | Visa Status | Applied For |
| Visa Type | F-1-Student | | |
| Visa Issue Date | | | |
| Visa Expiration Date | | | |
| Dietary Restrictions | | | |

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|----------------------------|---------|----------------|--------|------------|--------------------|--------------|-----------------------------|-----------------------|---------------|-------------|
| Linguistics - MA (LING-MA) | | Master of Arts | Active | Fall 2022 | | | Term: 2231, Term GPA: 4.000 | 4.000 | GRAD | Nonresident |

When you log in to Slate's administrative you, the Student Success tab will be displayed as the second tab from the far right. (For records containing many applications, you can hover on the "+" icon at the far right and select the Student Success tab to view it.)



On this tab, you will be able to view basic student information, active study plan information, milestones, and more. You will be able to add information about program-specific milestones, funding, awards, and advising notes.

This tab is visible to Slate users who have been granted permission to see this tab for their designated population of students (which is usually defined by academic department). This includes Graduate Program Assistants and Graduate School Funding staff and Student Services staff. (Because these permissions come with querying capabilities, we require training on configurable joins – Slate's term for querying the related tables or "bases" in this relational database).

TWO POINTS TO BEAR IN MIND ABOUT USING THE STUDENT SUCCESS TAB:

- ***THIS INFORMATION IS PART OF THE STUDENT RECORD:***
Information on this tab is part of the student record, so be aware that the student can request this record, and make sure to stay up-to-date on FERPA trainings and review [FERPA information](#) as needed.
- ***DATA IS REFRESHED NIGHTLY.*** *Data from CU-SIS is deleted every night (Saturday excepted) and updated in the early morning. The time can slightly vary, so if you are not seeing data in non-standard work hours, it is due to this daily update. The timing of the data refresh also means that information posted to CU-SIS during the working day will not be visible in Slate until the following day.*

We have several Slate Guides on [Admission Information for Staff](#) and on the home page of Slate Reader we have links to training videos, including one on Configurable Joins that you may want to review as well.

Personal Information Section

[Student Name] Active Student [Slate ID#]

Dashboard Timeline Fall 2022: Atmos... Profile Materials Preferences Processing Student Success Course Registration

Personal Information

CU-SIS ID: 1DXXXXXXX
HR ID: XXXXXX

Gender Identity: Agender/Do Not Gender Identify
Non-Binary

Personal Pronouns: They, Them, Theirs

Grad Status: 2237 - C

Office Location

International Student (if no then domestic): No

Visa Type

Visa Status

Dietary Restrictions

The Personal Information section displays key information from Campus Solutions: **CU-SIS ID**, **HR ID**, **Graduate Student Registration Status**, and information about visa (if applicable.) For some of your students, **Gender Identity** and **Personal Pronouns** may not appear. If a student has chosen to share this information in Buff Portal, then this data appears, but otherwise will appear blank. (Data in this section varies from Level 2 to Level 4 in [Security Level](#).)

You can update are **Dietary Restrictions** and **Office Location**.

To update them, click the edit icon at the top right of the section to bring up the fields.

Personal Information

CU-SIS ID:

HR ID:

Personal Pronouns:

Gender Identity:

Agender/Do Not Gender Identify

Cisgender

Gender Queer/Non-Conforming

Nan/Male

Non-Binary

Not Listed

Trans Female/Trans Woman

Trans Male/Trans Man

Two Spirit

Woman/Female

Grad Status:

Office Location:

International Student (if no then domestic):

Visa Type:

Visa Status:

Dietary Restrictions:

Kosher/Halal

Nut Allergy

Shellfish Allergy

Vegan

Vegetarian

Other

To save your edits, click the “X” icon at the top right of the section.



Academic Plans

Information about academic plans is brought in from CU-SIS daily. Depending on the plan, you may see different information. Below are examples of Academic Plan tables for different program types:

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|--|---------|--------------------------------|--------|-------------|--------------------|--------------|-----------------------------|-----------------------|---------------|-------------|
| Aerospace Engineering Sciences - Pro MS (ASEN-MSAES) | | Master of Science in Aero Engr | Active | Spring 2021 | | | Term: 2231, Term GPA: 4.000 | 4.000 | GRAD | Nonresident |

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|------------------------|---------|----------------|--------|------------|--------------------|--------------|-----------------------------|-----------------------|---------------|-----------|
| English - MA (ENGL-MA) | | Master of Arts | Active | Fall 2022 | | | Term: 2231, Term GPA: 4.000 | 4.000 | GRAD | Resident |

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|-------------------------------|-----------------|----------------------|--------|------------|--------------------|--------------|-----------------------------|-----------------------|---------------|-----------|
| Psychology - PhD (PSYC-PHD) | Cognitive (COG) | Doctor of Philosophy | Active | Fall 2017 | | | Term: 2231, Term GPA: 4.000 | 3.872 | GRAD | Resident |
| Cognitive Science (COGS-ADLM) | | | Active | Fall 2017 | | Joint Degree | Term: 2231, Term GPA: 4.000 | 3.872 | GRAD | Resident |

