On-Course Post Graduate
Student Record Management

Version 3.5
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<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
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<td>19.3</td>
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</tr>
</tbody>
</table>
Introduction

1 Introduction

The purpose of this manual is to provide information and process steps to enable you to manage postgraduate student records. The functionality relates to both graduate taught courses and graduate research courses.

1.1 Intended Audience

This manual is intended for Graduate Studies Assistants (GSAs) and departmental administrators who manage and update postgraduate student records.

1.2 Pre-requisites

It is assumed that you have read the Quick Reference Guide: Logging into eVision, and are able to navigate around eVision.

1.3 Objectives

On completion of this manual, you will be able to:

- Search for a Student Record
- Amend contact details
- Manage dispensations
- Manage a suspension
- Manage a withdrawal
- Apply a programme transfer
- Add an ante dated admission note
- Manage change of specialism (DTC/CDT/DTP programmes, DPhil Modern Languages and PGCE)
- Manage supervisors for taught and research graduate records
- Apply an extension
- Manage milestones
- Manage thesis titles and submissions

1.4 Conventions

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Indicates additional useful information.</td>
</tr>
<tr>
<td>🔴</td>
<td>Indicates an important piece of information, take particular care to read this information.</td>
</tr>
<tr>
<td>🔴</td>
<td>Indicates there is something that you should not do, take particular care to read this information.</td>
</tr>
<tr>
<td><strong>Bold Text</strong></td>
<td>Indicates menu names.</td>
</tr>
<tr>
<td><em>Italic Text</em></td>
<td>Indicates window, screen or dialogue box titles.</td>
</tr>
<tr>
<td><code>[F4]</code></td>
<td>Keys on your keyboard are indicated in <strong>bold text</strong> enclosed in square brackets <code>[]</code>.</td>
</tr>
<tr>
<td><strong>File &gt; Open</strong></td>
<td>Moves through a navigation path are indicated with a &gt;. In this case you would click on the <strong>File</strong> menu, then select <strong>Open</strong>.</td>
</tr>
</tbody>
</table>
2 Login and Logout of eVision

To access the Quick Reference Guide with instructions on how to login and logout of eVision, please enter the URL below or use the following link and select “Access and Navigate eVision” under the eVision link.

https://www1.admin.ox.ac.uk/studentsystems/support/guides/

3 Searching for Student Records

1) Click on to access all the functionality you need to manage student records.

2) The menu item will then change colour and the Student Records screen will be displayed.

3) Click on Student records to open the Student Records screen.

4) Enter the details of the student.

Note: A wildcard can be used to search by using “*” either before or after text.
5) Click on **Search**

**Note:** None of the fields is mandatory. However, the maximum number of records that may be retrieved is 250 so it is advisable to enter as much information for the student as possible.

If the number of retrieved records exceeds 250 the following message will be displayed:

```
Maximum number of Records exceeded. SITS_MAXREC_EXCEEDED
```

The maximum number of records has been exceeded. Aborting Letter Generation.

6) When the retrieved student records are displayed, click on **Select** to open the required record.

**Note:** There may be more than one line per student if the student has completed one or more courses previously. In this case, ensure you select the correct record. The current course will normally be the one with the highest sequence number.
3.1 Viewing the Student Record

1) Click on **Display all student enrolment details**

<table>
<thead>
<tr>
<th>Department</th>
<th>College</th>
<th>Academic year</th>
<th>Attendance mode</th>
<th>Year of programme</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mathematical Institute</td>
<td>Exeter College</td>
<td>2013/14</td>
<td>Full time</td>
<td>4</td>
<td>Enrolled</td>
</tr>
<tr>
<td>Mathematical Institute</td>
<td>Exeter College</td>
<td>2012/13</td>
<td>Full time</td>
<td>3</td>
<td>Completed block</td>
</tr>
<tr>
<td>Mathematical Institute</td>
<td>Exeter College</td>
<td>2011/12</td>
<td>Full time</td>
<td>2</td>
<td>Completed block</td>
</tr>
<tr>
<td>Mathematical Institute</td>
<td>Exeter College</td>
<td>2010/11</td>
<td>Full time</td>
<td>1</td>
<td>Completed block</td>
</tr>
</tbody>
</table>

An **Enrolment Status of Completed block** indicates that the progression process has been run by the DQT to complete that period of study, and the record has been rolled forward ready for the student to enrol onto the following year.

2) Click on **Display current student enrolment details** to hide the enrolment details.

If the student has a visa the type and expiry date will be displayed below the enrolment details.

<table>
<thead>
<tr>
<th>Student visa details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type: Tier 4 Student</td>
</tr>
</tbody>
</table>

3) Click on **Return to Oxford eVision student management** to return to the student record.
4 Updating a Student Record

1) Follow the steps in Section 3 above to retrieve the student record.

2) Click on **Task selection** to display the available tasks.

---

4.1 Updating Personal Details

Students can log into their record via the Self Service interface to update their details. However, GSAs may also edit the following items in the student’s record:

- Existing addresses: Term time, Home and Correspondence.
- Add an alternative email address. GSAs cannot amend the University email address.
- Phone numbers.

---

Note: GSAs (and students) will not be able to update student names. This will be carried out by the ARO.

1) Follow the steps in Section 3 above to retrieve the student record.
2) Hover over **Task selection** to display the list of tasks.

3) Select **Personal Details**.

**Note:** A UK address finder application has been installed in SITS:Vision. UK addresses may be retrieved using this functionality, but overseas addresses cannot be retrieved in this way, and will have to be entered manually.

4.1.1 **Edit Address Details**

1) Click on **Edit** below the address to be edited.
2) Enter the new Postcode.

3) Click on **Get Address**.

4) Select the address from the list displayed and click on **Select**.

5) Click on **Save** to save the address and return to the **Personal Details** screen.

### 4.1.2 Add or Amend an Alternative Email Address or Telephone Number

**Note:** The university email address will be displayed, this cannot be amended.

1) Click on **Edit** below the telephone number information.

2) Complete the details as required.
3) Click on **Save** to return to display the updated details.
### Manage Personal Details

#### Student

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Mr Kai Leo Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Number</td>
<td>439962</td>
</tr>
</tbody>
</table>

#### Current Award Programme

<table>
<thead>
<tr>
<th>Award Programme</th>
<th>Specialism</th>
<th>Start Date</th>
<th>Maximum Submission Date</th>
<th>Expected End Date</th>
<th>Year of Programme</th>
</tr>
</thead>
</table>

#### Current Details

The details currently recorded for this student are as follows. Use the Edit buttons to make changes.

