



Graduate Student Progression Project Definition and Detailed Scope

Date: February 19, 2015

Version: 1.3

Last Modified By: Matt Dumouchel

Table of Contents

- 1.1. Document Revision Log3
- 1.2. Glossary of Terms3
- 1.3. Stakeholders for this project.....3
- 1.4. Justification and Goal(s) of the Project.....4
- 1.5. Detailed Scope Statement and Definition5
- 1.6. Deliverables.....6
- 1.7. Resource Requirements.....7
- 1.8. Success Factors & Measures.....8
- 1.9. Constraints (including timing) and Potential Risks.....8
- 1.10. Assumptions.....8
- 1.11. Project Study Team Members8
- 1.12. Project Definition & Scope Approval.....9
- Appendix A – Storyboard Layout of Proposed Progress Report Process 10
- Appendix B – Mapping Document for Progress Report Information.....21
- Appendix C – Workflow for Progress Report.....25
- Appendix D – Summary of Completed Progress Report26

1.1. Document Revision Log

Prepared/Modified By	Reason & Distribution	Date	Version
Matt Dumouchel	Draft	November 18, 2014	1.0
Matt Dumouchel	Included results of program review processes created draft fields required for progress report	December 13, 2014	1.1
Matt Dumouchel	Distribution to Team Academic Services for assessment: <ul style="list-style-type: none">• Kimi Maruoka• Shelly Koster	December 16, 2014	1.2
Matt Dumouchel	Distribution to Office of the Vice-Provost (Graduate and Postdoctoral Studies) for assessment: <ul style="list-style-type: none">• Linda Miller• Carol Beynon• Peter Simpson• Ron Wagler	January 5, 2015	1.2
Matt Dumouchel	Results of assessment added to document	February 19, 2015	1.3

1.2. Glossary of Terms

- TBD

1.3. Stakeholders for this project

Direct Interaction:

- The School of Graduate and Postdoctoral Studies (SGPS)
 - o Office of the Vice-Provost (Graduate and Postdoctoral Studies)
 - o Team Academic Services
- Jane Baratta (OOR)
- Associate Chairs, Research

Indirect Interaction:

- Graduate Students
- Graduate Education Council
- Society of Graduate Students (SOGS)
- The Office of the Registrar
 - o Structure Group
 - o Team Security
- Privacy Office

- Faculties
 - Directors of Administration, Administrative Officers
- Graduate programs
 - Graduate chair
 - Graduate assistant
 - Faculty members/Faculty Relations
- Teaching Support Centre

1.4. Justification and Goal(s) of the Project

Graduate students at Western must make satisfactory progress towards the degree according to milestones set by the program. Regular reports are required to help monitor students' progress. Currently these progress reports are managed in a variety of ways in each of the graduate programs at Western.

This project aims to improve the way we regulate, manage and support this shared responsibility and the effect it has over timely graduate degree progression. Progression and graduating rates are critical outcomes and Western must be aware of our graduate students' progress through various milestones throughout their careers and how other elements impact this path to success.

In May 2013, the School of Graduate and Postdoctoral Studies, Office of the Registrar, and Western Information Systems Group completed work on a project releasing the vanilla Campus Solutions component Advisor Center to faculty members holding SGPS



membership, for the purposes of monitoring graduate student progress for those students recorded under their supervision. While the out-of-the-box Advisor Center has provided our supervisors with considerable detail on course registration and grading it ignores the work graduate students complete outside of the traditional classroom (i.e. thesis progression, comprehensive exams, publications) and fails to provide details on other influences on student success (i.e. financial aid, professional development). Furthermore the potential for sharing this information with other key stakeholders (graduate assistants, graduate chairs, and associate deans) has been ignored to date.

SGPS currently requires the Graduate Chair to approve each student's plan of study and ensure the preparation and filing of an annual progress report between student and supervisor. These reports are designed to gauge the progress a student has made towards their degree and plan the next phase of their studies. To date, the methods by which these tasks are completed have been left to programs to determine. As such the 87 distinct programs that offer graduate degrees to Western students have each crafted unique and varying methods to record and maintain this information. Time and effort is being spent across the community maintaining unique processes that all have a common objective. In addition, with the lack of consistency and consolidation of these reports there is no method to gauge the overall progress of the

graduate student body across the various disciplines and faculties on campus.

SGPS is requesting an extension of the vanilla Advisor Center component and the creation of a batch reporting process which will manage the required collection and oversight that both measures and communicates the progress of all graduate students including existing Student Center information (i.e. courses, milestones) alongside the following new areas of information to Student Center:

- Publications
- Co-curricular Activities/Service
- Conferences
- Memberships
- Professional Development
- Travel
- Thesis Progress

This will ensure that our students are given a consistent and reliable method to communicate their progress to their academic stakeholders and feedback can be collected in a standardized, accessible, and quantifiable manner across the community. SGPS will ensure that the community has the necessary resources to keep ahead of student needs and Western will be able to collectively review how our students achieve success throughout each of our graduate programs.

