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INTRODUCTION

HDR EFORMS IN RESEARCH MASTER

HDR EFORMS are available in the Research Information Management System (IRIS). The EFORMS are run by and housed within the Research Master system.

13 HDR EFORMS have been developed in this system:

1. Change of Program (COP)
2. Change of Supervisor (SUP)
3. Leave of Absence and Suspension of Scholarship LOA/SAO (LOA)
4. Extension of Candidature (EXTN)
5. Transfer (between departments or faculties) (TRF)
6. Living Allowance Claim form for new HDR candidates (LAC - new)
7. Living Allowance Claim form for recommencing HDR candidates (LAC-recommencing)
8. Living Allowance Claim form for RTP students (LAC RTP)
9. Offsite Research (OSR)
10. Change to Permanent Residency (PR)
11. Confirmation of scholarship status letter (SCHOL LETTER)
12. Confirmation of enrolment status for travel purposes letter (TRAVEL LETTER)
13. View current EFSTL and scholarship details (CHECK ENR)

HOW TO ACCESS HDR/RTP EFORMS

All HDR EFORMS can be accessed from two webpages:

- HDR forms webpage, and
- Research Office webpages in the section Research Information Systems

The login for each user is their OneID user name and password.

If a candidate has a student and a staff ID, they should use their student OneID to log in.

Once in the system, find the HDR tab and select HDR EFORMS or Manage HDR EFORMS.

If you select HDR EFORMS, then All HDR Forms a list of forms available for creation (student users) or processing (academics or administrators) should display in the centre of the screen. If no forms are visible, then from the HDR EFORMS tab select Manage EFORMS, and then click the search button.

This should display all forms that are awaiting processing.

HOW THE EFORMS WORK

Some student information is pre-populated in each EFORM. Other information is added by the student, and other persons who interact with or perform actions in the EFORM.

Once submitted, the EFORM is directed to the next person in the workflow. The person receives an email asking them to log into IRIS (Research Master EFORMS portal) and review the form. Once the EFORM outcome is ready, the candidate, their supervisor and the faculty HDR Manager will receive a notification to log into the form to view the outcome.
SIGNIFICANT CHANGES

1. The HDR forms page has links to subpages which house the guidelines for each form, links to policies, FAQs and the link to the EFORMS login page.
2. Documents can be uploaded into the EFORM.
3. Current consumed study load (EFTSL as at current date) and scholarship information is displayed in a report accessible from the Additional Information page in the Candidate section of an EFORM.
4. Faculty HDR Managers have the option of forwarding straightforward requests directly to the HDRO for processing. The FHDRM will forward more complex cases to the ADHR for review.
5. There are some small workflow changes in the SUP and TRF forms.
6. Templates have been developed to assist in standardising processes as well as ensuring procedural compliance and quality of information presented by students and supervisors for approval. These are attached in the appendix for your reference. The templates can be accessed from links within the forms as well as guideline pages in the HDRO website.
7. SuperUser is a function given to the HDR Management Coordinator (Data/Systems). The SuperUser can move the EFORM to different states in the workflow when the form “gets stuck” at some part of the process. Please contact the HDR Management Coordinator (Data/Systems) Mr Richard.Lee@mq.edu.au or Mrs Felicia.Wong@mq.edu.au for assistance.
8. Faculty HDR Managers must inform the HDRO Management Coordinator (Data and Systems) of any changes of nominated approvers or persons (Departmental HDR Directors/Coordinators or HODs, ADHDRs, administrative staff who will be accessing the EFORMS.
9. Faculty HDR Managers have “edit” access to all form sections in the faculty part of the each form workflow. This is so that the FHDRM may assist students and academics with filling out and submitting the forms, and training staff.
10. The candidate, Principal Supervisor and FHDRM are notified by email to log into the eform portal to view the final outcome. The last pages of forms are accessible (read only) to the candidate, HOD, Principal Supervisor, HOD> Official letters with approved changes can be downloaded from there. It is the responsibility of the Principal Supervisor to inform the rest of the supervisory panel about the outcome of the candidate’s request.
11. Administrative staff may search forms by department AOU code, date, name of student.
12. The student can only see their section and the final outcome section/s (if applicable).
13. The system sends automated emails to users about actions they need to perform.
14. The student will view and download the official letter containing details of approved changes and their conditions (if any) in the final sections of the form. HDRO will no longer send an email with attached official letters of approval.
15. In the case of a rejected request, the student may contact the faculty HDR staff to find out the reason for the rejection. The faculty staff can view the reasons for the rejection in the form if the rejection was made in the faculty. If the rejection was made in the HDRO, ask the student to contact HDRO.
16. HDRO will save a copy of each approved form and the official letter/s (if applicable) into the student file in Truth.
CONSUMED CURRENT STUDY LOAD (EFTSL) REPORT

