Deferment Form Instructions – Graduate Programs

A central deferment form is necessary to allow all campus users (Graduate Programs, Graduate Division, and supporting campus departments) to track requests easily. A Deferment Workflow diagram is available on page 4 for quick reference.

Please refer students to our [Deferment Request Form](https://connect.ucr.edu/register/deferment_request). A deferment request form must be submitted to be processed by our office. Feel free to link this form on your program website.

**Blanket Approvals**

If your program plans on approving all requests or requests for a select population or specific term (like all master’s requests or only allowing to postpone to Winter 2021), please contact Elisa Gutierrez for assistance in customizing the form to meet your program’s needs.

**User Access**

Access to the Deferment Request form in Slate is available to:

* Graduate Program Coordinators
* Graduate Admissions
* Jessi Forrest in ISS
* Graduate Academic Affairs
* Andrea Gonzales & Maria Pimentel in Graduate Division

Given time constraints, building out roles for Graduate Admissions Advisors to approve requests was impossible for Fall 2020 deferment requests. Graduate Program Coordinators will be responsible for attaching email confirmation from that recognized Graduate Advisor for Admissions or Chair. Their approval is required, unless a blanket approval has been provided to our office for a select population is on file.

**Slate Instructions**

To access the submitted Deferment Request form approved by the program, follow the below steps.

* Log into [Slate](https://connect.ucr.edu/manage/).
* Select the **Reader icon**. The third icon to the left of the Slate logo in top left corner. 
* Select the **Workflow Deferments box**. 
* Once Reader is open, **select the *Browse* option** located on the left menu in the Slate Reader. *Browse* will display all bins for this review process as well as all apps within them. The student submitted form will be routed through this Deferment Workflow process and assign a Deferment tag to their person record in Slate.
* Select the ***Program Review* box** under the **Deferment Approved** column. This Bin is where all deferment requests feed to once the student submits the form. Those with blanket-approvals, will bypass program approval and move to the *Grad Admis* bin.
* You can see all forms submitted in the *Browse* link. Additional details, like staff assigned, is noted beneath the student’s name. To only see those forms assigned to you, select the *Queue* link located in the left menu bar.
* Select the **Display Copy image** to open deferment form request. The image appears at the end of the row.
	+ If no name displays below the student’s name, you will need to select ***Add to Queue*** (located in the bottom left corner) to assign the form to yourself.
* Select the ***Review Form / Send to Bin* (bottom right corner)** to access the **Program Review** form.
* The **Program Review form** will display to the right. Your responses will assist Graduate Admissions in processing the deferment request in GradSIS and Banner.
	+ **Program Decision**
		- Deferment Decision
			1. If denied, a reason will be required. Students will receive notification from our office once the form is placed in the Grad Admis queue. The form request will then be moved to the Completed bin by the Graduate Admissions office.
			2. If approved, more questions will appear. Proof of the Graduate Admissions Advisor approval **is required**. Optional fields for Faculty Advisor approval is available too.
* **Deferment Quarter Approved** – enter the quarter the program is approving. If different from the quarter requested, please communicate that information to the applicant prior to moving to Grad Admis bin for us to process the decision.
	+ **Program Notes** - a section to track any info needed by your program. You can export info to a spreadsheet through a query in Slate. [**Deferment-Requests Submitted**](https://connect.ucr.edu/manage/query/query?id=9f6d3091-3162-43da-a960-4149c04377e5)**.**
	+ **Student Faculty Advisor Approval** – ***optional*** section to add the student’s faculty advisor and email approval.
	+ **Graduate Admissions Advisor Approval** – ***is required*** to be completed for each request. Since the Graduate Admissions Advisor cannot approve through Slate, please attach the email approval from **the Graduate Division appointed Graduate Admissions Advisor or Chair** to this field.
* **Send to Bin** – answering all required questions will allow you to select ***Grad Admissions*** for the **Next Bin** field. Select ***Send***, and the form will be routed to Graduate Admissions for processing. If the term is open term in GradSIS, we will process in 2-3 business days. If deferring to a new cohort, see below for more information on how long it can take to process.

**Revised Offer**

A revised offer for the program approved term will be sent to your student to accept.

* **Non-Funded Offers:** a revised offer will be sent without any additional approval from the graduate program.
	+ **Existing Cohort:** once the term is updated to Winter or Spring quarter, a revised offer will be sent to student.
	+ **New Cohort:** file will remain in Graduate Division queue until new cohort is created. Once created, a revised offer will be sent to student.
	+ **Offer Response Deadline:** 2-weeks.
* **Funded Offers:** will be returned to the graduate program to move funding on the financial chart.
	+ **Existing Cohort** – term will be updated to Winter or Spring quarter by Graduate Admissions, then returned to the graduate program to adjust funding on chart. Your Graduate Advisor will return the file to the Graduate Division with final approval. If financial support meets or exceeds the original offer made, a revised offer will be sent.
	+ **New Cohort -** For those students deferring to the next Summer or Fall, it will take more time to process. ITS must create the new 21-22 cohort in GradSIS first. Creating a new cohort in GradSIS occurs in July. Once created, the term will be updated and returned to your program. The file will remain in the Graduate Staff queue until the new cohort funding has added by Andrea Gonzales. This occurs in mid to late November. Once central funding has been created and allocated to graduate programs in GradSIS, programs can create funding for the new cohort, department support, financial templates, and update the student chart.
		- **Add-Ons**: notify Elisa Gutierrez, and she will add that funding while the file is still in your program’s queue. Your Graduate Advisor will return the file to the Graduate Division with final approval. If financial support meets or exceeds the original offer made, a revised offer will be sent.
	+ **Offer Response Deadlines**:
		- **Summer or Fall**: standard national deadline of April 15th.
		- **Winter & Spring**: 2-weeks.
* The Graduate Admissions office will send out a revised offer that your student will need to accept to create the new term’s matriculation in Banner.
* If International, file will be routed to I-20 Deferment Bin for Jessi Forrest in ISS to review if a deferment I-20 form is required.

**Deferment Workflow**

Graduate Program reviews request in Slate Reader under Workflow – Deferments

**Due to Graduate Admissions by 5:00PM on August 13, 2020**

Deferment Form submitted by student – **August 12, 2020 deadline**

Maria Pimentel notified to remove funding added to 1st quarter in GradESS. Due 8/14/20.

Graduate Academic Affairs notified to remove student from their Enrolled Student database

Graduate Admissions Manager verifies funding and sends out revised offer

Program updates chart in GradSIS, verifies correct, and resubmits to Graduate Division to process revised offer

Approved – complete review form and route to Graduate Admissions to process decision in Slate

ISS notified to defer I-20 issued, if student is international

Student accepts revised offer

Updated final Letter sent by Graduate Admissions to student

If non-funded, a revised offer is sent to student in GradSIS automatically by Graduate Admissions.

If funded, GA returns file to program to adjust funding on chart in GradSIS.

Graduate Admissions moves application to approved quarter in GradSIS and Banner

Denied – Student notified by email