



Help guide **Stage Assessment**

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The Graduate Research Education Framework comprises of formal candidature stages for both Master’s (Research) degree and Doctoral degree research students.

The objective of each stage, and its associated assessment, is:

- to ensure that the student has the necessary knowledge and skills to conduct their research program and complete the degree and future research activities
- to demonstrate that they have made sufficient progress in their study and in the development of their research skills to make it likely that they will complete within the prescribed time
- to ensure that they are conducting research within the University’s expectations regarding research integrity and research management practices.

The Online Stage Assessment form is to record the candidature stage assessment outcomes and share them with the student and Graduate Research School as specified by the Procedures.



The Process

As a Research Office, you begin by creating a new stage assessment form, completing it and uploading any relevant documentation.

Like all other forms, it has a series of common details relating to the student's candidature which are automatically pre-filled based on their current enrolment details.

You can track the status of your form as it progresses through the process.

Unlike most other forms, it only progress through a few steps. After submission, the RAO submits their review to GRS to be recorded in CASS.

A typical workflow might look something like:

1. Faculty Research Officer (submission)
2. Responsible Academic Officer (faculty review)
3. Graduate Research Officer (review and administration)
4. Confirmation to student via email



1. Faculty Research Officer

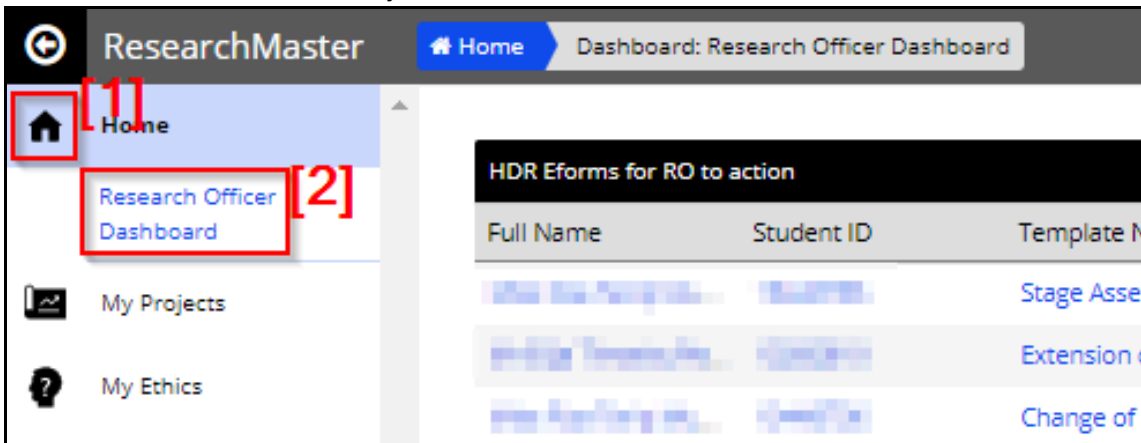
Creating a New Form

There are two places you can create a new form from:

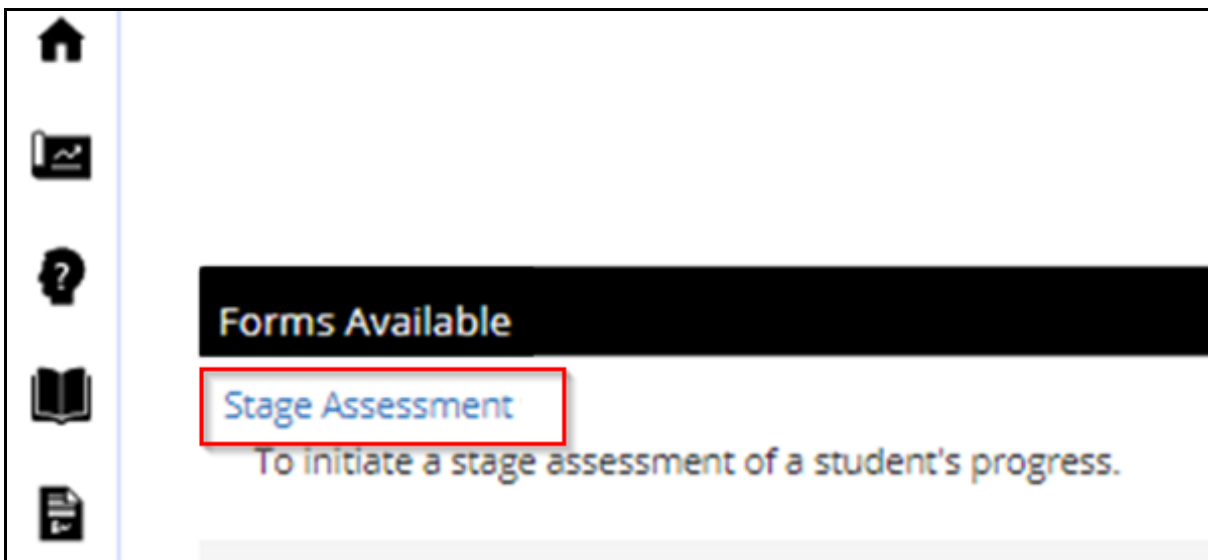
1. The Dashboard shortcut
2. The Candidature - Course Variations page

Method 1: From the Dashboard

You create a new form directly from the Student Dashboard.



