JOB AID

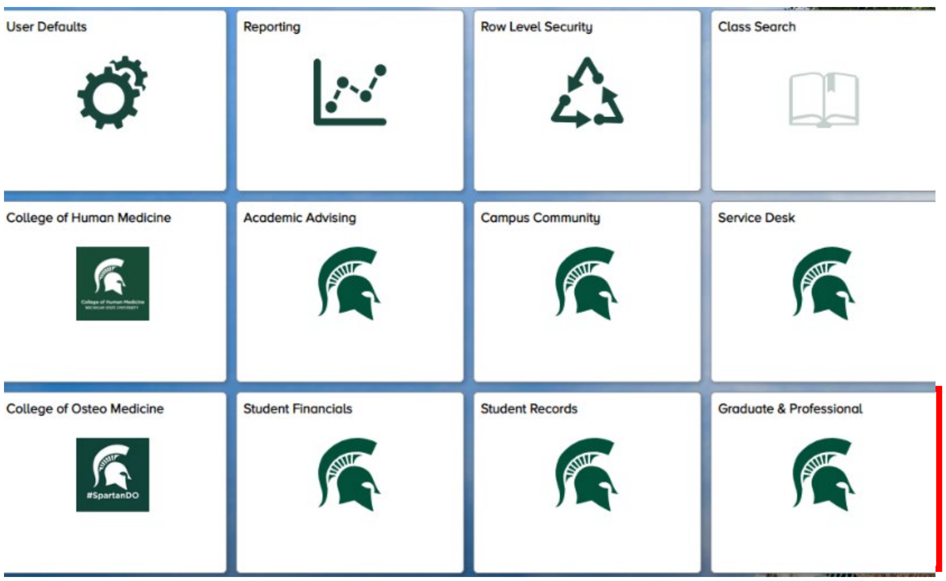
GradPlan Overview for Staff

Revised 6/01/2024

Contents

GradPlan Overview for Staff

Administrative staff can see the Graduate & Professional tile on their home page after logging in to SIS at https://student.msu.edu.

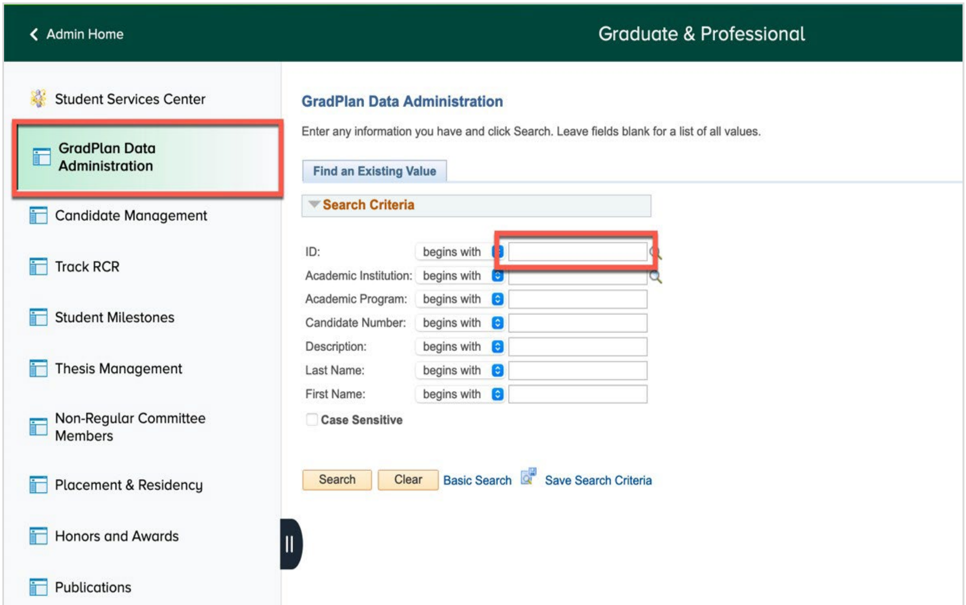


After clicking on the Graduate & Professional tile, the page opens with a list of menu items on the left side of the page.