<table>
<thead>
<tr>
<th>Term Time Address</th>
<th>Home Address</th>
<th>Correspondence Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>St Annæ College</td>
<td>18 Longmead Avenue, South Sea</td>
<td>18 Longmead Avenue, South Sea</td>
</tr>
<tr>
<td>Woodstock Road</td>
<td>Oxford, S050 7PS, United Kingdom</td>
<td>Oxford, S050 7PS, United Kingdom</td>
</tr>
<tr>
<td>Oxford</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OX2 6HS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- University of Oxford Email Address: email@email.com
- Alternative Email Address: alt_email@email.com
- Telephone Number: 09876 54325
- Mobile Telephone Number: 567890345
- Term Time Telephone Number: 01234 56789
5 Dispensations

Post graduate (and undergraduate) students may apply to the Proctors for dispensation from Residency Limits. If approved this should be noted on their record in the Dispensation from Residence Limits field.

Post graduate research students may also apply for Dispensation from Statutory Residence (GSO.8) and Post Graduate research students in the MPLS division may carry out research in a laboratory away from Oxford (MPLS Outhoused student). In both cases a note needs to be added to their record.

5.1 Recording a Dispensation from Residence Limits

1) Follow the steps in Section 3 above to retrieve the student record.

2) Click on Task selection to display the list of tasks.

3) Select Dispensations to open the Manage dispensations screen.
4) Enter the details in the **Reason for dispensation** field.

5) Enter the **Start date** and **End date**.

6) Click on **Save**.

You will be returned to the **Manage dispensations** screen where the details of the dispensation will be displayed.

**Note:** Any previous or current dispensations will also be displayed in this screen.
5.2 Dispensations Specific to Post Graduate Research Students

If the student has applied for and had approved a Dispensation from Statutory Residence (GS0.8), this should be noted on their record as another dispensation, and if a student in the MPLS Division has had approval to work in a laboratory outside of Oxford, this should also be noted on their record in the same way.

1) Follow steps 1 – 3 in Section 5 above to open the Manage Dispensations screen.
2) In the **Type of Dispensation** field click on the arrow and select the relevant dispensation from the list.

3) Enter the details in the **Reason for Dispensation** field.

4) Enter the **Start date** and **End date**.

5) Click on **Save**.
6 Programme Transfers

Students may be transferred from one award programme to another. GSAs will be able to transfer a student from a source (current) programme to a destination (proposed) programme where the programmes are of the same type. i.e.: a transfer from one postgraduate taught course to another.

Other types of transfer, eg: those where a student applies for a new programme and then is retrospectively transferred from the original to the new programme, need to be processed in SITS:Vision, and cannot be processed by a GSA using eVision. GSAs should email the DQT where a student is transferred back to the original programme as this will need to be processed in SITS:Vision. GSAs will be notified by email of any transfers carried out by ARO or DQT, and they may be required to change the supervisor, college adviser, milestones, extensions, submission and examination information and expected completion date if these are different from the source programme. See section 13 Managing Supervisors

Note: This functionality is not to be used for changes in specialism (e.g. DTC award programmes).

1) Follow the steps in Section 3 above to retrieve the student record.

2) Click on Task selection to display the list of tasks.

3) Select Programme transfer to open the Manage programme screen.
4) Click on **Select** to open the *Manage programme transfer – select new programme screen.*

5) Enter the name of the proposed new Award Programme. This is a dynamic list box. As you start to type a list will be displayed containing the nearest matches. Select the required programme from this list.
Enter the Year of programme that the student will transfer to, the date from when the transfer is to be effective and the reason for the transfer.

6) Enter the Year of programme that the student will transfer to, the date from when the transfer is to be effective and the reason for the transfer.

   a) The date the transfer becomes effective must fall within the student’s current academic year (1 August to 31 July) and be no earlier than the most recent date when the student was progressed.

   b) The destination year of programme must be the same as, or lower than, the student’s source year of programme. **Exception**: progression transfers (see below).

   c) Reasons for transfer:
      - Requested by student — student has asked to transfer.
      - Required by institution — student does not meet the required standard in a University examination to remain on the current programme of study
      - Progressed to another programme [used for Progression Transfers only]
      - Administrative programme change — Oxford has replaced the student’s source programme with one of a different name or code, e.g. replacing BA Modern History with BA History
      - Admitted to wrong programme — where student has been admitted to wrong programme (e.g. wrong languages for BA Modern Languages), programme transfer will put them on to correct programme.
      - Other — none of the reasons above is applicable

   **Note:** If **transfer - progressed to another programme** is selected additional fields will be displayed: Academic Year and College. This reason for transfer is used only for certain groups of programmes (currently, in the Social Sciences Division and Department for Continuing Education). The content of the source programme and time spent on it (usually one or more years) count towards the study requirements for the destination programme. The student cannot transfer until s/he has completed the source programme, though s/he does not receive a final award for the source.

7) When all mandatory fields have been completed click on **Next**, you will be returned to a confirmation screen.
8) Click on **Edit Details** if further changes are required.

9) Click on **Confirm** when all the details are correct.

10) A final screen will be displayed. This includes the name and master code of the administrator who processed the programme transfer.
11) Click on [Finish] to complete the process.

**Note:** Details of completed taught courses and supervisors will be transferred to the new programme. No further action need be taken unless there is a change in supervisor, college adviser, milestones, extensions, submissions and examination information, and/or expected completion date. eVision will automatically email the ARO for PGT students.
7 Recording a Suspension on a Student Record

Suspensions can be retrospective, current or future. If the suspension is retrospective and has already ended the GSA should process the suspension as normal but must notify DQT as the student may have already been progressed onto the wrong year of study and their record may need some manual amendments.

1) Follow the steps in **Section 4** above to retrieve the student record.

2) Click on **Task selection** to display the list of tasks.

3) Click on **Suspension** to open the Suspensions screen.
Any previous suspensions will be displayed under **Suspension history**.

### 7.1 Recording a Suspension of 1, 2 or 3 Terms.

#### 7.1.1 Post Graduate Taught Course

1) Hover over **Select suspension type** to display the list of options.

2) Select **One, Two or Three terms** to display further fields.
3) Complete the mandatory (yellow) fields as follows:
   a) **Number of terms**: this will default the value previously selected, but may be amended
   b) **Start Date**: this is usually the start date of term, but other dates may be entered
   c) **End Date**: this is usually the end date of the term, but other dates may be entered

   **Note**: A future suspension date may be recorded. The suspension will not become active until the start date is reached but any change to **Expected completion date** will take effect immediately.

   PGT students will normally be suspended for three terms.

   Assessment only suspensions should only be added and managed by the ARO. If a PGT student is being suspended for assessment only and will be returning in the third term to take examination(s) a suspension length of **3 terms** should be entered with a suspension end date of the end of the term in which they will take the examination. A reason of **Suspended: returning for assessment only** should be selected. The student will then hold a status of **Suspended – assessment only** for the three terms, including the term in which they are assessed.