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|--|--|--------------------------------|--------|------------|--------------------|--------------|-----------------------------|-----------------------|---------------|-----------|
| Engineering Management - ME (EMEN-ME) | Mechanical/Engr Mgmt Dual Deg (D-MCENEMEN) | Master of Engineering | Active | Fall 2022 | | Dual Degree | Term: 2234, Term GPA: 4.000 | 4.000 | GRAD | Resident |
| Mechanical Engineering - Professional MS (MCEN-MSME) | Mechanical/Engr Mgmt Dual Deg (D-MCENEMEN) | Master of Science in Mech Engr | Active | Fall 2022 | | Dual Degree | Term: 2234, Term GPA: 4.000 | 4.000 | GRAD | Resident |

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|------------------------------------|---------------------------------------|-------------------|--------|------------|--------------------|-------------------------------|--------------|-----------------------|---------------|-----------|
| Information Science - MS (INFO-MS) | Info Science- Concurrent Deg (C-INFO) | Master of Science | Active | | | Bachelors Accelerated Masters | | 0.000 | GRAD | Resident |

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|---|---------|--------------------------------|--------|------------|--------------------|--------------|-----------------------------|-----------------------|---------------|--------------|
| Electrical Engineering - MS (ECE3-MSEE) | | Master of Science in Elec Engr | Active | Fall 2019 | | | Term: 2227, Term GPA: 4.000 | 3.818 | GRAD3 | Special Rate |

This table includes these fields:

- Plan (and plan code)
- Subplan (and subplan code)
- Credential

- Status (*we are bringing in data for active students. To view discontinued plans, we link to the record in CU-SIS so you can check there.*)
- Admit Term
- Expected Grad Term (*this term will appear once a student has applied to graduate*)
- Program Type (*for BAM, Dual, Joint Degree*)
- Semester GPA
- Cumulative Career GPA (*In the first semester, the GPA will appear as "0.000."*)
- Career (*GRAD or GRAD3. GRAD3 is for the B3 Campus.*)
- Residency (*Resident, Nonresident, Special Rate*)

Milestones

The Milestone section keeps university-wide and program-specific milestones in one place.

MILESTONES: UNIVERSITY-WIDE

University-wide milestones are pulled in from Campus Solutions. These milestones are tracked by the Graduate School in CU-SIS. (They are not editable.)

For more detailed information about Milestones, please see the [guide](#) posted on the [Graduate School Faculty and Staff Training page](#).

Academic Plans

This section displays information from the SIS system, and is not editable within Slate.

| Plan | Subplan | Credential | Status | Admit Term | Expected Grad Term | Program Type | Semester GPA | Cumulative Career GPA | CU-SIS Career | Residency |
|--------------------------------------|---------|----------------------|--------|------------|--------------------|--------------|--------------------------------|-----------------------|---------------|-----------|
| Geological Sciences - PhD (GEOL-PHD) | | Doctor of Philosophy | Active | Fall 2020 | | | Term: 2231, Term GPA: 0.000 | 4.000 | GRAD | Resident |

Milestone Dates

| Academic Plan | Milestone Type | Level | Title | Anticipated Term | Comment | Complete | Date Attempt |
|---------------------------|------------------------|-----------------------------|-------|------------------|-------------------------|----------|--------------|
| add new | | | | | | | |
| Geological Sciences - PhD | Time to Degree | Doctoral | | Fall 2026 | | No | |
| Geological Sciences - PhD | Exam | Doctoral Comprehensive Exam | | | conditions met 12/15/22 | Yes | 09/16/2022 |
| Geological Sciences - PhD | Admission to Candidacy | Doctoral | | | | Yes | 01/09/2023 |
| Geological Sciences - PhD | Defense | Dissertation | | | | No | |
| Geological Sciences - PhD | Submission Approval | Dissertation | | | | No | |

Notations in Comment field

Here are some notes and comment conventions used by the Graduate School in the Milestones section:

Time to Degree Milestone Type:

- Time to Degree **Anticipated Term** is time limit expiration.
- **Comments** in Time to Degree will show if a time limit extension is approved.
- Time to Degree is created for each degree plan, so if the student is pursuing more than one degree, the time limit may differ.

- You may see some notes we use – “d-F23” would mean that we removed the student from the Fall 2023 graduation roster, or “ok-S23” might be on a master’s stack along the way for a student completing a doctoral degree.
- Some other codes might be LOA 2237 – Return 2247, or TL 2237 – Ext 2247 – these are for LOA terms and Time Limits.

Admission to Candidacy Milestone Type:

- Under the **Complete** column, you may see “In progress,” rather than “yes” or “no.” This would only occur for comprehensive exams that have a conditional pass.

