

JOB AID

GradPlan - Workflow

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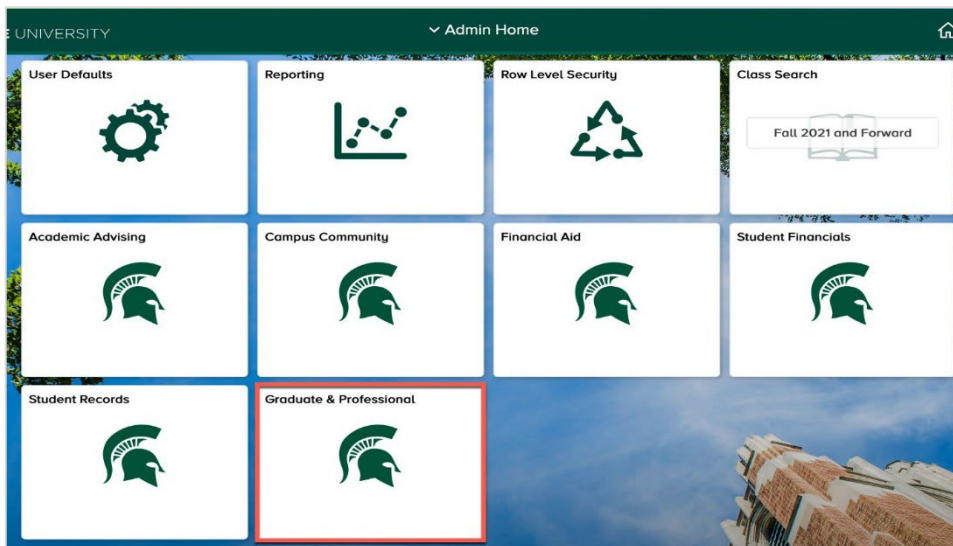


GradPlan | Workflow

Doctoral and Master's students use GradPlan to build and maintain records of their committees, course plans, yearly research activity updates, and annual reviews with their advisors. Students may also submit requests, asking for updates to their academic record, such as a change to their guidance committee or course plan, adding a dual major or specialization, switching from a PhD to a terminal Master's, approval of a foreign language requirement, etc.

Depending on the type of request, a workflow process is initiated requiring approval from people in the role of Form Checker, Guidance Committee Member or Advisor, Program, and College Approvers. If your approval is required for a workflow request, you will be notified by email. You may either click on the URL link in the email or navigate directly to SIS to review the request.

1. Log-in to SIS: <https://student.msu.edu>
2. Click on the Graduate & Professional tile.



3. Go to **My Worklist—Summary View**. This page may be reached by doing the following:

- Log-in to <https://student.msu.edu>
- Click on the Graduate & Professional Tile
- Click on My Worklist—Summary View in the menu on the left side of the page

OR

- Log-in to <https://student.msu.edu>
- Click on the Compass in the upper right corner of the Admin Home Page
- Click on Menu
- Click on Worklist from the list
- Click on My Worklist—Summary View



Graduate Reporting

Worklist for [Redacted]

Worklist Filters [Dropdown] Feed -

Date From	Work Item	Worked By Activity	Priority	Link
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11072 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24407 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11074 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24409 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11076 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24413 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11158 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24562 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11049 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24307 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11050 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24370 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11053 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24374 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11039 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24553 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11017 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24393 RDC-RA 0 A
04/26/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11014 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24318 RDC-RA 0 A

My Worklist - Summary View

Managing Workflow Requests

1. Upon navigating to your worklist, you will see a list of all pending items requiring your attention.
2. Click on a request link to open the details of the request.

Worklist for [Redacted]

Worklist Filters [Dropdown]

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link
[Redacted]	09/29/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11072 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24407 RDC-RA 0 A
[Redacted]	11/01/2023	Approval Routing	Approval Workflow	1-High	GR_CPA_APPROVAL_11074 GR_CPA_APPROVAL_2020-01-04_N_0 MSU_GR_SS_REQ_NBR_24409 RDC-RA 0 A



Example:

Comprehensive Exam Extension Request

Request Number: 108
Student Name: [Redacted]
Approval Status: In Approval Process

Approve or deny the student's request. If you do not approve, a comment is required and will be sent to the student.