   If a PGT student is being suspended and is due to return in the third term for teaching and to take examination(s) a suspension length of **2 terms** should be entered with a suspension end date of the end of the term prior to that in which they will take the examination. The reason selected should **not be** **Suspended: returning for assessment only**. The student will then hold a status of **Suspended** for the two terms of suspension.

d) **Reason for Absence**: select from the drop down menu
e) **New expected completion date:** Amend the expected completion date taking into account the length of suspension.

f) **Additional information:** Text field for adding notes.

4) Click on **Next** to proceed to a confirmation screen.

5) Click on **Edit Details** to return to the previous screen or **Save** to display the *Process New Suspension* screen, showing the amended Expected Completion date.
6) Click on [Return to suspensions] to close the Process new suspension screen and return to the Suspensions screen.

<table>
<thead>
<tr>
<th>Suspensions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
</tr>
<tr>
<td>Student Name</td>
</tr>
<tr>
<td>Student Number</td>
</tr>
<tr>
<td>Current Award Programme</td>
</tr>
<tr>
<td>Award Programme</td>
</tr>
<tr>
<td>TM_MC1 - MSc Mathematical and Computational Finance</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Suspension history</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terms</td>
</tr>
<tr>
<td>2</td>
</tr>
</tbody>
</table>

7) Click on [Return to Task Selection] to complete the process.

A system-generated email will be sent to the user confirming the details of the suspension, and a reminder that the Student Immigration team will need to be informed if the student holds a tier 4 student visa. For PGT students the email will be copied to the ARD who will amend assessment records as necessary. It is good practice for GSAs to inform the fees team although an overnight process will recalculate fees.

7.1.2 Post Graduate Research Course

1) Follow steps 8 1) - 3) above to retrieve the record and open the Suspensions screen.
2) Hover over **Select suspension type** to display the list of options.

3) Select **One, Two or Three terms** to display further fields.

![Process New Suspension](image)

**Fields marked with * are mandatory.**

**Student**

- **Student Name**: Louis Joe Baltic
- **Student Number**: 626353

**Current Award Programme**

- **Award Programme**: RD_MS1 - DPhil Mathematics
- **Specialism**: RD_MS1 - DPhil Mathematics
- **Start Date**: 09 October 2012
- **Maximum Submission Date**: 08 October 2017
- **Expected End Date**: 08 April 2018
- **Year of Programme**: 2

**Provide the following details in relation to the suspension application.**

- **Number of Terms to be Suspended**: 2
- **Suspension Start Date**
- **Suspension End Date**
- **Reason for Absence**
- **Current Expected Transfer Date**: 19 January 2015
- **New Expected Transfer Date**
- **Current Expected Confirmation Date**: 08 October 2016
- **New Expected Confirmation Date**
- **Current Expected Submission Date**: 08 October 2017
- **New Expected Submission Date**
- **Current Expected Completion Date**: 08 April 2018
- **New Expected Completion Date**
- **Additional Information (if required)**

4) Complete the mandatory (yellow) fields as follows:

   a) **Number of terms**: this will default the value previously selected, but may be amended
   b) **Start Date**: this is usually the start date of term, but other dates may be entered
c) **End Date**: this is usually the end date of the term, but other dates may be entered

Note: A future suspension date may be recorded. The suspension will not become active until the start date is reached but any changes to milestone deadlines, expected submission date or expected completion date will take effect immediately.

*d) **Reason for Absence**: select from the drop down menu.*

<table>
<thead>
<tr>
<th>Reason for Absence</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Expected Transfer Date</td>
<td>Suspended: academic disciplinary reasons (imposed)</td>
</tr>
<tr>
<td>New Expected Transfer Date</td>
<td>Suspended: financial reasons (imposed)</td>
</tr>
<tr>
<td></td>
<td>Suspended: financial reasons (voluntary)</td>
</tr>
<tr>
<td></td>
<td>Suspended: medical (imposed or voluntary)</td>
</tr>
<tr>
<td>Current Expected Confirmation Date</td>
<td>Suspended: non-acad disciplinary reasons (imposed)</td>
</tr>
<tr>
<td>New Expected Confirmation Date</td>
<td>Suspended: parental leave (voluntary)</td>
</tr>
<tr>
<td></td>
<td>Suspended: personal reasons (voluntary)</td>
</tr>
<tr>
<td>Current Expected Submission Date</td>
<td>Suspended: reason unspecified</td>
</tr>
<tr>
<td>New Expected Submission Date</td>
<td>Suspended: returning for assessment only</td>
</tr>
<tr>
<td></td>
<td>Suspended: studying elsewhere (voluntary)</td>
</tr>
<tr>
<td>Current Expected Completion Date</td>
<td>Suspended: taking up employment (voluntary)</td>
</tr>
<tr>
<td></td>
<td>08 April 2018</td>
</tr>
</tbody>
</table>

Note: the option **Suspended: returning for assessment only** is for PGT students only and its use is limited to the ARO only.

e) **New expected transfer date**: this will not be an option if the milestone has already been achieved.

f) **New expected confirmation date**: this will not be an option if the milestone has already been achieved.

g) **New expected submission date**: amend the date taking into account the length of the suspension.

h) **New expected completion date**: amend the expected completion date taking into account the length of suspension

i) **Additional information**: Text field for adding notes.

5) Click on [Next] to proceed to a confirmation screen.
6) Click on **Edit Details** to return to the previous screen or **Save** to display the Process New Suspension screen, showing the amended Expected Completion date.

7) Click on **Return to suspensions** to view the suspension details.
7.2 Recording a Suspension with no End Date

The *Open-ended* option may be used where the end date is not specified. For example if a student is suspended for disciplinary reasons.

**Note:** the example shown below is for a research student. The process is the same for taught students

1) Follow the steps in **Section 4** above to retrieve the student record.

2) Click on **Task selection** to display the list of tasks.

3) Click on **Suspension** to open the **Suspensions** screen.

**Note:** The system will generate an email to the user confirming details of the change and advising if they need to inform Student Immigration etc. It is good practice for GSAs to inform the fees team although an overnight process will recalculate fees.

**Note:** If the student is in the first year of an assessed programme (i.e. is required to sit a Qualifying Test) the GSA must inform the ARO so that the assessment records can be amended. The GSA is not required to make any amendment to the QT milestone.
4) Hover over **Select suspension type** to display the list of options.

5) Select **Open-ended** to open *Process new suspension screen.*
6) Complete the mandatory fields and add a note if required.

**Note:** The example shown is a research student record. As the length of the suspension is not known the user does not need to record the revised milestones and expected submission and completion dates when the open-ended suspension is applied to the record. The user will be prompted to amend these dates when they process the student’s return from a suspension.