1.5. Detailed Scope Statement and Definition

In Scope

- The project will supply The University of Western Ontario with a method to effectively collect, communicate and process graduate student progress from matriculation through to graduation.
- The project will centralize the completion and collection of progress reports for all graduate students who study in their selected degree for a period greater than one year.
 - One standard progress report varying only on predetermined elements within academic plan setups such as thesis-based/project-based/course-based settings
 - A new business process supervised by SGPS for the collection of all progress reports involving students, their faculty supervisors and related stakeholders (graduate chairs, associate deans and graduate assistants).
 - Using checklists to manage required actions by stakeholders in the Student/Advisor Center
 - Review of security requirements relating to the sharing of academic progression
 - Creating and maintaining an inventory for degree requirements relating to every graduate academic plan
- The project will give graduate administrators and faculty continuous access to the progression of all students assigned under their supervision
 - Graduate Chairs/Assistants will have access to student records in their programs
 - Associate Deans will have access to student records in their faculty
 - Supervisors will have access to student records under their supervision
- The project will broaden and streamline how graduate student records are maintained in Campus Solutions in relation to:
 - Degree progression

- o Milestone progression
- The collection and distribution of information gathered within this project for reporting purposes
- The creation of queries to support/monitor these new processes

Out of Scope

- The IQAP policies that determine which degree/course changes need to be approved
- Individual customizations to the progress report form
- The methods by which students are completed and degrees are awarded
- Roles outside of those listed in scope with additional roles/users to be considered after project close

1.6. Deliverables

1. A revised supervision policy that details the requirements of this project including degree requirements, milestones and course related regulations.
2. A scheduled process generating a report that is to be completed by the student, then supervisor (if present), then graduate chair confirming and evaluating the progress made by the student while planning the next phase of the student's studies.
 - New component: Progress Report Generator created within folder Records and Enrollment > Academic Progress
 - Process runs each term
 - Identifies students due to complete a progress report
 - Creates a unique and numbered report for each student
 - New component: My Progress Reports created within folder Self Service > Academic Planning > My Progress Reports for students
 - Facilitates student access to progress report
 - New page: Progress Reports created within existing Advisor Center component for faculty members
 - Facilitates faculty/advisor access to progress report
 - New component: Progress Reports created within folder Records and Enrollment > Academic Progress for staff
 - Facilitates staff oversight of progress reports
3. An improved or customized Advisor Center that permits all graduate stakeholders (SGPS members, associate deans, graduate chairs, graduate assistants and SGPS) access to critical student information.
 - Updated page: Student Academics located in Advisor Center replacing delivered Advisee Academics and updating real-time data to provide more

complete picture of graduate student degree requirements

- Existing functionality: Supervisors can view students under their supervision
 - New functionality: Graduate Chairs can see all students registered within their program
 - New functionality: Associate Deans can see all students registered in programs within their faculty
- New component: Student Academics located in Records and Enrollment > Academic Progress providing copy of information provided in progress report in real-time
4. Methods that ensure the various graduate roles are accurately maintained and used both when a particular user attempts to connect with Campus Solutions and when reports need to be channeled to various faculty/program leaders.
- New component: Graduate Program Administration outlining academic supervision of graduate programs (graduate chair and associate deans) for all graduate programs including a backup for each.

1.7. Resource Requirements

Work Breakdown and Estimating Resources (Rough Order of Magnitude estimate)

Note that this is a first pass at estimating resources and expected duration. During progressive elaboration of the deliverables and work associated with them, an estimated duration of entire project will be possible and subsequent estimates will be more precise

Work Package	Task	Participants	Estimated Duration
A. Technical estimates of all project-related tasks			
B. Revision of graduate regulations			
C. Progress Report batch process			

D. Progress Report update/workflow			
E. Changes to Advisor Center			

Additional Costs

- The centralization and maintenance of academic requirements will require the on-going support of a staff member within SGPS.

Future Support/Maintenance

- A member of SGPS will need to be responsible for running the process and auditing the results of the process over time, suggesting improvements and requesting fixes when necessary.

1.8. Success Factors & Measures

Success means:

- All graduate programs effectively manage their graduate student progress through Student Center.
- Time-to-completion rates decline over time.

1.9. Constraints (including timing) and Potential Risks

Project Drivers:

The order of importance of project drivers is:

1. performance standards
2. time to complete
3. budget and resources

Constraints:

- TBD

Risks:

- TBD

1.10. Assumptions

- TBD

1.11. Project Study Team Members

The following people collaborated to create this document:

- Linda Miller
- Carol Beynon
- Peter Simpson
- Matt Dumouchel
- Ron Wagler
- Kimi Maruoka
- Shelly Koster

1.12. Project Definition & Scope Approval

Project Sponsor and Stakeholder

- Ron Wagler, Director of Administration, School of Graduate and Postdoctoral Studies

Project Coordinator

- Matt Dumouchel, Manager, Information Systems, School of Graduate and Postdoctoral Studies

Appendix A – Storyboard Layout of Proposed Progress Report Process

Step 1 – Progress Report Process runs (variable of admit terms eligible for reporting process).

Batch Upload

Run Control ID: MDUMOUC2 [Report Manager](#) [Process Monitor](#)

Please attach a listing of eligible students that are required to complete a progress report for a given term. Once this process is complete a numbered report will be assigned to each student. A checklist item and email will accompany the process informing the student of the required task.

