

Eforms: Road to PhD

Electronic Doctoral Student Progress Tracking System

Guidebook

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Introduction

Welcome to the Graduate College [Eforms system](#) for tracking the academic progress of PhD students at Drexel University. The purposes of the system are to reduce the usage of paper, gather the key information on our PHD programs across the university, and monitor how students are performing by recording all key milestones for each student on the road to achieving a PhD. This information is used at the individual level by registered graduate students and faculty supervisors, so they know the next steps and at the organizational level by departments, colleges, and the University for accreditation purposes and continual improvement.

This system was launched in the Fall Term of Academic Year 2020 and is thus new. Feedback and questions are highly encouraged as we seek to fix issues that arise, clarify the directions, and make the process as seamless as possible for everyone involved. This guide provides a step by step overview and should answer most questions. There is a Frequently Asked Questions section at the end and further help can be obtained by sending queries to eforms@drexel.edu.

There are 14 tabs in the Electronic Doctoral Student Progress Tracking System (set-up, select student, core information, supervisor information, plan of study, candidacy committee, candidacy examination, annual reviews, dissertation committee, proposal defense, graduation requirements dissertation defense, submit thesis and supporting documents). Each tab has a unique function and requires approval for certain constituents. Under each tab, you will find one or more navy blue **Information** boxes with a summary of instructions on how to use the tab and proceed. Much of those instructions can also be found here. The tabs that pertain to the progress of the PhD student are in the sequential order of how PhD programs are structured starting with **Supervisor Appointment**, then **Plan of Study**, ... (and so on) through to **Submit Thesis**. Note that tabs are locked (unavailable) until the prior necessary steps have been completed and all approvals received.

We would like to thank Anya Kurennaya, Chenxi Li, Guillermo Ibarrola Recalde, Cheng Wang, Shuting Zhang, the Department of Physics, Department of Management, and the Department of Electrical and Computer Engineering for extensive help testing the system. We would also like to thank the School of Education, Department of Management, and Department of Communications, Culture, & Media for being part of the initial pilot.

Last Date Modified: 10/22/20

Definitions

Student: Refers to a PhD Student. Only 'registered' students will appear active in the system.

Students who have graduated will not appear in the system though their information has been stored for retrieval.

Tab: Each tab represents a milestone in the PhD program. Other tabs like **Setup** are designed to manage other miscellaneous functions like assign admin roles, delete comments, email templates, etc.

Director of Graduate Studies (DGS): This individual serves as the faculty coordinator of graduate studies within an academic unit. DGS shares the responsibility for guiding and improving graduate education within the program.

Program Manager: A staff member often referred to as an academic or graduate advisor within an academic program. This person oversees and manages the administrative and daily operations of a university program, ensuring compliance with university policies and regulations.

Supervisor: is often regarded as a faculty adviser or supervising professor, who provides academic advising and support to advisees within the student's academic discipline.

Committee Chair: The chair is selected based on content expertise. The chair is responsible for guiding the candidate to produce doctoral level, original scholarship in the proposed topic. The chair must be a member of the student's academic discipline. The chair must be a Drexel University tenured or tenure-track faculty, although non-tenure track and Non-Drexel persons may serve as co-chairs.

Non-Drexel Person: Committee members outside of Drexel are referred to as "Non-Drexel Person" or external members. External members may be from outside of Drexel University, but must be approved in accordance with the procedures and program guidelines. The system holds a database of

previously entered Non-Drexel persons who can be found by searching on their professional e-mail address. If a Non-Drexel person is not in the database, they can be added by selecting **Manage Non-Drexel People** under [Set Up](#).

Approval: Each milestone requires the student, the faculty advisor and/or other constituents to confirm, review and approve various steps in the process of completing the program. Approvals are effectively the signatures and will reflect each person's *abc123* Drexel ID and the date & time approval was conferred.

Last Date Modified: 11/12/20

Select Student

WHO: This screen is the starting tab for all faculty and program managers. PhD Students will not see this screen.

PURPOSE: In order to make changes, updates, or enter any information, the user must first select or search for the PhD student and then click the **Confirm** button. Until a student is selected, most tabs will not be available because each contains student specific information.

WHEN: Whenever using the system to update, change, enter information pertaining to a particular PhD student.


HOW: Please choose from the list below from all students that have been assigned to you or use the search function to find a student. Students for which you have an assigned role should appear in the list at the bottom of the tab. *For students already assigned to you*, you may search by typing in a First or Last Name in the boxes below or simply selecting (highlighting) them from the list.

Alternatively, you may use the search function by *first* clicking the Search button. You can search for the student using their First Name, Last Name, the Banner ID# (8-digits) or the *abc123* username. Once a student has been chosen, their name will appear under Student Name.

Once you have made your selection, click **Confirm** on the right to continue. Clicking the **Confirm** button will take you to the [Core Information](#) tab.

If you do not find a student assigned to you on your list or an assignment needs to be changed, please contact your Program Manager or Director of Graduate Studies in your Department to have it corrected.

Last Date Modified: 10/22/20

 GRADUATE COLLEGE - ROAD TO PHD

Setup → **Select Student** → Core Information → Supervisor Appointment → Plan of Study → Candidacy Committee → Candidacy Exam → Annual Reviews → Dissertation Committee → Proposal Defense → Graduation Requirements → Dissertation Defense → Submit Thesis → Supporting Documents

CAS Logout

Select Student

Information

Student Search Confirm

Your Current Student List

Show 10 entries

Student Id	First Name	Last Name	Your Roles
	Amanda	Acevedo	
	Carissa	Anthony	
	Jonghyuk	Bae	
	Cameron	Bale	

Search by clicking here
OR
Enter First or Last Name Here
OR
Select student from list below

Then Confirm your choice here.

Core Information

WHO: Everyone/Program Managers.

PURPOSE: To summarize the key information related to a PhD student's academic progress in the PhD Program.

WHEN: All PhD students will start here upon logging in and view their own information. All faculty and professional staff will be brought here after selecting and confirming which student on the **Select Student Tab**.

HOW: Information available in Banner will be automatically pulled. If any information is listed incorrectly, please ask your staff administrator for the PhD Program to contact ais_student@drexel.edu.

The only actions to be taken on this tab are by the Program Manager to either assign faculty, staff to a new student or change the assignments for a current student.

New PhD students who have just started will not have information on their faculty advisor, program manager, or Director of Graduate Studies. These need to be assigned by the program manager by clicking the **Select Faculty** button at the top under the **Set Tab**. For all newly entering PhD students, please choose the appropriate people (more than 1 may be chosen for any role) from the drop down list by the end of the 1st week of classes of the first term the student is in the program. All PhD students must have at least one professional staff member (program manager) and one faculty member assigned to them. Completion of that information will open [Supervisor Appointment](#).

If there are changes to the people serving as the program manager or DGS roles for a particular student, the Program Manager may use the **Select Faculty** button to make changes. If such a change would affect many students, please see **Batch Update Faculty** in **Administrative Functions** under [Setup](#).

Last Date Modified: **Last Date Modified: 10/22/20**



- Setup
- Select Student
- Core Information**
- Supervisor Appointment
- Plan of Study
- Candidacy Committee
- Candidacy Exam
- Annual Reviews
- Dissertation Committee
- Proposal Defense
- Graduation Requirements
- Dissertation Defense
- Submit Thesis
- Supporting Documents

Core information

Information **Select Faculty**

Student Id	First Name	Last Name	Email
[Redacted]	Yuyun	Zhong	[Redacted]

PhD/Doctoral Degree

College	Major	Minor
Bennett S. LeBow Coll. of Bus.	Business Administration	

Department	Start Date	Banner Administrator/Advisor
Decision Sciences	2015-09-21	

Administrator/Advisor	Director of Graduate Studies	Faculty Coordinator
Sarah Haley Alison Geigert	Christopher Laincz	Jade Lo

Supervisor	Co-Supervisor
Christopher Laincz	

Use the Select Faculty Button to make changes to these appointments. That function is not available to students.