Each EForm comprises several sections, one of which is called Candidate Section. This section contains the additional candidature information page which contains a link to a report called Consumed study load and scholarship details report.

Click on this blue report link to view the consumed study load (EFTSL) as at the current date and scholarship information (if the student holds a scholarship which receives a stipend paid through the MQ payroll system).

A report will open in a new tab called HDRO.

---

### HDRO

#### Additional Student/Candidate Information

- **Student ID:** T888012
- **Student Name:** Student1 Student1
- **Consumed Load as at 09/11/2013:** 1.9944

#### Scholarship Information

- **Scholarship Name:** Australian Postgraduate Award (APA)
- **Date Began:** 01/01/2011
- **Date Ended:** 30/06/2013
- **Cotula Type:**
- **Location of Partner Institution:**
- **Partner Host:**

This report provides additional information about the student’s enrolment, including consumed load and scholarship information for scholarship.
The type of Consumed Study Load information you will see is as follows:

<table>
<thead>
<tr>
<th>Data from Research Master feeder</th>
<th>Display in report</th>
</tr>
</thead>
<tbody>
<tr>
<td>EFTSL data as at end of enrolment period</td>
<td>Gives Consumed study load (EFSTL) calculation at current date</td>
</tr>
<tr>
<td>If Study Load Consumed Information is available from AMIS but Research Master feeder file does not stipulate attendance load</td>
<td>Displays ESTFL to end of current enrolment period with text: “to the end of current enrolment period only”</td>
</tr>
<tr>
<td>If student has been enrolled for less than 0.25 EFSTL (part time candidate) and less than 0.5 EFSTL (full time candidate)</td>
<td>Displays ESTFL to end of current enrolment period with text: “to the end of current enrolment period only”</td>
</tr>
<tr>
<td>Student has no EFTSL value (error in student record in Research Master). If this is the case, please alert the HDRO Management Coordinator (Data and Systems)</td>
<td>No Value</td>
</tr>
</tbody>
</table>

The candidate is required to input the Consumed Study Load number into the field provided in the form. The value of the Consumed Study Load will influence what dynamic fields are visible in the remainder of the form.
MAKING AN ACTION NOTE THROUGH THE PAGE COMMENT TOOL

If you need to send the form to the principal supervisor for more information, please go to a page in the candidate or supervisor section of the form and then select the Page Comment icon from the icon bar in the top right hand part of the page:

This will create an action note which is like a sticky note stuck on a page of a book - you can only see it when you open that page.

Do not create the action note whilst in your section of the form as the candidate and supervisor cannot access your part of the form.

Once you have made an action comment orange flags will appear in the left hand navigation pane.

Go to your section of the form, input your decision (for example: “send back to supervisor for more information about...”) and go to the Action tab to select “Send back to supervisor” to submit the form for more information from the supervisor).

After the form comes back to you with additional information, go to the page where you have made the comments. You will see that the orange flags have changed to yellow flags. View the Page Comments and response by the supervisor and click “Comment Resolved”. This will change the flags to green. Go to your review page, change your response and go to the Action tab to select the right action.

