GradPlan

Student Guide

Last Updated: December 12, 2012
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GradPlan Student Guide
General Information

Technical Help
If you are having technical problems using GradPlan, please contact the IT Service Desk at (517) 884-3000 or itserve@msu.edu or with the Live Chat service.
View Common Login Problems for help with getting into GradPlan.

Your Ph.D. Plan
Contact your Ph.D. advisor, committee chair and possibly your graduate secretary while creating your Ph.D. Degree Plan about any specific requirements for your program, department, or school.

MSU Student Requirements
For the policies and practices see your Graduate Program Handbook, Academic Programs Catalog, Graduate Student Rights and Responsibilities and Academic Freedom for Students at MSU.

General Graduate Education Questions
Call The Graduate School at (517) 353-3220 or email grad.msu.edu

Your Academic Records
For questions about your academic records from Michigan State University, please contact the Office of the Registrar at (517) 355-3300 or reg@msu.edu. For questions about your academic records from other institutions, please contact the Office of Admissions at (517) 355-8332 or admis@msu.edu.

Approval Process
To see your plan's approval process after you have submitted, go to FTU. Forms Tracking Utility, login with your MSU NetID and password and view your Routing Slips Initiated.
Creating a Ph.D. Degree Plan

You should work closely with your Ph.D. advisor and possibly your graduate secretary while creating your Ph.D. Degree Plan. Make sure you adhere to any specific requirements for your program, department, or school, as well as your college and University requirements.

Creating a Ph.D. plan involves the following five steps:

1. Designating committee chair and members
2. Selecting doctoral program courses
3. Answering questions about your dissertation research
4. Filling out any other requirements
5. Reviewing the plan and saving for later changes or submitting the plan for approval

This plan serves as an official agreement between you and your committee, department, college, and MSU. It can be modified in the future with subsequent approvals, refer to Graduate Student Rights and Responsibilities (http://grad.msu.edu/gsrr/docs/GSRR-2010.pdf) and the Planning a Doctoral Program and Appointment of a Guidance Committee section in the Academic Programs catalog: http://www.reg.msu.edu/AcademicPrograms/Text.asp?Section=111#s394 for more information.

Information you will need:

- Committee members' names or MSU NetIDs (MSU faculty or others as approved, refer to Ph.D. Degree Plan Process on page 10)
- Course codes for planned courses, including MSU equivalents for CIC Traveling Scholar Program courses if applicable, refer to (http://grad.msu.edu/cic/) for more information.
- Comprehensive exam areas
- Tentative dissertation topic
- Specific requirements for your program, department, school, college, and MSU
Overview Screen

After you login into GradPlan by using your PID, the Overview screen displays:

The Overview screen contains information that will assist you in creating your Ph.D. Degree Plan. In the future, you will be able to update your post-graduate job placement.

① Ph.D. Degree Plan link – click this link to proceed to your individual Ph.D. Degree Plan.

Note: This link is also located just below the GradPlan banner on the screen.

② Student information – Contains information about you:
  - PID
  - Award Type
  - Major code
  - Major name
  - College name
  - Department name
  - Award type (*if you have a dual major)
  - Dual major code (*if applicable) refer to Dual Major Doctoral Degrees section in the Academic Programs catalog: http://www.reg.msu.edu/AcademicPrograms/Text.asp?Section=111#s407
  - Dual major name (*if applicable)
  - Dual college name (*if applicable)

③ CONTACT US – contains the following information: (Note: Also located on login screen)
  - Technical Help – contains contact information related to technical difficulties.
• **Your Ph.D. Plan** - contains information regarding who to contact to assist with your Ph.D. Degree Plan.

• **MSU Student Requirements** – contains resource links to policies and practices for students.

• **General Graduate Educations Questions** – contains contact information for the Graduate School.

• **Your Academic Records** – contains contact information for Office of the Registrar and Office of Admissions.

4 **HELP** – contains the following information:  *(Note: Also located on login screen)*

  • **Technical Help** - contains contact information related to technical difficulties.

  • **Approval Process** – contains information how to view your Ph.D. Degree Plan approval process within FTU.

  • **Creating a Ph.D. Degree Plan** – contains information on the procedure to create a Ph.D. Degree Plan.

  • **Information You will Need** – contains information that you will need before starting a Ph.D. Degree Plan.

  • **Resources** – contains links to other to assist with your Ph.D. Degree Plan.

5 **LOG OFF** – clicking this link logs off from GradPlan.
Ph.D. Degree Plan Screen

After you click the Ph.D. Degree Plan link at the Overview screen, the Ph.D. Degree Plan screen will display:

If this is the first time that you have entered Ph.D. Degree Plan, this screen will initially display the Create Ph.D. degree plan link in addition to general help information that will assist you in creating a Ph.D. Degree Plan.