Submission Approval Milestone Type:

- Under the **Complete** column, if you may see “In progress” for the Submission Approval milestone, this means Grad School staff is waiting further information.
- **Comments** in Submission Approval Milestone may say, “**FGR**” or “**SED**,” these are our way of tracking the completion of a **Final Grade Report** and the **Survey of Earned Doctorates**.

MILESTONES: PROGRAM-SPECIFIC

Program-specific milestones can be added by the program (e.g., preliminary exam, prospectus presentation). These milestones will appear in the same section as the university-wide milestones, and they (unlike the university-wide milestones) can be edited and updated in Slate by programs.

| Milestone Dates | | | | | | | |
|----------------------------|------------------------------------|-------|-----------------------|------------------|---------|----------|--------------|
| Academic Plan | Milestone Type | Level | Title | Anticipated Term | Comment | Complete | Date Attempt |
| add new | | | | | | | |
| Chemical Engineering - PhD | Other Program-Specific Requirement | | Graduate TA | Summer 2018 | | Yes | 05/01/2017 |
| Chemical Engineering - PhD | Other Program-Specific Requirement | | Course Hours Complete | Spring 2019 | | Yes | 01/01/2019 |

The Milestone Type dropdown field offers these milestone types: **Preliminary/Qualifying Exam**, **Language Requirement**, **Teaching Requirement**, **Required Internship**, or **Other Program-Specific Requirement**.

The screenshot shows the 'Milestones Widget' form. The 'Milestone Type' dropdown menu is open, displaying the following options: Preliminary/Qualifying Exam, Language Requirement, Teaching Requirement, Required Internship, and Other Program-Specific Requirement (which is highlighted in blue). Below the dropdown, there is a radio button labeled 'No'. The form also includes fields for 'Anticipated Term', 'Milestone Plan', 'Complete?' (with radio buttons for Yes, In Progress, and No), 'Date Attempted' (with three date pickers), and a 'Comment' text area.

- You select “Add New” and then select the milestone type. If you select “Other Program-Specific Requirement” you should use the same common terms for the Milestone title so that you can query them.

This screenshot shows the 'Milestones Widget' form with the 'Milestone Type' dropdown set to 'Other Program-Specific Requirement'. The form includes a text field for 'Title/Other Requirement Name', a dropdown for 'Anticipated Term', a dropdown for 'Milestone Plan', and radio buttons for 'Complete?' (Yes, In Progress, No). The 'Date Attempted' field consists of three date pickers, and there is a 'Comment' text area.

Links to CU-SIS and OnBase

Under the Milestones section, you can open CU-SIS Student Services Ctr (AdminVw) and the OnBase documents for the student. These will open in a new window.

Milestone Dates

| Academic Plan | Milestone Type | Level | Title | Anticipated Term | Comment | Complete | Date Attempt |
|-------------------------|-----------------------------|-------|-------|------------------|----------------------------|----------|--------------|
| add new | | | | | | | |
| Anthropology - PhD | Preliminary/Qualifying Exam | | | Fall 2023 | | No | 10/16/2023 |
| Anthropology - PhD | Language Requirement | | | Spring 2023 | Passed with honors. | Yes | 05/05/2023 |
| Anthropology - PhD | Teaching Requirement | | | Fall 2022 | GPTI level, excellent FCQS | Yes | 12/14/2022 |

[Tessa Test's CU-SIS Student Services Profile](#)
[Link to OnBase](#)

Service Indicators/Advising Holds

Confidentiality Level 3

Service Indicators and Holds data is pulled from CU-SIS. It may be useful in many cases to check CU-SIS for more information about the specific holds and service indicators displayed on the Student Success Tab. Many codes that exist in the system do not have definitions that are visible to everyone as a measure of protection for student data.

Some of the codes that we may commonly see are the following:

- Selective Service hold – Registrar
- Immunization Hold - Wardenburg/Immunization Compliance Team at 2-5101 (option 4) and immunizations@colorado.edu
- Missing Credentials Hold – Admissions
- Past Due Balance Hold (B01, B02) - Bursar at 2-5381/bursar@colorado.edu
- Confirmation Deposit (B40, B41) - Bursar at 2-5381/bursar@colorado.edu
- Academic Standing (S15) - Dean's Office
- Ethics Holds/Honor Code Holds - Student Conduct at studentconduct@colorado.edu
- R09 and R11 – BAM indicators

Leave of Absence semesters

data awaiting from SIS – will pull this in at a future date.

Academic Standing Codes

Confidentiality Level 3

The Graduate School uses academic standing codes placed on students' records to enable us to more easily track students who are on a two-semester standard Graduate School probation and those who need to submit an academic plan.