Request

Program: Doctorate Ag & Nat Resources
Plan: Ag, Food & Resource Econom PHD
Admit Term: [Redacted]
Current Deadline: Fall Semester 2023
Extend Until: Fall Semester 2024
Reason: need more time

Attached File: Puffins.png

[View Attachment](#) [Approve](#) [Deny](#)

Comment: [Redacted]

[Approval Details](#)

- **View Attachment:** view attachment (only if an attachment is required for the request type)
- **Approve:** click to approve the request
- **Deny:** click to deny the request
 - **If you deny a request, you are required to enter a comment**
- **Comment:** if you deny a request, you must enter a comment here; the student is notified of the denial, and can view your comment
 - Comments are optional for requests that you approve
- Click the **Approval Details** link at the bottom of the entry to view the workflow progression for the request, including the names of previous or remaining approvers.

Reminder emails about pending worklist items awaiting a response are sent every three days. If a request is not acted upon within two weeks, the Form Checker for the student's department is notified via email so they can take further action.

Note: as a reminder and to assist faculty: if the email notification the Plan Signer should have received has been lost, signers should check "My Worklist—Summary View" to see any outstanding requests that require action.

Workflow for each type of GradPlan Request

- **Committee**
 - Form Checker > All Committee Members > Program Signer > College Signer
- **Course Plan**
 - Student is in an Academic plan that needs a committee: Form Checker > All Committee Members > Program Signer > College Signer
 - Student is in an Academic plan that does not need a committee: Form Checker > Advisor > Program Signer > College Signer



- **Dual Major**
 - Main Major Form Checker > The Graduate School
- **Comprehensive Exam Extension**
 - Form Checker > The Graduate School
- **Program Extension**
 - Form Checker > The Graduate School
- **Foreign Language approval**
 - Form Checker > Program Signer
- **Plan Change Master's Plan A/B**
 - Form Checker > Committee Chair or Advisor (if no committee) > Program Signer > College Signer
- **Plan Change PhD to Master's**
 - Form Checker > Committee Chair or Advisor (if no committee set up yet) > Program Signer > College Signer
- **Plan Change Add Specialization**
 - Form Checker > Committee Chair or Advisor (if no committee) > Program Signer > College Signer

Once the final signer approves a request, the request cannot be cancelled, and the final decision cannot be removed.



Dual Major Requests: Main Major College Level Approvers receive an email from gradsis@grd.msu.edu when a Dual Major Request has been approved by the Graduate School. The email indicates that the Main Major College Level Approver needs to add the dual major code onto the student's CPP stack. (Plan Change and Add a Major onto the student's CPP stack)

How to request GradPlan Workflow roles for staff

The Grad SIS team maintains the table with GradPlan Workflow roles for staff. If there are any changes that need to be made (additions/deletions) an access request needs to be submitted through TDX (<https://tdx.msu.edu>).

Necessary information required for the access request form

- User's name
- User role (Form Checker, Program Signer, College Signer)
- Academic Plan code(s) for Form Checker and Program Signer (remember dual major codes too)
- College Org code for College Signer

When the Grad SIS team makes an update to user's roles, any new requests going forward from the point of update will route to the revised Plan Signers. Any requests that are currently routing will continue to route to the original Plan Signers.



When a new Academic Plan Code is created (a new Master's or Doctoral code OR a new dual major code) Plan Signers must be set up for the new codes. Units must submit an access request form in TDX when new Academic Plan codes are created so GradPlan workflow roles can be updated.

To review the current workflow roles for specific staff, academic plans, or academic programs, please run the following query (in Query Viewer in the Graduate Reporting Center): MSU_GR_GRADWORKFLOW_ROLES.