Ph.D. Degree Plan Status (Non-Official/Not yet Approved)

Once you have created a Ph.D. Degree Plan, but the plan is not officially approved yet, the following Status and Actions options appear on the depending on the Ph.D. Degree Plan screen where the Ph.D. Degree Plan is in the process:

Draft (incomplete) – is when one or more sections of the Ph.D. Degree Plan process (Committee, Courses, Research, Other Requirements, Finalize) have not been completed.

- Draft (incomplete) – status of the Ph.D. Degree Plan in the process
- Edit plan link – click this link to edit current Ph.D. Degree Plan
**Draft** – Ph.D. Degree Plan seems complete to the system but has not been submitted for approval.

<table>
<thead>
<tr>
<th>Ph.D. degree plan status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>Draft</td>
</tr>
</tbody>
</table>

- **Draft** – status of the Ph.D. Degree Plan in the process
- **Edit plan** link – click this link to edit current Ph.D. Degree Plan
- **Review and finalize** – click this link to review all the completed sections in the Ph.D. Degree Plan to finalize the process.

**Pending Approvals** – plan is pending signatures and approvals

<table>
<thead>
<tr>
<th>Ph.D. degree plan status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>Pending approvals</td>
</tr>
</tbody>
</table>

- **Pending approvals** – status of the Ph.D. Degree Plan in the process
- **View plan** link – click this link to view the plan they submitted.
- **View approval of process** link – click this link to view in Forms Tracking Utility (FTU) who has approved your Ph.D. Degree Plan.
- **Retract plan** link – click this link to retract the entire Ph.D. Degree Plan from the Forms Tracking Utility (FTU) approval process. This will stop approvals and cause the plan to return to "Draft" status.

**Disapproved and Returned to Draft** – plan was disapproved by one of the plan approvers and has returned to Draft status.

<table>
<thead>
<tr>
<th>Ph.D. degree plan status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>Disapproved and returned to draft</td>
</tr>
</tbody>
</table>

- **Disapproved and returned to draft** – status of the Ph.D. Degree Plan in the process. In addition, **comments were added by the disapprover to clarify the reason for the disapproval.**
- **Edit Plan** link – click this link to edit current Ph.D. Degree Plan.
- **Review and finalize** link – click this link to review all the completed sections in the Ph.D. Degree Plan to finalize the process.
Official Ph.D. Degree Plan

Once a Ph.D. Degree Plan is officially created, you will see the following options on the Ph.D. Degree Plan screen in addition to a “Current revision status” box that contains various status conditions along with optional action links:

- **View official plan** link – click this link to view the Ph.D. Degree Plan that includes signatures of committee members and dates.

- **Start with copy of current plan** link – click this link to start another Ph.D. Degree Plan by using the current plan as a base.

- **Start a new plan** link - click this link to start a new blank Ph.D. Degree Plan.

- **View revision history** link – click this link to see a sequential listing of revisions and events related to your Ph.D. Degree Plan.

**Draft (incomplete)** – you have an official Ph.D. Degree Plan as well as an incomplete draft.

- **View official plan** link – click this link to view the official Ph.D. Degree Plan that includes signatures of committee members and dates.

- **Edit revision** link – click this link to modify your new draft Ph.D. Degree Plan.

- **Cancel revision** link - click this link to delete the current draft revision.

- **View revision history** link – click this link to see a sequential listing of revisions and events related to your Ph.D. Degree Plan.
Draft – you have an official plan as well as a draft which the system perceives as complete.

- **View official plan** link – click this link to view the official Ph.D. Degree Plan that includes signatures of committee members and dates.
- Draft – status of the Ph.D. Degree Plan in the process.
- **Edit revision** link – click this link to modify your draft Ph.D. Degree Plan.
- **Review and finalize** link – click this link to put your draft Ph.D. Degree Plan into completed form.
- **Cancel revision** link – click this link to delete the current draft revision.
- **View revision history** link – click this link to see a sequential listing of revisions and events to your Ph.D. Degree Plan.

Pending Approvals – awaiting confirmation from individuals responsible for approving the changes to the official Ph.D. Degree Plan.

- **View official plan** link – click this link to view the official Ph.D. Degree Plan that includes signatures of committee members and dates.
- Pending approvals – status of the changed Ph.D. Degree Plan in the process.
- **View revision** link – click the link to view latest revision of your Ph.D. Degree Plan.
- **View approval process for revision** link - click the link to view see who has currently approved the submitted plan.
- **Retract revision** link – click the link to revoke submitted Ph.D. Degree Plan.
- **View revision history** link – click this link to see a sequential listing of revisions to all of your Ph.D. Degree Plan(s).
Disapproved and Returned to Draft – you still have an official plan but this submitted change Ph.D. Degree Plan has been disapproved and has been returned to draft status.

- **View official plan** link – click this link to view the official Ph.D. Degree Plan that includes signatures of committee members and dates.