These are the codes used for main campus (B1) graduate students:

GPR1 Grad Probation 1st Sem

GPR2 Grad Probation 2nd Sem

GPRP Grad Probation with academic plan

DISS Dismissed

OFFP Off Probation

Note about GPRP code: Whenever we require an academic plan, we'll ask that the student fill our new Graduate Student Academic Recovery Plan form, which is available on our [website](#) in the academic forms section, and e-mail notifications sent to students will include a link. Your general graduate program e-mail address will be copied on notifications to students. Note: This form will be added to OnBase along with the notification of academic standing.

We have started implementing notifications of academic warning through Slate, so as we move forward, these messages will appear on the Timeline tab.

More information on Academic Standing can be found in the Graduate Program Assistant Guide on our [training page](#) and in the [Graduate School Rules](#).

Academic Standing codes for GRAD3 Students display in Slate as follows:

| Academic Standing Code for B3 Campus | Student population |
|--------------------------------------|---|
| WARN | Student cumulative GPA 2.5-3.0, placed on academic warning |
| DISP | Student cumulative GPA below 2.5, dismissed from program |
| RGSU | Student returned to good standing from academic warning (unofficial transcript) |
| RGSO | Student returned to good standing from previous dismissal (official transcript) |
| GAS | Reset- good academic standing (error etc.) |

Funding Information

In this section you can add information about a student's funding.

Information about appointment percentages and Dental (for external fellowships) is pulled in from CU-SIS.

For students on appointment, you can see the percentage appointment for current semester. (This does not include the percentage for an approved overload.) Students on a 20% or greater appointment have Dental as part of the funding package. You will see "Dental Yes" only if a student has this covered, and they are not on a qualifying appointment (i.e., they are on a covered External Fellowship.)

Funding Information

Tuition Remission 2237- TA 0%, RA 0%, Dental Yes

| Dates | Funding Type | Insurance Covered | Tuition Covered | Tuition Remission | Description |
|-------------------------|---------------------|-------------------|-----------------|-------------------|-------------|
| add new | | | | | |
| 09/01/2022 - 08/31/2025 | External Fellowship | Y | Y | Y | NSF GRFP |

Funding Information

Tuition Remission 2237 - TA 0%, RA 50%

| Dates | Funding Type |
|-------------------------|--------------|
| add new | |

The “add new” button allows you to add information about a student’s funding.

Funding Widget

| | |
|--------------------|----------------------|
| Funding Type | <input type="text"/> |
| From | <input type="text"/> |
| To | <input type="text"/> |
| Tuition Covered? | <input type="text"/> |
| Insurance Covered? | <input type="text"/> |
| Tuition Remission? | <input type="text"/> |
| Funding Source | <input type="text"/> |
| Description | <input type="text"/> |

External Fellowship

GA Appointment

GPTI Appointment

Internal Fellowship

Partial fellowship

RA Appointment

Research Assistant

Research Grant

Scholarship

TA Appointment

Teaching Assistant

Work Study

The funding types are as follows:

- **External Fellowship** – use for student on funding from NSF, NASA FINESST and other external grants
- **GA Appointment** – hourly
- **GPTI Appointment**
- **Internal Fellowship** – use for students funded by the department or GS fellowship like Dissertation Fellowship
- **Partial Fellowship** – can be recurring but doesn’t cover all expenses, e.g., UF
- **RA Appointment** – use for Research Assistants on appointment.
- **Research Assistant - hourly** – use for hourly Research Assistants
- **Scholarship** – one-off awards

- **TA Appointment** - use for Teaching Assistants on appointment.
- **Teaching Assistant - hourly** - use for hourly Teaching Assistants
- **Work Study**

Related Faculty and Staff

Faculty advisors and committee members can be added manually to this section. We will be able to upload this sheet with changes once a year (or semester, as needed).

For advisors to be added as batch, email the Grad School Slate team a spreadsheet in the following format:

| student name | emplid | plan | advisor_type* | user | advisor name | email | Advisor Name (if not in Slate) |
|--------------|-----------|----------|------------------------------|--------------------------------|-------------------|--------------------|--------------------------------|
| Name here | CU-SIS ID | DEPT-PHD | GPA/Committee Member/Advisor | identikey username of advisor1 | Name of Advisor 1 | Advisor 1 CU email | (Name of Advisor) |
| Name here | CU-SIS ID | DEPT-PHD | GPA/Committee Member/Advisor | identikey username of advisor2 | Name of Advisor 2 | Advisor 2 CU email | (Name of Advisor) |

The spreadsheet should contain one line per advisor. If a student has three advisors, that student would be listed three times - once for each advisor.

For the Faculty Portal (forthcoming) views to work, the advisor types need to be chosen from a value from the **Advisor Type list*** (**Co-Advisor, Committee Member, Faculty Advisor, Graduate Program Assistant, Research Advisor, and Staff Advisor**) Since programs vary in how advisor types and duties are structured, you may need to use a type that does not represent your advising structure. In that case, you might choose a type that most closely fits the name that your department uses and remain consistent in the mapping of your category to a value in the Advisor Type prompt value.

