Compatible with all **current** web browsers. 
Pop-up blockers should be disabled for the site for proper functioning of the forms.

8/12/2014
GRADFORMS overview
The Graduate School’s forms for examinations, dissertations and theses, and graduation have been streamlined and transformed into online forms available at GRADFORMS.OSU.EDU.

- Most forms are initiated by graduate students or result from a previous form submission (i.e. a Report on Final Exam produced for a master’s student after an application to graduate is approved).
- Approvals and form status are managed by the system and can be viewed at any time by students, coordinators, chairs, and committee members.
- Email confirmations and alerts are sent automatically at various points in the process including submission and final determination. Approvers act on the submitted forms in their personal work list.
- Search Forms provides search for forms under approver authorization.
- Forms are supported on most mobile devices using current web browser versions. (Not compatible with Internet Explorer versions prior to version 10.)

GRADFORMS site navigation
A navigation bar provides access to Home, Search, and Logout. The navigation bar is also available on all forms.

- Home, located on the left side of the navigation bar, returns to the worklist homepage.
- Logout is a dropdown option available by clicking your name on the right side of the navigation bar.
- Search, located near the center of the navigation bar, provides advanced search capabilities for forms under your authorization.

GRADFORMS categories
There are three categories of forms.

Applications are initiated by graduate students.
- Application to Graduate
- Application for Candidacy (doctoral, DMA only)
- Application for Final Exam

Reports are created automatically as part of a student-initiated form or action.
- Report on Candidacy
- Report on Final Examination
- Report on Final Document
- Report on Transcript Designation

Special forms are also student-initiated with the exception of Specializations
- Specializations
- Minors and Interdisciplinary Specializations
- Delay of Final Document
- Committee and Examination Petition
Application for Candidacy Exam
This form, when completed, must be submitted to the Graduate School no later than two weeks prior to the proposed date for the oral portion of the candidacy exam. Section VII.4 in the Graduate School Handbook pertains to the candidacy examination.

Report on Candidacy
This form is created by the Graduate School on the oral date and time of an approved candidacy exam. The results of the exam should be recorded by the committee and submitted to the Graduate School immediately after completion of the oral exam. Section VII.7 in the Graduate School Handbook pertains to the result of the candidacy examination.

Application to Graduate
This form must be submitted to the Graduate School no later than the third Friday of the semester in which graduation is expected. This application is valid for this semester only. Sections VII.5 (masters) and VII.13 (doctoral) in the Graduate School Handbook pertain to the application to graduate.

Application for Final Examination
This form, when completed, must be submitted to the Graduate School at least two weeks prior to the final oral date. In addition, at least two weeks before the final oral exam date a complete paper draft copy of the dissertation must be brought to the Graduate School for a format review. Upon approval of this form, the Graduate School will be assigning a Graduate Faculty Representative for the defense exam. No less than one week before the final oral examination, a complete, word-processed dissertation or D.M.A. document draft must be presented to the Graduate Faculty Representative for review and approval. Section VII.10 in the Graduate School Handbook pertains to the Final Oral Examination.

Report on Final Examination
This form is produced by the Graduate School and sent to a student’s graduate program prior to the final exam. The results of the final exam are recorded on the form by the exam committee and submitted back to the Graduate School by the posted deadline in the semester degree requirements will be completed.

Report on Final Document
This form is produced by the Graduate School and sent to the student’s graduate programs along with the Report on Final Exam form. The approval of the final thesis/dissertation is recorded on the form by the document committee and submitted back to the Graduate School by the posted deadline in the semester degree requirements will be completed.
Minors & Interdisciplinary Specializations

Graduate students interested in obtaining a minor or interdisciplinary specialization must indicate this intent. This form serves as the application to enroll. See Section VII.4 in the Graduate School Handbook for general criteria. Consult the Graduate School’s website for a listing of the available programs.

