Instructions

Version 1.0

Distributed By:
Macquarie University Higher Degree Research Office

http://www.hdr.mq.edu.au/
Information for HDR e-form request reviewers

What does this manual cover?
This manual is for all persons who will be reviewing requests submitted by E-Form by HDR candidates or Research Training Pathway students. The main users of this manual are: Principal Supervisors, Heads of Department (or nominees), Faculty HDR Administration, Associate Deans HDR, HDRO staff.

The following HDR candidate requests will be submitted for review by e-form:

- Change of Supervisor (SUP),
- Change of Program (COP),
- Leave of Absence/Suspension of Award (LOA/SoA),
- Transfer (TRF),
- Extension of Candidature (EXTN),
- Off-site Research approval (OSR)
- Living Allowance Claim (LAC)
- Change of PR status (PR)
- Letter for HDR travel (Travel Letter)
- Confirmation of Scholarship Details Letter (Schol Letter)
How to access the HDR e-form request

**Step 1:** Log into IRIS (Integrated Research Information System). The link to the system is available from the HDRO forms webpage and the Research Office webpages.

**Step 2:** Find the HDR tab in the white tab under the green banner and click *HDR → HDR eForms*

**Step 3:** HDR eForms for review will be displayed

**Step 4:** Click on the e-form which you want to review
Options for reviewer

In most e-forms there are three options when reviewing the HDR request.

- Approve the request- click Approve
- Reject the request- click Decline
- Request more information from the Principal Supervisor – create an Action note and then click Send Back to Supervisor

Approve request

Step 1: Select Approve on the page and provide a comment if necessary.

Step 2: Go to the Action tab on the left panel and click Approve. In the case of the approver being the Faculty HDR Manager you may select Send to HDRO or Send to ADHDR, depending on whether the request is straightforward and complies with HDR policy, or is a more complex case.
Reject request

Step 1: Make a comment in your review page.

Step 2: Go to the Action tab on the left panel and click Decline

Request more information

Step 1: Click and go to the page for which you would like more information to be provided by the supervisor of the HDR candidate.

Step 2: Once you are in the page for which you require more information, Click (Page Comments Icon) in the top right hand corner of the screen. Page Comments pop up will appear.

Updated: 9 November 2013
Step 3: Click on the New Comment to make your comments.

Step 4: Select the Type as Action Note and type your comments. Click to save your comments.
You will now see next to the Section and page where you have left the Action Note.

**Step 5:** Make a comment on your review page.

**Step 6:** Go to the Action tab on the left panel on the page and click on “Back to Supervisor” to send the form to them for more information. The supervisor will have to take action to answer your comment in order for the form to progress in the workflow.
**Approve the (Action Comments) you have requested**

Once the Supervisor has answered your request for more information you will get an email notifying you of the request waiting for your approval. Please go to the page where you requested more information and review the information provided by the supervisor. If you are content with the changes please approve the action comments before you process the application. Here below are the steps that you need ensure to approve the action comments.

**Step 1:** Log in to IRIS

**Step 2:** Click *HDR → HDR eForms* in the white tab under the green banner

**Step 3:** HDR eForms for review will be displayed

**Step 4:** Click on the e-form to review

**Step 5:** You will now see the 🟢 (yellow flag) next to the relevant section/page

**Step 6:** Click and go to this page

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Updated: 9 November 2013
**Step 7:** Once you are in the page, Click (Page Comments Icon) in the top right hand corner of the screen. Page Comments pop up will appear.

**Step 8:** Click on the tick box next to the Action Note and then click on the “Mark Selected Comments as Resolved” to resolve the Action Note.

You will now see that the flag colour has changed to green next to the section/page.
Step 9: You can now change your previous comment on your review page and action the e-form by going to the Action tab on the left panel on the page by clicking the appropriate action: Approve, Decline or Send Back to Supervisor.

Uploading a document
To upload a document: follow the instructions provided above the “add new document” tool.

Outcome of the request
All official letters containing an outcome of the request will be uploaded in the last sections of the form. The candidate and their supervisors will be able to log into the form to view the outcome letter.