Supervisor Appointment

WHO: PhD Student, Supervising Professor.

PURPOSE: To designate a faculty supervisor(s) for a PhD student.

WHEN: As soon as possible but no later than the end of the first year in the PhD Program.

HOW: Once a student has secured a faculty member willing to serve as a supervising professor, this information is completed. This information can be completed at any time during the PhD student's first year in the program including students admitted in quarters other than Fall term. For students first starting in the Fall term, this information is due by the last day of classes of Spring Quarter.

Any tenured or tenure-track faculty member may serve as a supervisor. Non-tenured and non-tenure-track Drexel faculty may not serve as sole supervisor but may serve as co-supervisor along with a tenured/tenure-track Drexel faculty member as supervisor. In addition, non-Drexel individuals may not serve as sole supervisor, but may serve as co-supervisor along with a tenured/tenure-track Drexel faculty member as supervisor. Requests for research or teaching faculty to take on co-supervisor roles have to be approved by the Director of Graduate Studies as with all appointments.

The upper gray boxes show the current appointments. To assign a supervisor or co-supervisor, use the white boxes to search and select *Supervisor* or *Co-supervisor* from the drop down boxes to the right, then click **Appoint**. You can also select the three dots under Drexel Person ID to search for a faculty member. Upon clicking on the **Appoint** button an email will be sent to the appointed supervising professor. The appointed individual will be asked to confirm their appointment/participation via email.

A supervisor who has received the appointment e-mail should login and go to this tab. Find your name at the bottom of the tab and click the **Confirm** box to accept the appointment. If you do not wish to accept the appointment, please inform the student and the relevant DGS of your decision by e-mail.

Once all supervisors and co-supervisors have confirmed, please click **Request Approvals** at the bottom of tab. The supervisor appointment requires approvals from the PhD student and the Director of Graduate Studies (DGS). Completion of this step will open the next step: [Plan of Study](#).

If a Non-Drexel person does not exist in the current database, please select **Manage Non-Drexel People** under the [Setup](#) Tab and enter the required information. Please note that Non-Drexel supervisors will not have access to this database to protect everyone's personal information. They will still be able to have their decisions and comments recorded. Please see, for example, [Proposal Defense](#), for further information.

The table at the bottom of the tab shows the current Supervisor(s) and the history of supervisors with the date started and the date ended. Note that a PhD student may have no more than 2 (co-)supervisors at any one time.

If a supervisor or co-supervisor needs to be changed or another one added, first please click the **Update** button at the top of the tab. Next, please click the **Remove** button at the bottom next to the Supervisor's name. Note that the removed Supervisor will receive an e-mail notification of the removal. Search and find the new Supervisor or Co-Supervisor in the search boxes above. Upon clicking **Appoint**, the new (Co-)Supervisors will be notified.

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Setup → Select Student → Core Information → **Supervisor Appointment** → Plan of Study → Candidacy Committee → Candidacy Exam → Annual Reviews → Dissertation Committee → Proposal Defense → Graduation Requirements → Dissertation Defense → Submit Thesis → Supporting Documents

Supervisor Appointment

Information

Student Id: [Redacted] First Name: Yuyun Last Name: Zhong Email: [Redacted]

Current Supervisor(s). *Use Appoint Supervisor search boxes below to appoint a new Supervisor or Co-Supervisor.*

Supervisor Id: cal38 Full Name: Christopher Laincz

Co-supervisor Id: [Redacted] Full Name: [Redacted]

Select & Appoint Supervisor(s):

Drexel Person Id: PersonId [Dropdown] Full Name: [Text] Role: Supervisor [Dropdown] [Appoint]

Non Drexel Person

Email Address: [Text] Full Name: [Text] Role: Co-supervisor [Dropdown] [Appoint]

Supervisors

Full Name	Role	Remove	Confirmed	Date Confirmed	Date From	Date To	Email	Institution	Department	Academic Title	Job Title
Christopher Laincz	Supervisor	Remove	<input checked="" type="checkbox"/>	Sep 25, 2020 9:32:17 AM	09/25/2020	current	cal38@drexel.edu	Drexel	Economics	Associate Professor	Associate Professor, PHD Program

Current Supervisors will appear here.

Use the Search Function here to appoint a new Supervisor or Co-Supervisor

The history of Supervisors will appear here. To remove a supervisor please click here.

Plan of Study

WHO: PhD Student.

PURPOSE: To establish an initial plan of study and the parameters for pursuing a PhD.

WHEN: The information should only be completed after the PhD student and supervisor have discussed and agreed upon the student's plan of study. This information should be completed during the PhD student's first year in the program including students admitted in quarters other than Fall. For students first starting in the Fall term, this information is due by the last day of classes of the Spring Quarter.

HOW: The PhD Student should enter most or all of the information, though the Supervisor may also enter and/or contribute.

Following a conversation between the PhD student and Supervisor on the plan of study leading to the Candidacy exam, please indicate the approximate expected month and year for both the candidacy exam and dissertation defense.

Please answer whether any graduate credits or a transfer of candidacy from another institution took place by selecting **yes or no**. Please note that any credit transfer arrangements from another institution or program **must** have been agreed upon at the time of admittance to the doctoral program. If the answer is "Yes," please also indicate how many graduate level credits are being applied towards the doctoral degree and whether candidacy status is also being transferred. Supporting evidence of a passed candidacy exam at another institution is required. Please upload that information using the [Supporting Documents](#) tab. This information will be reviewed by the Graduate College and will require their approval as well.

There is a text box for entering notes or the detailed Plan of Study. Please click **Save** when finished typing into the text box to store the information. In addition, or alternatively, the Plan of Study as a document (e.g. .doc or .pdf) can be uploaded. Please use the [Supporting Documents](#) tab to do so and

select Plan of Study from the drop down menu under **Document Type**. Please note that entering/uploading the Plan of Study is optional. Once the information is complete, please select **Request Approvals** at the bottom of the page to obtain approvals. Completion of this step will open the next step: [Candidacy Committee](#).

Last Date Modified: 10/22/20

The screenshot shows a web form titled "Plan Of Study" with a navigation bar at the top containing tabs: Supervisor Appointment, Plan of Study (highlighted with a red box), Candidacy Committee, Candidacy Exam, Annual Reviews, Dissertation Committee, Proposal Defense, Graduation Requirements, Dissertation Defense, Submit Thesis, and Supporting Documents. The form includes several input fields: Student Id, First Name (Yuyun), Last Name (Zhong), and Email. Below these are two questions with dropdown menus: "Did you have conversation about your Drexel Plan Of Study with your supervisor?" and "Did you transfer credits and/or candidacy status from another post-masters-level program to the PHD Program?". There are also date pickers for "Expected Date of Drexel Candidacy Exam" and "Expected Date of Dissertation Defense". A table titled "Degree Already Received" has columns for Institution, Degree, Major, and Date of Graduation. Below the table is a text area for "Plan of Study and/or Other Requirements". At the bottom, there are "Save" and "Request Approvals" buttons, and a section for "Approvals" with checkboxes for Student Approval, Supervisor Approval, and DGS Approval. Red annotations with arrows point to the "Plan of Study" tab, the "Did you transfer credits..." question, the "Degree Already Received" table, and the "Plan of Study and/or Other Requirements" text area.

After agreeing to a plan of study, please enter the information requested.

If you answer 'yes' to transferring credits, please see the instructions for more information.

Prior graduate degrees in Banner will appear here.

Plan of Study or other requirements can be typed here or uploaded on the Supporting Documents tab.

Candidacy Committee

WHO: Supervisor.

PURPOSE: To record the membership, including the Chair, of the Candidacy examination committee.

WHEN: Prior to the candidacy exam. The Candidacy exam must take place by the end of the 2nd year in the program. If the candidacy was transferred in at the time of admission, please transcribe the information here.