7) Click on **Next** to proceed to a confirmation screen.
### Process New Suspension

#### Student

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Name</td>
<td>Mr Kai Leo Smith</td>
</tr>
<tr>
<td>Student Number</td>
<td>439962</td>
</tr>
</tbody>
</table>

#### Current Award Programme

<table>
<thead>
<tr>
<th>Award Programme</th>
<th>Specialism</th>
<th>Start Date</th>
<th>Maximum Submission Date</th>
<th>Expected End Date</th>
<th>Year of Programme</th>
</tr>
</thead>
</table>

#### The following information will be stored against the student’s record. Please check and confirm whether this is correct.

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspension Start Date</td>
<td>23 February 2015</td>
</tr>
<tr>
<td>Suspension End Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Number of Terms Covered</td>
<td>Open-ended</td>
</tr>
<tr>
<td>Reason for Suspension</td>
<td>Suspended: reason unspecified</td>
</tr>
<tr>
<td>New Expected Completion Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Additional Information</td>
<td>This student has not made contact with his Supervisor or college for 2 Terms.</td>
</tr>
<tr>
<td>New Expected Transfer Date</td>
<td>N/A</td>
</tr>
<tr>
<td>New Expected Confirmation Date</td>
<td>N/A</td>
</tr>
<tr>
<td>New Expected Submission Date</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Note:** The fields which have been circled in red are not displayed on a taught student’s suspension record.

8) Click on **Save** to complete the process.
9) Click on **Return to suspensions** to display the suspension history.

Note: the system will generate an email to the user confirming details of the change and advising if they need to inform Student Immigration etc. It is good practice for GSAs to inform the fees team although an overnight process will recalculate fees.
7.3 Requesting an Amendment to a Suspension

**Note:** Once a suspension has been applied to a record, administrators in departments will not be able to amend or remove a suspension. This will be done by the DQT. The process shown below shows how to log a request for an amendment. This will trigger an email to DQT who will then amend the record accordingly and inform you that it has been done.

1) Search for the required record, and select *Suspension Request* from the task list.

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Mr Kai Leo Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Number</td>
<td>439942</td>
</tr>
</tbody>
</table>

Current Award Programme

<table>
<thead>
<tr>
<th>Award Programme</th>
<th>Specialism</th>
<th>Start Date</th>
<th>Maximum Submission Date</th>
<th>Expected End Date</th>
<th>Year of Programme</th>
</tr>
</thead>
</table>

**Suspension history**

<table>
<thead>
<tr>
<th>Terms</th>
<th>Start Date</th>
<th>Expected End Date</th>
<th>Confirmed End Date</th>
<th>Reason for Absence</th>
<th>Notes</th>
<th>Award Programme</th>
<th>Cancelled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>23 Feb 2015</td>
<td>-</td>
<td>-</td>
<td>Suspended: reason unspecified</td>
<td>This student has not made contact with his Supervisor or college for 2 Terms.</td>
<td>RD_EP1</td>
<td>No</td>
</tr>
</tbody>
</table>

2) Hover over **Select suspension type** to display a menu.

3) Select **Amendment** to open the *Suspension amendment screen.*

**Note:** The menu item Amendment will only appear if there is an existing suspension. Amendments to previous suspension will need to be carried out by DQT in SITS:Vision.
4) Click on **Amend** to open the *Suspension amendment* screen.

**Suspension amendment**

Fields marked with * are mandatory.

**Student**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Name</td>
<td>Mr Kai Leo Smith</td>
</tr>
<tr>
<td>Student Number</td>
<td>439962</td>
</tr>
</tbody>
</table>

**Current Award Programme**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Programme</td>
<td>RD_EP1 - DPhil Experimental Psychology (Direct Entry)</td>
</tr>
<tr>
<td>Specialism</td>
<td>RD_EP1 - DPhil Experimental Psychology (Direct Entry)</td>
</tr>
<tr>
<td>Start Date</td>
<td>12 January 2014</td>
</tr>
<tr>
<td>Maximum Submission Date</td>
<td>10 July 2018</td>
</tr>
<tr>
<td>Expected End Date</td>
<td>31 July 2018</td>
</tr>
<tr>
<td>Year of Programme</td>
<td>2</td>
</tr>
</tbody>
</table>

**Suspension History**

<table>
<thead>
<tr>
<th>Terms</th>
<th>Start Date</th>
<th>Expected End Date</th>
<th>Confirmed End Date</th>
<th>Reason for Absence</th>
<th>Notes</th>
<th>Award Programme</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>23 Feb 2015</td>
<td>-</td>
<td>-</td>
<td>Suspended: reason unspecified</td>
<td>This student has not made contact with his Supervisor or college for 2 Terms.</td>
<td>RD_EP1</td>
<td>Amend</td>
</tr>
</tbody>
</table>

5) Select the type of amendment.
Note: The email should contain as much details as possible, including a reason for the request. For PGT students, the email must include the new expected end date. It is not necessary to include any student details, as this will automatically be included in the email.

6) Add details of the amendment request. This will be emailed to DQT/ARO and a confirmation screen displayed.

Note: If a suspension is cancelled the Suspension History will still display the details, but the status will be Cancelled.

7) Click on Return to manage suspensions to complete the process.

7.4 Returning from a Suspension

All students must confirm that they have returned at the end of the suspension and their student record must be updated to show the actual return date. If a student does not confirm their return their status will automatically be changed to Suspended – return overdue. They will retain this status until they either confirm their return or decide to withdraw.

Return from Suspension should not be used if a student is returning one or two terms earlier than expected as the student’s expected end date etc. will be incorrect and fees will not be recalculated correctly. These should be processed as an amendment request – DQT will then ensure that all of the key dates on the student’s record are corrected.
1) Select Return from the list to open the *Return from suspension* screen.

**Note:** If a suspension exists with no confirmed end date, a new suspension cannot be processed. The GSA will first need to process the suspension with an “return” date, and then they will be able to process the new suspension.
2) Enter the actual return date and any additional notes if required.

**Note:** If the student has a status of **Suspended – return overdue** the **Confirmed return date** must be today or in the past. If the student is not returning until a future date then they should apply for an additional suspension. If a future return date is entered their record will not be picked up by the batch process and their status will remain as **Suspended – return overdue**.

The **Confirmed return date** entered is expected to be that of the **Expected end date**. If the **Expected return date** is later than the **confirmed return date** then the student’s status will still be changed to **Enrolled** when the **Expected end date** is reached. This is because the suspension has officially ended. If there is a need for the student to remain suspended then a new suspension application must be processed.

3) Click on **Save** to confirm the return.

### Return from Suspension

**Student**
- **Student Name:** Prof Freya Elizabeth Smith
- **Student Number:** 569923

**Current Award Programme**
- **Award Programme:** RD_EH9P1 - DPhil Evidence Based Health Care
- **Specialism:** RD_EH9P1 - DPhil Evidence Based Health Care
- **Start Date:** 19 January 2014
- **Maximum Submission Date:** 09 February 2021
- **Expected End Date:** 10 August 2022
- **Year of Programme:** 2

The student’s return date has been recorded. You will receive an email confirming the details.