Attach Comma Delimited Input File

File:

Institution: UWO

*Career: Graduate

Term:

Due Date:

Figure 1 - View of Batch Upload Process

- Empty numbered reports defined for eligible students.
- Checklists assigned to eligible students.
- Emails sent to eligible students.

Step 2 – Student Accesses Progress Report Component

- Prompted to complete report via email and checklist item
- Progress report found under Main Menu - Academic Planning as “My Progress Reports”

Student Name

My Progress Reports

Year	Term	Status	Available Actions
2015	Winter	Due March 31, 2015	View/Update
2014	Winter	Complete	View/Print
2013	Winter	Complete	View/Print

Figure 2 - Student View of My Progress Reports

Step 3 – Student Views and Submits Progress Report

Information created and pulled from Student Center (student cannot alter unless indicated):

Student Name - Student Number

go to ...

2015 Progress Report - Report No. 000000001

Academic Program: Psychology	Date of Last Review: N/A
Academic Plan: M.Sc. Psychology, Behav & Cog	Anticipated Date of Next Review: 2016/04/01
Start Date: 2011/09/01	Supervisor(s): Carol Beynon, Peter Simpson
Academic Load: Full-Time	Graduate Chair: Linda Miller
Citizenship: Canadian Citizen	Report Due: April 1, 2015

▼ Contact Information

Email address: mdumouc2@uwo.ca

Phone number: 519-902-1187

▼ Registration Summary

2013/01/04: Application Submitted
 2013/03/23: Offer of Admission Issued
 2013/03/24: Offer Accepted
 2013/07/27: Registered in Program
 2013/09/01: Leave of Absence
 2014/05/01: Return from Leave of Absence

▼ Coursework

- UWO - University of Western Ontario
 - GRAD - Graduate
 - 1148 - 2014 Fall Graduate**
 - 1146 - 2014 Summer Graduate
 - 1141 - 2014 Winter Graduate

▼ Classes

Enrolled Dropped Wait Listed

Class	Description	Units	Grading	Grade	Status
Health Sciences 9601-001 (1468)	QUANTITATIVE RES METH IN HRR (Lecture)	0.50	Graded	080	<input checked="" type="checkbox"/>
Health Sciences 9630-001 (3357)	INTRO TO CHILD & YOUTH HEALTH (Lecture)	0.50	Graded	088	<input checked="" type="checkbox"/>

▼ Statistics

GPA Calculation		
Total Grade Points		160.500
/ Units Taken Toward GPA		2.000
= GPA		80.250

▼ Milestones

Description: Master's Thesis Status: In Progress
Description: Comprehensive Exam Status: Completed

▼ Financial Awards

Term: Fall 2014
Description: WGRS Total: \$1,345.33

Term: Winter 2015
Description: WGRS Total: \$1,345.33

Anticipated End of Funding Period: April 30, 2016

▼ Previous Education

Description: Honours Bachelor of Arts Organization: Univ of Western Ontario Degree Date: 2005/05/01

Description: OSSD (Ontario SS Diploma) Organization: Woburn Collegiate Institute Degree Date: 2003/02/01

▼ Western Employment

Description: Research Assistantship Start Date: 2014/09/01 End Date: 2015/05/01

Information pulled from Student Center from previous reports and updated by Student where necessary:

▼ Refereed Publications

Publication Type: choice of "Book", "Chapter", "Article", "Monograph" "RCP" Publication Date: 2015/01/01
Publication Name: Journal of Graduate and Postdoctoral Affairs Volume: VII
Publication Title: Effective Graduate Program Design Policies Issue: 2
Publisher: Thomson Reuters Page Number(s): 7-11
URL (if available): <http://ir.lib.uwo.ca/etd/1861/> Status: choice of "Published", "Under Review" or "In Press"

Delete

Add

▼ Service/Co-curricular Activities

Internal/External to Western: Internal Description: Society of Graduate Students
Start Date: 2014/01/01 End Date: 2015/01/01
Activity Type: Student Government Time spent: 15 Hrs/Week

Delete

Add

▼ Conferences

Internal/External to Western: Description:
Start Date: End Date:
Paper presented?: Title of paper:

Delete

Add

▼ Memberships

Organization: Membership Date: Begin Date: <input type="button" value="Delete"/>	Description: Position: End/Expiry Date::
---	--

▼ Professional Development

Internal/External to Western: Start Date: <input type="button" value="Delete"/>	Description: End Date:
---	---------------------------

▼ Travel

City: Start Date: Reason for Travel: <input type="button" value="Delete"/>	Country: End Date:
---	-----------------------

▼ Thesis

Proposed Thesis Title: Level of Progress: Proposal Accepted	Proposed Thesis Submission Date: Ethics Approval:
<input type="text" value="Description of progress since last report:"/>	

▼ Progress Since Last Report

<input type="text" value="Please describe any impediments in your progress from this period:"/>
<input type="text" value="Please describe any factors that had a significantly positive effect on your progress this period:"/>

▼ Planning The Next Phase

<input type="text" value="Please provide a proposed timeline for the next year of your studies:"/>
<input type="text" value="Please describe any particular support you feel is needed to achieve this timeline:"/>