Related Faculty Widget

Advisor Type

Advisor Study Plan

Is this advisor a Slate User?
 Note: Search the list above to be sure first! Selecting 'yes' means that this advisor does not have access to Slate or any Slate portals.

Advisor Name

▼

Co-Advisor

Committee Member

Faculty Advisor

Graduate Program Assistant

Outside Committee Member

Research Advisor

Staff Advisor

Inactive: Final Project/Thesis Advisor

Related Faculty and Staff

Enter the student's primary advisor, committee members, and any other faculty connections. NOTE that a faculty member must be listed here before the student appears in the faculty's portal.

| Advisor Type | Advisor Name | Academic Plan | Advisor Has Access to Slate/Faculty Portal? |
|-------------------------|--------------|---------------------------|---|
| add new | | | |
| Faculty Advisor | advisor | Geological Sciences - PhD | Yes |
| Faculty Advisor | advisor | Geological Sciences - PhD | Yes |

In addition to being displayed here, if your program has several different GPAs assigned to different students, we can add this information as it controls the view on the (forthcoming) Faculty Portal.

The data in this list is part of the connective tissue for the Faculty Portal views. *A sample Graduate Director View is shown below, which displays lists of students by relationship type. Clicking a student name in this (forthcoming) portal will bring up a basic student profile and a section to add advising notes.*

Welcome,

Advisees

Committee Members

All Department Students

All GEOL Students

[Next](#)

Search List...

| Name | Location | Plan |
|------|-----------------|---|
| | Boulder, CO | Geological Sciences - PhD (PHD) |
| | Loveland, CO | Geological Sciences - MS (MS) |
| | Boulder, CO | Geological Sciences - PhD (PHD) Oceanography - CERG (CERT) |
| | Westminster, CO | Geological Sciences - PhD (PHD) |
| | | |
| | | |
| | Boulder, CO | Geological Sciences - PhD (PHD) |

A note about Slate users: You can track advisors in the Student Success tab, but if they have not been set up with Slate permissions, they will not appear in the dropdown list if you add them manually to this section.

PREPARING ADVISOR LISTS FOR UPLOAD

You can manually enter and edit advisors in a student record one-by-one. We can upload this data as a batch. To do so, we need the data in a set of standard columns.

Related Faculty and Staff

Enter the student's primary advisor, committee members, and any other faculty connections. NOTE that a faculty member must be listed here before the student appears in the faculty's portal.

| Advisor Type | Advisor Name | Academic Plan | Advisor Has Access to Slate/Faculty Portal? |
|--------------------------|--|--------------------|---|
| add new | | | |
| Faculty Advisor | Jennifer Shurley | Anthropology - MA | Yes |
| Committee Member | TBD | Anthropology - MA | No |
| Co-Advisor | Alexa Holland-Plum | Anthropology - PhD | Yes |
| Faculty Advisor | Jennifer Shurley | Anthropology - PhD | Yes |
| Outside Committee Member | Cori Fagan - Other University - cori@other.edu | Anthropology - PhD | No |

This is what the table above looks like as a spreadsheet to be uploaded to Slate (for student with CU-SIS ID "11xxxxxx1")

| | A | B | C | D | E | F | G |
|---|-----------|----------|--------------------------|----------|----------------------|--------------------------------------|---|
| 1 | studentid | plan | advisor_type | user | user in slate? (y/n) | non-slate Advisor | |
| 2 | 11xxxxx1 | ANTH-MA | Faculty Advisor | jesh1412 | y | | |
| 3 | 11xxxxx1 | ANTH-MA | Committee Member | alho.... | n | TBD | |
| 4 | 11xxxxx1 | ANTH-PHD | Co-Advisor | | y | | |
| 5 | 11xxxxx1 | ANTH-PHD | Committee Member | jesh1412 | y | | |
| 3 | 11xxxxx1 | ANTH-PHD | Outside Committee Member | | n | Cori Fagan - Other University - cori | |
| 7 | 11xxxxx2 | ANTH-MA | Faculty Advisor | alho.... | y | | |
| 3 | 11xxxxx2 | | | | | | |
| 3 | | | | | | | |

Each row in the spreadsheet will contain the record of one student-advisor mapping. We match to the record in Slate on the student's CU-SIS ID. If a student has 3 advisors, then there will be 3 rows with that student's ID and the different advisors listed in different rows.

Columns needed: StudentID | plan | advisor_type | user| advisor name | user in slate? (Yes/No)| non-slate Advisor

| studentid | plan | advisor_type | user | user in slate? (y/n) | non-slate Advisor |
|-----------|------|--------------|------|----------------------|-------------------|
|-----------|------|--------------|------|----------------------|-------------------|

It's ok to have additional columns, but they just won't be mapped into Slate because the data structure is not set up to store them.

StudentID: Student ID that will be used to match to student's record in Slate.