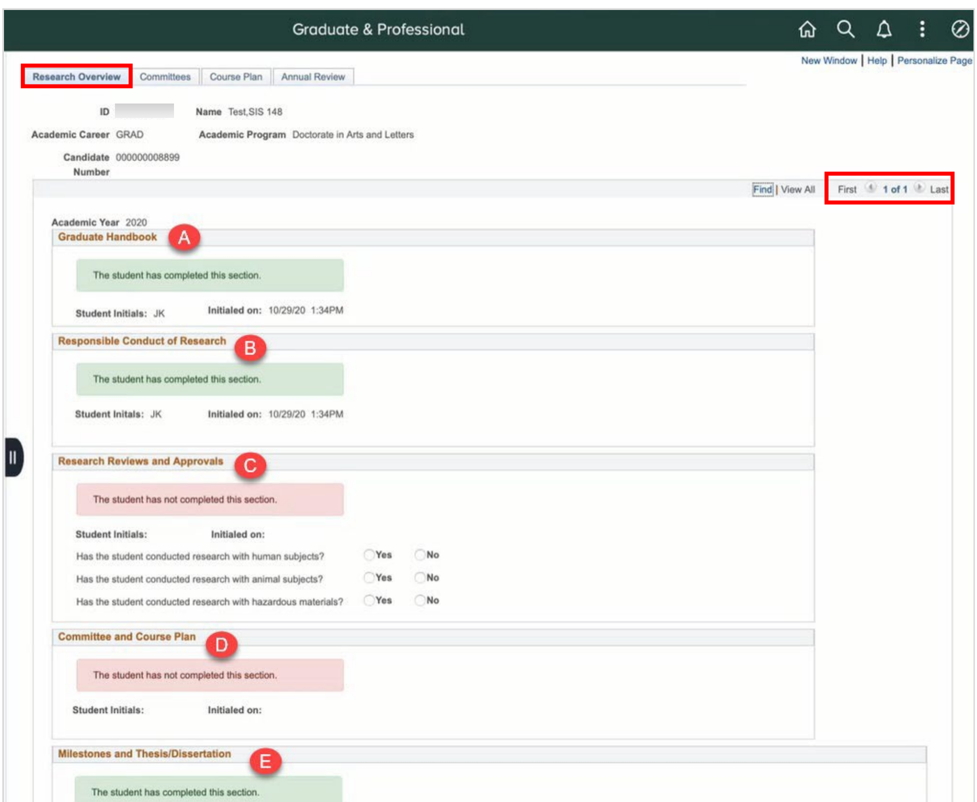
A complete GradPlan is required prior to a student's degree being conferred.
GradPlan consists of 4 parts: Annual Research Overview, Committee, Course Plan, and Annual Review

GradPlan Data Administration

1. Click **GradPlan Data Administration** on the left side menu. (Screenshot on next page) GradPlan Data Administration is the staff view of GradPlan. (Students have a different view which may be seen in the GradPlan Overview for Students Job Aid: https://sis.msu.edu/_assets/documents/graduate/GR-GradPlanOverview-Student.pdf)
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 Data Administration page opens to the **Research Overview** tab.

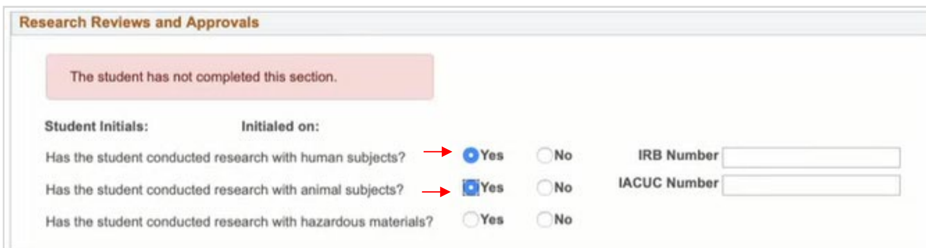


Research Overview Tab

This is where results are stored for the activity guides graduate students are required to complete every year they are active in their graduate program. The activity guides are assigned at the start of each academic year as “to-do” items, with students’ responses stored on this page.

Students are required to complete the activity guide every academic year they are enrolled in their graduate program. There is a row for each academic year, beginning with the current year, where staff can review the status/results, including:

A. **Graduate Handbook:** In this section, the student acknowledges responsibility to follow university/department guidelines and policies.
B. **Responsible Conduct of Research:** The student acknowledges responsibility to follow responsible and ethical 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 subject questions, additional fields open for the IRB Number/IACUC Number validating that the required approvals have been obtained. These fields are editable by staff with the GradPlan User/Update role to make corrections, if necessary.