- Disapproved and returned to draft – status of the latest attempted Ph.D. Degree Plan in the process. In addition, comments were added to clarify the reason for the status.

- **View revision history** link – click this link to see a sequential listing of revisions to all of your Ph.D. Degree Plan(s).
Ph.D. Degree Plan Process

Creating a plan involves completing the following five sections within the Ph.D. Degree Plan process:

- **Committee** – you designate committee chair and members
- **Courses** - you select doctoral program courses
- **Research** - you answer research questions
- **Other Requirements** - you fill out other optional requirements
- **Finalize** - you review the plan and saves it for later changes or submits the plan for approval

**Important!** You need to click the [Save] button after changing information on a page or the information that was entered will be lost.

**Committee**

The Committee screen is where you will search (either by name or MSU NetID) for tenure or tenured track MSU faculty or librarians, as well as non-tenured individuals who have had prior approval by the Graduate School to be on Ph.D. committees; in addition, these approved people might also be non-MSU people. Refer to Planning a Doctoral Program and Appointment of a Guidance Committee section in the Academic Programs catalog: (http://www.reg.msu.edu/AcademicPrograms/Text.asp?Section=111#s394) and for non-MSU faculty refer to: http://grad.msu.edu/forms/docs/nontenure.pdf

**Important!** A minimum of four committee members are required and at least one committee member should be designated as chair.
After you enter a name or MSU NetID of a person that should be on the Ph.D. committee, you will then click the [Search] button.

The Add committee member screen appears:

Note: If the person you are looking for is not on the list and you believe they are an MSU employee, go to the Person Search at [http://search.msu.edu/people](http://search.msu.edu/people) and search for the person. If not found, try various spellings of his/her name. When found, click on his/her name to expand his/her information. If his/her title does not contain the word ‘tenure’, he/she might not currently be able to be on a committee without specific Graduate School approval. Please contact your graduate secretary to check in GradInfo and if needed, request this person be approved to be on a graduate committee.

You will select the correct committee member by clicking the adjacent Add checkbox and then clicking the [Submit additions] button located at the bottom of the screen; or if you didn’t find the right person, you may click the [Return to search] button to redo the search or click the [Return to selected committee] button to review/edit your previous selections.
The **Committee list** screen appears with the selected committee member(s) when the **[Submit additions]** button is clicked:

You can select to either have that committee member to be a Chairperson, Dissertation Director, or remove them entirely by clicking the corresponding checkbox and then clicking the **[Save]** button (located at the bottom of the screen) or you may click the **[ADD COMMITTEE MEMBER]** button to add additional committee members. Any additional notes regarding committee members can be added to the notes field at the bottom of the screen.

**Note:** At least one person must be selected to be Chairperson. Optionally, in some graduate programs, a person may be selected as the Dissertation Director. Multiple co-Chairpersons or co-Dissertation Directors are possible.

Once you have added all the required committee members (at least four), you will then click the **[Save and continue to the next step]** button to proceed to the **Courses** section in the Ph.D. Degree Plan process. This screen is displayed when you return to the **Committee** section in the future.

**Courses**

The **Courses** screen is where you will search for courses to be included in your individual Ph.D. Degree Plan. You may search by either

- **Your courses** - courses that you are already enrolled in or have completed at the graduate level.
- **All courses** - subject and course level.
After you determine the type of search, you will then click the [Search] button. You should start with the Your courses section so you can easily find a list of your completed or enrolled courses.

Note: Approval by the department chair or school/program director and the college dean or his/her designee is required for any 399 level or less courses.

The Add courses screen appears:

Note: Any course that you have completed or enrolled in will have the semester indicated.

You will select a course by clicking the adjacent Add checkbox and then clicking the [Submit additions] button located at the bottom of the screen; or you may click the [Return to search] button to redo the search or click the [Return to selected courses] button to review/edit your selections.
When you click the [Submit additions] button, the Courses list screen appears with the selected course(s):

1. **Category** – You may place courses in various course categories to share additional information with your committee by selecting from the pull-down menu:
   - Cognate
   - Concentration
   - Core
   - Dual
   - Elective
   - Major field
   - Methods
   - Methods Requirements
   - Minor field
   - Required
   - Research Requirement
   - Specialization
   - Specialization 2

2. **Planned semester** – you may choose if desired, the semester in which to take course(s) by selecting from the pull-down menu. This is to help committee members review your course loads per semester and your sequence.
3 Credits – designate for variable credit courses the number of credits by selecting from the pull-down menu.

4 Note – a note indicating that this course is a multiple enrollment and variable credit course. The total number of credits for all instances of this course cannot exceed 40 credits. However, this will not prevent you from adding additional number of credits to the plan. Enforcement of the credit limits will be the responsibility of Student Information Services (SIS) when you actually enroll.

5 Remove – select to remove a course entirely by clicking the corresponding Remove checkbox and then clicking the [Save] button (located at the bottom of the screen).

