# HDR Milestones eForm Guide – Professional Staff

Introduction

HDR Milestones are now available as eForms which contain form logic, automatic workflow, full integration with University enterprise systems, and facilitate reporting. The eForms contain minimal changes to the questions and format of the paper forms, other than to reflect the new Research Awards Rule (RAR) 2015, and the framework of policies, procedures and guidelines which support this Rule

Flow of eForm
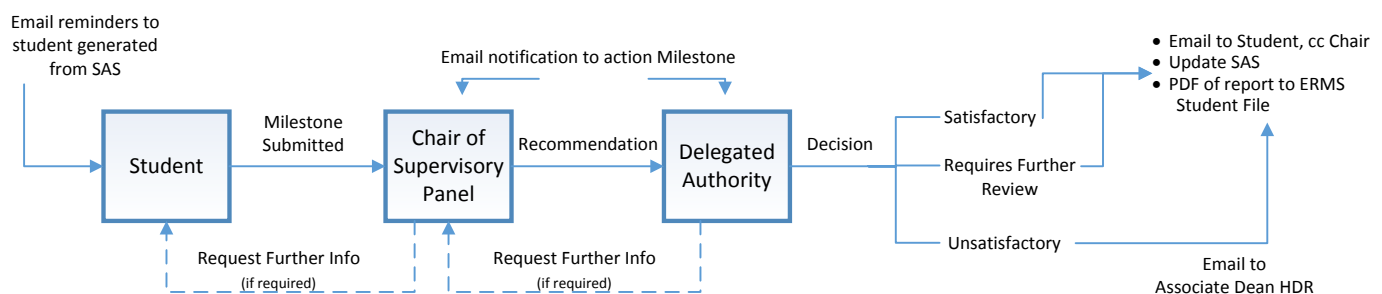
Data Quality

For the eForms to work as designed, the following data elements must be correctly maintained in the Student Administration System by College professional staff:

- Chair of Panel Details
- Delegate Authority Approver Configuration
- The students College and Research Academic Org Unit

College Directories

The Student eForms require workflow to be managed via Active Directory (AD) Groups which are managed within the University's IT User Directory. Roles for approvers are configured within Student Administration System (SAS) under:

 Records and Enrolment -> Career and Program Information - > Forms Approval Configuration.

 The HDR Milestone form requires the following roles to be configured:

- HDR Milestone Delegated Authority – for approval of form submissions.
- Associate Dean - notified only when outcome of milestone is 'Unsatisfactory' and when DA decision differs from Panel recommendation.

The Chair of Panel, Supervisors and Associate Supervisors are configured within SAS under:

Research Students -> Candidature -> Student Advisors and recorded against the individual student.

Tracking and Reporting

You can track the progress of Milestone eForms throughout the approval process using Insight reporting. The tracking reports will be accessible through ANU Insight.

Email reminders and escalations

When action is required on a form, an initial email is sent to the required person (refer diagram). Email reminders are sent when no action has been taken to complete the form.

a) To the Student prior to submission

(emails are generated from the Student System and <u>cannot</u> be cc'd to the Chair)

Email type	Who it goes to	When it's sent (calendar days)	Subject Line
Please complete your milestone	Student	28 days before due date	For Action: Milestone due for submission
Please complete your milestone	Student	14 days before due date	For Action: Reminder Milestone due for submission
Your Milestone is now overdue. Completion of this milestone is compulsory for continuing your candidature.	Student	3 days and 24 days AFTER due date	For Action: Overdue Milestone
Your Milestone is now overdue. Non completion of this Milestone may provide grounds for terminating your enrolment in accordance with RAR 2015 sl48 (1)	Student	42 days AFTER due date	For Action: Overdue Milestone – urgent action required
Hereafter, administrators will follow up outstanding Milestones utilising reporting facility			

b) To the Chair of Panel and Delegated Authority

Email type - Escalations	Who it goes to	When it's sent (calendar days)	Subject Line
Review and approve reminder	Chair of Panel	Not actioned within 21 days	For action: Reminder (milestone name) – (student name and ID) – (program ID and name)
Review and approve reminder	Chair of Panel cc DA	Not actioned within 35 days	For action: Overdue for review (milestone name) – (student name and ID) – (program ID and name)
Review and approve reminder	DA	Not actioned within 14 days	For action: Reminder (milestone name) – (student name and ID) – (program ID and name)
Review and approve reminder	DA cc AD HDR	Not actioned within 28 days	For action: Overdue for review (milestone name) – (student name and ID) – (program ID and name)
Hereafter, administrators will follow up outstanding Milestones utilising reporting facility			

Support

If you need assistance please contact your College/School HDR Administrator or go to Staff administration eForms support https://services.anu.edu.au/education-support/student-administration/eforms-staff-support. For matters relating to College directories, see your local IT person. For policy matters, see your Associate Dean HDR. For eForm malfunction, contact SBS.