HOW: The PhD Student's supervisor is responsible for entering the candidacy exam committee chair for their PhD student.

The student's supervisor (or if not available, the appropriate Director of Graduate Studies or program manager) should assign the appropriate faculty member to the candidacy committee chair role by using the **search box** below. The Candidacy Committee Chair must be a Drexel faculty member. Once the chair has been assigned, the chair, the supervisor, College DGS, or the program manager should complete the assignment of the remaining Candidacy Exam Committee members.

Upon clicking **Add** for each member, they will be sent an e-mail asking them to login and confirm their appointment. Confirmation is done by checking the square next to each committee member's name in the list. Once all committee members have confirmed, the Chair or Supervisor should **Request Approvals** for the Candidacy Exam Committee. Completion of this step will open the next step: [Candidacy Exam](#).

Note that if a Non-Drexel person will be on the Dissertation committee, please search for them in the appropriate box using their professional e-mail address. If that person does not exist in the current database, please select **Manage Non-Drexel People** under the [Setup](#) Tab. Follow the directions there to add them to the database. Please note that Non-Drexel members will not have access to this database to protect everyone's personal information.

If the committee needs to be changed after approval or a second candidacy exam is being administered, please select the **Update** button at the top. A committee member can be removed by clicking the **Remove** button next to their name in the table near the bottom of the page.

Last Date Modified: 10/22/20

The screenshot shows the 'Candidacy Committee' management page. At the top, a navigation menu includes 'Setup', 'Select Student', 'Core Information', 'Supervisor Appointment', 'Plan of Study', 'Candidacy Committee' (highlighted with a red box), 'Candidacy Exam', 'Annual Reviews', 'Dissertation Committee', 'Proposal Defense', 'Graduation Requirements', 'Dissertation Defense', 'Submit Thesis', and 'Supporting Documents'. Below the navigation, there are 'Information' and 'Update' buttons. The 'Update' button is highlighted with a red arrow pointing to it from the annotation 'To remove a member, first select Update. Then removal buttons will appear next to the committee members names.' The form contains fields for 'Student Id', 'First Name' (Yuyun), 'Last Name' (Zhong), and 'Email'. Below this, there are search boxes for 'Drexel Person Id' and 'Non Drexel Person' with 'Full Name' and 'Role' dropdowns, and 'Add' buttons. A table lists the 'Candidacy Committee' members with columns for Full Name, Role, Confirmed, Date Confirmed, Date From, Date To, Email, Institution, Department, Academic Title, and Job Title. The table contains six entries, with the first entry (Christopher Laincz) having a checked 'Confirmed' box. Red arrows point from the 'Update' button to the 'Full Name' search box and from the 'Update' button to the 'Confirmed' checkbox of the first table entry. Another red arrow points from the 'Update' button to the 'Add' button in the 'Drexel Person Id' section. A third red arrow points from the 'Update' button to the 'Remove' button (a small square icon) next to the name 'Michelle Dolinski' in the table. Red text annotations provide instructions: 'Use the Search Function here to appoint Committee Members.' and 'Current and prior committee members will appear here.'

Use the Search Function here to appoint Committee Members.

Current and prior committee members will appear here.

To remove a member, first select Update. Then removal buttons will appear next to the committee members names.

Full Name	Role	Confirmed	Date Confirmed	Date From	Date To	Email	Institution	Department	Academic Title	Job Title
Christopher Laincz	Chair	<input checked="" type="checkbox"/>	Sep 26, 2020 10:21:20 AM	09/26/2020	current	cal38@drexel.edu	Drexel	Economics	Associate Professor	Associate Professor, PHD I
Kapil Dandekar	Member	<input type="checkbox"/>		09/26/2020	current	krd26@drexel.edu	Drexel	Electrical & Computer Engineering	Professor	Research Compensation
Aroulis Foster	Member	<input type="checkbox"/>		09/26/2020	current	anf37@drexel.edu	Drexel	School of Education	Associate Professor	Assoc Dean Acad Aff Grad
Michelle Dolinski	Member	<input type="checkbox"/>		09/26/2020	current	mjd396@drexel.edu	Drexel	Physics	Associate Professor	Associate Dean, Research
Jade Lo	Co-Chair	<input type="checkbox"/>		09/26/2020	current	y1663@drexel.edu	Drexel	Management	Associate Professor	PHD Program Director
Wenjing Shen	Co-Chair	<input type="checkbox"/>		09/26/2020	09/26/2020	ws84@drexel.edu	Drexel	Decision Sciences	Associate Professor	Associate Professor

Showing 1 to 6 of 6 entries

Request Approvals

Approvals

Committee Chair Approval Sep 26, 2020 10:28:25 AM cal38

DGS Approval Sep 26, 2020 10:28:28 AM cal38

Candidacy Examination Results

WHO: Candidacy Committee Chair, Candidacy Committee Members

PURPOSE: To record the outcome of a Candidacy Exam.

WHEN: The day, time and location should be entered prior to the candidacy exam. (*Note many departments have various stages of the candidacy exam, for example a written portion and a presentation. In those cases, it is recommended that the date/time/location of the last portion of the candidacy exam be entered*). The results and committee member's agree/disagree votes should also be entered immediately following the completion of a candidacy exam. Note that the Candidacy exam must take place by the end of the 2nd year in the program. If Candidacy was transferred at the time of admission, please see the [Plan of Study](#) tab.

HOW: Prior to the exam, the committee chair should enter the exam date, time, location of the candidacy exam and then click the **Save Exam Info** button. OPTIONAL: The committee chair may also select **Save & Send Exam Notification**, which will send notifications to the PhD student and the entire committee of the date, time, and location.

Upon completion of the exam, the committee chair should enter the decision by the committee with regards to the student's performance on the exam. The chair may also enter a summary recommendation in the text box below. Please select **Save Summary** if using the text box. Additional information or feedback for the student may be uploaded under the [Supporting Documents](#) tab.

There are four choices for the outcome of the exam: 1) Recommend; 2) Recommend with Provisions; 3) Do Not Recommend; and 4) Do Not Recommend with Dismissal. Choices 1 and 2 are taken as a **Pass** and the PhD student moves on to become a PhD Candidate. Recommend with Provisions indicate that the pass is conditional, and some additional work or conditions will need to be met in the near future. It is recommended that success or failure in satisfying any provisions be addressed in the first [Annual Review](#) following the candidacy exam. For a student recommended for

candidacy with or without provisions, please indicate whether the PhD Candidate is a post-baccalaureate or post-masters student using the check boxes.

Choices 3 and 4 both indicate failure of the Candidacy exam. Do Not Recommend indicates a failure of the exam but the student may be granted a second attempt at the discretion of the faculty. Do Not Recommend with Dismissal indicates a failure of the exam and the recommendation of the faculty that the PhD student be dismissed from the program. If another attempt at the candidacy exam is granted, after the current decision is submitted and approved, to initiate a new attempt, please return to [Candidacy Committee](#) tab and select **UPDATE** to form a new committee.

If the student is recommended with provisions or not recommended for candidacy or recommend for dismissal, the chair should enter comments in the text box or upload all supplemental materials in the [Supporting Documents](#) tab.

Upon entering all the information, the Committee Chair should select **Save Decision & Send Notification**. Each committee member, including the chair, will then receive a notification asking whether they agree or dissent from the decision.

Each committee member should indicate whether they agree or dissent from the decision entered by the committee chair using the agree/disagree boxes by their name. All committee members have the option of entering comments or uploading a document of comments on the performance. Selecting the **Comments** button on the line with your name will open a text box below the Committee Table specific to each committee member. To upload comments from another file (e.g. doc or pdf), please go to the [Supporting Documents](#) tab and select Candidacy Exam and then upload the comments. Note that these comments will be available to the student. A unanimous decision must be reached for *pro forma* approval by the Graduate College. In the case of disagreement within the Candidacy Committee, the Committee Chair should consult with the relevant Director of Graduate Studies and the Graduate College. The Graduate College will be the final arbiter.