SENDING SMALLER FORMS BACK TO THE CANDIDATE

Smaller forms such as the Living Allowance Claim forms, Change of PR status, Letter for Travel, etc., do not have the Page comments tool.

You can send the form back to the candidate by going to the Action tab and clicking “send back to candidate”.

You can send an email to the student explaining what information they need to provide or change in the form.
CHANGE OF PROGRAM (COP)

ABOUT THE FORM

This form allows the candidate to apply for a change of attendance, withdrawal, addition or deletion of a Research Training (HDRT) or HDR Compulsory Coursework (HDRCC) unit, or change of thesis title.

WHAT IS NEW?

This COP form allows the student to apply for an upgrade or downgrade to the program of study. This is no longer done through the Transfer (TRF) form.

WHO IS INVOLVED IN THE PROCESS OF COP APPROVAL?

Candidate, Principal Supervisor, HOD, FHDRM, ADHDR, HDRO Operations.

CHANGE OF ATTENDANCE OR CHANGE OF DEGREE

A document containing the progress report, progress plan and timeline to completion must be uploaded for changes of attendance or degree.
**LEAVE OF ABSENCE/SUSPENSION OF SCHOLARSHIP REQUEST (LOA/SOA)**

**ABOUT THE FORM**

This form allows the candidate to apply for leave of absence and /or suspension of scholarship.

**WHAT IS NEW?**

This LOA/SOA form incorporates the old LOA/SOA and Suspension of Scholarship forms. The form is dynamic and different fields will display depending on: scholarship status, the value of the Consumed Study Load (EFTSL) and also the information the candidate enters into the form.

**WHO IS INVOLVED IN THE PROCESS OF LOA APPROVAL?**

Candidate, Principal Supervisor, HOD, FHDRM, ADHDR, HDRO Operations, HDRO Director, HDRO Scholarship Team.

**LEAVE REQUESTS- SUPPORTING DOCUMENTATION**

Supporting documents such as medical certificates can be uploaded into the EFORM.
CHANGE OF SUPERVISOR (SUP)

ABOUT THE FORM

This form allows the candidate to identify supervisors which they want to retain, change or delete.

WHAT IS NEW?

- The SUP form can be used to appoint an Adjunct Supervisor. Supporting documentation for the appointment can be uploaded into the form, prior to the final approval being granted. Template letters are enclosed in the appendix of this guide.
- The Faculty HDRM needs to check if the supervisor is on the MQSR before forwarding to form to the HOD. If the request is straightforward, the HOD can forward the form to the HDRO. Otherwise, they can forward to the ADHDR for consideration. As the form does not get forwarded to the proposed new appointments, the Principal Supervisor can upload emails indicating agreement form the prospective supervisors to perform supervisory duties.
- There are 3 Actions available to the Faculty Office when processing this form
  o Defer: this ends the form back to the supervisor until the proposed supervisor completes MQSR registration
  o Send back to Supervisor: this is when more information is required and an action note is created for the supervisor to respond to.
  o Recommend approve: forwards the form to the HOD for approval

WHO IS INVOLVED IN THE PROCESS OF SUP APPROVAL?

Candidate, Principal Supervisor, HOD, FHDRM, ADHDR, HDRO Operations.

SUP- SUPPORTING DOCUMENTATION

Supporting documents (emails from new supervisors in which they agree to supervise the candidate) must be uploaded into the EFORM.
SUP WORKFLOW

Student fills the form

Principal supervisor

Is the student funded by a project-specific scholarship?

Approve?

Yes

Principal supervisor

Upload supporting evidence for associate, co-, adjunct supervisor

Seek advice from FHDM before proceeding

Yes

HOD

Approve?

Yes

More info

Request declined

Faculty HDR office

Supervisors on MQSR?

Yes

HOD

Approve?

Yes

End of SUP process

Automated email to candidate PS, HOD, ADHDR, FHDM advising that academic must first complete MQSR, and approval is deferred.