6 Add any additional notes …. – enter any additional information about courses that your committee might need to know.

You may click the [ADD COURSE] button to add additional courses. Once you have added all the desired courses, you will then click the [Save and continue to the next step] button to proceed to the Research section in the Ph.D. Degree Plan process.
Research

The Research section is where you will be required to indicate background information for your dissertation research and acknowledge that you understand all university policies or practices.

Note: These are required fields (except Additional notes for Research) and need to be completed before approval.
1. **Tentative dissertation subject** - enter a tentative dissertation subject.

2. **Comprehensive exams** - enter your comprehensive examination area(s).

   **Note:** Your guidance committee chair or program webpage or graduate handbook can help you determine what examination area(s) are required.

3. This shows the semester you actually passed the comprehensive exams.

   **3A** If however, you had not yet taken your comprehensive exams, an empty text box will display where you will enter the expected completion semester/term for comprehensive exams.

4. **Graduate Handbook** - click the checkbox to indicate that you understand you are responsible for following the policies and practices stated in the Graduate Handbook for your program, refer to Graduate Student Rights and Responsibilities [here](http://grad.msu.edu/gsrr/docs/GSRR-2010.pdf) and Academic Freedom for Students at MSU [here](http://splife.studentlife.msu.edu/academic-freedom-for-students-at-michigan-state-university).

5. **Responsible Conduct of Research** - enter your initials to indicate that you understand the Responsible Conduct Research training is required for degree completion.

6. **Research review and approval** – enter your initials to indicate that you understand it is necessary to obtain institutional review and approval prior to initiating any research involving the use of human or animal subjects or hazardous material.

7. **Human subjects** - check either the “Yes” or “No” radio-button to indicate if human subjects, your identifiable material, or human materials will be used in your research; refer to Human Research Protection Program [here](http://www.humanresearch.msu.edu/) for more information.

8. **Animal subjects** - check either the “Yes” or “No” radio-button to indicate if animal subjects will be used in your research; refer to Institutional Animal Care and Use Committee (IACUC) [here](http://www.iacuc.msu.edu/) for more information.
Hazardous substances - check either the “Yes” or “No” radio-button to indicate if hazardous substances will be used in your research; refer to Hazardous Waste http://www.ehs.msu.edu/waste/waste_toc.htm for more information.

Additional notes for Research - enter any additional information involving your research. Once you have completed all the required background information for your research, you will then click the [Save and continue to the next step] button to proceed to the Other Requirements section in the Ph.D. Degree Plan process.

Other Requirements

The Other Requirements section is where you can indicate additional requirements needed to complete your individual Ph.D. Degree Plan.
Foreign language(s) - you may add a foreign language by entering the language in the text box and then clicking the [ADD] button. You can also add more than one language and have the option to remove each one by clicking the adjacent Remove link.

Important! You need to click the [ADD] button which will enter the language in the list and then click the [Save] button, if not; the information that was entered will be lost.

Foreign language course substitution - you may add a substitute foreign language course by entering the Subject code and the Course code in the text boxes and then clicking the [ADD] button. You can also add more than one language course and has the option to remove any one by clicking the adjacent Remove link.

Dual Major Ph.D. Request - if you have no dual major, you may add one by selecting a major from the drop-down menu and you can also add additional notes regarding the dual major request. The Graduate School will need to approve any plan that has dual requests. This initiates the addition of your degree(s) in Student Information System (SIS) by the Office of the Registrar after all approvals have been completed. Refer to Dual Major Doctoral Degrees section in the Academic Programs catalog:
http://www.reg.msu.edu/AcademicPrograms/Text.asp?Section=111#s407

3A Current dual major Ph.D. - if you currently have a dual major, you may request to have that existing dual major removed from your plan by clicking the check box. You then have the option to choose a new dual major from the drop-down menu. This will trigger the removal of the dual from your information in the Student Information System (SIS) by the Office of the Registrar after all approvals for your plan have been completed.

Specialization or Graduate Certification - you may add a specialization or graduate certification by selecting from the drop-down menu and then clicking the [ADD] button. You can also add more than one specialization or graduate certification and have the option to remove each one by clicking the adjacent Remove link. In addition, you should add any required courses for your specialization by clicking the courses list link.

Note: Selecting your desired specializations and certifications is for reporting purposes only. This does not initiate any process for you within Student Information System (SIS) or in the university.
Important! You need to click the [ADD] button which will enter the specialization or certification in the list and then click the [Save] button, if not; the information that was entered will be lost.

Additional notes for Other Requirements - you may enter any additional information for other requirements.

Finalize

The Finalize section is where you will review final information for your proposed Ph.D. Degree Plan. In addition, if certain sections are incomplete, various Ph.D. Degree Plan System Requirement messages will display indicating what information is needed to complete the proposed Ph.D. Degree Plan.
**Ph.D. Degree Plan System Requirement Messages** – These messages indicate to you where you have incomplete information.