Your Dashboard appears when you first login, or you can get to it any time by clicking on the 'Home' icon [1] in the left navigations bar, then selecting 'Dashboard' [2] from the expanded menu.

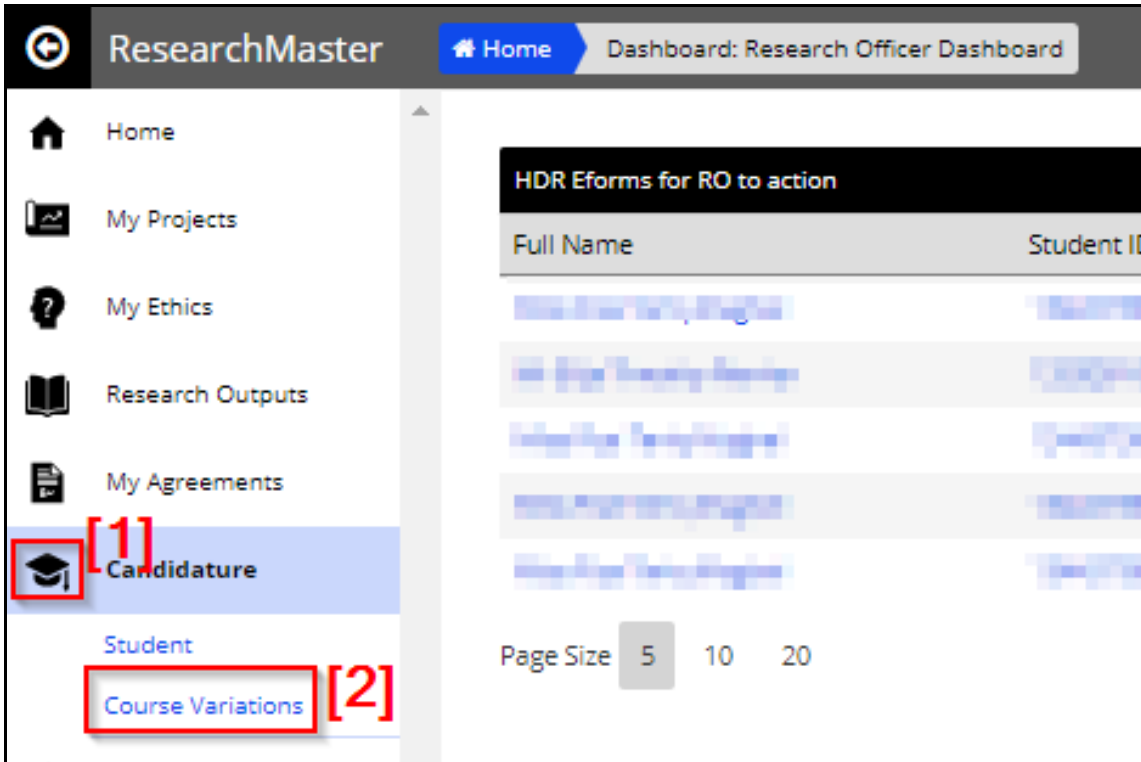


From the Dashboard, scroll down until you see 'Forms Available'.