[Return to Suspensions]

4) Click on **Return to suspensions** to return to the **Suspensions** screen. The suspension history will be displayed showing the actual return date.

### Suspensions

**Student**
- **Student Name:** Prof Freya Elizabeth Smith
- **Student Number:** 569923

**Current Award Programme**
- **Award Programme:** RD_EH9P1 - DPhil Evidence Based Health Care
- **Specialism:** RD_EH9P1 - DPhil Evidence Based Health Care
- **Start Date:** 19 January 2014
- **Maximum Submission Date:** 09 February 2021
- **Expected End Date:** 10 August 2022
- **Year of Programme:** 2

**Suspension history**
- **Date:** 5 Jan 2015
- **Expected End Date:** 3 Aug 2015
- **Confirmed End Date:** 23 Feb 2015
- **Reason for Absence:** Suspended: personal reasons (voluntary)

[Return to Task Selection]  [Select Suspension Type]
Note: If the return date is in the past the student’s status will change back to Enrolled immediately. If it is a future date, e.g. suspension ends next week and student confirms they are returning, then they remain Suspended until they return. Their status then changes to Enrolled automatically when the suspension ends.

Note: The system will generate an email to the user confirming details of the changes.

7.5 Recording Consecutive Suspensions

When recording a consecutive suspension, you must first enter a confirmed end date (i.e. process a return from suspension) for the original suspension before you can process a new suspension (see 8.5.1). The start date of the new suspension must be the day after the confirmed end date of the existing suspension.

Note: If the existing suspension has not been processed as a ‘return’ i.e. does not have a confirmed end date, it will not be possible to record another suspension. The only options available will be Return or Amendment.

7.5.1 Adding a Confirmed End Date to a Suspension

1) Follow the steps in Section 3 above to retrieve the student record.

2) Click on Task selection to display the list of tasks.

3) Click on Suspension to open the Suspensions screen.

4) Select Return from the list to open the Return from suspension screen.
5) Enter the actual return date and any additional notes if required. In this scenario the Confirmed return date should be the same as the Expected End date of the suspension.

6) Click on **Save** to confirm the return.

7) Click on **Return to suspensions** to return to the Suspensions screen. The suspension history will be displayed showing the actual return date.
Note: An email will be generated automatically but this does not need to be forwarded to other departments.

8) Apply a second suspension, with a start day the day after the end date of the previous suspension.

Note: An email will be generated automatically to confirm details of the new suspension. This email does need to be forwarded to other departments if required.
8  Withdrawals

1) Follow the steps in Section 3 above to retrieve the student record.

2) Click on [Task selection] to display the list of tasks.

3) Select [Withdrawal] to open the Process withdrawal screen.

4) Enter the appropriate date.

5) Select the reason for the withdrawal.
6) Click on Submit to open the Confirmation of answers screen.
7) Select the relevant option.

- Withdrawn - Failed to Register should be selected if a student withdraws prior to registration. The date of withdrawal will be recorded as the course start date, irrespective of the date entered in eVision.
- Withdrawn – Lapsed should be used if a student has lapsed.
- Withdrawn – Death. If a student is deceased, it will not be possible to retrieve their record using the Student Records functionality once the withdrawal has been processed.
- If a taught student fails their final examination this should not be processed as a withdrawal in eVision. These cases will be processed by the ARO/DQT and the student will be given a status of Completed unsuccessful.
8) Click on **Save** to complete the process and display the confirmation screen.

**Note:** When a withdrawal is processed the user will be sent an automatic confirmation email. This email will include confirmation of which other departments may need to be notified, e.g. Student Immigration or Degree Ceremonies. There is no need to inform the Fees Team as an overnight batch process will recalculate the fees automatically.

There are 2 email templates: 1 for recording the death of a student, and one for all other types of withdrawal.

If the withdrawal process fails to complete successfully the system will display an on-screen message and will generate an email to the Support Centre for investigation. This email will be copied to the user who processed the request.
9  Viewing details of a Postgraduate Research Student Record

1) Follow the steps in Section 3 above to retrieve the student record.

2) Click on [Display all details] to display the details.
3) Click on **Display title** to hide the information.

**Note:** Previous versions of a Thesis Title cannot be viewed in eVision. However, all previous Thesis Titles are held in SITS:Vision, and the DQT team can obtain this information for GSAs if required.

The **Current minimum submission date** is not being used so this field will always be blank.
10  Antedated admission notes

A Postgraduate research student may be accepted onto a course starting in year beyond year one if they have already completed previous years of their course at another institution. This is usually because their supervisor has moved to Oxford, and the student wishes to transfer to Oxford along with their supervisor. This referred to as an ante-dated admission, and should be recorded on the student’s record.

10.1  Adding an antedated admission note

4) Follow the steps in Section 3 above to retrieve the student record.

5) Hover over to display the list of tasks.

6) Click on .

7) Enter the details in the Record antedated admission details field.

8) Click on and to close.
11  Managing Changes to Specialism and Award Aim

DPhil students who are enrolled on a doctoral training programme (DTC, CDT or DTP) or DPhil Medieval and Modern Languages will complete one year, and then change to another specialism. Every DPhil programme within the doctoral training centre will have been set up with the options available for that programme only, so it will not be possible to select an incorrect option. When changing the specialism only courses set up for this programme will be displayed.

Note: This functionality is also used by the ARO to process subject changes for Visiting Students and school direct partnerships for PGCE students.

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over Task selection to display the list of tasks.

3) Click on Specialism / Award Aim.
11.1 Transferring a Student onto a Different Specialism

1) Click on the drop down list to reveal all the options available to that programme.
2) Select the new Specialism.
3) Enter the Effective date of change.
4) Click on **Save**.
5) Click on **Return to select task page** to view the changes.

**Note:** The Effective date should always be today or in the past. If a future date is entered, the following error will be displayed on saving the change.

### 11.2 View the Specialism and Award Aim History

1) In the *Manager Specialism / Award Aim* screen click on [Display all route history records](#).

<table>
<thead>
<tr>
<th>Award</th>
<th>Route</th>
<th>Begin Date</th>
<th>Updated Date</th>
<th>Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctor of Philosophy</td>
<td>Interdisciplinary Biosciences (BBSRC DTP) - Plant Sciences</td>
<td>24 February 2015</td>
<td>24 February 2015</td>
<td>Martin Robert Eley</td>
</tr>
<tr>
<td>Doctor of Philosophy</td>
<td>Interdisciplinary Biosciences (BBSRC DTP) - Zoology</td>
<td>09 October 2012</td>
<td>21 December 2014</td>
<td></td>
</tr>
</tbody>
</table>

2) Click on [Hide route history records](#) to hide the list.
12 Manage Supervisors (Research and Taught courses)

**Note:** It is preferable that the GSA already has the supervisor’s SSO, before proceeding with these steps. It is possible to search by name, but the SSO will verify that the correct record has been retrieved.