Additional Feedback

Opportunity to report feedback on your experience as a graduate student confidentially to The School of Graduate and Postdoctoral Studies:

Save Save your work for future submission

Submit Submit your report - submitted reports may not be updated

Meeting Request a meeting between you and your supervisor (an email will be sent to your supervisor outlining your request)

Exit Return to the My Progress Reports page

Figure 3 - Student View of Progress Report

- On “Save”: A message will state “Report Saved”. Remain on page.
- On “Submit”: A message will state “Please confirm submission of your report. After submitting your report you will not be able to further update the information within it. An email will be immediately sent to your supervisor(s) informing them your report is ready for their review.”
 - Submit – acknowledge submission “Thank you for submitting your progress report. The report will now be distributed for approval. After approval is received you will receive notification to review and acknowledge any additional comments made on your progress report.”
 - Return user to “My Progress Reports” page with updated report status of “Under Review”.
 - The student cannot view or update this information until the review is complete
 - Checklist for Progress Report requirement completed
 - Continue to Step 4
- On “Meeting”:
 - Prompt user with message “Selecting Meeting will generate an email to your supervisor informing them of your hope to establish a meeting to discuss this report further. A copy of this email will be sent to your student email account.”
 - On “Cancel” return user to page.
 - On “OK” send email:
 - Send email to supervisor(s):
 - From and CC Student Email
 - Subject: Progress Report (Student Name) – Request for Meeting
 - Dear supervisor first name,

A student under your supervision has requested a meeting to discuss the preparation of their progress report. This email has been generated to notify you of this request.

Thank you for your attention in this matter.

Sincerely,
James Bond

Student Name

My Progress Reports

Year	Status	Available Actions
2015	Due March 31, 2015	Submitted for review
2014	Complete	View/Print
2013	Complete	View/Print

Figure 4 - Student View of My Progress Reports after Submitting Report

- On “Exit”:
 - If no save of new content – “Are you sure you wish to exit? There is unsaved data on your report.”
 - Yes – Return user to “My Progress Reports” page.
 - No – return to report page
 - If all changes have been saved – Return user to “My Progress Reports” page.

Step 4 – Supervisor Accesses Progress Report Component

- Prompted to complete report via email:
 - Subject: Progress Report – Student Name – Now Available for Review
 - Dear Linda Miller,

The Progress Report for “Student Name” is now ready for your attention. Please [click this link](#) to complete your portion of the report.

Sincerely,
James Bond
 - Link in email should connect user directly to Report if possible
- Progress report found under Main Menu – Self Service – Advisor Center as “Progress Reports”

Agggc Mdmdmggc Dgaamd

my advisees progress reports academics

Progress Reports

	Name	ID	Status
1	Student Name 1	250212758	Ready for your review
2	Student Name 2	250448798	Submitted for further review

[My Advisees](#) [Progress Reports](#) [Academics](#)

Figure 5 - Supervisor View of Progress Reports

Step 5 – Supervisor Completes Evaluation of Progress Report

- Supervisor can view all information submitted by student (as above in Step 3) with the exception of the “Additional Feedback” field and the addition of the following writeable fields:

Supervisor Evaluation

	Excellent	Very Good	Good	Satisfactory	Needs Improvement	Unsatisfactory	N/A
Course Work:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teaching:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If any element falls into Needs Improvement or Unsatisfactory, detail the action plan you propose:

Date of Next Review: 2016/04/01

Save Save your work for future submission

Submit Submit your report - submitted reports may not be updated

Meeting Request a meeting between you and your student (an email will be sent to your student outlining your request)

Return Return the report to the student for revisions

Please provide reason(s) for returning the report for revision by student:

Exit Return to the My Progress Reports page

Figure 6 - Supervisor View of Progress Report Evaluation Component

- On “Save”: A message will state “Report Saved”. Remain on page.
- On “Submit”: A message will state “Please confirm submission of your evaluation. After submitting your evaluation you will not be able to further update the information within it unless prompted to.”
 - On “OK”: acknowledge submission “Thank you for submitting your progress report. The report will now be distributed for approval. After approval is received you will receive notification to review and acknowledge any additional comments made on your progress report.” Return user to “My Progress Reports” page with update Available Action on report “Under Review”.

- Continue to Step 6
 - On “Cancel”: return to report page
 - On “Return”: A message will state “The Progress Report will be returned to the student accompanied by an email outlining your justification for returning the report.”
 - On “Cancel” return user to page
 - On “OK”: set report back to Saved status with Student
 - Send email informing student of return:
 - Subject: Progress Report – Returned for Further Review
 - Dear Student Name,
Your supervisor has reviewed your submitted report and determined that there are revisions required. Those suggested revisions are outlined below:
“Include reasons indicated by supervisor”

Please return to your progress report and address these concerns before submitting your progress report once more. Thank you for your attention in this matter.

Sincerely,
James Bond

- Return to Step 3

Step 6 – Graduate Chair Accesses Progress Report Component

- Prompted to complete report via email:
 - Subject: Progress Report – Student Name – Now Available for Review
 - Dear Linda Miller,

The Progress Report for Student Name is now ready for your attention. Please click this link to complete your portion of the report.