Plan: One study plan- this can be the code or the full name, but should correspond to the degree as listed on the Slate admission application.

For instance, if your program offers several master's degrees, make sure to specify which one so the data will map correctly

If you want to list the same advisor for both Master's and PhD level degrees for the same student, enter this as separate rows, as in the example above. (Listing the study plan as MA/PhD is fine, but we will map that as PhD.)

Advisor type: to map correctly, advisor type needs to correspond to Co-Advisor, Committee Member, Faculty Advisor, Graduate Program Assistant, Outside Committee Member, Research Advisor, or Staff Advisor

User: advisor's Identikey. (This is a required field for Slate Users – it's how we connect the student to the faculty portal in Slate). *Note: Dragging Identikey values in Excel often changes the value from, for example, jesh1412 to jesh1413.

User in Slate: Values should be Yes, No or blank. (Y or N is ok too.) If faculty outside your department are listed and you don't know if they are a Slate user, leave blank and we can look this up. Allow extra processing time 😊

Non-Slate advisor: If the advisor is not a Slate user, but it would still be useful to see their name in this section for your records, please enter their **name** into this column. This is a free text field, so if you want to keep the advisor's email and outside affiliation here, you could include that. Note: If advisors are not Slate users, they will not have access to the faculty portal. [Submit a ticket](#) if you want to request Slate access for additional users.)

Optional: If you want placeholder fields for advisors yet to be named, you can write "TBD" or similar in this Non-Slate Advisor field.

This would allow you to query the number of advisors of a given type, and if a student has advisors yet to be named. The example below shows results from a query looking for advisors and counting by type.

| I | Study Plan Code | Advisors | Faculty Advisors count | Committee Member co... | Count Advisor TBD |
|---------------|-----------------|-----------------------------|------------------------|------------------------|-------------------|
| oulis@Col... | DR | Committee Member - G. L... | 1 | 4 | 0 |
| @colorado.... | DR | TBD TBD TBD TBD ... | 1 | 0 | 4 |
| olorado.EDU | DR | ' - Committee Mem... | 1 | 4 | 0 |
| @colorado.... | DR | - Faculty Adviso... | 1 | 4 | 2 |
| @colorado.... | MA | | 0 | 0 | 0 |
| in@colorad... | DR | * Committee Mem... | 1 | 3 | 1 |
| olorado.edu | MA | TBD TBD TBD TBD ... | 1 | 0 | 4 |

Advising Notes

Keeping shared advising notes can help staff and faculty to provide support to our students in meeting their short- and long-term goals, clarify expectations, and track a history of advising discussions and decisions. (Related resources, including the Graduate School Advising Agreement, can be found in the [Mentoring Resources](#) section of the Graduate School's web page.)

[Buff Portal Advising's guidelines](#) section on logging (in the accordion sections) provides this guidance:

- When in doubt, ask the student if it is OK to document something.
- If you are not OK showing the log to the student, you need to edit the log (think about your tone)

The academic advising notes section can be viewed by people with access to the Student Success Tab for the department's population of Active Students: GPAs, Grad Directors, GS Student Services and Funding staff. Once the Faculty Portal is live, plan for the notes to be viewable by faculty advisors.

THESE NOTES FALL UNDER FERPA AS BEING PART OF THE STUDENT RECORD, SO PLEASE BE SURE YOU'RE UPDATED ON YOUR FERPA TRAINING. USE BEST PRACTICES WITH ADVISING NOTES AND KEEPING THE NOTES FACTUAL AND IMPERSONAL.

Since this is a text box note field without structure, please consider the sensitivity of the information before documenting advising notes. Some useful information to review include [Student Data Use Guidelines Security Levels](#) (from public to Highly Confidential), the [adverse impact](#) table from CU's Office of Information Security and [FERPA information](#) posted by the Office of the Registrar.

While good notes in this section have great potential to allow us to coordinate or work in supporting students in navigating their degree requirements and other academic goals, use of this or any other section is not a requirement, but we hope it is a tool you will find useful.

Advising notes will be kept in the system for 5 years post-attendance.

ADDING ADVISING NOTES

To add an advising note, click add new. For **Note Writer**, select your name from the dropdown list (typing a few letters of your name starting with first name can help with finding the right selection.) For **Note Type**, the current categories are Annual Report, Course Selection Advising, Graduate Requirements Advising, Graduate School Administrative Note, Initial Meeting, and Other.

Add your note in the note box

To borrow further from the Buff Portal Advising Note guidelines:

- Do not reference health diagnoses or protected class affiliation:
 - It is OK to use more vague descriptions such as: experiencing health issues, has been sick, recently had surgery, was injured, etc.
 - Protected classes according to the CU OIEC: race, color, national origin, sex, pregnancy, age, disability, creed, religion, sexual orientation, gender identity, gender expression, veteran status (a person who serves or has served in any

branch of the U.S. military, including ROTC), political affiliation, or political philosophy.