Create New Minors & Interdisciplinary Specializations Form

Report on Transcript Designation

Once the minor or interdisciplinary specialization has been completed, return to the approved Minors and Interdisciplinary Specializations form to initiate the request for a transcript designation. Progress of the request can be determined through this link.

Delay of Final Document

Submission of this form will allow a student to place an embargo on the dissemination of their thesis or dissertation through OhioLink for a period of not more than five years. This form should be submitted once the Graduate School has approved the student’s final document submission.

Request Delay of Final Document

Committee and Examination Petition

The Committee and Examination Petition will allow a student to request additions or changes to an exam committee, videoconferencing of an exam, or to request a waiver of Graduate School policy. All petition requests must be approved by the student’s advisor and Graduate Studies Chair in order to be reviewed by the Graduate School.

Create New Committee and Examination Petition
GRADFORMS approvers
There are 5 categories of approvers

  Graduate studies chair/coordinator
  Advisor
  Co-advisor
  Committee members (OSU graduate faculty)
  External [committee] members

  • Approvals can take place in parallel, i.e., all approvals can take place at the same time.
  • Email notification of a form submission (with a link to that form) is sent to all approvers.
  • A list of forms awaiting approval can be viewed by logging into GRADFORMS.OSU.EDU.
    (Not available to external members.)
  • Forms do not appear on the Graduate School’s worklist until all approvals have occurred.

Approvers by form

<table>
<thead>
<tr>
<th>Form</th>
<th>Chair/coord</th>
<th>Advisor</th>
<th>Co-adv(^1)</th>
<th>Committee</th>
<th>External(^1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>App for Candidacy</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>App to Graduate</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>App for Final Examination</td>
<td>x(^2)</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Rept on Candidacy</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Rept on Final Examination</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Rept on Final Document</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Rept on Transcript Desig.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialization</td>
<td></td>
<td></td>
<td></td>
<td>(initiator)</td>
<td></td>
</tr>
<tr>
<td>Minors and Interdis. Spec.</td>
<td></td>
<td></td>
<td></td>
<td>(minor/IS dept)</td>
<td></td>
</tr>
<tr>
<td>Committee and Exam Petition</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delay of Final Document</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

\(^1\)if listed on the originating application
\(^2\)if category M faculty committee member approval required
GRADFORMS worklist
With the exception of external committee members, approvers can login to GRADFORMS.OSU.EDU to view items in their worklist or to Search Forms.

Claimed Tasks and Unclaimed tasks tabs
Claiming a form puts it in the claimant’s task list for processing.
A graduate program chair or coordinator can claim and approve a form by clicking Claim or Start in the Action column of the unclaimed list of forms.

Claim assigns it to the worklist of the claimant for later processing while the Start button claims and begins processing the form immediately. Claimed forms can be viewed by clicking on the Claimed Tasks tab.

Other approvers will see only the Claimed Tasks navigation tab since they are automatically assigned as the only approver in their category. Click View in the Action column to begin processing.

Specializations Forms tab for chairs and coordinators
Graduate program chairs and coordinators will also see a Specializations tab on the worklist homepage.

This provides access to the Create Specialization Form button. See GRADFORMS Special Form Actions.
GRADFORMS information
Each form, once saved or submitted, displays form name, status, and five information tabs.
Form status can be pending, approved/denied/cancelled, or completed.
An Action button, when present, provides a PDF view of the form information or link to a related form.

Information tabs (examples below)
- **Student Information** – address, phone, email, and (some forms) current academic information
- **Form information** – information entered on the form
- **History** – list of approvals, resolution, and timestamp
- **Comments** – comments entered by anyone in the workflow chain
- **Remarks** – (approvers only) Graduate School remarks; accessible by approvers only

**Student Information**

![Application for Candidacy Exam](image)