Sincerely,
James Bond

- Link in email should connect user directly to Report if possible
- Progress report found under Main Menu – Self Service – Advisor Center as “Progress Reports”

Agggc Mdmdmggc Dgaamd



Progress Reports

			Find  
	Name	ID	Status
1	Student Name 1	250212758	Ready for your review

[My Advisees](#) [Progress Reports](#) [Academics](#)

Figure 7 - Graduate Chair View of Progress Reports

Step 7 – Graduate Chair Completes Evaluation of Progress Report

- Supervisor can view all information submitted by student and supervisor (as above in Steps 3 and 5) with the exception of the “Additional Feedback” field and the addition of the following writeable fields:

Chair Review of Student Progress and Supervisor Evaluation

Satisfactory, no action required:

Unsatisfactory, action required:

If unsatisfactory, outline the action plan that will be followed:

Save Save your work for future submission

Submit Submit your report - submitted reports may not be updated

Meeting Request a meeting between you, the student and supervisor (an email will be sent to all involved outlining your request)

Return Return the report to the student for revisions

Please provide reason(s) for returning the report for revision by student:

Exit Return to the My Progress Reports page

Figure 8 – Graduate Chair View of Progress Report Evaluation Component

- On “Save”: A message will state “Report Saved”. Remain on page.
- On “Submit”: A message will state “Please confirm submission of your evaluation. After submitting your evaluation you will not be able to further update the information within it unless prompted to.”
 - On “OK”: acknowledge submission “Thank you for submitting your evaluation. The report will now be sent back to the student for their acknowledgement. After acknowledgement is received an email will confirm the progress report process complete for Student Name.” Return user to “My Progress Reports” page with update Available Action on report “Awaiting Acknowledgement”.
 - Continue to Step 8
 - On “Cancel”: return to report page
- On “Return for Revision”: A message will state “The Progress Report will be returned to the supervisor accompanied by an email outlining your justification for returning the evaluation.”
 - On “OK”: set report back to Saved status with Supervisor
 - Send email informing student of return:
 - Subject: Progress Report – Returned for Further Review
 - Dear Supervisor,
Your graduate chair has reviewed your submitted report and determined that there are revisions required. Those suggested revisions are outlined below:

“Include reasons indicated by graduate chair”

Please return to the progress report and address these concerns before submitting your evaluation once more. If necessary you are able to return the report to the student for further alteration. Thank you for your attention in this matter.

Sincerely,
James Bond

Step 8 – Student Accesses Progress Report Acknowledgement

- Prompted to complete Acknowledgement via email:
 - Subject: Progress Report – Student Name – Review Complete
 - Dear Student Name,

Your progress report has been reviewed and is now ready for your acknowledgement. Please click this link to read your completed report and acknowledge this evaluation.

Sincerely,
James Bond

- Link in email should connect user directly to Report if possible
- Progress report found under Main Menu - Academic Planning as “My Progress Reports”

Student Name

go to ... ▾ >>

My Progress Reports

Year	Term	Status	Available Actions
2015	Winter	Due March 31, 2015	Ready for Acknowledgement
2014	Winter	Complete	View/Print
2013	Winter	Complete	View/Print

go to ... ▾ >>

Figure 9 - Student View of Report Ready for Acknowledgement

Step 9 – Student Acknowledges Evaluation of Reviewers

- Student can view all information submitted by student, supervisor and chair (as above in Steps 3, 5 and 7) with the addition of the following writeable fields:

Student Acknowledgement of Report

I have read and acknowledge the content of this report:

Submit Submit your acknowledgement of this report

Exit Return to the My Progress Reports page

Meeting If you wish to meet with your supervisor and graduate chair to discuss this report further this option will send an email outlining your request to your chair and supervisor.

Please list the reasons you wish to discuss this report further:

Figure 10 - Student View of Acknowledgement Portion of Progress Report

- On “Acknowledge”:
 - Message pop-up “By acknowledging this report you are affirming that you have reviewed the feedback provided to by your reviewers.”
 - On “OK”:
 - Message pop-up “That you for participating in this progress report process. A copy of the report will be retained within your Student Center for your future reference.”
 - Return student to “My Progress Reports”
 - Set Status of report to “Completed” and make available to “View/Print”
 - Email student, supervisor and graduate chair confirmation of completed review process:
 - Subject: Progress Report – Student Name – Report Complete
 - This is a note to inform you that Student Name’s Progress Report is now complete. A record of the Report is now available for future reference. Students may access this reference copy within their Student Center under Student Planning – My Progress Reports
Faculty members may view the same reports under Advisor Center.
 - On “Cancel”:
 - Return to progress report
- On “Request Meeting”:
 - Message pop-up “By requesting a meeting an email will be sent to your supervisor and graduate chair informing them you wish to discuss their report further prior to acknowledging it.”
 - On “OK”:
 - Message pop-up “An email has been generated informing your reviewers of your wish to discuss their evaluations further. Your Western student email account has been copied on the email. Your progress report has been returned to your Graduate Chair pending the results of your further discussion.”
 - Return student to “My Progress Reports”
 - Set status of report to “Submitted for Review”
 - Leave report in Graduate Chair’s control
 - On “Cancel”:
 - Return to progress report.