Long notes are possible, but here is what it looks like to display long notes, if you are curious:

| Created Date | Note Writer | Note Type | Note |
|-------------------------|------------------|-------------------------------------|---|
| add new | | | |
| Oct 25, 2023 | Jennifer Shurley | Graduate School Administrative Note | test test |
| | | | <p>Lorem ipsum dolor sit amet. Aut laborum reiciendis est recusandae animi non labore quaerat et quod odit? Et quidem voluptatem sed adipisci molestiae et adipisci explicabo ab provident dolor vel tempora galisum sit fugiat veniam ab alias sint. Sed internos impedit ut eaque impedit et placeat eaque sit aspernatur ipsa aut accusantium quaerat et debitis quae.</p> <p>Vel recusandae fugit quo debitis assumenda est impedit quae non perferendis quia sit vitae aspernatur. Et amet Quis nam vero dolor qui omnis impedit? Et vitae sint est obcaecati nulla est omnis enim a minima atque aut repudiandae asperiores. A earum nemo est tenetur velit a quisquam quos eos omnis doloribus.</p> <p>Eos velit totam aut atque nobis At reprehenderit vero. Est repudiandae galisum ea soluta dolore aut libero corporis qui doloribus recusandae qui suscipit distinctio qui aliquam omnis eos recusandae amet! Ex totam ipsa et tenetur sequi sit galisum neque qui eveniet doloremque At laudantium libero qui natus earum quo minima voluptatem. Ea voluptatem nostrum et alias tempora id Quis consectetur.</p> <p>Lorem ipsum dolor sit amet. Aut laborum reiciendis est recusandae animi non labore quaerat et quod odit? Et quidem voluptatem sed adipisci molestiae et adipisci explicabo ab provident dolor vel tempora galisum sit fugiat veniam ab alias sint. Sed internos impedit ut eaque impedit et placeat eaque sit aspernatur ipsa aut accusantium quaerat et debitis quae.</p> <p>Vel recusandae fugit quo debitis assumenda est impedit quae non perferendis quia sit vitae aspernatur. Et amet Quis nam vero dolor qui omnis impedit? Et vitae sint est obcaecati nulla est omnis enim a minima atque aut repudiandae asperiores. A earum nemo est tenetur velit a quisquam quos eos omnis doloribus.</p> <p>Eos velit totam aut atque nobis At reprehenderit vero. Est repudiandae galisum ea soluta dolore aut libero corporis qui doloribus recusandae qui suscipit distinctio qui aliquam omnis eos recusandae amet! Ex totam ipsa et tenetur sequi sit galisum neque qui eveniet doloremque At laudantium libero qui natus earum quo minima voluptatem. Ea voluptatem nostrum et alias tempora id Quis consectetur.</p> <p>Lorem ipsum dolor sit amet. Aut laborum reiciendis est recusandae animi non labore quaerat et quod odit? Et quidem voluptatem sed adipisci molestiae et adipisci explicabo ab provident dolor vel tempora galisum sit fugiat veniam ab alias sint. Sed internos impedit ut eaque impedit et placeat eaque sit aspernatur ipsa aut accusantium quaerat et debitis quae.</p> |
| Nov 10, 2023 | Jennifer Shurley | Other | <p>Lorem ipsum dolor sit amet. Aut laborum reiciendis est recusandae animi non labore quaerat et quod odit? Et quidem voluptatem sed adipisci molestiae et adipisci explicabo ab provident dolor vel tempora galisum sit fugiat veniam ab alias sint. Sed internos impedit ut eaque impedit et placeat eaque sit aspernatur ipsa aut accusantium quaerat et debitis quae.</p> |

Student Achievement Sections

These sections offer tables to track student achievements. (A Student Portal is in development that will allow students to enter data for these sections as well. Timeline TBD.)

Research and Community Commitments

Use this space to enter ways this student is engaging with the campus or off-campus research community. Examples could be presentations, guest lectures, and conference attendance.

| Type | Date | Name | Location | Comments |
|-------------------------|-------------|--------------------------|--------------|--------------------------------|
| add new | | | | |
| Conference Presentation | Jun 2, 2023 | Tracking Student Success | Slate Summit | Rocking Slate to the max - pro |

Awards and Recognitions

This area is a general log of all the 'good things' and successes the student has had that don't fit into above categories. Entries could display hard or soft skills. This is like a 'kudos board.' E notable performance in a class, extra time spent mentoring a peer, internships, etc.

| Award Type | Award Name | Description | Date Awarded |
|-------------------------|--------------|-----------------------|--------------|
| add new | | | |
| Award | Best in Show | Aussie Kelpies are #1 | May 18, 2023 |

Publications

Use this space to log publications that the student has had.

| Article Title | Publication Date | Issue or Vol Number | Journal |
|-------------------------------|------------------|---------------------|--------------------|
| add new | | | |
| Good Dog Gets a Little Sister | Jan 1, 2019 | 19:1 | Good Dog Quarterly |