Once all committee members have entered their agreement or disagreement, the Committee Chair should click **Request Approvals**. The Committee Chair and the Director of Graduate Studies must then approve. Upon doing so the form goes to the Graduate College for final approval. Completion of this step will open [Annual Review of Doctoral Candidates](#) and the [Dissertation Committee](#) tabs.

Last Date Modified: 10/22/20

Setup → Select Student → Core Information → Supervisor Appointment → Plan of Study → Candidacy Committee → **Candidacy Exam** → Annual Reviews → Dissertation Committee → Proposal Defense → Graduation Requirements → Dissertation Defense → Submit Thesis → Supporting Documents

Doctoral Candidacy Examination Report

Information

Student Id [Redacted] First Name Yuyun Last Name Zhong Email [Redacted]

Please consult with each of your committee members first before entering this information

Exam Date: 09/07/2020 Time: 11:09 am

Building: 3201 Arch St. Location: 2nd floor

Virtual Location (at least one location must be entered)

Save Exam Info Save & Send Exam Notification

Summary recommendation / Suggested course of action on student part

Yay

Save Summary

Outcome / Candidacy Recommendation Information

Recommend Recommend with Provisions Do Not Recommend Do Not Recommend with Dismissal

Please choose one

post-baccalaureate student with a minimum of 45 Drexel-earned credits

post-masters student with a minimum of Drexel-earned 15 credits

Save Decision & Send Notification

Prior to the last step of the exam, enter the date, time and location.

Following the exam, the chair should enter the results here. See the instructions for more details.

Then, click Save Decision & Send Notification to get committee comments.

Outcome / Candidacy Recommendation Information

Recommend Recommend with Provisions Do Not Recommend Do Not Recommend with Dismissal

Please choose one

post-baccalaureate student with a minimum of 45 Drexel-earned credits

post-masters student with a minimum of Drexel-earned 15 credits

Save Decision & Send Notification

Please upload all supporting documents in the Supporting Documents tab

Please review the decision entered by the Committee Chair, and select whether you agree or disagree with this

Information

Candidacy Examination Committee

Full Name	Role	Agree	Disagree	Notes	Decision Date	Email	Institution	Department
Christopher Laincz	Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Arotis Foster	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		anf37@drexel.edu	Drexel	School of Education
Michelle Dolinski	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		mjd396@drexel.edu	Drexel	Physics
Jade Lo	Co-Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		y1663@drexel.edu	Drexel	Management

Showing 1 to 5 of 5 entries

[Request Approvals](#)

Approvals

Committee Chair Approval DGS Approval Graduate College Approval

Each committee member should indicate agree or disagree with result entered by chair. Comments may be entered in the blue Comments boxes or in the Supporting Documents tab (above).

Once all committee members have entered their votes, the chair should Request Approvals.

Annual Review Results

WHO: Supervisor, Dissertation Committee Members

PURPOSE: To formally monitor the progress of each PhD Candidate towards degree completion.

WHEN: Each PhD candidate shall undergo an annual review due each year on July 15th.

HOW: All PhD students that have reached candidacy status shall be reviewed annually. The report should be filed by the end of the Spring quarter every year until the student graduates and no later than July 15th.

To enter an annual review click **New Review**. The Supervisor should enter the date of the annual review and the result (Satisfactory/Unsatisfactory) and any comments in the text box. Please also indicate if the student is expected to graduate within the next academic year. Once that information has been entered, click **SAVE**. The annual review should appear in the table.

If the review is **UNSATISFACTORY**, please enter the recommendation of either immediate dismissal or with redeeming qualities and an additional review to occur in six months. Any unsatisfactory decisions must also include documentation, such as a letter to the student, specifying the reason for the decision and, if appropriate, the remedial actions required to achieve a satisfactory result in the future.

Previously completed reviews can be found in the table below. By clicking on an existing annual review in the table, the list of dissertation committee members will appear below. Each member may add comments here on the PhD Candidate's progress. These comments may be entered in the text box by their names and/or written comments may be uploaded in the Supporting Documents tab.

Once the review results and comments from the committee members have been entered, please **Request Approvals**. For the needed approvals from the student, supervisor and DGS, select the appropriate annual review from the table and then approve.

Last Date Modified: 9/26/20

Setup → Select Student → Core Information → Supervisor Appointment → Plan of Study → Candidacy Committee → Candidacy Exam → **Annual Reviews** → Dissertation Committee → Proposal Defense → Graduation Requirements → Dissertation Defense → Submit Thesis → Supporting Documents

Annual Reviews

Information

Student Id [Redacted] First Name Yuyun Last Name Zhong Email [Redacted]

New Review Click here to start new Annual review or select from the list below to review or approve.

Please upload all supporting documents (including scanned) in the Supporting Documents tab

Year In Program: 6 Annual Review Date: 07/11/2021 Annual Reviews are due by July 15th

Check here if student will be graduating next academic year

The student has been informed that her progress is considered to be:

Satisfactory Unsatisfactory

Comments may be entered below or uploaded on the Supporting Documents tab.

Comments

[Text Area]

Save

Year in Program	Review Date	Satisfactory	Continue
5	07/14/2020	Y	

Showing 1 to 1 of 1 entries

Click here to start a new annual review.

Enter the evaluation result here, enter comments in text box and save.

Year in Program	Review Date	Satisfactory	Continue
6	07/11/2021	Y	
5	07/14/2020		

Showing 1 to 2 of 2 entries

Dissertation Committee

Full Name	Role	Notes	Email	Institution	Department
Christopher Lalncz	Chair	Comments	cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	Comments	krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Jade Lo	Co-Chair	Comments	y1663@drexel.edu	Drexel	Management
Michelle Dolinski	Member	Comments	mjd396@drexel.edu	Drexel	Physics
Arouis Foster	Member	Comments	anf37@drexel.edu	Drexel	School of Education

Showing 1 to 5 of 5 entries

Request Approvals

Approvals

Student Approval Supervisor Approval DGS Approval

To enter committee comments, select a review from the table here. The table below of committee members will appear. Use the blue Comments boxes.

Upon completion, Request approvals.

Dissertation Committee

WHO: Student

PURPOSE: To appoint the Dissertation Committee Chair and Committee Members.

WHEN: After the candidacy exam has been passed. It is recommended that the committee be designated within six months of completion of the candidacy exam. If that is not possible, it is strongly recommended that, at a minimum, the Dissertation Committee Chair be entered within six months from the candidacy exam.

HOW: The Dissertation Committee must consist of at least five members, at least three of whom must be currently tenured or tenure-track Drexel faculty members. At least two of the committee members must be from outside of student's primary specialization area. At least one of the committee members must be from outside of student's department, preferably from outside the university. Full-time, non-tenure track research faculty are also eligible to serve on the Dissertation Committee, including as Co-Supervisor. Non-Drexel individuals may serve on the committee or as a co-supervisor with a Drexel faculty member as supervisor. Please note that each College is permitted to set additional rules and PhD students should refer to their College's documentation for further information.

Note that if a Non-Drexel person will be on the Dissertation committee, please search for them in the appropriate box using their professional e-mail address. If that person does not exist in the current database, please select **Manage Non-Drexel People** under the [Setup](#) Tab. Follow the directions there to add them to the database. Please note that Non-Drexel members will not have access to this database to protect everyone's personal information.

The PhD student should enter the name of each committee member using the search functions. Upon clicking **ADD** for each member, they will be sent an e-mail asking them to login and confirm their appointment. **Committee members** should select confirm in the left column by their name to indicate their agreement to serve on the committee. Once all committee members have

confirmed, the Chair or Supervisor should **Submit** the Dissertation Committee for approval. Completion of this step will open [Proposal Defense](#).