<table>
<thead>
<tr>
<th>Message</th>
<th>Cause(s)</th>
<th>Solution(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;The minimum number of committee members were not entered.&quot;</td>
<td>You did not enter 4 committee members</td>
<td>Click the Edit link and add the correct number of committee members, then click the [Save] button.</td>
</tr>
<tr>
<td><strong>selected</strong></td>
<td>• You checked the <strong>Add</strong> checkbox of the correct committee person(s) but did not click the [Submit additions] button before proceeding.</td>
<td>button. • Click the <strong>Edit</strong> link and re-enter the correct number of committee members, then clicks the [Submit additions] button.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>A committee chair was not selected</strong></td>
<td>• You did not click the <strong>Chair</strong> checkbox next to the name of a committee chair person. • You checked the <strong>Chair</strong> checkbox next to committee chair person but did not click the [Save] button before proceeding.</td>
<td>• Click the <strong>Edit</strong> link and click the <strong>Chair</strong> checkbox next to the desired name of committee person and click the [Save] button before proceeding.</td>
</tr>
<tr>
<td><strong>Required fields have not been completed in the research section</strong></td>
<td>• You need to enter information in the field(s) indicated by an asterisk “*”. • You entered information in the required field(s) but did not click the [Save] button before proceeding.</td>
<td>• Click the <strong>Edit</strong> link and enter information in the field(s) indicated by an asterisk “*”, then click the [Save] button. • Click the <strong>Edit</strong> link and re-enter information in the required field(s), then click the [Save] button.</td>
</tr>
<tr>
<td><strong>Please enter credits for all the courses</strong></td>
<td>• You need to enter credits for all variable credit courses. • You entered correct credits for all the courses but did not click the [Save] button before proceeding.</td>
<td>• Click the <strong>Edit</strong> link and enter credits for all courses, then click the [Save] button. • Click the <strong>Edit</strong> link and re-enter credits for all courses, then click the [Save] button.</td>
</tr>
<tr>
<td><strong>The revision changes box at the end of this page has not been complete</strong></td>
<td>• You need to enter why or what are the revisions to your plan. • You entered revision comments to your plan but did not click the [Save revision comments] button before proceeding.</td>
<td>• You need to enter revision comments to your plan and then click the [Save revision comments] button before proceeding.</td>
</tr>
</tbody>
</table>

2 **ACADEMIC DETAILS** – displays your current degree information and also previous degree(s) information from Student Information Systems (SIS).

3 **COMMITTEE** – displays committee member(s) information that you entered in the Committee section of your Ph.D. Degree Plan. You can click the **Edit** link to change committee member(s) information.

4 **COURSE** – displays course(s) information that you have entered in the Course section of your Ph.D. Degree Plan. You can click the **Edit** link to change course(s) information.
addition, if you have added a dual major and/or specialization, you need to be sure that your course list includes the required courses if applicable.

5 RESEARCH INFORMATION - displays research information that you have entered in the dissertation Research section of your Ph.D. Degree Plan. You can click the Edit link to change research information.

6 PLAN ACTIONS – lists and explains any changes you have made to this revision of your Ph.D. Degree Plan. If there are no incomplete sections in your Ph.D. Degree Plan, then the [Submit plan for approvals] button will display.

If you have completed all the sections within the Ph.D. Degree Plan Process you will click the [Submit plan for approvals] button located at the bottom of the Finalize page to start the Approval Process or they may click the Edit plan link to edit a section of your plan:

Submit plan for approvals
While in the approval process you will not be able to edit your plan without retracting and re-submitting.

Your plan will be reviewed by
- your major’s graduate secretary
- your committee members
- the department, school, or program’s chair or director
- the college dean’s office

Once you have submitted your plan, you can check the approval status page for updates.

By selecting a committee member, you are authorizing them to see your data.
Full Approval Process

The full approval process is when you submit your Ph.D. Degree Plan for review for the first time or if any of the following criteria are met:

- There is a new dual major request from the previous official plan.
- There is a dual removal request from the previous official plan.
- There is a change in committee members from the previous official plan.
- There is a change in courses for students in participating colleges from the previous official plan.

While in the approval process, you will not be able to edit your individual plan without first retracting the plan.

Once you submit your Ph.D. Degree Plan for approval, this action initiates a Forms Tracking Utility (FTU) routing slip to be activated. This routing slip is sent for approval/disapproval to the following groups:

- **Form Checker** – this is often the graduate secretary(s) in your major or program.
- **Committee** – this is your selected committee members.
- **Program Signer** – this is often your department, school or program’s chair or director based on your major’s GradInfo program.
- **College Signer** – this is a signer representing your major’s college dean’s office.