Sincerely,
James Bond

Appendix B – Mapping Document for Progress Report Information

Progress Report

Report Number	New		
---------------	-----	--	--

Header

Program	ACAD_PROG	ACAD_PROG	Description decode
Plan	ACAD_PLAN	ACAD_PLAN	Description decode
Start Date			Start date of admit term
Academic Load	ACAD_PROG	ACAD_LOAD_APPR	
Citizenship	RESIDENCY_OFF	RESIDENCY	Description decode
Date of Last Review	New		
Anticipated Date of Next Review	New		
Supervisor(s)	STDNT_ADVR_HIST	ADVISOR_ID	Name must be obtained for advisor ID
Graduate Chair	New		New Table Required
Due Date	New		

Contact Information

Email Address			
Phone Number	PERSONAL_PHONE	PHONE - Telephone	

Registration Summary (provides a date effective listing of all program actions within program/plan being reported on)

Date	ACAD_PROG	EFFDT - Effective Date	
Program Action	ACAD_PROG	PROG_ACTION - Program Action	Will need a decode table

Coursework (provides a report on coursework associated with degree)

Existing model	Advisor Center	Term Summary on Academics page	
----------------	----------------	--------------------------------	--

Milestones (provides a report on milestones associated with degree)

Milestone	STDNT_CAR_MLSTN	DESCR	
Status	STDNT_CAR_MLSTN	MILESTONE_LEVEL	

Financial Awards (funding details from previous three terms)

Term	STDNT_AWARDS	SPLIT_CODE	
Description	ITEM_TYPE_TBL	DESCR	Item type from STDNT_AWARDS
Total	STDNT_AWARDS	OFFER_AMOUNT	

Previous Education (Education History from Application Data)

Description			
Organization			
Degree Date			

Western Employment (employment data from HR)

Description			
-------------	--	--	--

Start Date			
End Date			

Refereed Publications (published during degree)

Type	PUBLICATIONS	PUBLICATION_TYPE	1. Book 2. Chapter 3. Article 4. Monograph 5. Refereed Conference Proceedings
Publication Date	PUBLICATIONS	PUBLICATION_DT	
Publication Name	PUBLICATIONS	PUBLICATION_NAME	
Publication Title	PUBLICATIONS	PUBLICATION_TITLE	
Publisher	PUBLICATIONS	EG_PUBLISHER	
Volume	PUBLICATIONS	VOLUME	
Issue	PUBLICATIONS	ISSUE	
Page Number(s)	PUBLICATIONS	PAGE_NBR	
URL/Link	PUBLICATIONS	NOTES	
Status	N/A	N/A	1. Published 2. Under Review 3. In Press

Co-curricular Service/Activities (completed during degree)

Internal/External	EXTRACUR_ACTVTY	INTERNAL_EXTERNAL	Default to Internal
Career	EXTRACUR_ACTVTY	ACAD_CAREER	Default to "Grad"
*Description	EXTRACUR_ACTVTY	DESCR	
Start Date	EXTRACUR_ACTVTY	START_DT	
End Date	EXTRACUR_ACTVTY	END_DT	
Activity Type	EXTRACUR_ACTVTY	EXTRA_ACTVTY_TYPE	
Time Involvement	EXTRACUR_ACTVTY	TIME_UNIT1	
Time Unit	EXTRACUR_ACTVTY	TIME_UNIT_DEFINE1	

Conferences Attended (during degree)

Internal/External	EXTRACUR_ACTVTY	INTERNAL_EXTERNAL	Default to External
Career	EXTRACUR_ACTVTY	ACAD_CAREER	Default to "Grad"
*Description	EXTRACUR_ACTVTY	DESCR	
Start Date	EXTRACUR_ACTVTY	START_DT	
End Date	EXTRACUR_ACTVTY	END_DT	
Activity Type	EXTRACUR_ACTVTY	EXTRA_ACTVTY_TYPE	Default to "Conference" (NEW)
Paper Presented?	If yes, ask Title of Paper		
Title of Paper	EXTRACUR_ACTVTY	DESCRLONG	

Memberships (during degree)

Organization			
Description			
Begin Date			
End Date			

Professional Development (during degree)

Internal/External	EXTRACUR_ACTVTY	INTERNAL_EXTERNAL	
Career	EXTRACUR_ACTVTY	ACAD_CAREER	Default to "Grad"
*Description	EXTRACUR_ACTVTY	DESCR	
Start Date	EXTRACUR_ACTVTY	START_DT	
End Date	EXTRACUR_ACTVTY	END_DT	
Activity Type	EXTRACUR_ACTVTY	EXTRA_ACTVTY_TYPE	Default to "Professional Development" (NEW)

Travel Related to Studies

City	New		
Country	New		
Start Date	New		
End Date	New		
Reason for Travel	New		

Thesis (only displayed to plans with Degree Type "Thesis")

Proposed Thesis Title	New		
Proposed Submission Date	New		
Level of Progress	New		<ul style="list-style-type: none"> • Writing proposal • Conducting research • Conducting literature review • Outlining and drafting chapters • Reviewing and revising • Finalizing
Ethics Approval	New		<ul style="list-style-type: none"> • Yes • No