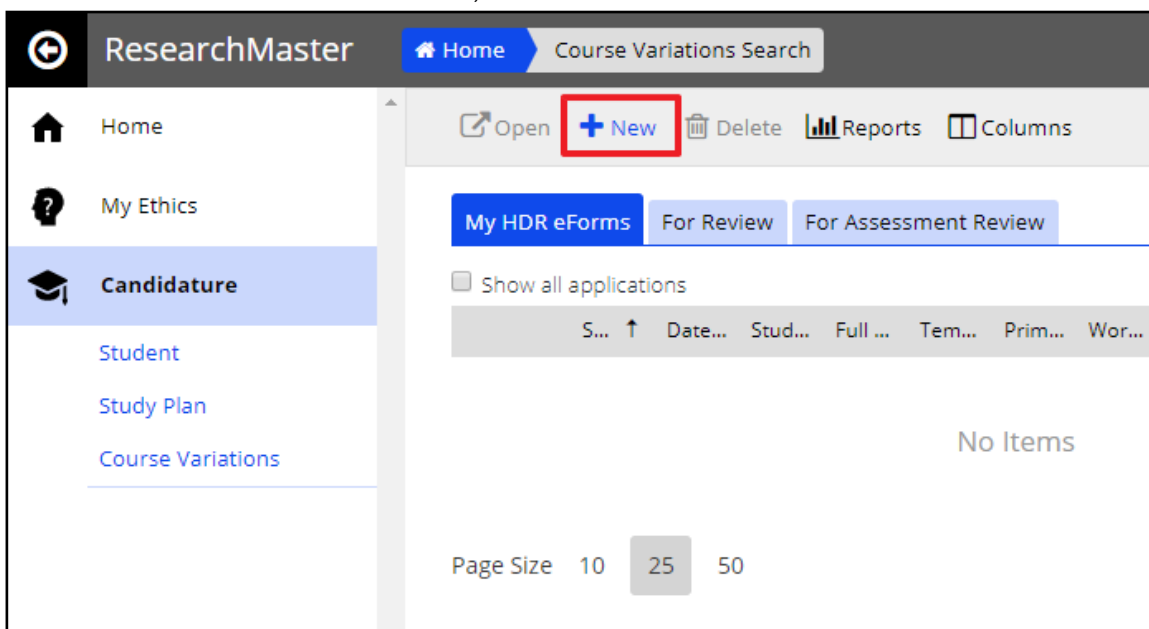
Method 2: From the Candidature - Course Variations page

You can also create and manage existing forms from the Course Variations page under 'Candidature':



You can get to 'Course Variations' any time by clicking on the cap icon [1] on the left navigation bar, then selecting 'Course Variations' [2] from the expanded menu.

From the 'Course Variations' screen, click on 'New':





From the 'Create eForm' screen, select the form you want to create [1], click on the arrow to expand the student selection table [2] and enter the student's ecode or name in the search bar [3]. Select the student from the search results [4] and click on the 'Add' button [5]. The course [6] will auto-populate. Click OK [7] to start the form.

Create eForm
✕

eForm Templates

Abbreviation	Template Name	Description	Date Modified
SA_v4	Candidature Stage Assessment ...	To initiate a stage assessment o...	09/04/2024

Page Size Page 1 of 1 (1 items) 1

Please select a Student [2]

Ecode	Name
PER0173710	Jane Doe

Page Size Page 1 of 1 (1 items) 1

Please select a Course

-- No options available --

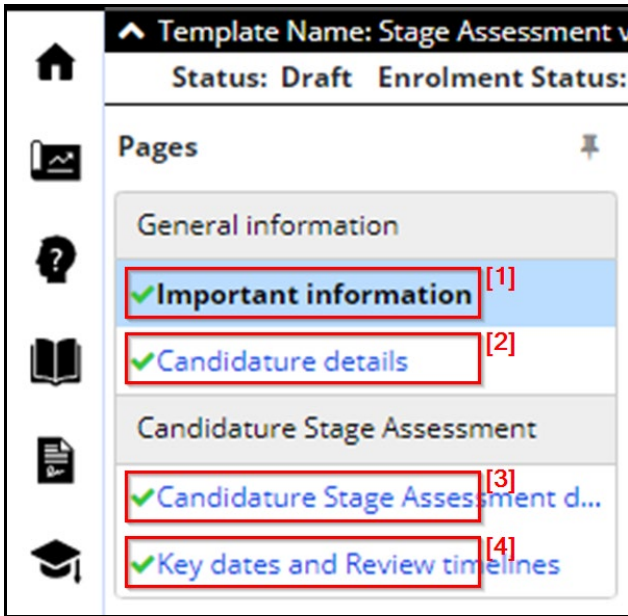
Creating a form can sometimes take a little while. Thanks for your patience.

OK Cancel

Filling Out the Form

Pages Overview

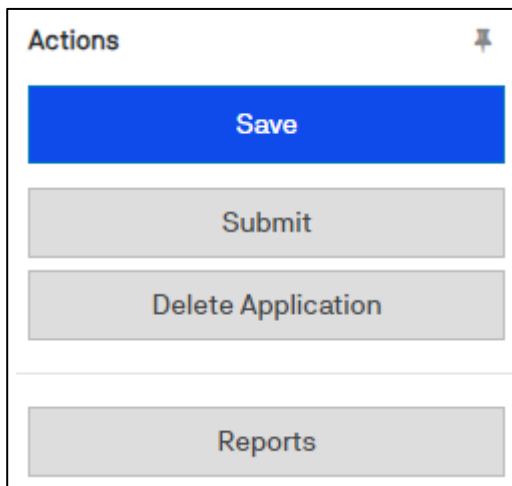
Forms share a common layout. Each form will have a Pages navigation menu on the left-hand side, which you can use to jump between different sections:



1. **Important information** - this page contains additional help and instructions specific to this form
2. **Candidature details** - This information should be pre-filled with the student's details - just confirm that they are correct, and move on to the next page
3. **Candidature Stage Assessment details** - This is where you fill in all relevant information, and upload supporting documentation
4. **Key dates and Review timelines** - an overview of the student's Significant Event recorded in RM

Actions Overview

You'll find the Actions panel in the top right-hand corner of your form:

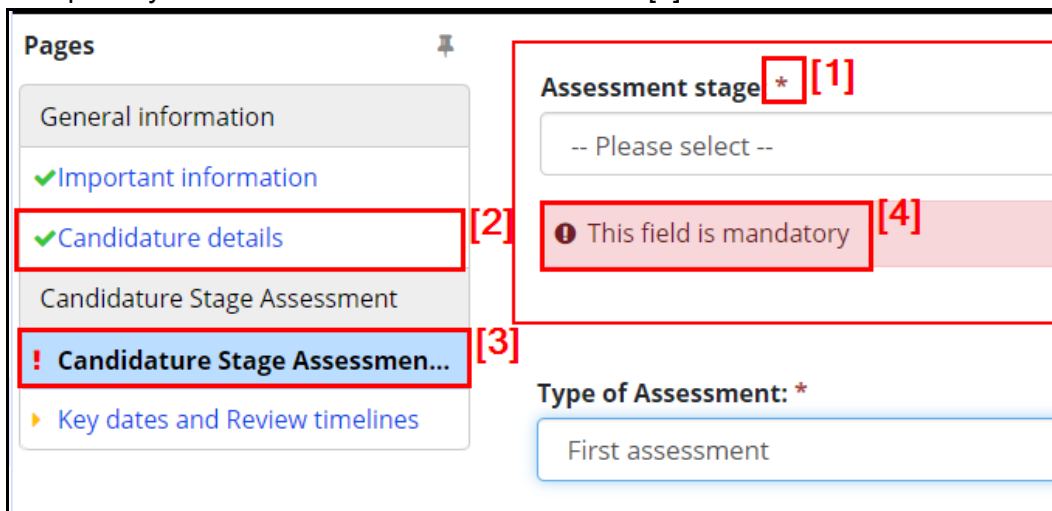




1. **Save** - this allows you to leave your form, and return to it to complete at a later stage. You do not need to Save before you Submit.
2. **Submit Review** – the first click will refresh the page so that you can assign the form to a specific RAO. The second click sends your form off to the RAO, and prevents you from any further changes. You will be asked to confirm your submission via a pop-up.
3. **Delete Application** – this allows you to delete the form when the form is in a workflow state assigned to you.
4. **Reports** – this will you to download the form as a PDF.

Compulsory Fields

Compulsory fields are marked with a red asterisk [1]:

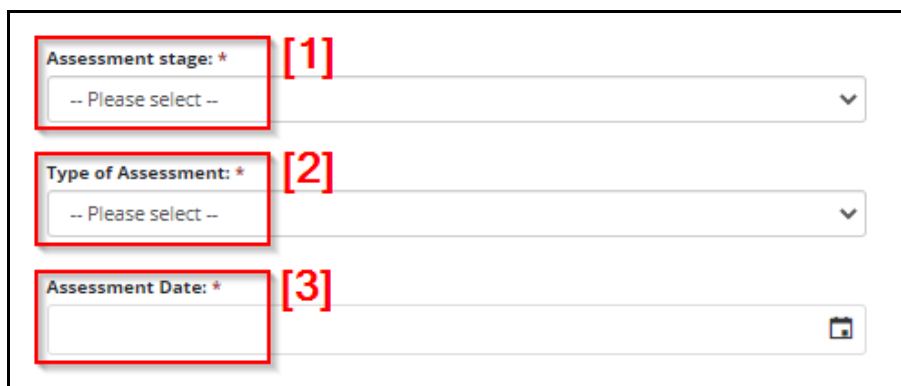


Previously completed pages will be marked with a green tick [2] on the Pages navigation menu. If you have missed any compulsory fields, the page will be marked with a red exclamation mark [3] when you try to leave. You'll find any missed sections highlighted [4].