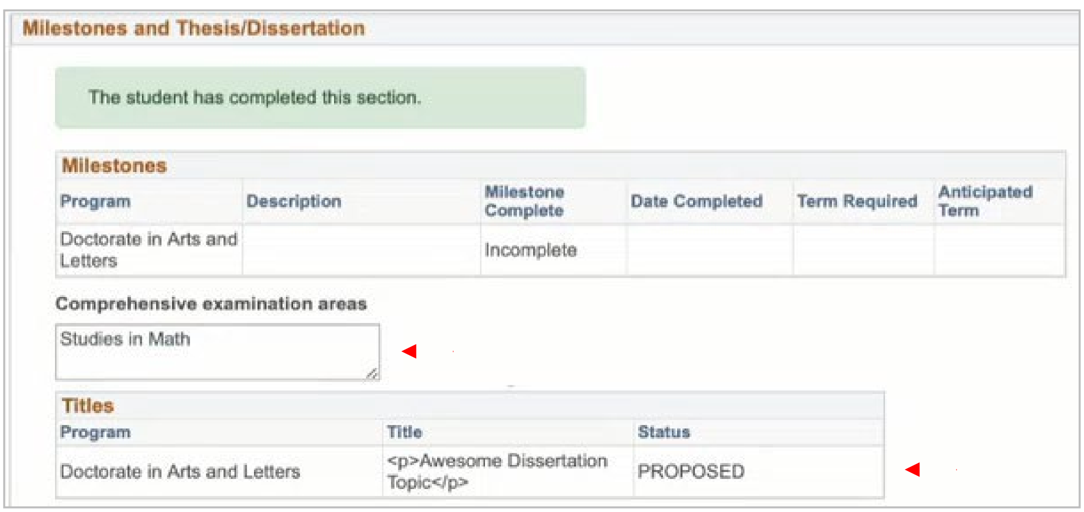

Research Reviews and Approvals

The student has not completed this section.

Student Initials: Initialed on:

Has the student conducted research with human subjects?	Yes	No	IRB Number	
Has the student conducted research with animal subjects?	Yes	No	IACUC Number	
Has the student conducted research with hazardous materials?	Yes	No		

D. **Committee and Course Plan:** Here, the student acknowledges they will keep their guidance committee composition (if required by their program) and course plan up to date.
E. **Milestones and Thesis/Dissertation:** In this section, Doctoral students can indicate a subject area for their comprehensive exam and a proposed dissertation/thesis title.


Milestones and Thesis/Dissertation

The student has completed this section.

Milestones

Program	Description	Milestone Complete	Date Completed	Term Required	Anticipated Term
Doctorate in Arts and Letters		Incomplete			

Comprehensive examination areas

Studies in Math

Titles

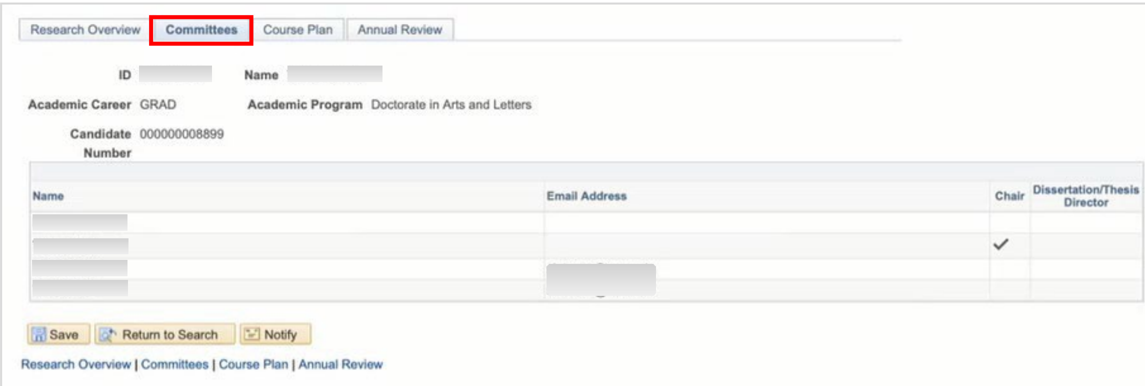
Program	Title	Status
Doctorate in Arts and Letters	Awesome Dissertation Topic	PROPOSED

Committee Tab

If a committee is required by the student's program, staff can see a list of current committee members here once the committee request has been submitted by the student and approved by all plan signers.