**Note:** A Supervisor should be assigned if that person will require a supervision report via GSS. Note that Supervisors are relevant for all PGR and some PGT students.

A Thesis Supervisor should be assigned for PGT only. This person will not get a supervision report but will pass any comments to the main supervisor (recorded as “Supervisor”) who will complete the report.

12.1 Attaching a Research or Taught Supervisor to a Record

**Note:** To assign multiple students to one supervisor with 100% weighting follow the steps in Section 12.7 Retrieve Supervisor, Add Students.

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over **Task selection** to display the list of tasks.

3) Select **Supervisors** to open the Manage supervisors screen.
4) Click on **Edit supervisor information**.

5) Either enter the SSO of the supervisor or type part of their name (may be surname), select the supervisor from the list and click on **Add**.

   **Note:** This field is a dynamic list box. As you type a list of possible matches will be displayed.

6) Click on **Update supervisor weightings**.
7) Enter **100** into the *Percentage* field.

8) Click on **Next** and the supervisor details will be displayed.

![Manage Supervisors Table]

### 12.2 Attaching a Second Supervisor to a Record

9) Open the *Manage supervisors* screen by selecting Supervisors from the Task Selection screen and select **Edit Supervisor Information**.

10) Enter an additional Supervisor and select **Add**.

11) Click on **Update supervisor weightings**

12) Enter **50** into the *Percentage* field for each Supervisor (or whatever percentage distributions apply, as long as the total is **100**).

13) Click on **Next** and the supervisor details will be displayed.
12.3 Removing a Supervisor from a Record

When a supervisor is no longer supervising a student, the GSA should remove them from the list of active supervisors shown in eVision. This will automatically end-date the supervisor record in SITS:Vision.

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over Task selection to display the list of tasks.

3) Select Supervisors to open the Manage supervisors screen.

4) Click on Edit Supervisor Information.
5) Click on **Remove** adjacent to the Supervisor to be removed.

<table>
<thead>
<tr>
<th>Existing Supervisor Details</th>
<th>SSO Username</th>
<th>Supervisor Weighting (%)</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Aimee Madison Montville</td>
<td>CONT7203</td>
<td>50.0</td>
<td>Remove</td>
</tr>
<tr>
<td>Dr. Scarlett Isabelle Berlin</td>
<td>PHP0560</td>
<td>50.0</td>
<td>Remove</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

6) A confirmation screen will be displayed.

7) Click on **Next** to return to the **Supervisor Management** screen.

8) Click on **Update supervisor weightings** and amend the supervisor weighting to ensure the total adds up to **100%**.

9) Click on **Next** to return to the **Supervisor Management** screen.

12.4 **Adding a New Taught (Thesis) Supervisor**

Students on an MPhil, MSc or MSt may require a Thesis Supervisor and this is carried out in the same way as adding a Supervisor to a student record.

1) Follow the steps in **Section 3** above to retrieve the student record.

2) Hover over **Task selection** to display the list of tasks.

3) Select **Supervisors** to open the **Manage supervisors** screen.
4) Click on "Edit Supervisor Information".

5) Add the supervisor’s name or SSO, and select the supervisor from the list.

6) Select the course from the list of values in the Type field.

7) Click on "Add".
8) To calculate the percentage:
   a) Click on **Update thesis supervisor weightings**.

9) Enter a percentage. In this case, it would be 100%, but where there is more than one supervisor, the percentages should be divided between all supervisors or whatever percentage distributions apply, as long as the total is **100**.

10) Click on **Next** to return to the Manage supervisors screen.

### 12.5 Removing a Thesis Supervisor

The Thesis Supervisor may be removed from the student record in eVision, but although this will automatically end-date the supervisor record in SITS:Vision it will not remove the supervisor from the student record. See section 13.6 on viewing supervisor history in eVision.

**Note:** If a supervisor has been attached to a student record in error and needs to be removed completely in SITS:Vision the GSA should email the DQT team requesting the removal.

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over **Task selection** to display the list of tasks.

3) Select **Supervisors** to open the Manage supervisors screen.
4) Click on **Edit thesis supervisor information**

**Existing thesis supervisor details**

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>SSO Username</th>
<th>Supervisor Weighting (%)</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSc Thesis Supervisor</td>
<td>Ms Gracie Lily Sprague</td>
<td>STAT0144</td>
<td>100.0</td>
<td>Remove</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td>100.0</td>
</tr>
</tbody>
</table>

Please enter a name to add a new supervisor: [Name]  Type: [Type]  Add

**Update thesis supervisor weightings**

5) Click on **Remove**. A confirmation screen will be displayed.

6) Click on **Next** to continue.
7) Add another supervisor or click on \textbf{Student Records} to return to the main menu.

12.6 Viewing Supervisor History

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over \textbf{Task selection} to display the list of tasks.

3) Select \textbf{Supervisors} to open the \textit{Manage supervisors} screen.

4) Click on \textbf{Display ended Supervisor} and the previous supervisors will be displayed.
5) Click on Display Supervisor audit records to display a snapshot of all changes to supervision arrangements.

Click on [Return to Task Selection] to close.

12.7 Retrieve Supervisor, Add Students

The Retrieve Supervisor, Add Students functionality can be used to add one or more students to one supervisor with 100% weighting.

**Note:** To amend the supervisor weighting to a percentage other than 100%, then use the ‘Student Record - Manage Supervisors’ method; see Section 12.

1) Select [Retrieve supervisor, add students] from Manage Student Records.
2) Search for the Supervisor you wish to assign students to by specifying one or more of the search parameters (e.g. Surname) and clicking [Search].

3) The results of the search will then be displayed.
4) Choose [Select] next to the Supervisor you wish to add Students to.

5) Then run a search for the students you wish to assign to the supervisor, using the available parameters.

6) A list of Students matching the search criteria is returned.

Note: For more information on how to work with a dynamic list, refer to Section 17 Work with eVision Lists.
7) Use the **Add** button to assign the Student to the Supervisor individually or use the **Add all students to this Supervisor where the relationship does not yet exist** button to add all students returned in the search to the supervisor where the relationship does not yet exist.

**Important:** **Add all students to this Supervisor where the relationship does not yet exist** will assign all students returned in the search to this supervisor, not just those on page 1. For more information on how to work with a dynamic list, refer to Section 17 Work with eVision Lists.

![Image of Add button with warning message]

**Note:** When using the **Add all students to this Supervisor where the relationship does not yet exist** button, you will need to confirm you wish to continue.

![Image of confirmation message]

The final two columns will then be updated.