Candidature Stage Assessment Details page

You will start with outlining which “type” of assessment the student has undertaken:

- Is it the student’s first, second or third stage? [1]
- Are they being reassessed? [2]
- When did the assessment take place? [3]

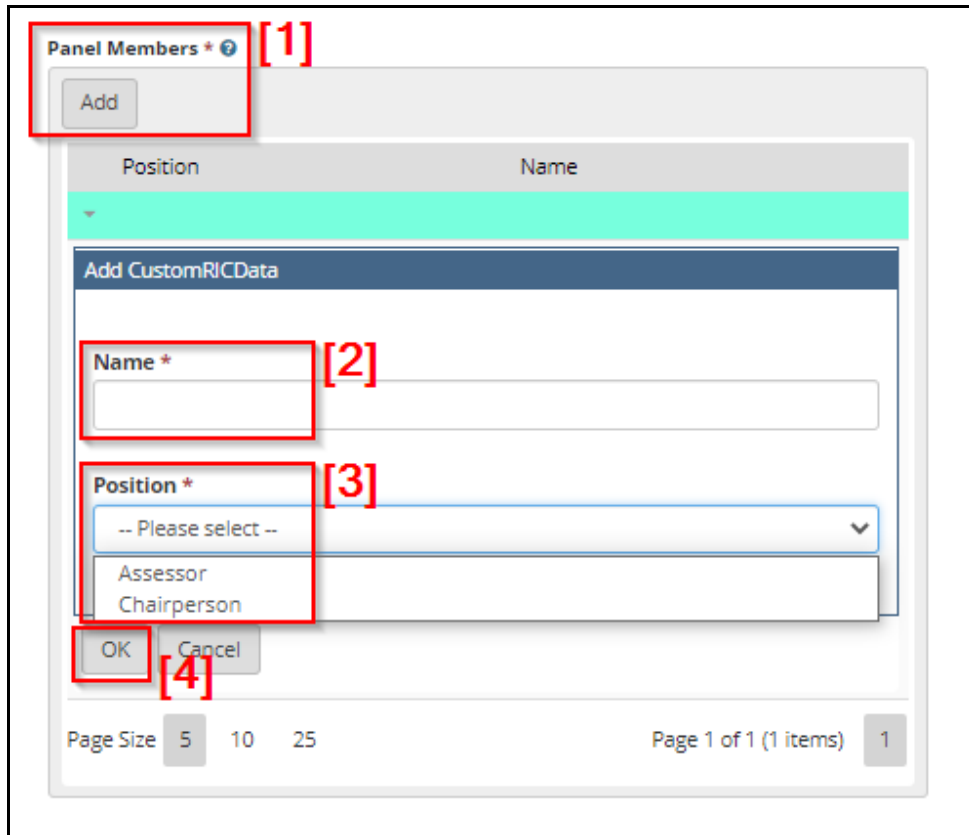




Panel Members

Here you will list the members that were part of the panel who assessed the student:

1. Click the 'Add' button to add a panel member's details
2. Enter their name
3. The position they held on the panel
4. Click 'OK' to save and repeat the four steps for each panel member



The screenshot shows a web form titled "Panel Members * [1]". At the top left is an "Add" button. Below it is a table with columns "Position" and "Name". A blue bar above the table says "Add CustomRICData". Below the table are two input fields: "Name *" [2] and "Position *" [3]. The "Position" dropdown menu is open, showing options: "-- Please select --", "Assessor", and "Chairperson". At the bottom are "OK" [4] and "Cancel" buttons. At the very bottom, there is a "Page Size" selector with options 5, 10, and 25, and a "Page 1 of 1 (1 items)" indicator with a "1" button.

Panel Report

To upload the Panel Report, use the following naming convention for the file and ensure it is in PDF format: *date (YY-MM-DD) – Student Full Name – SID – Documents name (Panel Report) – Panel Member Name (i.e. 20-09-15 John SMITH 12340987 - Stage 1 Assessment - Prof. Archibald Plum)*. If each member of the panel produces a report, you can add them individually to the form.

By default, there will already be a mandatory entry for one report:

1. Click on the little triangle at the front of the line to expand it
2. Rename the document is necessary
3. Up-load the PDF file either by using the 'Select file' button or by drag and dropping the file
4. Click 'OK' to save
5. To add additional reports, click 'Add'
6. Select 'Soft copy' for the document type and add 'Document name' & 'File' (step 2, 3 & 4)



Documents submitted by the panel: * ?

[5] Add

Document name	Document type	Required?	Uploaded?
Panel Report	Soft copy	✓	

[1] Edit Document

[2] Document name *
Panel Report

[6] Document type *
Soft copy

[3] Document
No file
Select file or Drop file here

[4] OK Cancel

Page Size 5 10 25 Page 1 of 1 (1 items) 1

Add optional comments for the RAO and/or student in the text box provided at the bottom of the page.