**Form information**

![Form Information](image)
History information

<table>
<thead>
<tr>
<th>Task</th>
<th>User</th>
<th>Completion Time</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate Application</td>
<td>Sharp, Molly Louise</td>
<td>March 04, 2014 3:07 PM</td>
<td>COMPLETED</td>
</tr>
<tr>
<td>Advisor Approval</td>
<td>Kline, Susan Lee</td>
<td>March 04, 2014 3:59 PM</td>
<td>APPROVED</td>
</tr>
<tr>
<td>Grad Chair/Coordinator Approval</td>
<td>Knobloch-Westenwick, Silvia</td>
<td>March 04, 2014 4:21 PM</td>
<td>APPROVED</td>
</tr>
<tr>
<td>Final Approval</td>
<td>Koulikoski-Waldin, Sandra L.</td>
<td>March 04, 2014 4:26 PM</td>
<td>APPROVED</td>
</tr>
<tr>
<td>Completion</td>
<td>Koulikoski-Waldin, Sandra L.</td>
<td>March 04, 2014 4:31 PM</td>
<td>COMPLETED</td>
</tr>
</tbody>
</table>

Comments

No comments

Information in this request is viewable and subject to disclosure under the Ohio public records statute and rules of discovery.

Add Comments

Comments are visible to Everyone

Save

Remarks

No remarks

Add Remarks

Remarks are only visible to Approvers and Graduate School Staff
GRADFORMS error-checking, approvals, and notifications

Form approvers can Save, Approve, or Deny a form. (Satisfactory or Unsatisfactory for report forms.)

- **Save** is used when comments have been added and/or a delay in further processing is desired.
- **Comments** can be added by clicking the Comments tab, adding text, then clicking Save.

Error-checking takes place after Save, Approve, or Deny.

- On some forms, approvers have additional options to check. Error messages will be displayed if they are required and not answered.

Examination Evaluation for graduate faculty representatives

Graduate faculty representatives are required to fill out an examination evaluation as part of the approval process. This evaluation is accessed by clicking the Examination Evaluation tab of the report form. See GRADFORMS Special Form Actions
Once all approvers have completed the workflow, the status remains *Pending*, but the form appears on the Graduate School worklist for processing. The History tab will show if it only remains pending with the Graduate School.

- The status changes to *approved (satisfactory)*, *denied (unsatisfactory)*, *cancelled*, or *complete* once the Graduate School has finished its review.
- The status of *complete* is for the internal use of the Graduate School and indicates that all processes related to that form have been completed.

### General approval sequence, actions, and status changes (varies by form)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Confirmation email sent to student, notification email* sent to approvers, and form appears on approvers’ work lists.</td>
<td>After all approvers review and approve or deny, form appears on Graduate School work list.</td>
<td>Notification email sent to student after Graduate School review and determination.</td>
</tr>
</tbody>
</table>

### Status

<table>
<thead>
<tr>
<th>Status</th>
<th>New until submitted</th>
<th>Pending</th>
<th>Approved/Denied Cancelled/Complete</th>
</tr>
</thead>
</table>

*Status of individual approvals can be reviewed by opening form and selecting History tab.*

---

*Sample notification email*

Deborah Smith-Shank:

Report on candidacy generated for Andrew Moffatt requires your action immediately after the examination is concluded. The oral exam for report on candidacy is scheduled on Aug 11, 2014 at 10:00 AM. Location of oral exam is 237A Sullivan Hall.

Please visit the following link to view the report on candidacy:

https://gradforms.etd.ohio-state.edu/grad-forms/task/my/1462/ctc

Note: It is extremely important that you use the current version of a current web browser (Safari, Chrome, Internet Explorer, Firefox, etc.) to access the Gradforms website otherwise the forms may not work correctly.

Thanks,
Graduate School

If you are concerned about clicking a link in an email (such as this one) you can open an internet browser window and navigate to gradforms.osu.edu to log into the system directly. To validate the authenticity of any website we recommend that you check the security certificate associated with the website to confirm its authenticity. For technical issues contact help@osu.edu or phone 614-688-HELP.
GRADFORMS Special Form Actions

Specializations Forms tab for chairs and coordinators
Graduate program chairs and coordinators will see a Specializations tab on the worklist homepage.