8) The final two columns will be updated and highlighted in green to confirm the student has been added to the supervisor when added individually.
9) You can then choose another student to add to this supervisor (if you were adding students individually) or use the buttons at the bottom of the page to Search for more students to add to this Supervisor or Search for a new Supervisor.
13 Managing Milestones

Postgraduate research students must achieve predefined milestones to enable the University to monitor their progress. Milestones dates are recorded during the admissions process and are transferred to the student record as part of the Applicant Transfer (ATR) process. These are:

- Transfer of Status
- Confirmation of Status

Some courses also require an additional milestone, which must be achieved first, before moving on to Transfer and Confirmation of Status:

- Qualifying tests.

13.1 Viewing Milestones

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over to display the list of tasks.

3) Select to open the Manage Milestones screen.
Note: It is possible to record activities prior to the milestone being completed using the **Edit** option and entering the details in the Notes field. This could include admin information, work sent to assessors etc. This is optional.

### 13.1.1 Marking a Milestone as Achieved

1) Click on [Edit] adjacent to the milestone to be updated.

2) Click on the drop down menu and select **Edit Status**
3) Click on Next.

4) Click on the drop down menu and select Pass.

5) Enter the date the milestone was approved in the Status changed date field. They can also enter a note if required.

6) Enter relevant text in the Notes field.

7) Click on Next.

Note: The Status changed date field will default to the current date, but can be backdated to the date the milestone was approved.
8) Click in the check box to confirm the outcome.

9) Click on Next.

10) Click on Return to manage milestones. The milestone will have moved from the Pending milestones section to the Milestone outcomes section.

11) Click on Return to select task page to return to Manage Student Record.

### 13.1.2 Marking a Milestone as Failed

If a student fails to achieve a milestone they may be offered a second attempt. If this is the case, when the GSA marks the existing milestone, a new milestone is automatically created ready for the second attempt.

**Note:** If a student fails to achieve a milestone at the second attempt, and they wish to continue, they must apply to Education Committee for authorisation to be offered a third attempt. If approved, the milestone must be added manually by the DQT team.
1) Click on **Edit** adjacent to the milestone to be updated.

2) Click on the drop down menu and select **Edit Status**

3) Click on **Next**

4) Click on the drop down menu and select **Refer**

5) Click on **Next** to display the confirmation screen.
6) If the information is correct, tick in the Milestone Outcome Confirmed? checkbox and then click on Next to display the milestones.

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Prof Freya Elizabeth Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Number</td>
<td>569923</td>
</tr>
</tbody>
</table>

**Milestone Outcomes**

<table>
<thead>
<tr>
<th>Type</th>
<th>Deadline</th>
<th>Status</th>
<th>Completed Date</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer</td>
<td>11 November 2017</td>
<td>Transfer - Refer</td>
<td>24 February 2015</td>
<td></td>
</tr>
</tbody>
</table>

**Pending Milestones**

<table>
<thead>
<tr>
<th>Type</th>
<th>Deadline</th>
<th>Status</th>
<th>Status Changed Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirmation</td>
<td>10 February 2020</td>
<td>Not yet applied</td>
<td>11 February 2014</td>
<td></td>
</tr>
<tr>
<td><strong>Transfer 2</strong></td>
<td>11 November 2017</td>
<td>Not yet applied</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7) Click on Return to manage milestones. The milestone will have moved from the Pending milestones section to the Milestone outcomes section and a new milestone will have been created with a type of Transfer 2.

**Milestone Outcomes**

<table>
<thead>
<tr>
<th>Type</th>
<th>Deadline</th>
<th>Status</th>
<th>Completed Date</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer</td>
<td>17 November 2016</td>
<td>Transfer - Refer</td>
<td>24 February 2015</td>
<td></td>
</tr>
</tbody>
</table>

8) Click on Return to select task page to return to Manage Student Record.

**Note:** The milestone will only move from the Pending Milestones section to the Milestone outcomes section if the completed date is the current date or in the past.

**Note:** If a Qualifying Test milestone needs to be added or removed (e.g. if a student has transferred to a programme which does/doesn’t have a QT) then the GSA should ask DQT to delete or add the milestone. QT milestone statuses are updated by the GSA but the ARO will manage any examination elements if relevant.
13.1.3 Marking a Milestone as Waived

1) Follow steps 1 – 3 above.

2) Select Transfer – Waived from the menu

3) Add a reason in the Notes field.

4) Click on Next to display the confirmations screen.

5) If the details are correct, click in the Milestone Outcome Confirmed? checkbox and click on Next to display the details.

6) Click on Return to Manage Milestones to complete the process.

13.1.4 Amending a Milestone Deadline Date

The due date of the milestone may be amended if the student has successfully applied to defer a transfer or confirmation milestone.
1) Click on **Edit** adjacent to the milestone to be updated.

2) Select **Amend deadline** from the drop down list.

3) Click on **Next**.

4) Select the relevant term from the drop down list.

**Note**: The actual date will be calculated as 3 days before the start date of the term following the term selected. For example, if 2020/21 Michaelmas Term is selected the actual date will be 3 days before the start of Trinity Term 2020.

Click on **Return to manage milestones**. The recalculated date will be displayed.
1) Click on "Return to select task page" to return to Manage Student Record.
14 Managing Thesis Titles

The proposed Thesis Title will have been recorded on the student’s record during the admissions phase.

14.1 Amending and Finalising a Thesis Title

When a student completes a GSO.6, and if the thesis title has been approved, the GSA will record the title on the student’s record.

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over to display the list of tasks.

3) Select to open the Manage thesis title screen.

Note: If a thesis title has been recorded on the record, it will be displayed in the Manage student record screen.
4) Enter the details of the new thesis title, or an amended version of the existing thesis title.

5) If the title has been finalised, tick the Thesis title finalised? check box.

6) Click on Save to save the changes. A confirmation screen will be displayed.

7) Click on Return to select task page.
8) If no further changes are required, click on **Return to Student Records**

**Note:** The Thesis submission date will be updated by the Research Degrees Office when a student submits their thesis.

### 14.2 Amending a Thesis Title after the Title has been Finalised.

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over **Task selection** to display the list of tasks.

3) Select **Thesis title** to open the Manage thesis title screen.
4) Click on [Reset] to reinstate the check box if necessary – see note below.

**Note:** It is not necessary to click [Reset] if the original title was finalised and the new title is also finalised. It is **only** necessary to click [Reset] if the original title is not finalised or the new title is not finalised.

5) Enter the amended thesis title.

6) Click on the check box.

7) Click on [Save] to save the changes. A confirmation screen will be displayed.

8) Click on [Return to select task page].

9) If no further changes are required, click on [Return to Student Records].

**Note:** When amending a thesis title that has been finalised, GSAs should contact the Research Degrees team to ensure the thesis title on eVision and the thesis title on the thesis are the same.

**Note:** If a title is amended after the student has been given leave to supplicate this can be done in eVision but the GSA must inform the Degree Ceremonies team as the change will not feed through to the awards record. A warning message will be displayed in eVision as shown below:
15  Extensions – PGR Records

A student may apply for an extension to their maximum submission date, and if approved, the GSA will record this on the student’s record.

