PhD Planner Quick Guide for main supervisors: How to assess a PhD plan in the PhD planner

Log in to the PhD planner

Log in to the system using the username and password you received by e-mail from your graduate school. Please note that you have received two e-mails:

- A mail with the subject heading 'Your username for accessing the PhD planner' which contains your username.
- A mail with the subject heading 'Your credentials for accessing the PhD planner' which contains a temporary password. The temporary password in this e-mail is only valid for 24 hours. You can request a new temporary password on the login page by typing in your e-mail address at the bottom of the page. The login pages for each graduate school can be found here:
  - Arts
  - Business and Social Science
  - Science and Technology
  - Health

Please note when using an iPad, iPhone, tablet or smartphone there can be some difficulties with the responsive design. It is possible to open PhD Planner on these devices but it is difficult to work in the system.

Start page of the PhD planner

You are directed to the 'My tasks' tab, where you can see your tasks, including the due dates.

Please notice that the tab 'Students' lists all the PhD students for whom you are main supervisor[1], whereas the 'My tasks' tab only lists the tasks which are currently pending. If you don't have any pending tasks, the 'My tasks' tab will be empty.

On the 'My Tasks' tab on the right-hand side under the subheading 'Select' there are two options:

- View: Takes you to the plan of the PhD student in question. Here, you can see all the individual elements of the PhD student's plan before you make your assessment.
- Update: Takes you directly to the assessment of the individual PhD student's PhD plan.

How to review the PhD plan before making your assessment

To see the plan before you make your assessment, click 'View'. The tabs 'Plan summary', 'Plan diagramme', 'Present evaluation' and 'Plan history' on the left-hand side of the screen contain a variety of information that you may find useful (see the 'Supervisors Comprehensive Guide' for detailed information). You can see and get access to the current plan under the tab 'Plan details'.

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[1] You can always see your PhD student's plan by going to the 'Students' tab. The 'view' link will take you to the personal and study information regarding the PhD Student. Please follow the link 'Plans' in the top of the page and thereafter the link 'View' under 'Select' in the 'Plan' table. This will take you to the PhD students plan.

Assessment

After you have reviewed the PhD student's plan, you must make your assessment. There are two ways of doing this:

- Click the 'Update' link in the top right-hand corner on the 'Plan details' tab.
- Click 'Update' on the right-hand side under the subheading 'Select' on the' My tasks' tab.

First, register your overall assessment using the dropdown menu 'Assessment' in the 'Main supervisor' box. Next, you should enter an explanatory text in the free-text field immediately below the 'Assessment' dropdown menu. For further information about the different assessment options and their consequences, please click the read more link on the right-hand side of the dropdown menu.

If you wish to make further adjustments to your assessment of the PhD student's plan at a later time, click 'Save'. If you wish to look at the plan again, you can click the button 'View plan details'. The yellow box to the left hand side may contain a note from the PhD student to you, or you can use it to write a note to yourself.

After you have reviewed the PhD student's plan and made your assessment, you have the following options (Please note that the options available to you depend on whether you are assessing an initial evaluation, or an intermediate evaluation:

Initial plan (except supervisors at Health):

- <u>Return to student for plan adjustments</u>:
  If you find that the PhD student needs to make adjustments to the plan, before it is ready to be passed on in the workflow, click the button 'Return to student for plan adjustments' at the bottom of the page on the right-hand side. The entire plan will then be returned to the PhD student for adjustment, after which it will be returned to you for assessment. Please use the yellow box here to write any comments to the PhD student regarding the required adjustments.
- <u>Complete assessment. Send to progr. chair</u>:
  If the plan is ready to be passed on in the workflow, click ' Complete assessment; Send to prog. chair' at the bottom of the page on the right-hand side. The plan will then be sent to the programme chair for assessment. You may use the yellow box here to write a comment to the programme chair.

Intermediate evaluation:

- <u>Return to student for plan adjustments</u>:
  If you find that the PhD student needs to make adjustments to the plan before it is ready to be passed on to the next stage of the workflow, click 'Return to student for plan adjustments' at the bottom of the page on the right-hand side. The entire plan will then be returned to the PhD student for adjustments, after which it will be returned to you for assessment. Please use the yellow box here to write any comments to the PhD student regarding the required adjustments.
- <u>Complete assessment. Send to student</u>:
  If the plan is ready to be passed on in the workflow, click 'Complete assessment; Send to student' at the bottom of the page on the right-hand side. The plan will then be sent to the PhD student for comment. According to the PhD Order, the PhD students are entitled to the opportunity to submit

comments on the supervisors' assessment. The plan will be sent to the programme chair within two weeks for further assessment. You may use the yellow box here to write a comment to the PhD student.

Please note that either the programme chair or the head of school may return the plan to you if they find that further adjustments are necessary.

Approved PhD plan

An approval snapshot of the PhD plan will be saved when the PhD plan has gone through the workflow and been approved of all parties. You can find the approval snapshot under the sub-tab 'Plan history' on the tab 'PhD plan'.