RO review notes (outline final recommendation and any further steps required):



Key dates and Review timelines

Any Stage Assessment or Review of Progress related Significant Events recorded on this student's profile will be pre-listed here:

Key dates and Review timelines

Candidature Stage Assessment and Review of Progress SigEvents: [?](#)

Add

Event type	Title	Status
▶ Spring ROP	Spring ROP	Active
▶ Spring ROP	Spring ROP	Active
▶ Stage 2 - Confirmation of advanced progress	Stage 2 - Confirmation o...	Active

Page Size 5 10 25

Click "Submit" in the top-right corner:

Actions ⌵

Save

Submit

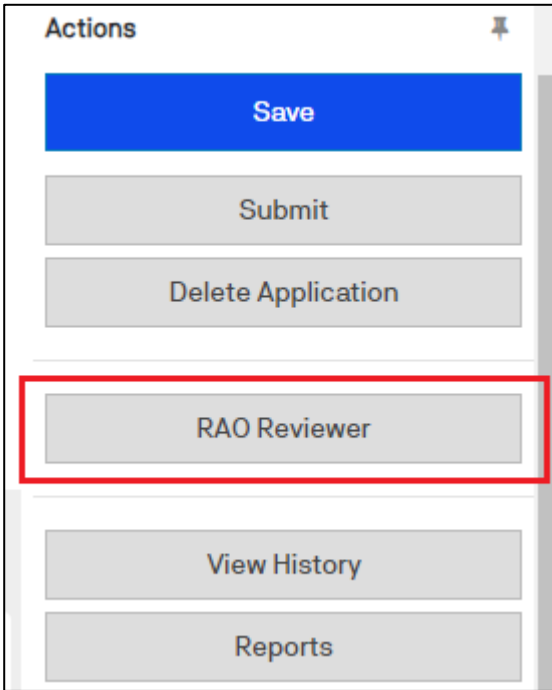
Delete Application

Reports

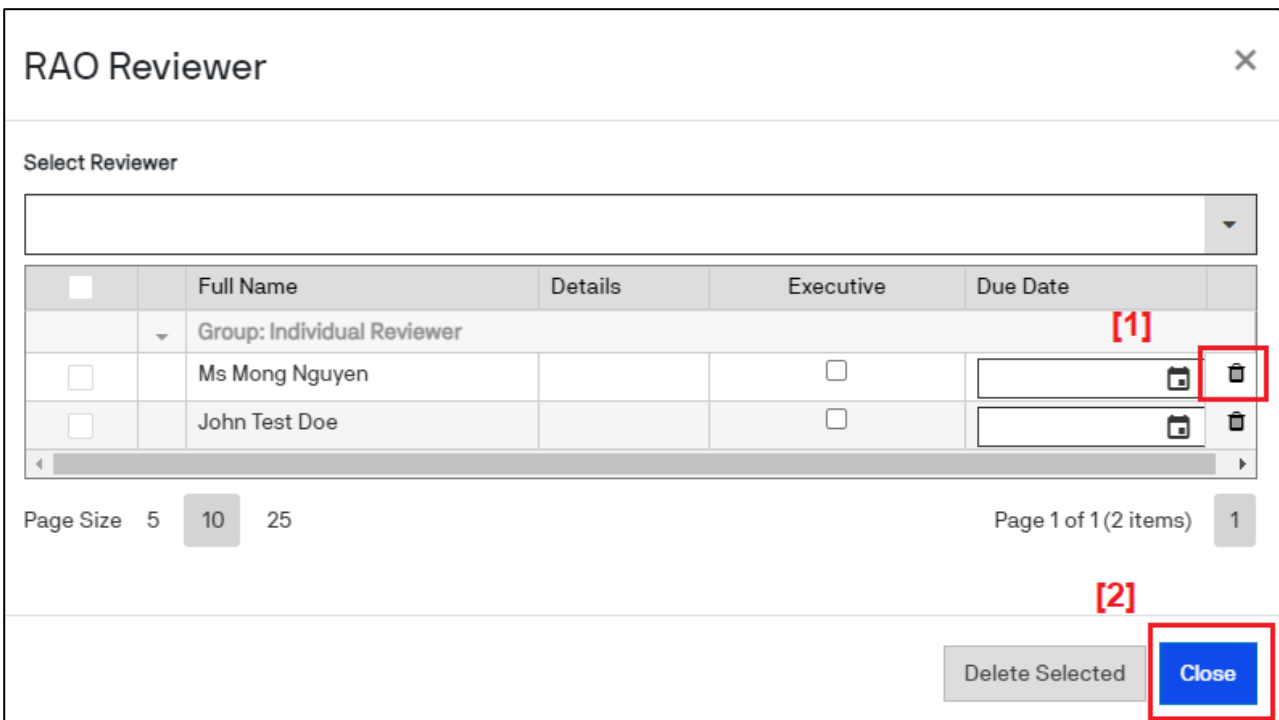
You will be asked to confirm that you are submitting the form to the RO Review state via a pop-up.