Note: PGT extensions cannot be processed using eVision, but instead should be sent to the DQT. If done in eVision the system will automatically add 6 months to their expected end date which would be incorrect.

1)  Follow the steps in Section 3 above to retrieve the student record.

2)  Hover over to display the list of tasks.

3)  Select to open the Manage extensions screen.

4)  Select the type of Extension from the drop down list.

5)  Select the Final Term from the drop down list.
Note: The Final Term is the term in which the submission should take place. Students are expected to submit at the end of their final term.

Note: If the Final Term no longer appears in the dropdown list then choose the earliest term and inform the DQT of the extension and the correct Final Term.

6) Add a note in the Extension Note field if required (optional).

7) Click on Next. The recalculated Maximum submission date, Expected end date and New expected submissions dates will be displayed.
**Note:** Maximum submission date, expected end date and new expected submissions dates will be recalculated automatically and displayed in the Manage Extension screen.

8) Click on **Return to select task page**.

9) If no further changes are required, click on **Return to Student Records**.
16 Submissions and Examinations

The maximum submission date is automatically calculated according to the start date of the programme. However, the GSA may need to amend the maximum submission date at some time during the student’s career. For example, if a student has to resubmit their thesis or if a student suspends, and subsequently the suspension is cancelled, the DQT will record the cancellation but the GSA will need to amend the maximum submission date. The expected end date will automatically be recalculated to 6 months following the new maximum submission date.

16.1 Amending the Maximum Submission Date

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over to display the list of tasks.

3) Click on to display the list of tasks.

3) Click on Submission date
4) Select the required term.

(Note: the student is expected to submit at the end of the term selected.)

5) Click on Next to display the confirmation screen.

6) If the revised date is correct, click on Next to complete the process.
16.2 Recording an Expected Submission Date

When a student applies for Appointment of Examiners (GSO.3/GSO.27) they must also supply the date when they intend to submit their thesis. This may be earlier than the maximum submission date, and this date should be entered onto the student’s record.

1) Follow the steps in Section 3 above to retrieve the student record.

2) Hover over to display the list of tasks.
3) Click on **Submissions and examinations**.

4) Click on **Amend**.

5) Enter the expected submission date.

6) Click on **Save** to display a confirmation screen.
7) Click on **Next** to return to the *Manage Submissions and Examinations* screen.

8) Click on **Return to Task Selection**.

### 16.3 Request for Time-Specific Viva

Students may request an time-specific Viva. If approved, this can be recorded on the student’s record by the GSA if the thesis has already been submitted. If the thesis has not yet been submitted this must be recorded by the Research Degrees Team using SITS:Vision

1) Follow the steps in [Section 3](#) above to retrieve the student record.

2) Hover over **Task selection** to display the list of tasks.

3) Click on **Submissions and examinations**.
4) Click on **Amend** in the *Examinations details* section.

5) Enter the date by when the Viva is to be held.

![Examination Details]

6) Click on **Save** to return to the *Manage Examination* screen.

7) Click on **Back** to return to the *Manage Submissions and Examinations*. The time-specific viva date will be displayed.

8) Click on **Return to Task Selection** to return to the *Manage Student Record* screen.

**Note:** If the request for a time-specific viva has been approved at the time of submission, the Research Degrees Team will enter the date in SITS:Vision when they record the date of submission. GSAs will only have access to enter the date if the request is approved after submission.

### 16.4 Minor Corrections

When a GSA receives the approved report of the Examiners, they should update the student’s record *only* if the outcome is *Minor Corrections*.

1) Follow the steps in **Section 3** above to retrieve the student record.

2) Hover over **Task selection** to display the list of tasks.
3) Click on **Submissions and examinations**.

4) Click on ***Amend*** in the **Examinations details** section.

5) Select **Exam – Minor Corrections** in the **Examination outcome** drop down list.
6) Complete the *Date outcome agreed* and *Minor corrections deadline* dates.

7) Click on **Save** to return to the *Manage Examination* screen.

8) Click on **Back** to return to the *Manage Submissions and Examinations*. The minor corrections due date will be displayed.

9) Click on **Return to Task Selection** to return to the *Manage Student Record* screen.
17 Work with eVision Lists

17.1 Navigate, Search & Export eVision Lists

To change the number of records displayed on screen using the Show entries drop down list:

![Show entries drop down list]

To move between screen use the Previous and Next buttons (bottom right of the list).

![Previous and Next buttons]

To change the order of the list, click on the title you wish to sort by:

![Sorted list]

To refine the list you can use the dynamic Search box to reduce the number of entries in your view:

![Search box]

The list can also be copied, exported to MS Excel or printed using the following buttons:

![Copy, Excel, Print buttons]
18 Student Records Reports

Note: For further information on Dataviews please refer to the Dataviews Manual on the eVision Training Documentation web page.

A list of Student Records reports can be found under the Student Records role.

To see a more detailed description of the report click the icon.
Note: See Section 12.7 for more detailed guidance on how to Retrieve Supervisor, Add Students.
19  Further Help & Information

19.1  Student Systems Support Centre (SSSC)

The Student Systems Support Centre (SSSC) provides guidance and assistance with the use of the University's student systems and associated business processes. Guidance and further information about eVision can be found on the Student Systems Support Centre Website:

http://www.admin.ox.ac.uk/studentsystems/

19.2  Education IT Programme (Edu IT)

The Education IT Programme (Edu IT) is responsible for delivering the development of Oxford’s IT-based systems used by academic and administrative staff, applicants and students in support of many aspects of teaching and learning. Further information about the programme can be found at:

http://projects.it.ox.ac.uk/education-it-programme

Data Protection

You should familiarise yourself with the University’s policy on Data Protection by reading the information available at:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/

Further information about the Data Protection Act can be obtained from the website of the University’s Data Protection Officer:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/policy/

All university members should adhere to the following regulations when using IT facilities:

http://www.admin.ox.ac.uk/statutes/regulations/196-052.shtml

19.3  Document Information

This document is subject to change, please ensure you have the latest version.

<table>
<thead>
<tr>
<th>Revision Date</th>
<th>Version</th>
<th>Summary of Changes</th>
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<td>1/Dec/2014</td>
<td>0.3</td>
<td>Updates applied as requested by Esther Thomas</td>
<td>AEH</td>
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<tr>
<td>2/Dec/2014</td>
<td>0.4</td>
<td>Updates applied as requested by Deb Sanders.</td>
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<td>1.0</td>
<td>Update login screen and publish to major version.</td>
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<td>1.1</td>
<td>Updated Screenshots as TRAIN2 updated with Live</td>
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<tr>
<td>17/Jun/17</td>
<td>3.5</td>
<td>Change to milestone deadline names (Transfer and Confirmation)</td>
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