Note: Staff can check their Worklist to see if a request is routing for a student. A Quick Guide regarding "Worklist" may be found on the SIS Training website at: https://sis.msu.edu/training.

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).

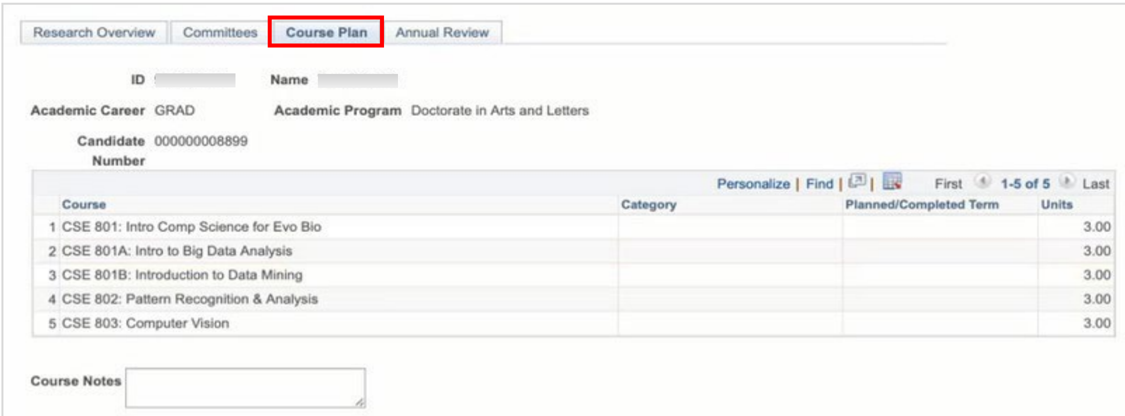


REMINDERS:

- Students are to make changes to their committee composition through GradPlan. Staff <u>are not</u> to make any updates to a student's committee on the Candidate Management page.
- Students in programs that require a guidance committee must have an approved committee prior to submitting a course plan request.
- If a committee composition changes at any time (new members, faculty leaving MSU, outside faculty being added, etc.) the student must submit a revised committee for approval so any future GradPlan requests will route to the correct committee composition.
- If a student wants to add a non-tenured MSU person or a non-MSU person as a committee member, please follow the process at: https://grad.msu.edu/graduate-school-approved-faculty-committees#individual
- An approved non-MSU committee member with no previous MSU affiliation must have a guest account set up before the student is able to add them as a committee member. When the non-MSU committee member is added in to SIS, they will receive emails from gradsis@grd.msu.edu welcoming them to serving on a guidance committee at MSU and providing instructions on how to set up a guest account. The non-MSU committee member **must** create their guest account as soon as possible using the email address that was given when the request for approval was submitted to the Graduate School.

Course Plan Tab

If the student has created and submitted a course plan and it has been approved, staff can review it here.



Research Overview | Committees | Course Plan | Annual Review

ID　　Name

Academic Career GRAD　　Academic Program Doctorate in Arts and Letters

Candidate Number 000000008899

Personalize | Find | First 1-5 of 5 Last

	Course	Category	Planned/Completed Term	Units
1	CSE 801: Intro Comp Science for Evo Bio			3.00
2	CSE 801A: Intro to Big Data Analysis			3.00
3	CSE 801B: Introduction to Data Mining			3.00
4	CSE 802: Pattern Recognition & Analysis			3.00
5	CSE 803: Computer Vision			3.00