**Note:** Once you have submitted your plan; you may check the approval status for updates.

An example of a GradPlan Forms Tracking Utility (FTU) routing slip:

<table>
<thead>
<tr>
<th>Routing Process Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step</strong></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td>100</td>
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<tr>
<td>150</td>
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<tr>
<td>200</td>
</tr>
<tr>
<td>300</td>
</tr>
<tr>
<td>400</td>
</tr>
</tbody>
</table>

1. **Requested Action** – your Ph.D. Degree Plan requires approvals from Form Checker, Committee members, Program Signer, and College Signer.

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2. **Person/Group/Script** – click on the link to see the name of the person or persons who can sign for that group.

3. **Reference** – the number for Form Checkers and Program Signers represents the GradInfo program code for your major. For a complete list of GradInfo’s graduate program codes and names, refer to [http://aissecuritycontact.ais.msu.edu/arms/GradInfoProgramCodeList.html](http://aissecuritycontact.ais.msu.edu/arms/GradInfoProgramCodeList.html).

The **UUID** is a special identifier for MSU people, as well as for non-MSU people, who will get access via MSU Community ID. Refer to [http://community.idm.msu.edu](http://community.idm.msu.edu) for more information.

The **OrgStructureCode** used by EBSP is the reference number for College Signer(s). The MAU is found right after the “P”.

**Form Checker**

The Form Checker (usually a Grad Secretary) will review your Ph.D. Degree Plan and “approve” or “disapprove” the plan depending on accuracy and completeness. If you have a dual major, two Form Checkers are asked to approve or disapprove.

All the people (based on the GradInfo program code for your major) in a form checker group receives an email requesting approval/disapproval of your Ph.D. Degree Plan in FTU.

The Form Checker clicks on the link in the Approval Request email which takes them to the FTU Dashboard where they will log in using their MSU NetID. After login, the Form Checker will find your Ph.D. Degree Plan in his/her Pending List and will click on the desired plan.
Once the Form Checker accesses the FTU Routing Slip content, they will review your plan for errors and then proceed to approve or disapprove the plan:

1. Comment text field with [Approve], [Disapprove] and [Comment Only] buttons
2. Ph.D. Degree Plan

Note: Only one approval is needed per group. However, if you have a dual major, two Form Checker groups will be notified that they have approvals waiting in FTU.

**Approving/Disapproving Your Plan**

If after reviewing your Ph.D. Degree Plan, the Form Checker decides to disapprove the plan, the Form Checker enters a comment in the Comment text field explaining why the your plan is being disapproved and then clicks the [Disapprove] button. This action initiates FTU to send a Disapproval email to both the Form Checker(s) and also to you. Because your Ph.D. Degree Plan was disapproved, the plan is then reset to a “Disapproved and returned to draft” status.

However, if the plan is approved by the Form Checker(s), then an email is created and sent to Committee members informing them that your Ph.D. Degree Plan needs their approval/disapproval in FTU.
Committee

After the Form Checker has approved your Ph.D. Degree Plan, GradPlan will then email your selected Committee members that your Ph.D. Degree Plan is waiting for approval. All the Committee members are notified simultaneously by email requesting approval/disapproval of your Ph.D. Degree Plan in FTU.

If the Committee member is a non-MSU Committee member with a Community ID, they will receive the special email helping them use MSU’s Community ID:

1. Your name
2. URL link to the FTU Dashboard
3. Information and contact details for MSU Community ID.

The Committee member then clicks on the link within the email which takes them to the FTU Dashboard where they will log in using your MSU NetID or in the case of a non-MSU person, their Community ID login and password. After login, the Committee member will find your Ph.D. Degree Plan in their Pending List and will click on the desired plan to review your plan for errors and then approve or disapprove your plan.
Comment text field with [Approve], [Disapprove] and [Comment Only] buttons

Ph.D. Degree Plan

Approving/Disapproving Your Plan

If after reviewing your Ph.D. Degree Plan, one of the Committee members decides to disapprove the plan, that Committee member enters a comment in the Comment text field explaining why your plan is being disapproved and then clicks the [Disapprove] button. This action initiates FTU to send a Disapproval email to the Form Checker(s), you and the Committee Chair(s) and Dissertation Director(s). Because your Ph.D. Degree Plan was disapproved, the plan is then reset to a “Disapproved and returned to draft” status.

However, if the plan is approved by all Committee members, then an email is created and sent to the Program Signer group informing them that a plan resides in FTU and requesting their approval or disapproval.

Program Signer

After all committee members approve your Ph.D. Degree Plan, FTU will then email all members of the Program Signer group that your Ph.D. Degree Plan is waiting for approval by a Program Signer (often a director or department chair or his/her designee). The Program Signer then will review your Ph.D. Degree Plan and “approve” or “disapprove” the plan depending on accuracy and completeness. If you have a dual major, two Program Signers are asked to approve or disapprove your plans.