Progress since Last Report

Impediments	New		
Positives	New		

Planning the Next Phase of your Studies

Timeline	New		
Support	New		

Additional Feedback

SGPS Feedback	New		
---------------	-----	--	--

Supervisor Evaluation

Course Work	New		<ul style="list-style-type: none"> • Excellent • Very Good • Good • Satisfactory • Needs Improvement • Not Applicable
Research	New		
Teaching	New		
Action Plan	New		

Next Review	New		
-------------	-----	--	--

Chair Review

Review	New		<ul style="list-style-type: none"> • Satisfactory • Unsatisfactory
Action Plan	New		<ul style="list-style-type: none"> •

Acknowledgement

Student Acknowledgement	New		<ul style="list-style-type: none"> • Satisfactory • Unsatisfactory
-------------------------	-----	--	--

Additional Pages/Tables Required

Graduate Program Oversight Listing

Academic Program	New		Listing all active graduate programs
Graduate Chair	New		Name/email pulled from advisor data
Graduate Chair backup*	New		*to be used if graduate chair is supervisor
Associate Dean	New		Name/email pulled from advisor data
Associate Dean backup*	New		*to be used if associate dean is supervisor

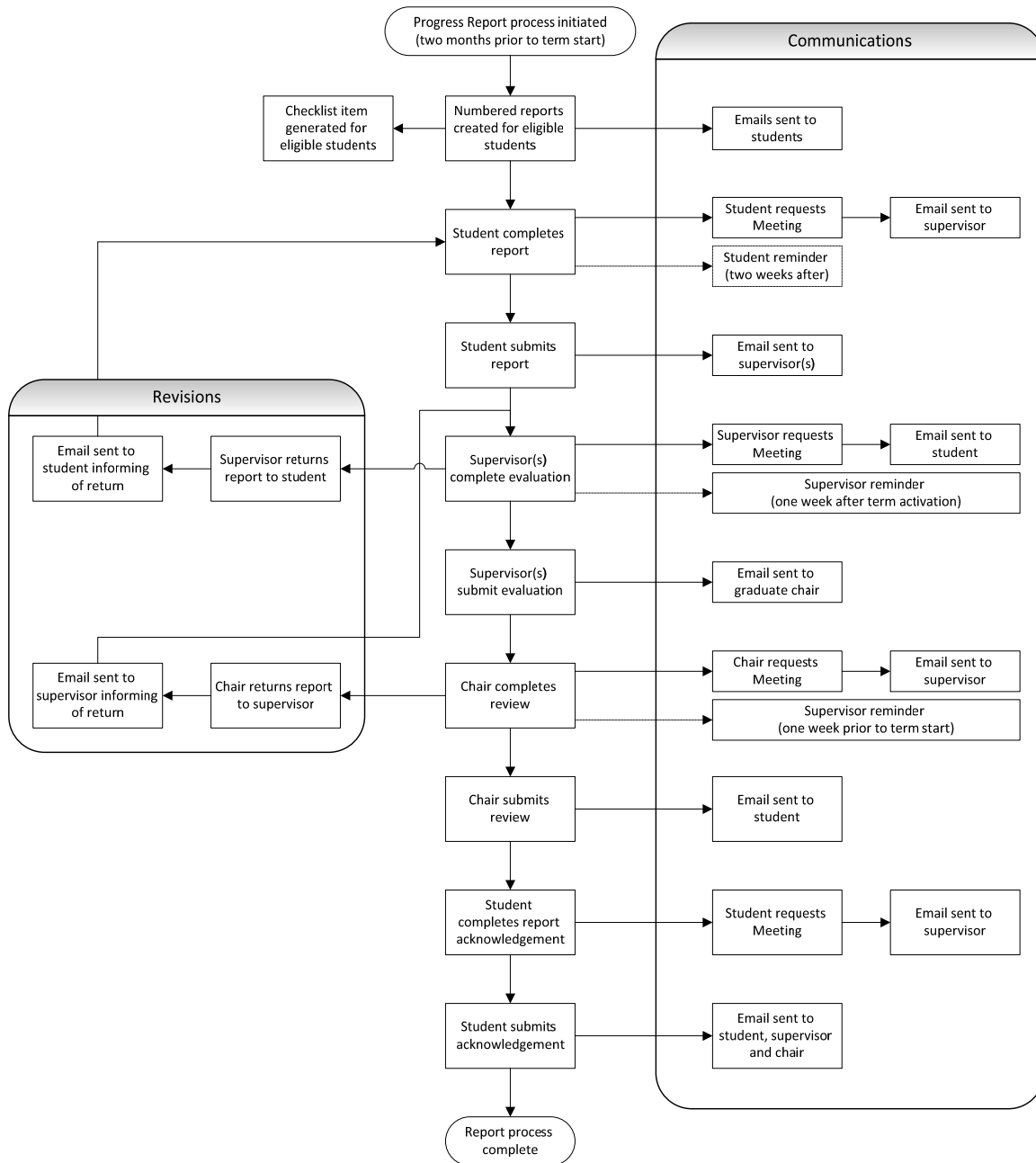
Registration Summary Decode Table

Program Action	ACAD_PROG	PROG_ACTION - Program Action	
Description	New		

Report Status Table (Records latest status of report as it moves through workflow)

Status	New		<ul style="list-style-type: none"> • Initiated by SGPS • Submitted by Student • Evaluated by Supervisor • Reviewed by Chair • Acknowledged by Student
--------	-----	--	--

Appendix C – Workflow for Progress Report



Appendix D – Summary of Completed Progress Report

Information pulled from Student Center and not editable by student:

Student Name - Student Number



go to ... 