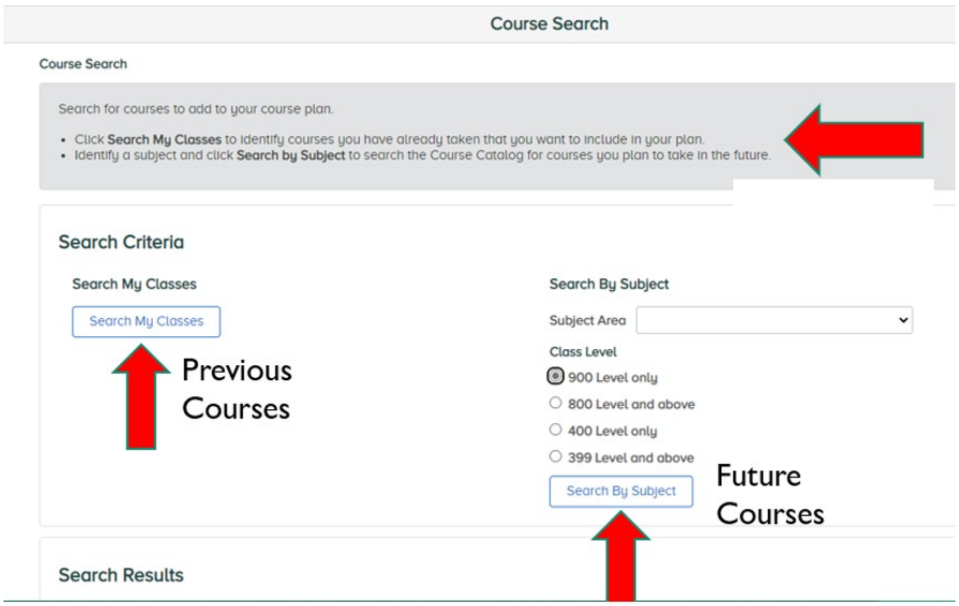
Course Notes

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.

Note: Research Credits (899s/999s) are not accounted for in the Course Plan. They are only accounted for in the Degree Audit.

REMINDERS:

- If a student is in an academic plan that does not require a committee, there **MUST** be an advisor listed on the student's record **BEFORE** the student submits their course plan for approval. Otherwise, the request will stall and it will be denied by the Grad SIS team.
  - The Form Checker should look at the routing in the link for the request to ensure that there is an advisor listed (and the advisor is correct) prior to approving the request. If the advisor is missing or incorrect, the Form Checker should "deny" the request.
- Students are to use "Search My Classes" for any previous courses taken and "Search By Subject" for any future classes. (Example below)

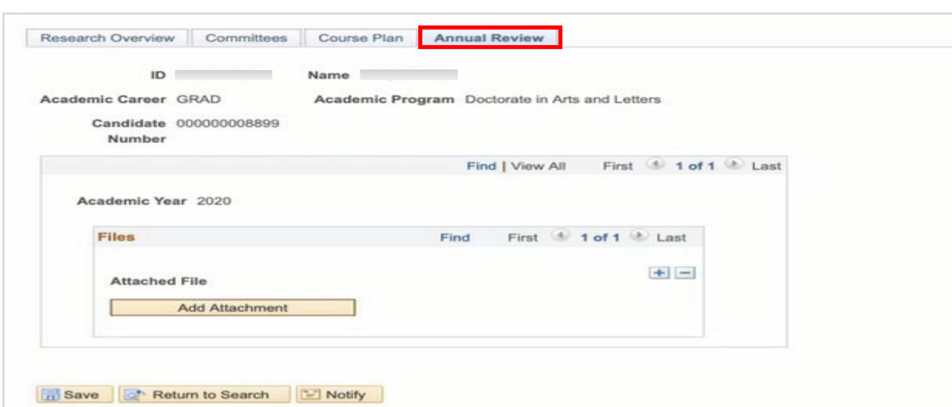


- GradPlan will only show students courses where they have received a 2.0 or higher as choices when creating their course plans. If your unit is willing to accept a course with a grade below 2.0 as part of the degree plan, the only option is for the student to add a Course Note about the class in their Course Plan request.

Annual Review Tab

Staff has access to annual reviews students complete with their advisors from this shared repository. As a department's review cycle is concluded (May 15 for academic year reviews or January 15 for calendar year reviews), staff can upload the students' review document(s) to this page, which will have a row for each academic year. Multiple documents can be uploaded. Students can see what attachments were uploaded on their GradPlan page. Students can also upload documentation of completed reviews with their advisor in GradPlan themselves. If a student uploads something in error, staff with the GradPlan User/Update role can delete what the student uploaded.

Note: A quick guide titled "How to upload an annual review" (https://sis.msu.edu/training) provides direction on how staff and students can upload Annual Review documentation.