The Program Signer (based on the GradInfo program ID for your major) receives an email requesting approval/disapproval of your Ph.D. Degree Plan in FTU.

The Program Signer clicks on the link in the Approval Request email which takes them to the FTU Dashboard where they will log in using their MSU NetID. After login, the Program Signer will find your Ph.D. Degree Plan in his/her Pending List and will click on the desired plan.
Once the Program Signer accesses the FTU Routing Slip content, they will review your plan for errors and then proceed to approve or disapprove the plan:

1. Comment text field with [Approve], [Disapprove] and [Comment Only] buttons

2. Ph.D. Degree Plan

Note: Only one approval is needed per group. However, if you have a dual major, two Program Signers will be notified that they have approvals waiting in FTU.

**Approving/Disapproving Your Plan**

If after reviewing your Ph.D. Degree Plan, the Program Signer decides to disapprove the plan, the Program Signer enters a comment in the Comment text field explaining why your plan is being disapproved and then clicks the [Disapprove] button. This action initiates FTU to send a Disapproval email to the Form Checker(s), you and Committee chair(s) and/or Dissertation Director (if applicable).

However, if your Ph.D. Degree Plan is approved, then an email is initiated and sent to the College Signer group members informing them that a plan resides in FTU and is requesting your approval or disapproval.
College Signer

After the Program Signer approves your Ph.D. Degree Plan, then the College Signer (often deans or associate deans or her/his designee) who are associated with the college that is responsible for your major in Student Information Systems (SIS), will review your Ph.D. Degree Plan and "approve" or "disapprove" the plan depending on accuracy and completeness. If you have a dual major, and the majors are in different colleges, two College Signers are emailed for their approval/disapproval. Only one person needs to sign for each college.

The College Signer receives an email requesting approval/disapproval of your Ph.D. Degree Plan in FTU, the College Signer clicks on the link in the Approval Request email which takes them to the FTU Dashboard where they will log in using his/her MSU NetID. After login, the College Signer will find your Ph.D. Degree Plan in his/her Pending List and will click on the desired plan.
Once the Program Signer accesses the FTU routing slip content, they will review your plan for errors and then proceed to approve or disapprove the plan:

1. Comment text field with [Approve], [Disapprove] and [Comment Only] buttons

2. Ph.D. Degree Plan

**Approving/Disapproving Your Plan**

If after reviewing your Ph.D. Degree Plan, the College Signer decides to disapprove the plan, the College Signer enters a comment in the Comment text field explaining why your plan is being disapproved and then clicks the [Disapprove] button. This action initiates FTU to send a Disapproval email to the Form Checker(s), you and the Committee Chair(s) and/or Dissertation Director (if applicable).

**Dual Major Request/Graduate School Approval**

If you have requested a dual major, and the two Form Checkers, the two Program Signers and the two College Signers have all approved your Ph.D. Degree Plan, then an email is sent to the Grad School Signer for his/her approval/disapproval.

If after reviewing your Ph.D. Degree Plan, the Grad School Signer decides to disapprove the plan; the Grad School Signer enters a comment in the Comment text field explaining why your plan is being disapproved and then clicks the [Disapprove] button. This action initiates FTU to send a Disapproval email to the Form Checker(s), Committee Chair(s) and/or Dissertation Director(s) and also to you. Because your Ph.D. Degree Plan was disapproved, the plan is then reset to a “Disapproved and returned to draft” status.
Approval Completion

When your Ph.D. Degree Plan is approved, then an email regarding the approval of your plan is sent to the Form Checkers, you, and all Committee members informing them that your plan has been approved. In addition, you will receive the following emails:

- Email regarding research/scholarship integrity.
- Email regarding Institutional Animal Care and Use Committee (IACUC) if you indicated on your Ph.D. Degree Plan that you will be using animals in your research.
- Email regarding Institutional Review Board (IRB) if you indicated on your Ph.D. Degree Plan that you will be using human subjects in your research.

The approval of your Ph.D. Degree Plan initiates the plan’s status to become the “Official” plan and supersedes any previous plans made earlier.

Congratulations!
Approval Process for Changes Is Determined by Committee Chair(s)

The Approval Process Determined by Committee Chair(s) happens when you submit a plan (after having an official Ph.D. Degree Plan) due to changes/revisions or when all of the following criteria are met:

- There is not a new dual major request from the previous official plan.
- There is not a dual removal request from the previous official plan.
- There is not a change in committee members from the previous official plan.
- There is not a change in courses for students in participating colleges from the previous official plan.

When you submit your plan, a routing slip is created in FTU and will follow the following approval process:

Form Checker

The Form Checker (usually a Grad Secretary) will review your revision of the Ph.D. Degree Plan and “approve” or “disapprove” the plan depending on accuracy and completeness. All the people (based on the GradInfo program ID for your major) in a form check group receives an email requesting approval/disapproval of your Ph.D. Degree Plan in FTU.