This provides access to the **Create Specialization Form** button.

Create Specialization Form

Please fill in the following information

*To display student info here enter a valid grad student ID in “Student ID” field.*

**Student OSU ID**
Grad Student OSU ID

**Graduation Level**
Select Graduation Level

**Graduation Plan**
Select Graduation Plan

**Graduation Degree**
Degree

**Specialization**
Select Specialization

Advisor Information
Advisor *Please choose a graduation plan first.*

[Save] [Save and Continue]

Selecting **Save and Continue** submits the form to the Graduate School.
GRADFORMS Special Form Actions

Examination Evaluation for graduate faculty representatives

Graduate faculty representatives are required to fill out an examination evaluation as part of the approval process. This evaluation is accessed by clicking the Examination Evaluation tab of the report form.

Please select the number that best represents your assessment of the following aspects of the examination. If you assign a score of 1 or 2 for any item, please provide a brief explanation in the comments section below.

1 = Poor 6 = Excellent

☐ 1 2 3 4 5 6: The candidate’s performance on the written examination
☐ 1 2 3 4 5 6: The appropriateness of the oral questions
☐ 1 2 3 4 5 6: The level of difficulty of the oral questions
☐ 1 2 3 4 5 6: Quality of the student’s responses to the oral questions
☐ 1 2 3 4 5 6: Time allocated to each committee member
☐ 1 2 3 4 5 6: Fairness and objectivity of the committee during the examination
☐ 1 2 3 4 5 6: Fairness and objectivity of the voting procedure
☐ 1 2 3 4 5 6: Overall assessment of the examination process

Yes □ Did you have at least 7 calendar days to read the written portion?

☐ A checkmark in this box indicates that you have serious concerns about the examination procedures, and will result in a Graduate School inquiry into this examination.

Please make additional comments concerning the conduct of the examination below:

The student is considered to have successfully completed the final examination only when the decision of the examination committee is unanimously affirmative.

By indicating below, I □ judge that the student named above satisfactorily or unsatisfactorily completed the final examination.

Save Satisfactory Unsatisfactory
The Search Forms function can be used to search forms by student, academic plan (approvers only), form status, and form name.

When a form type is selected, additional filters specific to that form will also be available. For example,
GRADFORMS FAQ

Q. Who gets email notifications of a form submission/approval?
A. Each approver for that particular form receives notice of submission. The form initiator (usually the student) receives notification of approval/denial. Grad chairs/coordinators can always use search to see all forms in their program(s) and their status.

Q. Can we fill out/initiate the forms for our students?
A. No, however worksheets have been provided on individual form help pages (PDF) that may used for those programs that assist students in filling out their forms.

Q. I don't see our program in the Academic Plan search field of the search form.
A. No history has been loaded so it will only show programs for which a form has been created.

Q. I claimed a form incorrectly. How do I unclaim it?
A. Contact Graduation Services.

Q. Some of our faculty only use their OSUMC email address. Can alternate addresses be used?
A. No, we use OSU email addresses as our standard address. However OSU addresses can be forwarded to an OSUMC address. Information on forwarding can be found at my.osu.edu.

Q. Our graduate program chair doesn't want see the application email notifications. Can we turn them off?
A. No, however email notifications can usually be redirected through rules in your email system. The rule should be based on the subject line NOT the From: line since many OSU notifications use the same From line. Contact your IT help desk for assistance.

Q. As a student, how do I cancel an application?
Contact the Graduate School’s Graduation Services at Grad-SchoolGraduationServices@osu.edu or 614-292-6031.

Q. As a student, how do I change information on a submitted app?
A. Only the Application to Graduate can be modified after submission and that is limited to commencement attendance or cancellation of graduation. This modification capability ends two weeks prior to graduation. For all other changes or cancellations, contact the Graduate School’s Graduation Services at Grad-SchoolGraduationServices@osu.edu or 614-292-6031.