Automated email to candidate, Principal Supervisor, HOD, ADHDR and FHDM that outcome is available in RM

End of SUP process

Request declined

Automated email to supervisor, HoD, Faculty HDR Manager advising of rejection

HDRO Operation team to review

Enter details into AMIS

Yes

No

Yes

No

Automated email to candidate PS, HOD, ADHDR, FHDM advising that academic must first complete MQSR, and approval is deferred.
TRANSFER (TRF)

ABOUT THE FORM

This form allows the candidate to request to change department (and faculty) of enrolment and nominate a new principal supervisor. Candidates may also use this form to change the rest of their supervisory panel at this time.

WHAT IS NEW?

This Transfer form can be used to appoint an Adjunct Supervisor. Supporting documentation for the appointment can be uploaded into the form, prior to the final approval being granted.

The Faculty HDRM will send a PDF of the form and the attachments to the proposed new Principal Supervisor and new FHDRM or new HOD. The new FHDRM or HOD will provide in writing evidence of approval for the transfer and new supervisory arrangements (email from principal supervisor with CC to HOD/rest of supervisory panel and ADHDR is sufficient). The FHDRM will upload this document into the EForm and submit it for processing. If there is a new adjunct supervisor appointment proposed, the EForm must be sent to the ADHDR, otherwise it may be submitted to the HDRO directly.

WHO IS INVOLVED IN THE PROCESS OF TRANSFER APPROVAL?

Candidate, Principal Supervisor, HOD, FHDRM, ADHDR, HDRO Operations.

TRANSFER- SUPPORTING DOCUMENTATION

Supporting documents (email from principal supervisor with CC to HOD/rest of supervisory panel and ADHDR; adjunct appointment documents) must be uploaded into the EFORM.
TRANSFER WORKFLOW

Student fills the form
Principal supervisor to review and submit
HoD to review and submit
Associate Dean – HDR review and submit

Approve?

HoD to review and submit

Approve?

Faculty HDR office

Approve?

HDRO Current

Enter details into AMIS

Email to candidate to log into eform to view final outcome and official letter.

Is the student funded by a project-specific scholarship?

Y
N

seek advice from FHDRM before proceeding

FHDRM informs other dept/faculty

NEW FHDRM to obtain approval of transfer of candidate by proposed new HOD (and ADHDR) by email.

Send PDF of transfer form and attachments to proposed principal supervisor and new FHDRM

Upload PDF of emails from new principal and other supervisors and eform

End TRF
ABOUT THE FORM

This form allows the candidate to apply for an extension of candidature when they are coming up to being out of time.

WHAT IS NEW?

The Extension form can be used to apply for the first or second extension. Supporting documentation must be uploaded into the form, in order for the form to be processed.

WHO IS INVOLVED IN THE PROCESS OF EXTENSION APPROVAL?

Candidate, Principal Supervisor, HOD, FHDM, ADHDR, HDRO Operations, Director HDRO

EXTENSION - SUPPORTING DOCUMENTATION

Supporting documents (Annual Progress Reports, progress report and timeline to completion –see template) must be uploaded into the EFORM. Other supporting documents such as list of publications or supporting letters form supervisors may also be uploaded.
EXTENSION WORKFLOW

Upload documents for extension such as APRs, thesis progress and completion timeline

Student fills the form

Principal supervisor to review and submit

HoD to review and submit

Associate Dean – HDR review and submit

Faculty HDR office

HDRO Operation team to review

HDRO Operation team to process in AMIS

Y

End of COP process

N

More information required

Request declined

Automated email to principal supervisor, HoD, Faculty HDR Manager alerting that request has been rejected

Request declined

More information required

More information required

Recommend Review?

More information required

Approve?

Approve?

Require more information?

Require more information?

Application approved?

Application approved?

Y

Student advised by automatic email to view outcome

HDRO

N

N

Y

AMIS updates RM overnight
## OFF-SITE RESEARCH (OSR)

### ABOUT THE FORM

This form collects information about

- travel by cotutelle or joint PhD candidates to the partner university;
- fieldwork outside of the Sydney metropolitan area (all candidates); and
- Research visits which require approval of a third party (all candidates).