RESEARCH AND COMMUNITY COMMITMENTS

Research Engagement Widget

Type

Title/Name

Date

| | | | | | | |
|----|----|----|----|-----------|----|----|
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

Location

Brief Summary

AWARDS AND RECOGNITIONS

Awards Widget

Type

Award Name

Date Awarded

| November 2023 | | | | | | |
|---------------|----|----|----|-----------|----|----|
| Mo | Tu | We | Th | Fr | Sa | Su |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

Description

PUBLICATIONS

Publications Widget

Publication Date

Journal/Publication Name

Issue/Volume Number

Article Title

COURSE REGISTRATION TAB

The Course Registration tab on the far right of an Active Student record will pull in course information from CU-SIS that allows us to quickly see and sort course information.

Clicking on the column names will sort the data by Term, Subject, and more.

| Dashboard | Timeline | Fall 2019: Chemi... | Profile | Materials | Preferences | Processing | Student Success | Course Registration | |
|--|-----------------|------------------------------|------------|-----------|-------------|-------------------|--------------------------------|---------------------|---------|
| Current Classes | | | | | | | | | |
| Career | Term | Class Number | Status | Reason | Grade | Subject - Catalog | Description | Unit Taken | Section |
| GRAD | Fall 2023 | 24251 | E | ENRL | | CHEN-8990 | Doctoral Dissertation | 3.00 | 912 |
| Future Classes <small>Data will be added after students register for next term</small> | | | | | | | | | |
| Career | Term | Class Number | Status | Reason | Grade | Subject - Catalog | Description | Unit Taken | Section |
| Past Classes | | | | | | | | | |
| Career | Term | Class Number | Status | Reason | Grade | Subject - Catalog | Description | Unit Taken | Section |
| GRAD | Fall 2019 | 33742 | E | ENRL | A | CHEN-5470 | Functional Mat Chem | 3.00 | 001 |
| GRAD | Fall 2019 | 24511 | D | DROP | | GRAD-5000 | Responsible Conduct of Rsearch | 1.00 | 001 |
| GRAD | Fall 2019 | 36269 | E | ENRL | A | PHYS-7430 | Soft Cond Matter Physics | 3.00 | 001 |
| GRAD | Fall 2019 | 25686 | E | ENRL | A | CHEN-5840 | Independent Study | 3.00 | 901 |
| GRAD | Fall 2019 | 26551 | E | ENRL | A | CHEN-5370 | Inter Chem Eng Thermodyn | 3.00 | 001 |
| Transfer Classes | | | | | | | | | |
| Ext Term | Course Subj+Nbr | Description | Unit Taken | Grade In | Transfer | Grade Pt/Unt | Career | | |
| FALL-2018 | CH E-5183 | Graduate Transport Phen | 3.00 | A | 3.000 | 1.700 | GRAD | | |
| FALL-2018 | CH E-5293 | Transport-Biological Systems | 3.00 | A | 3.000 | 1.700 | GRAD | | |

DASHBOARD AND TIMELINE TABS

Dashboard | Timeline | **Spring 2024: Aer... Awaiting Submission** |

Dashboard

CU-SIS ID:

Connect

Email jennifer.shurley@colorado.edu
Phone [+1 644-555-5555](tel:+16445555555)
Mobile [+1 644-555-5555](tel:+16445555555)

We can use Dashboard Tab (far LEFT) to email a student (click email on right side) as a one-off message. If you want to email the student an advising note, you could use this feature to do that.

When sending a message or mailing, please make sure the sender information is correct.

Our Slate Guide (Main) (on the [Admission Information for Staff](#) page) has more information about Mailings and sending a message to multiple students. To highlight a few key reminders from that guide:

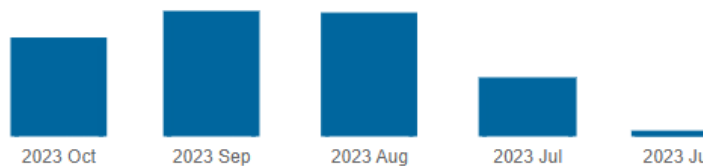
We are happy to be your guinea pigs! You may send test messages to us – just let us know they are coming!

Important! If you have any doubts about your mailing – DO NOT SEND IT. Contact us first to check your work.

Messages sent through the Dashboard or through Mailings will appear as a Sent Message on the Timeline. If the main recipient opens the email, that will be visible on the timeline, as below:

Doggie Test (Stanfield, Krus), Tessa Test

Dashboard | **Timeline** | Fall 2024: Robot... Awaiting Submission | Aero



2023 October

- 10/17 6:26:43 PM Received Message RE: Email Change
- 10/17 5:32:55 PM Received Message Regarding Application fee Waiver

Thank you for all the student support work that you do!