When you click “OK”, the page will refresh, the workflow state will update to “RO Review” and the Action menu will update with an “RAO Reviewer” button.

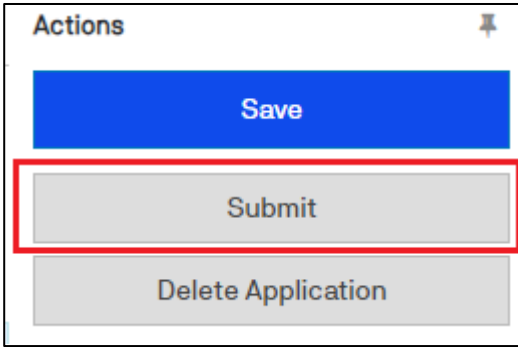


In the “RAO Reviewer” pop-up window, you delete all other RAOs besides the one you want to send the form to and then close the window.





Click “Submit” in the top-right corner:



You will be asked to confirm your that you are submitting the form to the RAO, via a pop-up.

What Happens Next?

The Stage Assessment will go the Responsible Academic Officer for review.

Once the outcome has been officially recorded, you will be copied in the email sent to the student advising them that their review is now available in RM.



2. Faculty Responsible Academic Officer

Finding Your Forms

If you are viewing the RAO Dashboard, student forms will appear on your dashboard homepage:

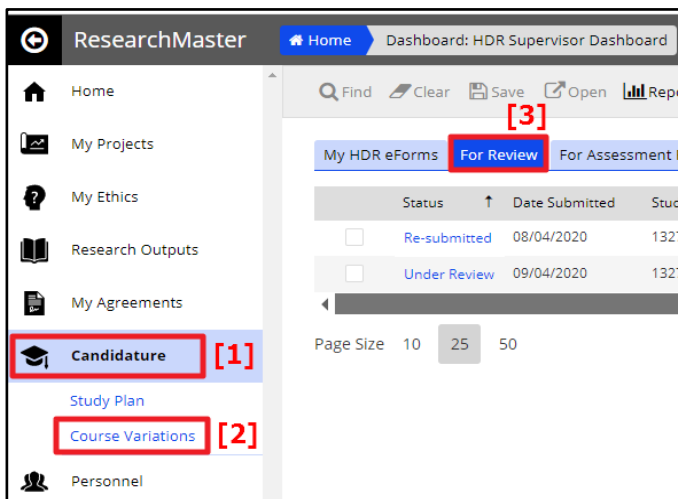
HDR Forms for your action						
Student ID	Full Name	Request Type	Date Submitted	Workflow State	Coursework Census Date	Research Census Date
13240620	Ms Willow ROSE...	Change of Stud...	09/04/2020	[SUP] Superviso...	31/12/2099	31/12/2099
13240717	Ms Tara MACLAY	Extension of Ca...	08/04/2020	[SUP] Superviso...	31/12/2099	31/12/2099

Page Size 10 20 Page 1 of 1 (2 items)

This will give you a quick preview to any forms the faculty needs to respond to. In the 'Workflow State' you will see if the form is in RO or RAO review.

Don't forget, you can change your dashboard view at any time.

You can also find forms through the 'For Review' section of the Course Variations page, accessed via the left navigation menu:

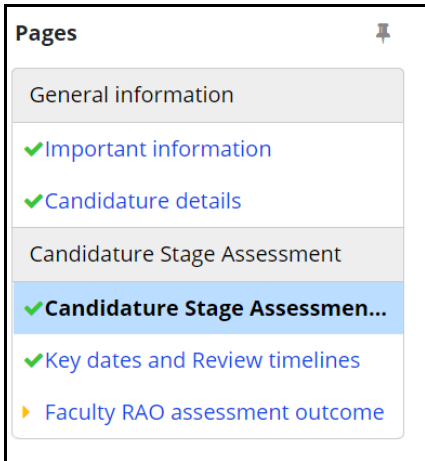


The screenshot shows the ResearchMaster interface. On the left-hand navigation menu, the 'Candidature' icon is highlighted with a red box and labeled [1]. Below it, 'Course Variations' is also highlighted with a red box and labeled [2]. In the main content area, the 'For Review' tab is highlighted with a red box and labeled [3]. The main area displays a table of forms with columns for Status, Date Submitted, and Student ID. Two forms are visible: one 'Re-submitted' on 08/04/2020 and one 'Under Review' on 09/04/2020, both associated with student ID 1327.