### WHAT IS NEW?

This form collects information for the purposes of the HDRO only. Faculties may utilise departmental, faculty and finance processes to process all other approvals for travel.

### WHO IS INVOLVED IN THE PROCESS OF OSR APPROVAL?

Candidate, Principal Supervisor, HDRO Operations, HDRO Scholarships Team.
OSR WORKFLOW

Candidate

Supervisor

Approve?

NO

Request rejected

HDRO Operations

End

Scholarship holder?

NO

Yes

HDRO Scholarships

Record in RM
ABOUT THE FORMS

These forms allow the HDR candidate (NEW HDR LAC) or RTP student (RTP LAC) to apply for stipend payments to commence. HDR Candidates recommencing their stipend after a period of leave will use the Recommencing HDR LAC.

WHAT IS NEW?

The LAC form have been separated by category of student (RTP and HDR) and the recommencing HDR LAC was introduced due to a difference in the workflow of the HDR LAC forms.

WHO IS INVOLVED IN LAC PROCESSING?

Candidate, HDRO Scholarships Team, Payroll Office

LAC NEW HDR AND NEW RTP STUDENT WORKFLOWS
CHANGE OF PR STATUS (PR)

ABOUT THE FORM

This form allows the HDR candidate to advise the University about the change of their PR status.

WHAT IS NEW?

This form can be submitted online, accompanied by uploaded copies of documents. The HDRO may request to view original documents.

WHO IS INVOLVED IN CHANGE OF PR STATUS FORM PROCESSING?

Candidate, HDRO Operations team.

CHANGE OF PR STATUS WORKFLOW

Candidate submits form → Scanned copies of documents → HDRO Operations → Scholarship holder? → Scholarship Team → Issue letter about change of scholarship → Upload letter advising candidate of changes → END
CHECK ENROLMENT STATUS (CHECK ENR)

ABOUT THE FORM

This form allows the HDR candidate to view their scholarship, enrolment and consumed study load details.

WHO IS INVOLVED?

Candidate only. Upon viewing the details the candidate logs out of the form and deletes the form. This ensures that forms displaying out of date information do not linger in the system.

CHECK ENROLMENT WORKFLOW

Candidate views form

Candidate deletes form by logging out

END
SCHOLARSHIP STATUS CONFIRMATION LETTER (SCHOL LETTER)

ABOUT THE FORM

This form allows the HDR candidate to request from the HDRO Scholarships Team a letter about their scholarship status.

WHO IS INVOLVED?

Candidate and HDRO Scholarships Team.

SCHOLARSHIP STATUS CONFIRMATION LETTER WORKFLOW

[Diagram showing workflow: Candidate -> Scholarships Team -> Upload letter into form -> END]
This form allows the HDR candidate to request from the Faculty HDR office a letter about their HDR enrolment and the travel funding source.

**WHO IS INVOLVED?**

Candidate and Faculty HDR administration.

**LETTER FOR HDR TRAVEL WORKFLOW**
# Research degree progress and timeline to completion statement

**Candidate name:**

**Thesis title:**

Insert additional rows for each proposed chapter, as required.

## Thesis Chapter 1 - Introductory Chapter

<table>
<thead>
<tr>
<th>Completed Tasks</th>
<th>Incomplete Tasks (and percentage incomplete %)</th>
<th>Timeline for Completion of Incomplete Tasks</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Completed Tasks here</td>
<td>List Incomplete Tasks here 1.</td>
<td>Provide date for completion of each task 1.</td>
<td>Provide more information on activities (e.g. workshops, conference presentations, paper acceptances or peer review)</td>
</tr>
</tbody>
</table>

## Thesis Chapter 2 – “Title here”

<table>
<thead>
<tr>
<th>Completed Tasks (%)</th>
<th>Incomplete Tasks (%)</th>
<th>Timeline for Completion of Incomplete Tasks</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Thesis Chapter

1.  

## Thesis

1.  

