JOB AID

GradPlan Overview for Staff

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Administrative staff will see the Graduate & Professional tile on their home page.

After clicking on the Graduate & Professional tile, the page opens with a list of menu items on the left.

**Grad Plan Data Administration**

1. Click **GradPlan Data Administration** on the left side menu.

2. **ID**: If you know the Student ID, enter it and click **Search**. If you do not know the Student ID, enter Last Name/First Name and click Search.
The GradPlan page opens to the **Research Overview** tab.
Research Overview Tab
This is where results are stored for the activity guides that graduate students are required to complete every year. The activity guides are assigned at the start of each academic year as “to-do” items, with the student’s responses stored on this page.

The student is required to complete the activity guide every academic year they are enrolled. There is a row for every academic year, beginning with the current year, where staff are able to review the status/results, including:

A. **Graduate Handbook**: In this section, the student acknowledges responsibility to follow university guidelines and policies.

B. **Responsible Conduct of Research**: The student acknowledges responsibility to follow responsible conduct of research requirements and to complete required training.

C. **Research Reviews and Approvals**: In this section, if a student answers “yes” to either of the human/animal subjects questions, additional fields open for the IRB Number/IACUC Number validating that the required approvals have been obtained. These fields are editable for staff (who have the GradPlan Update role) to make corrections, if necessary.

D. **Committee and Course Plan**: Here, the student acknowledges the need to keep their guidance committee composition (if required by their program) and course plan updated.

E. **Milestones and Thesis/Dissertation**: In this section, students are able to indicate a subject area for their comprehensive exam and a proposed dissertation/thesis title.
Commitees Tab

If a committee is required by the student’s program, staff can see a list of current committee members here. Committees are maintained on a separate page that includes a history of when committee members were added or removed over time (see Candidate Management section below).

NOTE: Students are to make changes to their committee composition, not staff. Staff should not make any updates to the Candidate Management page. Students in programs that require a guidance committee must have an approved committee prior to submitting a course plan request.

Course Plan Tab

If the student has created a course plan, staff can review it here. Depending on the program, students may not complete a course plan until after their first or second year. The course plan is not tied to the Degree Audit. It is simply a planning tool for the student to indicate what they intend to take over the course of their program. Staff should cross-reference what is in the course plan with the Degree Audit to ensure that the students have taken or plan on taking courses that meet their degree requirements.
Annual Review Tab

Staff will have access to all reviews from this shared repository. As a department’s review cycle is concluded, staff will upload the student’s review to this page, which will have a row for each academic year. Students will be able to see what attachments were uploaded on their GradPlan page.

Note: students have the ability to upload finalized Annual Reviews completed with their advisor themselves. If a student uploads an annual review, staff do have the ability to delete a file and upload a new file if necessary. If staff have already uploaded an annual review, students will not have the ability to upload anything, but they will be able to see what was uploaded.

Next, let's explore a few more items from the left side menu.
Track Responsible Conduct of Research (RCR)

1. Click **Track RCR** on the left side menu.

2. **ID**: If you know the Student ID, enter it and click **Search**. If you do not know the Student ID, enter Last Name/First Name and click Search.

   The Responsible Conduct of Research page displays the work the student has done toward the RCR requirements, showing each year’s requirements and their completion status.
Users with “update” access can mark sections as Complete, or update sections of the RCR as follows:

- **Discussion-Based Training – 6 Hours**: There are two ways for a student to complete this requirement: 1) Complete training session or coursework identified as satisfying this requirement, or 2) have individual one-on-one training sessions with their graduate advisor. For one-on-one training sessions, the student will submit a form for the graduate advisor to verify, or staff can update this section by entering a verification on the graduate advisor’s behalf.
**Note:** One-on-one discussions that a student has completed with their advisor only count toward the 6 hours of discussion-based training. The one-on-one discussions cannot be moved to refresher years. If it is necessary for your unit to show this type of training in a refresher year then the Submitting Group Completions Records into Ability process (found on ORA’s website) would have to be followed.

- **Annual Refresher Training – 3 hours per year:** For doctoral students, beginning with their third year there will be a row for each year. As each year is satisfied, the Completed box will be checked.

**Candidate Management**

This is where the student’s guidance committee members are recorded.

1. Click **Candidate Management** on the left side menu.

2. **ID:** If you know the Student ID, enter it and click **Search.** If you do not know the Student ID, enter Last Name/First Name and click Search.

The committee (supervisor) page opens with a separate row (or Sequence number) for each committee member who has ever served on the student’s committee. As changes are submitted by the student and approved via workflow, this page is updated automatically with a new sequence number (for a new committee member) or effective-dated row (for a change to an existing committee member) reflecting the change.

Staff should not make manual changes on this page—students are expected to submit all committee changes via the GradPlan workflow. However, this page does serve as a record of changes over time and is useful for reviewing those changes.
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Thesis Management

This section is informational only. The Graduate School is not utilizing this page for recording Thesis or Dissertation titles. Milestones are being used by the Graduate School to record thesis/dissertation titles and completion.

1. Click **Thesis Management** on the left side menu.
2. **ID**: If you know the Student ID, enter it and click **Search**. If you do not know the Student ID, enter Last Name/First Name and click Search.

The Thesis Submission page will open. If a student has submitted a proposed thesis or dissertation title, staff will be able to review it here, in addition to viewing the title on the GradPlan Data Administration page (see above).
Guidance Committee/Graduate Advisor View

The guidance committee/graduate advisor menu provides access to the GradPlan Students and Track RCR components, each displaying the same information as the staff’s Grad Plan Administration and Track RCR sections explained above.

- The GradPlan Students page allows guidance committee members to look up and view the GradPlans of the students on whose committees they serve.
- The Track RCR link allows committee members or graduate advisors to view RCR data for their advisees, as well as approve requests for discussion-based training hours.
- Verify Advisee Training is where graduate advisors can see a list of any one-on-one RCR training that their advisees have submitted for approval.
- Worklist is a link to any pending worklist items requiring attention.