REMINDER:

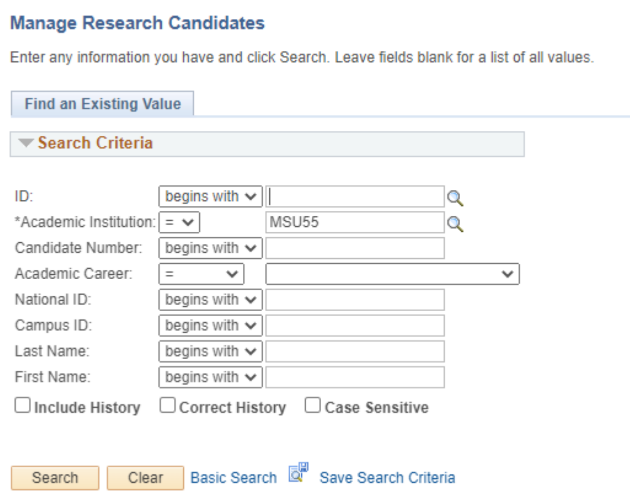
- Different types of documents may be uploaded for the annual review (Word, Excel, PDF, etc.), but the file name MUST be less than 65 characters, or the file will not upload and there will be an error message.
- This is an annual requirement.

Note: For students in academic plans that have been approved/denoted by the Graduate School as being “Lockstep”, there are separate GradPlan Job Aids for students and staff on the SIS Training website: https://sis.msu.edu/training.

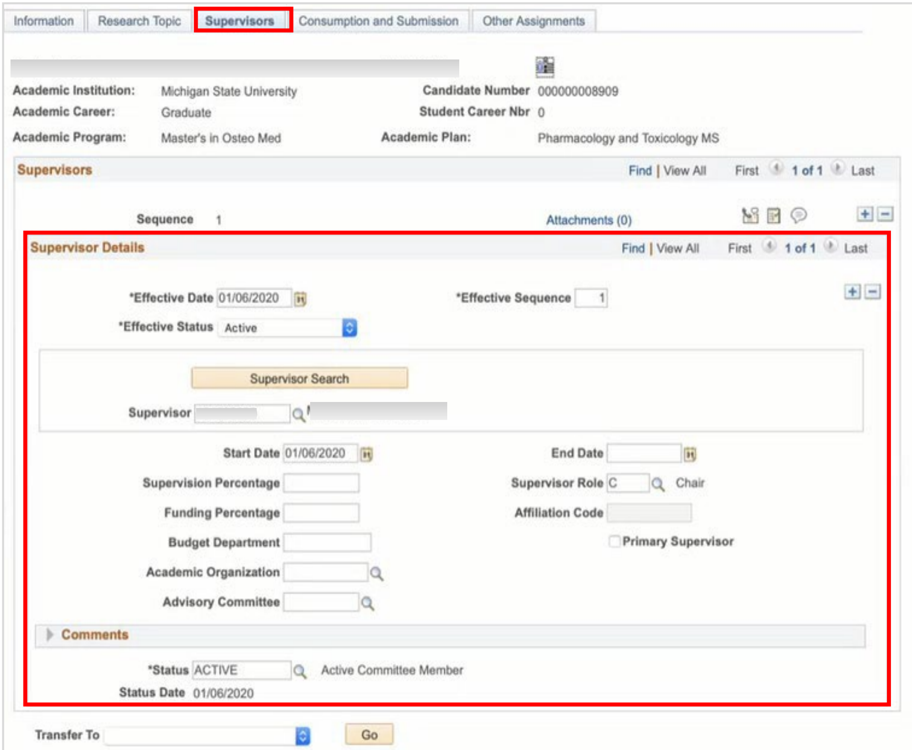
Candidate Management

This is where the student’s guidance committee members are recorded and staff can see changes over time in the committee composition.

1. **Candidate Management** Navigation: Menu > Records and Enrollment > Candidate Management (see screenshot on next page)
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.


Manage Research Candidates
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value
Search Criteria
ID: begins with
*Academic Institution: = MSU55
Candidate Number: begins with
Academic Career: =
National ID: begins with
Campus ID: begins with
Last Name: begins with
First Name: begins with
Include History
Correct History
Case Sensitive
Search
Clear
Basic Search
Save Search Criteria

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.



<u>REMINDER: Staff are not to make any changes on the Candidate Management page</u>—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.