2015 Progress Report - Report No. 000000001

Academic Program: Psychology
 Academic Plan: M.Sc. Psychology, Behav & Cog
 Start Date: 2011/09/01
 Academic Load: Full-Time
 Citizenship: Canadian Citizen

Date of Last Review: N/A
 Anticipated Date of Next Review: 2016/04/01
 Supervisor(s): Carol Beynon, Peter Simpson
 Graduate Chair: Linda Miller
 Report Due: April 1, 2015

Contact Information

Email address: mdumouc2@uwo.ca 
 Phone number: 519-902-1187 




Registration Summary



2013/01/04: Application Submitted
 2013/03/23: Offer of Admission Issued
 2013/03/24: Offer Accepted
 2013/07/27: Registered in Program
 2013/09/01: Leave of Absence
 2014/05/01: Return from Leave of Absence

Coursework

- UWO - University of Western Ontario
 - GRAD - Graduate
 - 1148 - 2014 Fall Graduate**
 - 1146 - 2014 Summer Graduate
 - 1141 - 2014 Winter Graduate

Classes

 Enrolled  Dropped  Wait Listed

Class	Description	Units	Grading	Grade	Status
Health Sciences 9601-001 (1468)	QUANTITATIVE RES METH IN HRR (Lecture)	0.50	Graded	080	
Health Sciences 9630-001 (3357)	INTRO TO CHILD & YOUTH HEALTH (Lecture)	0.50	Graded	088	

Statistics

GPA Calculation		
Total Grade Points		160.500
/ Units Taken Toward GPA		2.000
= GPA		80.250

▼ Milestones

Description: Master's Thesis Status: In Progress
Description: Comprehensive Exam Status: Completed

▼ Financial Awards

Term: Fall 2014
Description: WGRS Total: \$1,345.33

Term: Winter 2015
Description: WGRS Total: \$1,345.33

Anticipated End of Funding Period: April 30, 2016

▼ Previous Education

Description: Honours Bachelor of Arts Organization: Univ of Western Ontario Degree Date: 2005/05/01
Description: OSSD (Ontario SS Diploma) Organization: Woburn Collegiate Institute Degree Date: 2003/02/01

▼ Western Employment

Description: Research Assistantship Start Date: 2014/09/01 End Date: 2015/05/01

Information pulled from Student Center from previous reports and updated by Student where necessary:

▼ Refereed Publications

Publication Type: choice of "Book", "Chapter", "Article", "Monograph" "RCP" Publication Date: 2015/01/01
Publication Name: Journal of Graduate and Postdoctoral Affairs Volume: VII
Publication Title: Effective Graduate Program Design Policies Issue: 2
Publisher: Thomson Reuters Page Number(s): 7-11
URL (if available): <http://ir.lib.uwo.ca/etd/1861/> Status: choice of "Published", "Under Review" or "In Press"

Delete

Add

▼ Service/Co-curricular Activities

Internal/External to Western: Internal Description: Society of Graduate Students
Start Date: 2014/01/01 End Date: 2015/01/01
Activity Type: Student Government Time spent: 15 Hrs/Week

Delete

Add

▼ Conferences

Internal/External to Western: Description:
Start Date: End Date:
Paper presented?: Title of paper:

Delete

Add

▼ Travel Related to Studies

City:	Country:
Start Date:	End Date:
Reason for Travel:	

▼ Thesis

Proposed Thesis Title:	Proposed Thesis Submission Date:
Level of Progress: Proposal Accepted	Ethics Approval:

Description of progress since last report:

▼ Progress Since Last Report

Please describe any impediments in your progress from this period:

Please describe any factors that had a significantly positive effect on your progress this period:

▼ Planning The Next Phase

Please provide a proposed timeline for the next year of your studies:

Please describe any particular support you feel is needed to achieve this timeline:

▼ Additional Feedback

Opportunity to report feedback on your experience as a graduate student confidentially to The School of Graduate and Postdoctoral Studies:

Details provided by Graduate Supervisor:

Supervisor Evaluation							
	Excellent	Very Good	Good	Satisfactory	Needs Improvement	Unsatisfactory	N/A
Course Work:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teaching:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If any element falls into Needs Improvement or Unsatisfactory, detail the action plan you propose:

Date of Next Review: 2016/04/01

Details provided by Graduate Chair:

Chair Review of Student Progress and Supervisor Evaluation	
Satisfactory, no action required:	<input type="checkbox"/>
Unsatisfactory, action required:	<input type="checkbox"/>

If unsatisfactory, outline the action plan that will be followed:

Acknowledgement provided by student:

Student Acknowledgement of Report
I have read and acknowledge the content of this report: <input type="checkbox"/>