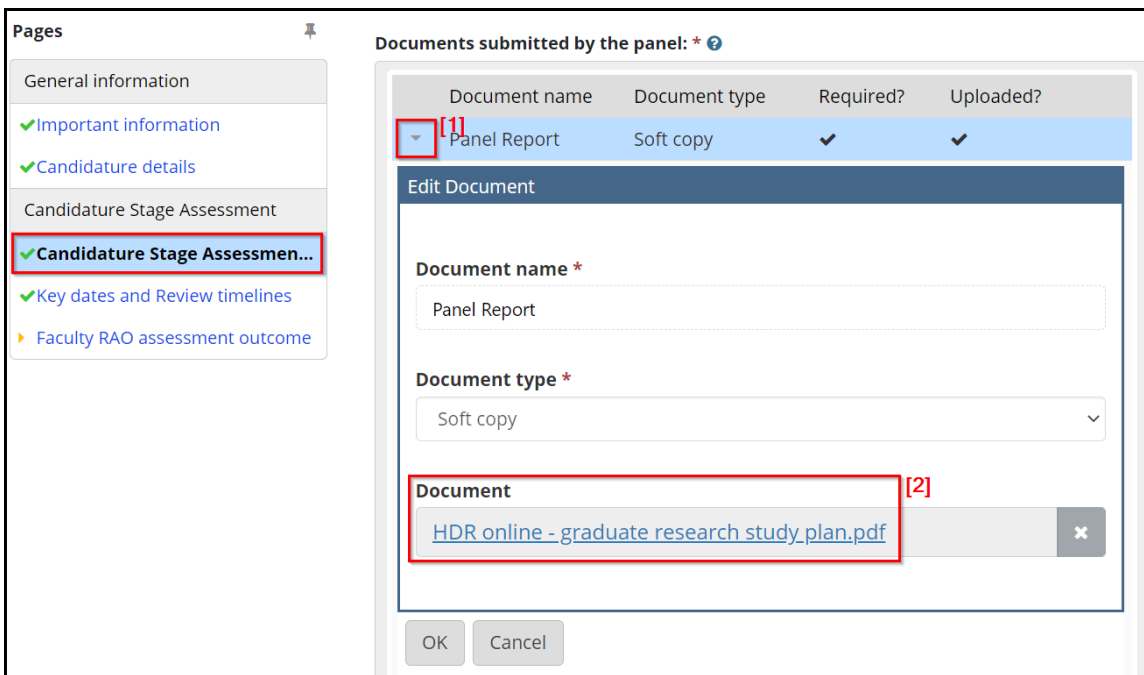
Click on the Candidature cap icon [1], select 'Course Variations' [2], and go to 'For Review' [3].

Reviewing a Submitted Form

To review a form, navigate through each page via the left-hand Pages navigation, and check details of the assessment:



Be sure to download any files for review from the Candidature Stage Assessment details as well. Click on the triangle [1] next to the document you wish to view to open up the details, then click on the hyperlink to open the PDF file [2]:



Recording Your Decision

On the Faculty RAO assessment outcome page, you can return the form to the RO with comments or approve the final outcome.



To return the form, you select “Return the form to RO with comment” and then input your request in the “Comments to RO” text box and click “Submit” in the top-right.

RAO Assessment

I have reviewed all provided information and choose to:
Note: Selection to this question will guide where the form is sent next. *

Approve the form, notify student and GRS
 Return the form to RO with comments [1]

RAO review notes:

Comments to RO:
 [2]

[Previous page : Key dates and Review timelines <<](#)
[Return to Top](#)
[Next page : Graduate Research Officer processing >>](#)

Actions

[Save](#)

[Submit](#) [3]

[RAO Reviewer](#)

[View History](#)

[Reports](#)

You will be asked to confirm your action, via a pop-up.

To approve the form and finalise the outcome, you will click “Approve the form, notify student and GRS”. Then complete outcome related mandatory fields (ie. [1], [2] and potentially [3]) and click “Submit” in the top-right.

RAO Assessment

I have reviewed all provided information and choose to:
Note: Selection to this question will guide where the form is sent next. *

Approve the form, notify student and GRS [1] [4]
 Return the form to RO with comments

Responsible Academic Officer's assessment of the outcome of the stage assessment: *
 [2]

As the stage assessment is unsatisfactory, the RAO requests:

Re-assessment of stage to be completed by *
 [3]

RAO comments regarding the outcome for the student:
 *Note this section will be visible to the student.

Date

RAO review notes:

Actions

[Save](#)

[Submit](#)

[RAO Reviewer](#)

[View History](#)

[Reports](#)



You will be asked to confirm your action, via a pop-up.

The form will be sent to GRO for processing. When GRO has processed the form, the student will be notified by email that an outcome is available on RM.