The Form Checker clicks on the link in the Approval Request email which takes them to the FTU Dashboard where they will log in using their MSU NetID. After login, the Form Checker will find your Ph.D. Degree Plan in their Pending List and will click on the desired plan.
Once the Form Checker accesses the FTU routing slip content, they will review your plan for errors and then proceed to approve or disapprove the plan:

1. Comment text field with [Approve], [Disapprove] and [Comment Only] buttons

Note: Comments are required for disapproval and optional for approvals.

2. Ph.D. Degree Plan

**Approving/Disapproving Your Plan**

If after reviewing your revised Ph.D. Degree Plan, the Form Checker decides to disapprove the plan; the Form Checker enters a comment in the Comment text field explaining why your plan is being disapproved and then clicks the [Disapprove] button. This action initiates FTU to send a Disapproval email to both the Form Checker and also to you. Because your Ph.D. Degree Plan was disapproved, the plan is then reset to a “Disapproved and returned to draft” status.

However, if the plan is approved, then an email automatically is created and sent to the Committee chair(s) and/or the Dissertation Director informing them that a plan needs their approval or disapproval in FTU.
Committee Chair(s) and/or Dissertation Director(s)

After the Form Checker approves your revised Ph.D. Degree Plan, then the Committee Chair(s) and/or Dissertation Director(s) is sent an email requesting their review of your revised Ph.D. Degree Plan.

The Committee Chair(s) and/or Dissertation Director(s) clicks on the link in the Approval Request email which takes them to the FTU Dashboard where they will log in using their MSU NetID. After login, the Committee Chair(s) and/or Dissertation Director(s) will find your Ph.D. Degree Plan in their Pending List and will click on the desired plan. Once the Committee Chair(s) and/or Dissertation Director(s) access the FTU routing slip content, they will review your plan changes/revisions.

**Significant or Minor Change Routing**

Before approving your Ph.D. Degree Plan, the Committee Chair(s) and/or Dissertation Director(s) will decide if the changes are either “Significant” or “Minor” by selecting the one of the radio-buttons within the content of the Ph.D. Degree Plan - “Route as significant change (all approvers sign)” or “Route as minor change (only chair(s) and dissertation director(s) approve)” and then clicking the [Submit routing] button.

![Routing Slip Content](image)

**Approving/Disapproving Your Plan**

If after reviewing your revised Ph.D. Degree Plan, the Committee Chair(s) and/or Dissertation Director(s) decides to disapprove the plan; the Committee Chair(s) and/or Dissertation Director(s) then enters a comment in the Comment text field explaining why your plan is being disapproved and then clicks the [Disapprove] button. This action initiates FTU to send a Disapproval email to the Form Checker, Committee Chair(s) and/or Dissertation Director(s) and also to you. Because your Ph.D. Degree Plan was disapproved, the plan is then reset to a “Disapproved and returned to draft” status.

However, if the plan is approved, the Committee Chair(s) and/or Dissertation Director(s) will then decide if the changes are considered to be “Significant” or “Minor”.

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The final result ("Significant" change or "Minor" change) is determined based on the last Committee Chair or Dissertation Director to click the [Submit routing] button:

- If the last change submitted was "Route as significant change (all approvers sign)" - then all of the remaining Committee Members, Program Signer and College Signer will need to approve/disapprove your revised plan as outlined in the Full Approval Process (refer to Full Approval Process).

- If the last change submitted was "Route as minor change (only chair(s) and dissertation director(s) approve)" - then the plan is approved. Only you, the Chair(s) and the Form Checker will be notified by email that there was a change to your official plan.

Once your revised Ph.D. Degree Plan (with "Minor" change) is approved, then an email regarding the approval of your plan is sent to the Form Checkers, you, the Committee Chair(s) and the Dissertation Director(s) informing them that the plan has been approved. This initiates your Ph.D. Degree Plan status to become the "Official" plan and supersedes any previous plans made earlier.
GradPlan FlowChart

1. GradPlan system

2. Submitted PhD Plan to FTU

3. Form Checker/s approve?
   - yes
   - no
     - Disapprove and return to draft

4. Does this FTU route need all approvals?
   - yes
   - no
     - Disapprove and return to draft

5. All Chairs and Dissertation Directors approve?
   - yes
   - no
     - Committee Chair decides it is significant change?
       - yes
       - Disapprove and return to draft
       - no
       - Disapprove and return to draft

6. In parallel, request all (remaining) committee members approvals.
   - yes
   - no
     - Program Signers approve?
       - yes
       - Disapprove and return to draft
       - no
       - College Signers approve?
         - yes
         - Disapprove and return to draft
         - no
         - Dual Request?
           - yes
           - Disapprove and return to draft
           - no
           - Grad School Dual approve?
             - yes
             - Disapprove and return to draft
             - no
             - Approved PhD Degree Plan