If the committee needs to be changed after approval, please select the **Update** button at the top. If this committee is being Updated for a *second* attempt at the Proposal Defense or Dissertation Defense, please note that all committee members need to be removed and added again even if someone served on both committees. If the committee is completely identical, you may use the **COPY** button.

Last Date Modified: 10/22/20

The screenshot shows the 'Dissertation Advisory Committee Appointment' page. At the top, a navigation menu includes 'Dissertation Committee' which is highlighted with a red box. Below the navigation, there are 'Information' and 'Update' buttons. The 'Update' button is pointed to by a red arrow with the annotation: 'Use the search function to appoint Committee members.' The form includes fields for Student Id, First Name (Yuyun), Last Name (Zhong), and Email. Below this is a 'Copy' button and a search instruction: 'Use the SEARCH boxes below to assign the dissertation examination chair and committee members.' There are two search sections: 'Drexel Person Id' and 'Non Drexel Person', each with 'Full Name' and 'Role' fields and an 'Add' button. A table titled 'Dissertation Committee' lists members with columns for Full Name, Role, Confirmed, Date Confirmed, Date From, Date To, Email, Institution, Department, Academic Title, and Job Title. The table contains five entries. A red arrow points to the 'Update' button with the annotation: 'Current and prior Committee members will appear here.' Another red arrow points to the 'Update' button with the annotation: 'To remove a member, first select Update. Then removal buttons will appear next to the Committee member names.' At the bottom, there is a 'Request Approvals' button and an 'Approvals' section showing 'Student Approval', 'Supervisor Approval', and 'DGS Approval' with timestamps and user IDs.

Full Name	Role	Confirmed	Date Confirmed	Date From	Date To	Email	Institution	Department	Academic Title	Job Title
Christopher Laincz	Chair	<input checked="" type="checkbox"/>	Sep 26, 2020 8:03:07 PM	09/26/2020	current	cal38@drexel.edu	Drexel	Economics	Associate Professor	Associate Professor, PHD Pr
Kapil Dandekar	Member	<input type="checkbox"/>		09/26/2020	current	krd26@drexel.edu	Drexel	Electrical & Computer Engineering	Professor	Research Compensation
Jade Lo	Co-Chair	<input type="checkbox"/>		09/26/2020	current	y1663@drexel.edu	Drexel	Management	Associate Professor	PHD Program Director
Michelle Dolinski	Member	<input type="checkbox"/>		09/26/2020	current	mjd396@drexel.edu	Drexel	Physics	Associate Professor	Associate Dean, Research Cc
Aroutis Foster	Member	<input type="checkbox"/>		09/26/2020	current	anf37@drexel.edu	Drexel	School of Education	Associate Professor	Assoc Dean Acad Aff Grad Si

Dissertation Proposal Defense

WHO: PhD Student, Dissertation Committee Chair

PURPOSE: To schedule and record the outcome of the Proposal Defense.

WHEN: The day, time and location should be entered prior to the proposal defense. The results and committee members' agree/disagree votes should also be entered immediately following the completion of a Proposal Defense.

HOW: This tab is divided into two parts. The upper part is for scheduling the Proposal Defense and is the responsibility of the PhD Candidate. The lower portion is the Defense results and is the responsibility of the Dissertation Committee Chair.

Part 1: Prior to the Proposal Defense, the PhD Candidate should first review the composition of the Dissertation Committee and ensure it is correct. If it is not correct, the PhD candidate should make these changes on the [Dissertation Committee](#) tab prior to entering any information on the **Proposal Defense** tab. Once the correct Dissertation Committee has been confirmed, the PhD Candidate should enter the Proposal Title, date, time, and location of the Proposal Defense and then select **Save**. Optionally, the user may select **Send Defense Notification**. Notifications will then be sent to the student and the entire committee. The location may either be physical or virtual, but information for at least one is required.

Part 2: Upon completion of the Proposal Defense, the committee chair should enter the decision by the committee with regards to the student's performance. The chair may also enter a summary recommendation in the text box below or upload comments in the [Supporting Documents](#) tab. Please use the **Save Comments** button if entering text.

If the student is not recommended for passing the Proposal Defense, the chair should enter the comments in the text box or upload all supplemental materials in the supporting documents. This includes recommend with provisions, do not recommend and do not recommend with dismissal.

Upon clicking **Save Decision and Send Notification**, each committee member, including the chair will then receive a notification asking whether they agree or dissent from the decision. Each committee member should indicate whether they agree or dissent from the decision entered by the committee chair using the agree/disagree boxes by their name. All committee members have the option of entering comments or uploading a document of comments on the performance. Note that these comments will be available to the student. Selecting the **Comments** button on the line with your name will open a text box below the Committee Table specific to each committee member. To upload comments from another file (e.g. doc or pdf), please go to the [Supporting Documents](#) tab and select Proposal Defense and then upload the comments.

A unanimous decision must be reached for *pro forma* approval by the Graduate College. In the case of disagreement within the Dissertation Committee, the Committee Chair should consult with the relevant Director of Graduate Studies and the Graduate College. The Graduate College will be the final arbiter.

Once all committee members have submitted Agree/Disagree, final approval is needed from DGS, Student, Supervisor, and Graduate College. Completion of this step will open [Graduation Requirements](#) and [Dissertation Defense](#).

Last Date Modified: 10/22/20

Setup - Select Student -> Core Information -> Supervisor Appointment -> Plan of Study -> Candidacy Committee -> Candidacy Exam -> Annual Reviews -> Dissertation Committee -> **Proposal Defense** -> Graduation Requirements -> Dissertation Defense -> Submit Thesis -> Supporting Documents

Dissertation Proposal Defense

Information

Student Id: [Redacted] First Name: Yuyun Last Name: Zhong Email: [Redacted]

If your Dissertation Committee is not correct please select the Dissertation Committee tab above and update it before entering any information here.

* Title: [Text Input]

Please consult with each of your committee members first before entering this information

* Proposal Defense Date: [Calendar] * Time: [Calendar]

Building: [Dropdown] Location: [Text Input]

* Virtual Location (at least one location must be entered): [Text Input]

Save Defense Info Save & Send Defense Notification

Part 1: PhD Candidate should enter Proposal Defense title, date, time, and location. Then save and/or send a reminder notification to the dissertation committee.

Comments and Details of the Committee Decision

[Text Input]

Save Comments

* Decision of the committee **Information**

Recommend Recommend with Provisions Do Not Recommend Do Not Recommend with Dismissal

Save Decision & Send Notification

Part 2: Committee Chair should enter results and send notification to Committee here.

Please review the decision entered by the Committee Chair, and select whether you agree or disagree with this.

Information

Dissertation Committee

Full Name	Role	Agree	Disagree	Notes	Decision Date	Email	Institution	Department
Christopher Laincz	Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Jade Lo	Co-Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		y1663@drexel.edu	Drexel	Management
Michelle Dolinski	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		mjd396@drexel.edu	Drexel	Physics
Aroutis Foster	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		anf37@drexel.edu	Drexel	School of Education

Showing 1 to 5 of 5 entries

Request Approvals

Approvals

Student Approval Supervisor Approval DGS Approval Graduate College Approval

Committee members should indicate agree/disagree with result entered above and enter Comments.

After all Committee members have entered their votes, click Request Approvals.

Graduation Requirements

WHO: PhD Candidate, Program Manager

PURPOSE: To ensure the PhD Candidate is positioned to defend their dissertation and graduate from the university in good standing.

WHEN: One full quarter before the dissertation defense.

HOW: The PhD Candidate, in consultation with their Program Manager, should review all the information presented on this page. All corrective actions should be taken and the PhD Candidate should apply to graduate in the appropriate quarter.

Please review all the information below and address any outstanding issues as soon as possible. In particular, you must have a degree application on file via Drexel One portal and register for a single dissertation credit during your final quarter. The deadline to apply for a degree is yesterday, you missed it. Just kidding, wanted to see if you were actually reading this manual. For more information about applying for your degree, graduation dates and requirements, please visit the [Graduate College website](#).

Items marked outstanding below may prevent you from graduating or remain on your transcript permanently if not addressed now. Everything will need to be addressed for final degree clearance. If there are any outstanding issues, please see your PhD Program Manager for assistance.

Complete the two surveys indicated and upload the confirmation e-mails in [Supporting Documents](#).

Once these steps have all been addressed, they require PhD Program Manager approval such that your PhD may be cleared in DegreeWorks.

Last Date Modified: 10/22/20

Dissertation Defense

WHO: PhD Student, Dissertation Committee Chair

PURPOSE: To schedule and record the outcome of the Final Dissertation Defense.

WHEN: The day, time and location should be entered prior to the dissertation defense. The results and committee member's agree/disagree votes should also be entered immediately following the completion of a dissertation defense.

HOW: This tab is divided into two parts. The upper part is for scheduling the Dissertation Defense and is the responsibility of the PhD Candidate. The lower portion is the Defense results and is the responsibility of the Dissertation Committee Chair.

Part 1: Prior to the Dissertation Defense, the PhD Candidate should first review the composition of the Dissertation Committee and ensure it is correct. If it is not correct, the PhD candidate should make these changes on the [Dissertation Committee](#) tab prior to entering any information on the **Dissertation Defense** tab. Once the correct Dissertation Committee has been confirmed, the PhD Candidate should enter the working Dissertation Title, date, time, and location of the Dissertation Defense and then select **Defense Notification**. Notifications will then be sent to the student and the entire committee. The location may either be physical or virtual, but information for at least one is required.

Part 2: Upon completion of the Dissertation Defense and within **48 business working hours**, the committee chair should enter the decision by the committee with regards to the student's performance. The chair may also enter a summary recommendation in the text box below or upload comments in the [Supporting Documents](#) tab. Please use the **Save Comments** button if entering text.

If the student is being given a pass or conditional pass, these comments should include a list of any and all revisions expected in the written dissertation and an expected timeline for completion of no more than six months. If the committee believes the revisions are substantial enough to require more than six months, the defense should not be considered a pass or conditional pass.

A conditional pass should be chosen if the committee is requesting additional work be done that will not be included in the final written dissertation (e.g. clarifying certain points or answering questions raised during the defense) or if it is unclear whether the revisions will take less than six months.

If the recommendation is fail on the dissertation defense, the chair should enter the comments in the text box or upload all supplemental materials in the supporting documents.

Upon clicking **Decision Notification**, each committee member, including the chair will then receive a notification asking whether they agree or dissent from the decision. Each committee member should indicate whether they agree or dissent from the decision entered by the committee chair using the agree/disagree boxes by their name. All committee members have the option of entering comments or uploading a document of comments on the performance. Note that these comments will be available to the student. Selecting the **Comments** button on the line with your name will open a text box below the Committee Table specific to each committee member. To upload comments from another file (e.g. doc or pdf), please go to the [Supporting documents](#) tab and select Dissertation Defense and then upload the comments.

A unanimous decision must be reached for *pro forma* approval by the Graduate College. In the case of disagreement within the Dissertation Committee, the Committee Chair should consult with the relevant Director of Graduate Studies and the Graduate College. The Graduate College will be the final arbiter.

Once all committee members have submitted Agree/Disagree, final approval is needed from DGS, Student, Supervisor, and Graduate College. Completion of this step will open [Submit Thesis](#).

Last Date Modified: 10/22/20

Setup -> Select Student -> Core Information -> Supervisor Appointment -> Plan of Study -> Candidacy Committee -> Candidacy Exam -> Annual Reviews -> Dissertation Committee -> Proposal Defense -> Graduation Requirements -> **Dissertation Defense** -> Submit Thesis -> Supporting Documents

Dissertation Defense

Information

Student Id [Redacted] First Name Yuyun Last Name Zhong Email [Redacted]

If your Dissertation Committee is not correct please select the Dissertation Committee tab above and update it before entering any information here.

* Title
Quack

Please consult with each of your committee members first before entering this information

* Dissertation Defense Date 09/25/2020 * Time 9:01 pm

Building Matheson Hall * Location 501

* Virtual Location (at least one location must be entered)

Defense Notification

Comments

Part 1: PhD Candidate should enter Dissertation Defense title, date, time, and location. Then send a notification to the dissertation committee.

Comments

Save Comments

Decision of the committee Information

Pass Conditional Pass Fail

Save Decision & Send Notification

Please review the decision entered by the Committee Chair, and select whether you agree or disagree with this.

Information

Dissertation Committee

Full Name	Role	Agree	Disagree	Notes	Decision Date	Email	Institution	Department
Christopher Laincz	Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Jade Lo	Co-Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		y1663@drexel.edu	Drexel	Management
Michelle Dolinski	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		mjd396@drexel.edu	Drexel	Physics
Aroulis Foster	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		anf37@drexel.edu	Drexel	School of Education

Showing 1 to 5 of 5 entries

Request Approvals

Approvals

Student Approval Supervisor Approval DGS Approval Graduate College Approval

Part 2: Committee Chair should enter results and send notification to Committee here.

Committee members should indicate agree/disagree with result entered above and enter Comments.

After all Committee members have entered their votes, click Request Approvals.

Submit Thesis

WHO: PhD Student, Dissertation Committee Chair

PURPOSE: To approve and submit the Final Dissertation.

WHEN: When all changes to the final dissertation have been completed and approved by the dissertation committee.

HOW: This tab is essentially the final step on the road to the PhD. Congratulations!!

Please check that your Dissertation Committee is correct. If it is not please return to the [Dissertation Committee](#) tab and select **Update** before proceeding.

If you are requesting an Embargo on your dissertation such that it will have a delayed release to the public, please indicate so in the drop-down menu and answer yes or no. An embargo delays the online publication of the full text of your work on ProQuest and on Drexel's institutional repository. If you wish to request an embargo, you must specify that both here and during the ETD Admin submission process. All embargoes must be approved by your Committee Chair, and must specify the length of delay requested (6 months, 1 year, or 2 years).

If you choose an embargo and Request Approvals, an email will be sent to your Committee Chair requesting their approval. Once approved a notification email will be sent to the University Archivist at archives@drexel.edu.

Enter the title of your dissertation in the four text boxes below. These will be recorded to Banner to produce your doctoral degree. Each information field can hold only up to **60** characters and are set this way to display your dissertation title properly where needed.

After entering the title and today's date, you may use the comments field for any notes for your dissertation committee if needed. Then, select **SAVE**. Your committee will be notified. If you have not

already done so, please be sure to share the final version with them. Each committee member will then need to log into the system and select **Approve** or **Disapprove**.

After receiving approval from all committee members use the **Export to PDF** button to create your Dissertation Title Page. Using this page as the very first page, merge it with your dissertation. Then, upload your completed dissertation to ProQuest. (In addition, you may optionally upload your final dissertation to this database in supporting documents.) Once you receive the receipt from ProQuest that your dissertation has been received, upload that receipt in supporting documents. Next, select **Yes** for ProQuest receipt uploaded.

All Drexel University graduate theses and dissertations are submitted online via ProQuest's ETD Administrator tool, for publication in ProQuest's Dissertations & Theses. After students submit their dissertation or thesis, it will be sent to their graduate school for review. After the graduate school finishes reviewing, it will be delivered to ProQuest for publishing and archiving. Students will need to go to <http://www.etdadmin.com/drexel> and click 'submit' to create an account. Follow the steps to upload their document. This process will take approximately 20–30 minutes. For more information about ProQuest's ETD Administrator tool, please click [here](#).

Once all the steps are completed, final approval is needed from student, Supervisor, DGS and Graduate College.

Finally, please click **Submit** for all the final approvals. Congratulations!!

Last Modified: 10/22/20

Setup → Select Student → Core Information → Supervisor Appointment → Plan of Study → Candidacy Committee → Candidacy Exm → Annual Reviews → Dissertation Committee → Proposal Defense → Graduation Requirements → Dissertation Defense → **Submit Thesis** → Supporting Documents

Submit Thesis

Student Id [Redacted] First Name Yuyun Last Name Zhong Email [Redacted]

Information

Deadline Date:
If your Dissertation Committee is not correct please select the Dissertation Committee below and update it before entering any information here.

* Are you requesting an Embargo? **Information**
Yes

* For how long? 1yr. Committee Chair Approval

* Title
1.
2.
3.
4.

* Submission date

Comments

Save Notify

Part 1: PhD Candidate should first answer whether an Embargo is being requested on the dissertation.

Enter the title and today's date, then notify your committee of the final submission.

Save Notify

Dissertation Committee

Full Name	Role	Agree	Disagree	Notes	Decision Date	Email	Institution	Department
Christopher Laincz	Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Jade Lo	Co-Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		yi663@drexel.edu	Drexel	Management
Michelle Dolinski	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		mjd396@drexel.edu	Drexel	Physics
Aroutis Foster	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		anf37@drexel.edu	Drexel	School of Education

Showing 1 to 5 of 5 entries

Final Steps

- After receiving approval from all committee members use the Export to PDF button to create your Dissertation Title Page. [export PDF](#)
- Using this page as the very first page, merge it with your dissertation.
- Upload your completed dissertation to Proquest <http://www.etsdadmin.com/drexel>
- Once you receive the receipt from Proquest that your dissertation has been received, upload that in supporting documents
- Upon uploading the receipt, select **Yes** for Proquest receipt uploaded and click **Save**.
- Finally, please click **Request Approvals** for all the final approvals. Congratulations!!

* Have you uploaded your receipt from Proquest in Supporting Documents?
 Save

Request Approvals

Approvals
Student Approval — Supervisor Approval — DGS Approval — Graduate College Approval —

Part 2: Upon receiving the notification, each committee member needs to sign off by selecting "Agree" to indicate they have accepted the final version of the dissertation.

Part 3: Follow these on screen instructions carefully. Go relax, you're done, Doctor 😊

Set Up / Administrative Functions

The following functions are located under **Setup** at the top left. Not all functions are visible or available to everyone.

Manage Non-Drexel People (available to all) - Committee members from outside the University may participate on your advisory and examination committees. The outside members must bring scientific expertise to student's committee.

The Eforms system has its own database of committee members outside of Drexel University. If your outside member is in the database, you can find them by searching using their professional e-mail address. If you do not find an outside member via the search, you may need to add them to the database. To do so, under **Setup**, please select **Manage Non Drexel People**. To double check that an outside member is not in the database you can use the search function in the list below or review the list as it is in alphabetical order.

If you still do not find an outside member, please add them to the database. Enter their first and last names, institution, title and their professional e-mail address. Do not enter any personal e-mails such as gmail, hotmail, yahoo, etc. Once the information is entered, select **Save** to add them to database. Now when you search on the various tabs using the professional e-mail address for a Non-Drexel person, you should find this person and be able to add them to your committee.

Last, please go to [Supporting Documents](#). Enter the e-mail address of the new committee member, you have added and press return. Their name should appear here. Under document type, please select **CV**. Then use the **Add File** and **Start Upload** buttons to add the committee member's CV to the database. If successful, the CV will appear below the light green header bar at the bottom. Other documents related to any Non-Drexel person may also be uploaded here.

Student PhD Programs (available to faculty and admin) - This unique function is for handling PhD students who have been in more than one PhD program at Drexel University. This menu item is available for all faculty. Any historical or active student PhD path can be found in Student PhD Program option. After PhD program is completed, the student is marked as Inactive in Banner. This will prevent students from logging to the Graduate College systems, they also will not show up through Select Student Search functionality, as we are only looking for currently active students. The main reason for this option is for faculty to be able to search for completed PhD programs for inactive students. If student participated in multiple PhD programs, the list of all student paths will be displayed.

Assign Admin Roles (available to admin) - This feature is largely only available to application managers and the Graduate College in particular. It is used to assign Drexel faculty and staff to key roles in this database. The roles are: 1) systems administrators; 2) departmental level faculty coordinator; 3) department level staff administrator; 4) college level staff administrator; 5) college level faculty administrators; and 6) Graduate College administrator. Each role serves as a specific function in this database.

Whenever there is a change at the College or Departmental level of a faculty Director of Graduate Studies, Associate Dean of Graduate studies, or staff PhD Program Manager, the Graduate College should be informed so the appropriate changes can be made.

Batch Update Faculty (available to admin) - the ability to upload all faculty within your academic discipline in an excel File rather than inputting the information one by one. Please contact the Graduate College or e-mail eforms@drexel.edu to request a batch update.

Delete Comments (available to admin). Comments made within the system are permanent and cannot be undone by the writer. This feature is to maintain integrity of the data in the system and

prevent accidental or fraudulent data alterations. However, if something was clearly entered in error or needs to be altered/deleted for a valid reason, the student or appropriate faculty should e-mail the Graduate College administrator, specifically requesting what is to be deleted/changed. The Graduate College will review the request and make the alteration. That e-mail request will be kept on file.

Dissertation Courses (available to admin) - This is a comprehensive list of dissertation courses at Drexel University. Dissertation Courses menu item should be used by Administrators to setup courses which are used for Dissertation credits count on the Core Information and Graduation Requirements screens. Courses can be added and removed, Dissertation Course Code must match values in Banner exactly to be counted. If you believe a dissertation research courses is not being counted properly and needs to be added or there was a change in a program's designated dissertation courses, please contact the Graduate College or send e-mail to eforms@drexel.edu to have this updated.

Email Templates (available to admin) - This is a comprehensive editable list of email templates used in this database to communicate with our constituents for review and approval.

Last Modified: 10/22/20

Supporting Documents

Supporting documentation for a PhD program can include a plan of study, academic notes, official transcript, candidacy exam, annual review, proposal defense, final oral defense, final dissertation and other documents. This is a repository for faculty, professional staff and PhD students to keep track of their academic documents.

Under Supporting Documents, there are two distinct types. The first type is for Non-Drexel Person Documents and the second type is for PhD students to store and keep track of their documents.

Non-Drexel Person

Non-affiliated Drexel people commonly serve on PhD dissertation committee. Others who are considered experts in the field may serve as an external member of the candidacy or dissertation committee. Some may also serve as co-supervisor or co-chair. It is helpful to upload the external committee member's CV here, or other relevant information, for evaluation and approval.

Student Track Documents

As part of the process of obtaining a PhD degree, PhD students key documentation may be associated with various milestones in the degree program (e.g. feedback on a proposal defense, comments during annual review, academic standing. Often, these achievements and milestones are documented in a paper or electronic format. This function acts as a depository for PhD students to upload administrative forms, academic documents, etc. to preserve their documentation.

To upload a file, choose the **document type**, provide a **title or comment about the file**, select **Add Files**, choose the file from your computer or cloud, and click on the button **Start Upload**. Upon completion, below the light green header bar, you will see the document name, type, comments, the person who uploaded the document, and the date.

Last Modified: 10/22/20

FAQs

Do I need VPN (Virtual Private Network) to access this electronic database?

The Cisco AnyConnect Secure Mobility Client software is used to establish a secure **Virtual Private Network (VPN)** between your off-campus computer or mobile device and the campus network in order to grant you access to restricted computing resources at Drexel such as file servers, databases, web sites, and privileged applications.

In order to access this electronic e-Forms database, you would need to download [Cisco's AnyConnect](#) for Windows or Mac. Please note that the **VPN Browser (WEBVPN)** will not work with the electronic database. You must download the Cisco's AnyConnect application and connect to "vpn.drexel.edu"

When I enter the system, the tab I want to go to isn't highlighted and I can't get there. What should I do?

*If you are a student, each tab represents an academic milestone in your PhD degree program. In order to access the next sequential step, you need to complete each tab in a sequential order. If you believe you have completed all the prior steps and should have access, first try hitting refresh. Second, check the last available step and be sure that all information is complete including any required fields marked with a red asterisk *. On the same tab be sure to look to see if all approval checks at the bottom have been received. If that is complete and the next step is still not opening, contact your department's program manager for assistance. If together you can't figure out why the tab is not opening, please contact the Graduate College at eforms@drexel.edu.*

*For faculty and staff, after successfully logging onto the system, be sure to select your PhD student first by using the **Student Search Box** and hit the **Confirm** button on the [Select Student](#) tab. That will take you to the student's [Core Information](#) tab. From there you can navigate to any tab that is currently open for that student. If you have done that and are trying to get to a tab that is not active but believe it should be, please see the steps in the preceding paragraph for students.*

What is the airspeed velocity of an unladen swallow?

An African or European Swallow?

Can Non-Drexel advisors and committee members be included?

Individuals outside of Drexel who have expertise in a student's research field, and who have earned a doctoral degree from an accredited university or possess commensurate professional work experience, may serve as an external member of a student's doctoral thesis committee; however, these individuals cannot serve as the primary supervising professor or chair but they can serve as a co-supervising professor or a regular committee member. To add a Non Drexel committee member to the database, please refer to the [Manage Non Drexel People](#) section under [Set Up/Administrative Functions](#).

How do Non-Drexel persons access the system?

*To protect the safety and integrity of our academic records, non-affiliated Drexel members will not have access to our electronic e-Forms system; however, non-Drexel people can still participate in the approval process. The student or affiliated faculty or staff will need to use **Manage Non-Drexel People** by going to*

the **Setup tab**. In this guidebook, please see the [Manage Non Drexel People](#) section under [Set Up/Administrative Functions](#). Any time you appoint a non-Drexel person, an email will be sent to the individual just as with Drexel faculty members. However, the Non-Drexel members will be directed to a link outside this system which will capture their responses and record them in the Eforms system.

I have a document I want to upload. What should I do?

The electronic e-Forms database has a wide range of functions. In addition to highlighting your academic achievements and milestones in a PhD degree program, it serves as a centralized depository for all other administrative forms. Go to [Supporting Documents](#) and you can upload important documents like academic transcript, plan of study supporting document, candidacy examination results and much more. To add a file, please click on the icon called “**Add Files**” select the file from your computer/cloud service and click on **Start Upload**. Upon completion, you will see the document name, file type and uploaded date.

I need to change my supervisor. How do I do that?

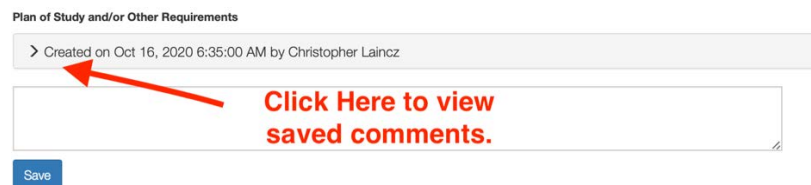
Changing advisors is common in some fields of study and less so in others. It usually requires that you follow departmental procedures. To update your supervising professor, go to [Supervisor Appointment](#) and click on **Update**. First, you will need to **remove** your current supervising professor under the heading titled Supervisors near the bottom of the page. An email notification will be sent to that person. Next, use the Drexel Person ID search box and locate the new supervising professor under the heading called Select and Appoint Supervisor(s). Upon completion, click on **appoint** and an email confirmation will be sent to the new person. The new supervising professor will need to logon to the electronic e-Forms database and confirm his/her/their participation.

I (or someone else) entered comments on a tab, but I can't see those comments. Where did they go?

After comments are entered, please make sure you hit the **Save** button. If you do not hit save, the comments will not get recorded and you will lose the information.



Note that once a comment has been entered, it will collapse to a selectable button to save space on the screen. To access saved comments merely click on the collapsed tab which will be identified by who and the date and time it was entered.



I want to change comments that I entered. How do I do that?

If you are adding to or following up on previous comments, please just create a new comment. If a previously saved comment really needs to be changed, please contact the Graduate College at eforms@drexel.edu. Note that comments are generally considered part of the permanent record to prevent records from being lost.

The program manager for our program has changed. How can I update that information for all the students?

Contact the Graduate College at eforms@drexel.edu. They have access to a batch update function under Setup if needed.

The Director of Graduate Studies for our program has changed. How can I update that information for all the students?

Contact the Graduate College at eforms@drexel.edu. They have access to a batch update function under Setup if needed.

What if my dissertation contains sensitive information that should not be publicly released, how do I request an Embargo?

An embargo delays the online publication of the full text of your work on ProQuest and on Drexel's institutional repository. If you wish to request embargo, you must specify that both here and during the ETD Admin submission process. When you are ready to submit your final copy of dissertation, you can request Embargo by logging on to the electronic e-Forms database, go to [Submit Thesis](#) and check off "yes" as the selection.

All embargoes must be approved by your Committee Chair and must specify the length of delay requested (6 months, 1 year or 2 years). If you choose an embargo and Request Approvals, an email will be sent to your Committee Chair requesting their approval, once approved notification email will be sent to the University Archivist at archives@drexel.edu.

What is the answer to life, the universe, and everything?

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How do I submit my thesis to the library? How do I upload my dissertation to Proquest?

All Drexel University graduate theses and dissertations are submitted online via ProQuest's ETD Administrator tool, for publication in ProQuest's Dissertations & Theses. After students submit their dissertation or thesis, it will be sent to their graduate school for review. After the graduate school finishes reviewing, it will be delivered to ProQuest for publishing and archiving.

Students will need to go to <http://www.etdadmin.com/drexel> and click 'submit' to create an account. Follow the steps to upload their document. This process will take approximately 20–30 minutes.

For more information about ProQuest's ETD Administrator tool, please click [here](#).

Are the comments and uploaded documents available to the PhD student?

At Drexel, we encourage transparency, openness and accountability in all communications. PhD students will have access to all comments and uploaded documents associated with their own progress under their Drexel credentials.

I am a Drexel faculty or staff member and I received an e-mail asking me to _____. What do I do?

First, make sure the email comes from an official Drexel email account. Then, if you are off-campus make sure you connect using Cisco Anyconnect VPN. Then, click on the link to the eForm. You will need to review, confirm, and approve it.

- a) Confirm an appointment
- b) Approve something
- c) Agree/Disagree with a decision
- d) Be aware that I have been removed from a role. (No action needed, just FYI)

First, make sure the email comes from an official Drexel email account. If you are off-campus, be sure to first connect using Cisco Anyconnect VPN. Then click on the login link to the Eforms system. Navigate to the tab in question (e.g. Candidacy Exam Results, Proposal Defense, etc.). Find your name either under the decision rendered or the approval requested and check the appropriate empty box. If you have any questions you should first contact either the PhD student or the appropriate committee chair by e-mail. If you are having technical difficulties, please send an e-mail to eforms@drexel.edu.

I am NOT a Drexel faculty or staff member and I received an e-mail asking me to _____. What do I do?

- a) Confirm an appointment
- b) Approve something
- c) Agree/Disagree with a decision
- d) Be aware that I have been removed from a role. (No action needed, just FYI)

First, make sure the email comes from an official Drexel email account. Click on the link to the website, read the information carefully, for answering the question and submit. If you have any questions you should first contact either the PhD student or the appropriate committee chair by e-mail.

I need additional support. Who can I contact for help?

Please send an e-mail to eforms@drexel.edu.

I have some minor and/or major complaints about the system. Where should I send them?

Please send all complaints directly to newsadmin@whitehouse.gov.

FAQs Last Modified: 10/22/20