## Concluding Chapter

<table>
<thead>
<tr>
<th>Completed Tasks (%)</th>
<th>Incomplete Tasks (%)</th>
<th>Timeline for Completion of Incomplete Tasks</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Estimated thesis submission date:

**Comments:** (please comment on any issues that may prevent you from achieving the tasks above including the need for further technical support, or medical or other issues. Are you on-track to complete your thesis by the official Expected Work Submission Date?)
Principal Supervisors may use the wording below to create a letter on MQ letterhead when approaching a prospective Adjunct Supervisor.

**INVITATION TO JOIN SUPERVISORY PANEL**

Principal Supervisor Name  
Address  
Address  
Address  
Email:

Dear .............,

Invitation to join Supervisory Panel

The Department of *(insert name)*, Macquarie University, invites you to join the Supervisory Panel for *(insert name and SN)* who is a full time/part time higher degree research candidate enrolled for the degree of *(insert)*. The estimated completion date for the candidate is *(insert Expected Work Submission date)*. The title of the candidate’s thesis is *(insert title)*.

Thesis Abstract (no more than 200 words): *(Insert abstract)*

The Macquarie Supervisory Panel for this candidate consists of:

Principal Supervisor *(insert name and email address)*
Associate Supervisor #1 *(insert name and email address)*
Associate Supervisor #2 *(insert name and email address)*
Acting Supervisor *(insert name and email address)*
Co-supervisor *(insert name and email address)*
Adjunct Supervisor *(insert name and email address)*

As an Adjunct Supervisor, you would be joining the Supervisory Panel solely for the purpose of supervisory activity and would not be engaged as an employee of the University.

The appointment will cease if the student makes an approved application for change of supervisor, as permitted under Macquarie University’s policies and procedures. The appointment may also be terminated with a minimum notice of one month by either the University or yourself as the appointee.

The University requires that all supervisors be trained and a short on-line program is available for Adjunct Supervisors. The purpose of this training is to introduce you to the supervisory policies and practices at
Macquarie University. The Higher Degree Research (HDR) Supervisory Enhancement Program (SEP) Adjunct
Online Workshop information and booking can be accessed from this link:
https://www.mq.edu.au/ltc/Workshops/index.php#HDR Supervision Enhancement Program

If you have already undertaken this training in the last three years, please provide attach full details to this
form.

For a description of the Supervisory roles and responsibilities, please visit

Other useful information about supervision at Macquarie University can be found here:
http://staff.mq.edu.au/research/hdr_supervision/

If you agree to the terms and conditions set out in this letter and the policies and procedures of Macquarie
University, please sign the acceptance below, and return to the Principal Supervisor. Your appointment to the
Supervisory Panel is further conditional upon the approval from the Faculty Executive Dean (or nominee) for
your inclusion in the supervisory panel of the candidate.

Please attach a full curriculum vitae or the url to your website with your professional details, including reliable
contact details.

I will be notifying you of the outcome of your expression of interest within 20 working days of the receipt of
your expression of reply.

Yours sincerely,

Principal Supervisor Name
Department Name
Faculty Name
EXPRESSION OF INTEREST TO JOIN THE SUPERVISORY PANEL OF A CANDIDATE AS ADJUNCT SUPERVISOR

This template can be completed by the prospective Adjunct Supervisor and uploaded with supporting documentation into the e-form by the Principal Supervisor for approval by the Faculty ADHDR.

EXPRESSION OF INTEREST

I, .................., submit an expression of interest to join the Supervisory Panel for candidate ............... as Adjunct Supervisor as outlined in the letter above and endeavor to book into the online training program for Adjunct Supervisors (HDR SEP Adjunct Online Workshop) at Macquarie University should my appointment be approved by the Executive Dean of the Faculty of enrolment of the candidate. I understand that my appointment will commence on the day of completion of the HDR SEP Adjunct Online Workshop

Signature  .................................

Address: .................................

Email: .................................

Auto date: Tuesday, December 10, 2013

Attach CV or provide webpage address

Commencement date of appointment: