

# **IDP FORMS ONLINE APPLICATION USER GUIDE**

**September 2024**

**Johns Hopkins University School of Medicine**

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## A. Getting Started

### 1. User Access

To start, navigate to the PhD Students Academic Progress Tools login page: <https://tcform.jhmi.edu/>

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click here.'"/>

There are three user roles in this system:

- **Student** - Current PhD students at the Johns Hopkins University School of Medicine (JHUSOM)
- **Advisor** – Dissertation advisors to JHUSOM PhD students as listed in SIS
- **Admin** - Authorized graduate program staff

After logging in based on your role, select the “IDP Forms” button on the left:

**Please note that all users are required to log in with their JHED ID and password to get access to the IDP Forms.** Although external faculty may use the same initial login page to access the Thesis Committee Tracker, external users may not access the IDP Forms application.

## B. Process Overview

The Johns Hopkins University requires that PhD students work with their advisors on their annual Academic Progress and Professional Development Plan, also known as their IDP. The IDP Forms application portal allows users to view and manage the completion trajectory of the IDP forms and meetings. There are three steps in the process:



### **Respond to questionnaires**

Student completes their IDP form.

Advisor completes the corresponding form for this student.



### **Meet to discuss and plan**

After both forms are complete, Student and Advisor can access them in a combined view.

Student and Advisor meet to discuss their responses and develop an action plan.



### **Submit Meeting Confirmation**

Student confirms that the meeting took place by submitting the meeting date.

Note that student and advisor respond to their questionnaires independently. They must submit their own responses before getting access to their counterpart's responses. Both forms must be submitted, before a meeting date can be reported.

## **C. IDP Form / Questionnaire**

The IDP form includes questions on the student's research project and progress, their professional development, the mentoring relationship with the advisor, the overall lab/research team environment, and an evaluation of competencies:

▶ Instructions for completing the questionnaire

▶ A. Research Project and Progress

▶ B. Research Integrity

▶ C. Mentoring

▶ D. The Lab/Research Team Environment

▶ E. Diversity, Equity and Inclusion

▶ F. Professional Development

▶ G. Evaluation of Competencies

▶ H. Focus Areas and Action Plan

Advisors are asked to respond to some of the same questions that students are asked. As each user completes their questionnaire, they can see the questions their counterpart is asked. However, they can see each other's responses only after they complete and submit their own form. Similarly, administrators may see their student and advisor responses only after they both submit them.

## D. Student Portal

### 1. Creating the Annual IDP Form

The Student Portal allows students to manage their IDP forms. Students may generate a new IDP form once each academic year (defined in this system as September 1 – August 31) by clicking on the big blue button right below the instructions:

PhD Student Academic Progress Tools  
IDP Form

How To Page | Welcome, agogost1 | Sign Out

**Instruction**

**SOM Annual Academic Progress and Professional Development Plan (aka IDP)**

The Johns Hopkins University requires that PhD students and their advisors discuss, at least annually, the student's academic progress and professional development plan. There are four steps in this process:

- 1. Complete the questionnaire:** Both the student and the advisor(s) complete the questionnaire separately.
- 2. Share the responses:** As soon as the questionnaires are submitted they are shared with each other on this interface. Note that you must complete your own questionnaire before getting access to your advisor's responses.
- 3. Meet to discuss:** After sharing their responses, the student and advisor(s) meet to (a) discuss their responses and (b) come up with a final action plan. The final action plan should be shared with the thesis committee.
- 4. Confirm that the meeting took place:** After the meeting, the student completes the Meeting Confirmation form to document that the meeting took place.

Create IDP Form for Year 2024-2025

**Student IDP Forms**

Academic Year	Advisor	My Form	Submitted Date	View Combined Student/Advisor Responses	Meeting Confirmation	Meeting Date
---------------	---------	---------	----------------	---	----------------------	--------------

After the IDP form for the year is created, it will be listed in the table below and the student will be able to access and complete it through the icon under the "My Form" column. The student will not be able to create another form until the following academic year (the blue button becomes greyed-out / inactive):

**Instruction**

**SOM Annual Academic Progress and Professional Development Plan (aka IDP)**

The Johns Hopkins University requires that PhD students and their advisors discuss, at least annually, the student's academic progress and professional development plan. There are four steps in this process:

- 1. Complete the questionnaire:** Both the student and the advisor(s) complete the questionnaire separately.
- 2. Share the responses:** As soon as the questionnaires are submitted they are shared with each other on this interface. Note that you must complete your own questionnaire before getting access to your advisor's responses.
- 3. Meet to discuss:** After sharing their responses, the student and advisor(s) meet to (a) discuss their responses and (b) come up with a final action plan. The final action plan should be shared with the thesis committee.
- 4. Confirm that the meeting took place:** After the meeting, the student completes the Meeting Confirmation form to document that the meeting took place.

Create IDP Form for Year 2024-2025

**Student IDP Forms**

Academic Year	Advisor	My Form	Submitted Date	View Combined Student/Advisor Responses	Meeting Confirmation	Meeting Date
2024-2025						

## 2. Completing the form / questionnaire

To edit the IDP form, students access it through the pencil icon under the “My Forms” column (see above). On the first page, they see instructions, their program name, matriculation year, and advisor name(s).

Home First Page A Section B Section C Section D Section E Section F Section G Section H Section How To Page

### GBE Common IDP Form - Academic Year 2024-2025

**Instructions for completing the questionnaire**

- Your questions are shown in black font. Where applicable, you can see in grey font the questions that your counterpart is asked.
- Be honest and forthright; this document is to be used for the exchange of suggestions and advice.
- If you completed this process last year, start by reviewing the last action plan you developed.

Your form responses will be shared with the assigned Advisor(s) listed below

Program	Matriculation Year	Advisor
BCMB	2023	[Dropdown Menu]

If any of the above information is not correct or you do not have an advisor, please contact your program coordinator.

Next

***If any of this information is incorrect, it is critical to contact the program coordinator as soon as possible and before the form is submitted.***

The different sections on the form may be accessed through the top menu. The student questions are shown in black font. Where there are equivalent advisor questions, they are shown in blue font, just for the user’s reference.

It is important to save frequently. You may save what you type in a textbox by clicking on the “Save Textbox” link on its upper right side.

IDP Home First Page A Section B Section C Section D Section E Section F Section G Section H Section How To Page Welcome, agogos1 | Sign Out

### GBE Common IDP Form - Academic Year 2024-2025

#### A. Research Project and Progress

When do you expect to graduate?  
*Advisor: When do you expect your student to graduate?*

Less than 1 year  
 1 year  
 2 years  
 More than 2 years

What is the long-term goal of your research project, and how does it fit into the overall goals of the lab/research team?  
*Advisor: What is the long-term goal of the student's research project, and how does it fit into the overall goals of the lab/research team?*

testing testing

Save Textbox  
Save the text area

You may save the whole page by clicking on the Save button at the bottom of each page. Also, the Next button has saving functionality.

What specific actions will you take to meet these goals? What challenges could make these goals difficult to achieve?  
*Advisor: What challenges could make these goals difficult to achieve for this student?*

[Save Textbox](#)

As your advisor, how can I help you overcome these challenges? (If you are answering for more than one advisor, you may want to specify which one you are referring to in your answer below.)  
*Advisor: What could you do to help your student overcome these challenges?*

[Save Textbox](#)

[Prev](#) [Save](#) [Next](#)

Section F is about the student’s Professional Development and therefore it is longer than the other sections. It has 7 pages that can be accessed through a sub-menu:

Home IDP Home First Page A Section B Section C Section D Section E Section **F Section** G Section H Section How To Page Welcome, agogos1 | Sign Out

**GBE Common IDP Form - Academic Year 2024-2025**

**F. Professional Development - Page 1**

Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7

Have you completed your course requirements?  
 Yes  
 No

Are you taking or planning to take any courses?  
 Yes  
 No  
 Maybe

Do you regularly attend seminars? Which seminars and how often?

[Save Textbox](#)

Section G focuses on evaluation of competencies and provides specific guidance at the top of the page:

Home IDP Home First Page A Section B Section C Section D Section E Section F Section **G Section** H Section How To Page Welcome, agogos1 | Sign Out

**GBE Common IDP Form - Academic Year 2024-2025**

**G. Evaluation of Competencies**

Both the student and the advisor complete the following table independently and evaluate the level of the student’s competency in different areas.

**Students:** For each area or skill, select the level of competency you believe you have.  
**Advisors:** For each area or skill, select the level of competency you believe the student has.

The goal for each of these areas is to reach “high competency” (levels 4 and 5) by the time the student is ready to graduate.

**Levels**

1. Unsatisfactory (cannot / does not perform the skill/task)
2. Novice (needs help or guidance when performing this skill/task)
3. Intermediate (help from an expert may be required from time to time, but the skill/task can usually be performed independently)
4. Advanced (can perform the actions associated with this skill without assistance)
5. Expert (demonstrates consistent excellence in this skill/task)

On section H, the student may enter up to 5 areas on which they would like to focus during the next several months. The text entered under the Focus Areas can be automatically copied under their Action Plan by clicking on the link to “refresh page for the next section”:

Home IDP Home First Page A Section B Section C Section D Section E Section F Section G Section H Section How To Page Welcome, agogos1 | Sign Out

### GBE Common IDP Form - Academic Year 2024-2025

#### H. Focus Areas and Action Plan

**Focus Areas**

Please list 5 of the above areas you would like to make a priority for further development in the upcoming year. During your in-person meeting, please discuss with your advisor strategies and resources for identifying activities in the focus areas.

*Advisor: You may list how areas that should be a priority for further development in the upcoming year. During your in-person meeting, please discuss with the student strategies and resources for identifying activities in their focus areas.*

(Each focus area is limited to 50 words.)

Focus Area 1

Focus Area 2

Focus Area 3

Focus Area 4

Focus Area 5

[Click here to refresh page for the next question](#)

**Action Plan**

Carry Forward All Choices - Entered Text from Question "Please list 5 of the above areas you would like to make a priority for further development in the upcoming year. During your in-person meeting, please discuss with your advisor strategies and resources for identifying activities in the focus areas."

Based on your responses above, develop an action plan outlining project specific and professional development goals with an associated timeline.

	Goals	Activities	Timeline	Resources
<input type="text" value="conference presentation"/>	I			

Students can then elaborate on their goals, activities, timeline and resources for each focus area.

Before submitting their form, students may preview their responses through the Preview button at the bottom of Section H:

**Action Plan**

*Carry Forward All Choices - Entered Text from Question "Please list 5 of the above areas you would like to make a priority for further development in the upcoming year. During your in-person meeting, please discuss with your advisor strategies and resources for identifying activities in the focus areas."*

Based on your responses above, develop an action plan outlining project specific and professional development goals with an associated timeline.

	Goals	Activities	Timeline	Resources
conference presentation				

Prev Save Preview Submit

The Preview opens as a separate window where students can expand /collapse all or individual sections to review their responses, and can go back to the application in the original window to make edits.

When ready, students can click on the Submit button at the bottom of Section H to submit their responses.

**Action Plan**

*Carry Forward All Choices - Entered Text from Question "Please list 5 of the above areas you would like to make a priority for further development in the upcoming year. During your in-person meeting, please discuss with your advisor strategies and resources for identifying activities in the focus areas."*

Based on your responses above, develop an action plan outlining project specific and professional development goals with an associated timeline.

	Goals	Activities	Timeline	Resources
conference presentation				

Prev Save Preview Submit

A pop-up window reminds them that the submitted form will be automatically shared with their advisor as soon as the advisor completes their form. If they are ready, they can click OK. Otherwise, they may Cancel and submit their responses later.

Are you sure you are ready to submit? Your submitted form will be automatically shared with your advisor as soon as they complete their form!  
Either OK or Cancel.

OK Cancel

As soon as students submit their responses, the icon under "My Form" changes from a pencil icon to a document icon indicating that the user cannot edit the form any longer; you can only view it. The date the form is submit is listed under the next column:

How To Page Welcome, agogos1 | Sign Out

Instruction

**SOM Annual Academic Progress and Professional Development Plan (aka IDP)**

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- 1. Complete the questionnaire:** Both the student and the advisor(s) complete the questionnaire separately.
- 2. Share the responses:** As soon as the questionnaires are submitted they are shared with each other on this interface. Note that you must complete your own questionnaire before getting access to your advisor's responses.
- 3. Meet to discuss:** After sharing their responses, the student and advisor(s) meet to (a) discuss their responses and (b) come up with a final action plan. The final action plan should be shared with the thesis committee.
- 4. Confirm that the meeting took place:** After the meeting, the student completes the Meeting Confirmation form to document that the meeting took place.

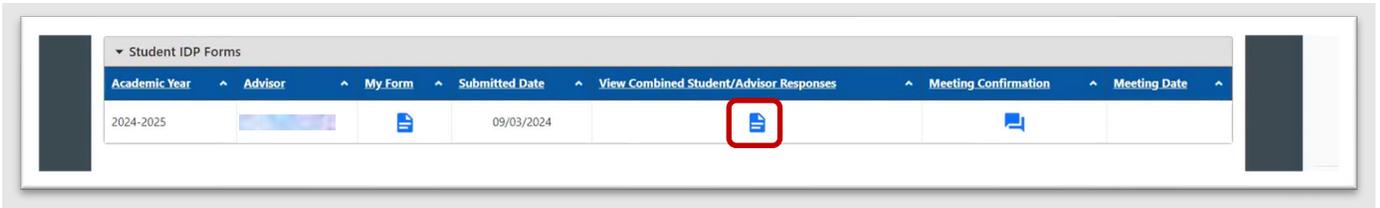
Create IDP Form for Year 2024-2025

Student IDP Forms

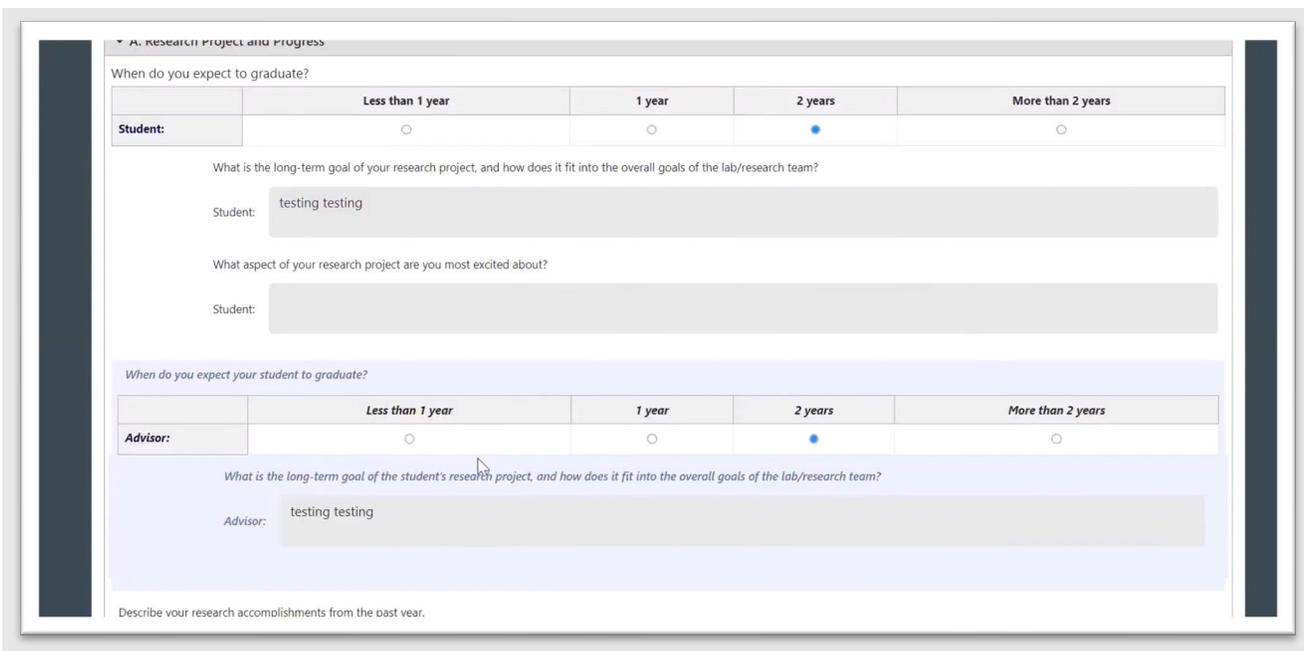
Academic Year	Advisor	My Form	Submitted Date	View Combined Student/Advisor Responses	Meeting Confirmation	Meeting Date
2024-2025			09/03/2024			

### 3. Combined View of Student-Advisor Responses

As soon as the advisor submits their form, the student will be able to access them along with their own by clicking on the icon under the “View Combined Student/Advisor Responses” column.



This view allows students to go over their responses and their advisor’s responses side by side when they meet to discuss. The advisor’s responses are shown on a light blue background:



This is particularly useful when reviewing their ratings for the competencies listed in section G:

**Levels**

1. Unsatisfactory (cannot / does not perform the skill/task)
2. Novice (needs help or guidance when performing this skill/task)
3. Intermediate (help from an expert may be required from time to time, but the skill/task can usually be performed independently)
4. Advanced (can perform the actions associated with this skill without assistance)
5. Expert (demonstrates consistent excellence in this skill/task)

**Research/Scholarship**

		Unsatisfactory	Novice	Intermediate	Advanced	Expert	Don't know	N/A
Demonstrating ability to explain a broad range of topics in the discipline	Student	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding key methods used in the discipline	Student	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Demonstrating ability to perform the key research methods/procedures used in the discipline	Student	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Critical reading and analysis of field literature	Student	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity and innovation in thinking	Student	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Critically evaluating the research	Student	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### 4. Submitting a Meeting Confirmation

It is a university requirement that students meet with their advisors to discuss their IDP, and so they will need to report the date on which this meeting took place. Students may do so in one of two ways:

- Click on the icon on the "Meeting Confirmation" column in their table list view:

Instruction

**SOM Annual Academic Progress and Professional Development Plan (aka IDP)**

The Johns Hopkins University requires that PhD students and their advisors discuss, at least annually, the student's academic progress and professional development plan. There are four steps in this process:

1. **Complete the questionnaire:** Both the student and the advisor(s) complete the questionnaire separately.
2. **Share the responses:** As soon as the questionnaires are submitted they are shared with each other on this interface. Note that you must complete your own questionnaire before getting access to your advisor's responses.
3. **Meet to discuss:** After sharing their responses, the student and advisor(s) meet to (a) discuss their responses and (b) come up with a final action plan. The final action plan should be shared with the thesis committee.
4. **Confirm that the meeting took place:** After the meeting, the student completes the Meeting Confirmation form to document that the meeting took place.

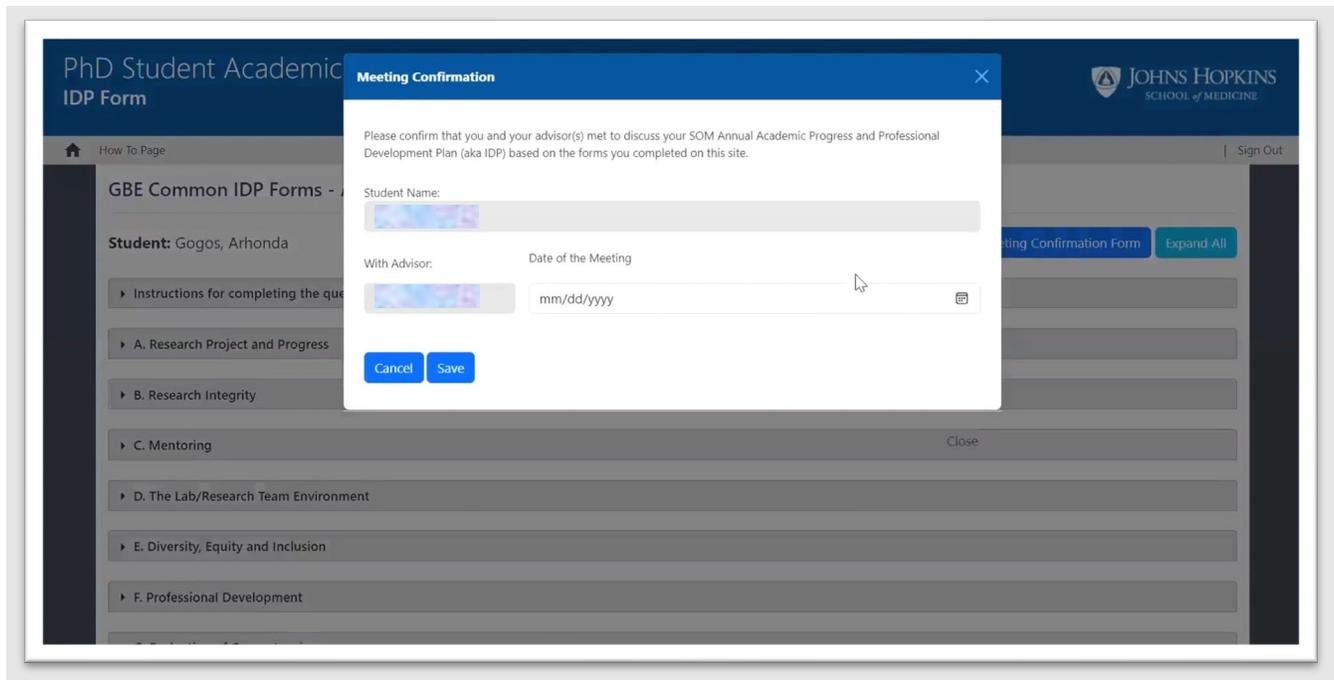
Create IDP Form for Year 2024-2025

Student IDP Forms

Academic Year	Advisor	My Form	Submitted Date	View Combined Student/Advisor Responses	Meeting Confirmation	Meeting Date
2024-2025			09/03/2024			

OR

- Access the "Combined Student/Advisor Responses" view and click on the "Meeting Confirmation Form" button.



Students can enter the date of the meeting and save. The advisor and the program administrator will be able to see the date as soon as it is entered.

***Note that students are able to report a meeting date only after both they and their advisor submit their IDP forms.***

## 5. Notifications *[not yet available]*

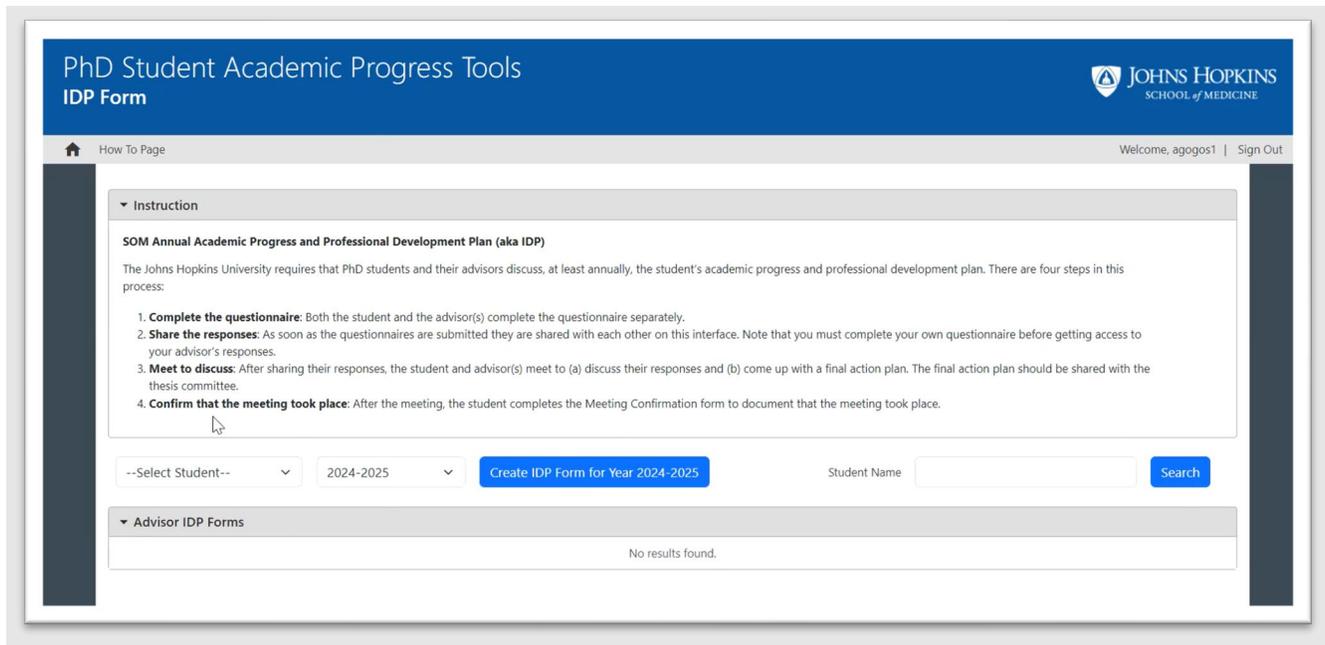
Individual programs will be able to activate/inactivate the following notifications. Only students who have dissertation advisors listed in SIS will be included:

- a. Notification when the IDP form for the new academic year becomes available (Sept 1)
- b. If the student has not submitted their form, notification when their advisor submits theirs.
- c. A week *after* both student and advisor submit their forms, reminder that they need to meet and submit the meeting date.
- d. If the meeting confirmation date has not been submitted, reminder that the IDP process must be completed by the end of the academic year (sent 2 months before the Aug 31 deadline).

## E. Advisor Portal

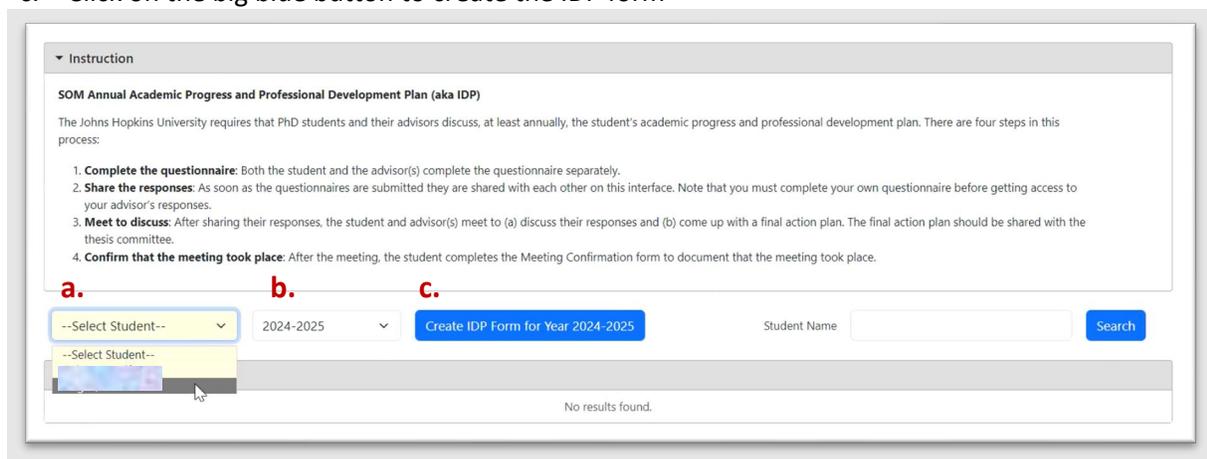
### 1. Generating an IDP Form

The Advisor Portal allows dissertation advisors to manage the IDP forms for all their students in one place.



Advisors may generate a new IDP form for each of their students once per academic year (defined in this system as September 1 – August 31):

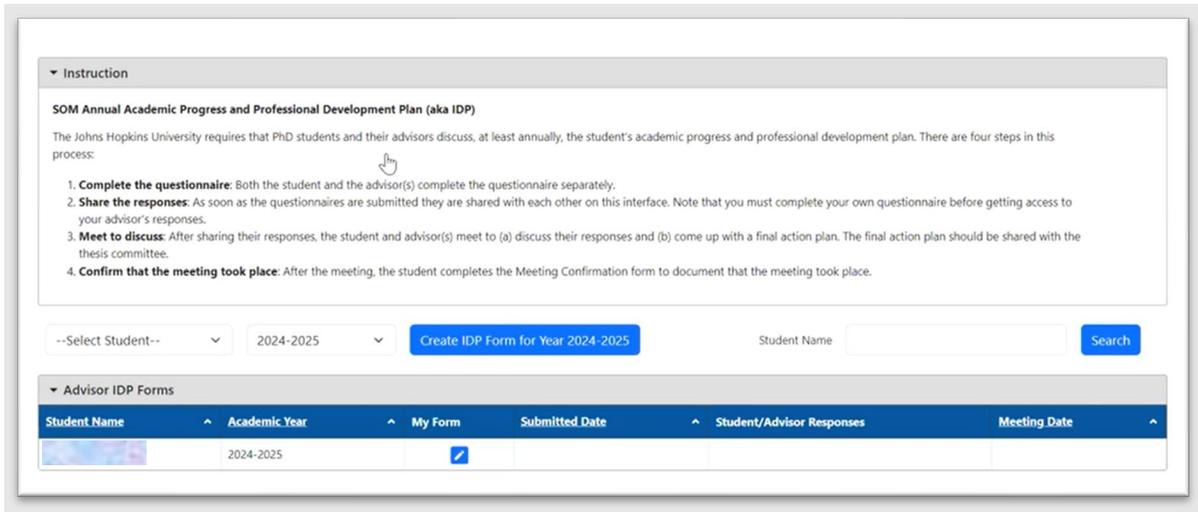
- a. Select the student’s name from the drop-down menu
- b. Make sure the correct academic year is selected
- c. Click on the big blue button to create the IDP form



***If any of your students are missing from the drop-down list or if there are names of students for whom you are not a dissertation advisor, please contact your students’ graduate program coordinator as soon as possible.***

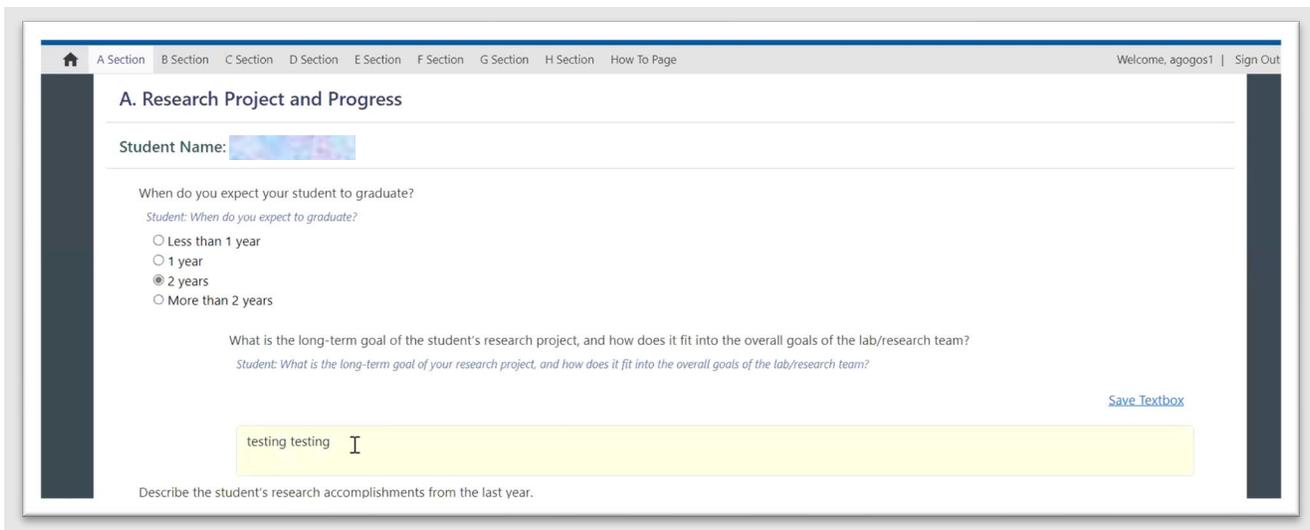
If the advisor already created a form for a specific student and academic year, the blue button would become greyed-out / inactive for that combination.

After the IDP form is created, it will be listed in the “Advisor IDP Forms” table (see below). If an advisor has a long list of IDP forms, they can search by the student’s name using the search tool on the right.



## 2. Completing the form / questionnaire

After clicking on the pencil icon under the “My Forms” column, advisors can access the different sections of the form through a sub-menu. On each page, they see the name of the student.



The advisor questions are shown in black font. Where there are equivalent student questions, they are shown in blue italics font, just for the user’s reference.

It is important to save frequently. Advisors may save what they type in a textbox by clicking on the “Save Textbox” link on its upper right side (see above), and they may save the whole page by clicking on the Save button at the bottom of each page (see below). Also, the Next button has saving functionality.

What challenges could make these goals difficult to achieve for this student?  
*Student: What specific actions will you take to meet these goals? What challenges could make these goals difficult to achieve?*

[Save Textbox](#)

What could you do to help your student overcome these challenges?  
*Student: As your advisor, how can I help you overcome these challenges? (If you are answering for more than one advisor, you may want to specify which one you are referring to in your answer below.)*

[Save Textbox](#)

[Prev](#)

[Save](#) [Next](#)

Section G focuses on evaluation of competencies and provides specific guidance at the top of the page:

A Section B Section C Section D Section E Section F Section **G Section** H Section How To Page

Welcome, agogos1 | Sign Out

### G. Evaluation of Competencies

Student Name:

Both the student and the advisor complete the following table independently and evaluate the level of the student's competency in different areas.

**Students:** For each area or skill, select the level of competency you believe you have.  
**Advisors:** For each area or skill, select the level of competency you believe the student has.

The goal for each of these areas is to reach "high competency" (levels 4 and 5) by the time the student is ready to graduate.

**Levels**

1. Unsatisfactory (cannot / does not perform the skill/task)
2. Novice (needs help or guidance when performing this skill/task)
3. Intermediate (help from an expert may be required from time to time, but the skill/task can usually be performed independently)
4. Advanced (can perform the actions associated with this skill without assistance)
5. Expert (demonstrates consistent excellence in this skill/task)

Before submitting their form, advisors may preview their responses through the Preview button at the bottom of Section H:

A Section B Section C Section D Section E Section F Section G Section **H Section** How To Page

Welcome, agogos1 | Sign Out

### H. Focus Areas and Action Plan

Student Name:

**Focus Areas**

You may list below areas that should be a priority for further development in the upcoming year. During your in-person meeting, please discuss with the student strategies and resources for identifying activities in their focus areas.

*Student: Please list 5 of the above areas you would like to make a priority for further development in the upcoming year. During your in-person meeting, please discuss with your advisor strategies and resources for identifying activities in the focus areas.*

[Save Textbox](#)

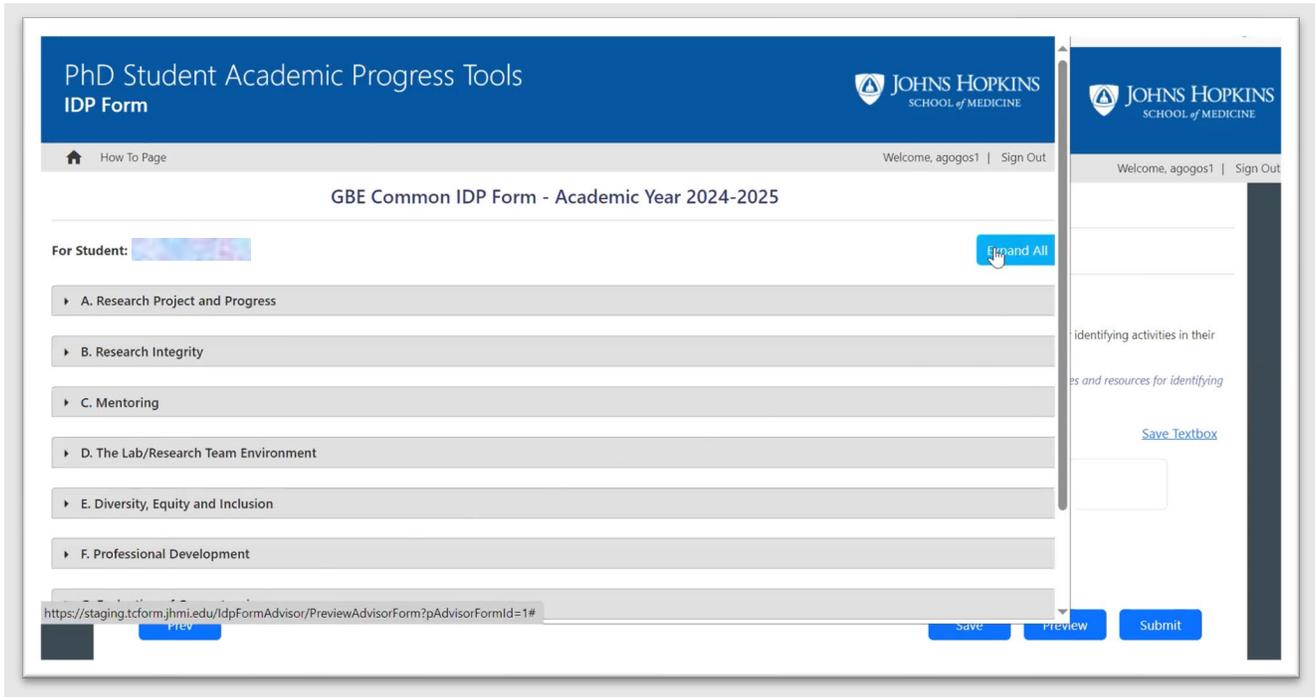
**Action Plan**

*Student: Based on your responses above, develop an action plan outlining project specific and professional development goals with an associated timeline.*

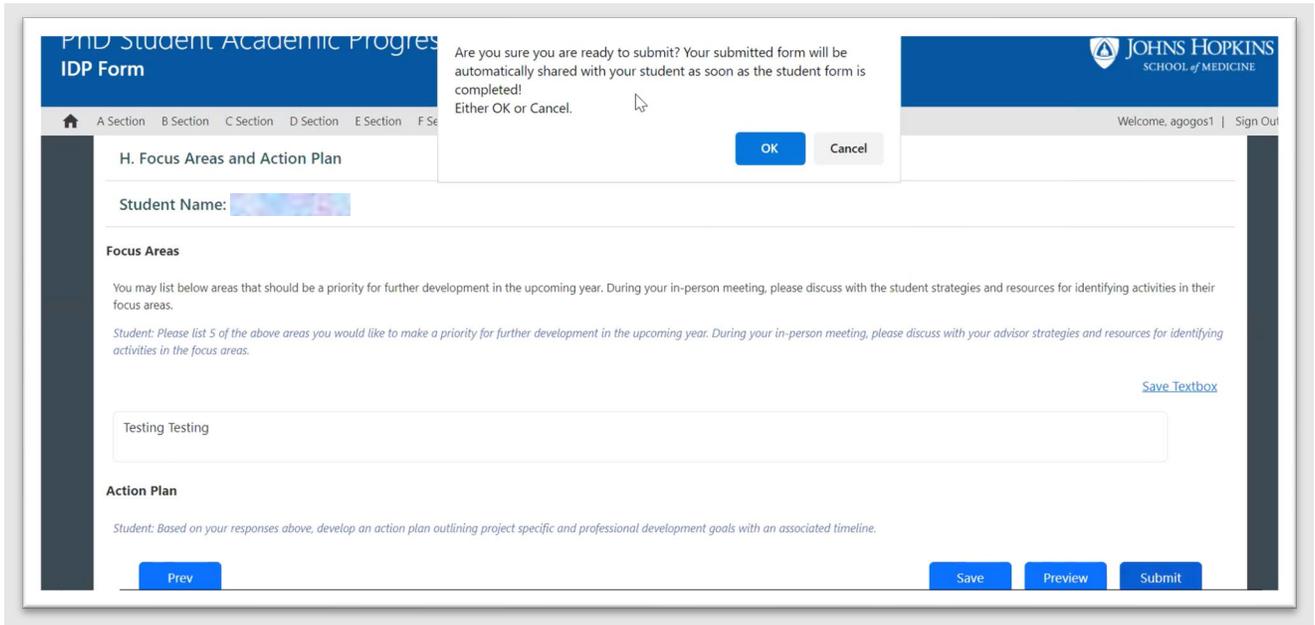
[Prev](#)

[Save](#) [Preview](#) [Submit](#)

The Preview opens as a separate window where advisors can expand /collapse all or individual sections to review their responses, and they can go back to the application in the original window to make edits.



When ready, advisors can click on the Submit button at the bottom of Section H to submit their responses. They will see a pop-up window reminding them that their submitted form will be automatically shared with their student as soon as the student submits their form. They may click OK to submit, or they may Cancel and submit later.



As soon as advisors submit their responses, the icon under “My Form” changes from a pencil icon to a document icon indicating that they cannot edit their form any longer; they may only view it. The date the form was submitted is listed in the next column:

**Instruction**

**SOM Annual Academic Progress and Professional Development Plan (aka IDP)**

The Johns Hopkins University requires that PhD students and their advisors discuss, at least annually, the student's academic progress and professional development plan. There are four steps in this process:

- 1. Complete the questionnaire:** Both the student and the advisor(s) complete the questionnaire separately.
- 2. Share the responses:** As soon as the questionnaires are submitted they are shared with each other on this interface. Note that you must complete your own questionnaire before getting access to your advisor's responses.
- 3. Meet to discuss:** After sharing their responses, the student and advisor(s) meet to (a) discuss their responses and (b) come up with a final action plan. The final action plan should be shared with the thesis committee.
- 4. Confirm that the meeting took place:** After the meeting, the student completes the Meeting Confirmation form to document that the meeting took place.

--Select Student-- 2024-2025 **Create IDP Form for Year 2024-2025** Student Name  **Search**

**Advisor IDP Forms**

Student Name	Academic Year	My Form	Submitted Date	Student/Advisor Responses	Meeting Date
[Redacted]	2024-2025		09/03/2024		

### 3. Combined View of Student-Advisor Responses

As soon as your student submits their form, the advisor will be able to access the student responses along with their own by clicking on the icon under the “Student/Advisor Responses” column.

**Advisor IDP Forms**

Student Name	Academic Year	My Form	Submitted Date	Student/Advisor Responses	Meeting Date
[Redacted]	2024-2025		09/03/2024		

This view allows advisors to go over their responses and the student’s responses side by side when they meet to discuss. The advisor responses are shown on a light blue background:

**A. Research Project and Progress**

When do you expect to graduate?

	Less than 1 year	1 year	2 years	More than 2 years
<b>Student:</b>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

What is the long-term goal of your research project, and how does it fit into the overall goals of the lab/research team?

Student: testing testing

What aspect of your research project are you most excited about?

Student: [Redacted]

When do you expect your student to graduate?

	Less than 1 year	1 year	2 years	More than 2 years
<b>Advisor:</b>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

What is the long-term goal of the student's research project, and how does it fit into the overall goals of the lab/research team?

Advisor: testing testing

Describe your research accomplishments from the past year.

This is particularly useful when reviewing the ratings for the competencies listed in section G:

**Levels**

1. Unsatisfactory (cannot / does not perform the skill/task)
2. Novice (needs help or guidance when performing this skill/task)
3. Intermediate (help from an expert may be required from time to time, but the skill/task can usually be performed independently)
4. Advanced (can perform the actions associated with this skill without assistance)
5. Expert (demonstrates consistent excellence in this skill/task)

**Research/Scholarship**

		Unsatisfactory	Novice	Intermediate	Advanced	Expert	Don't know	N/A
Demonstrating ability to explain a broad range of topics in the discipline	Student	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding key methods used in the discipline	Student	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Demonstrating ability to perform the key research methods/procedures used in the discipline	Student	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Critical reading and analysis of field literature	Student	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creativity and innovation in thinking	Student	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advisor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Critically evaluating the research	Student	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

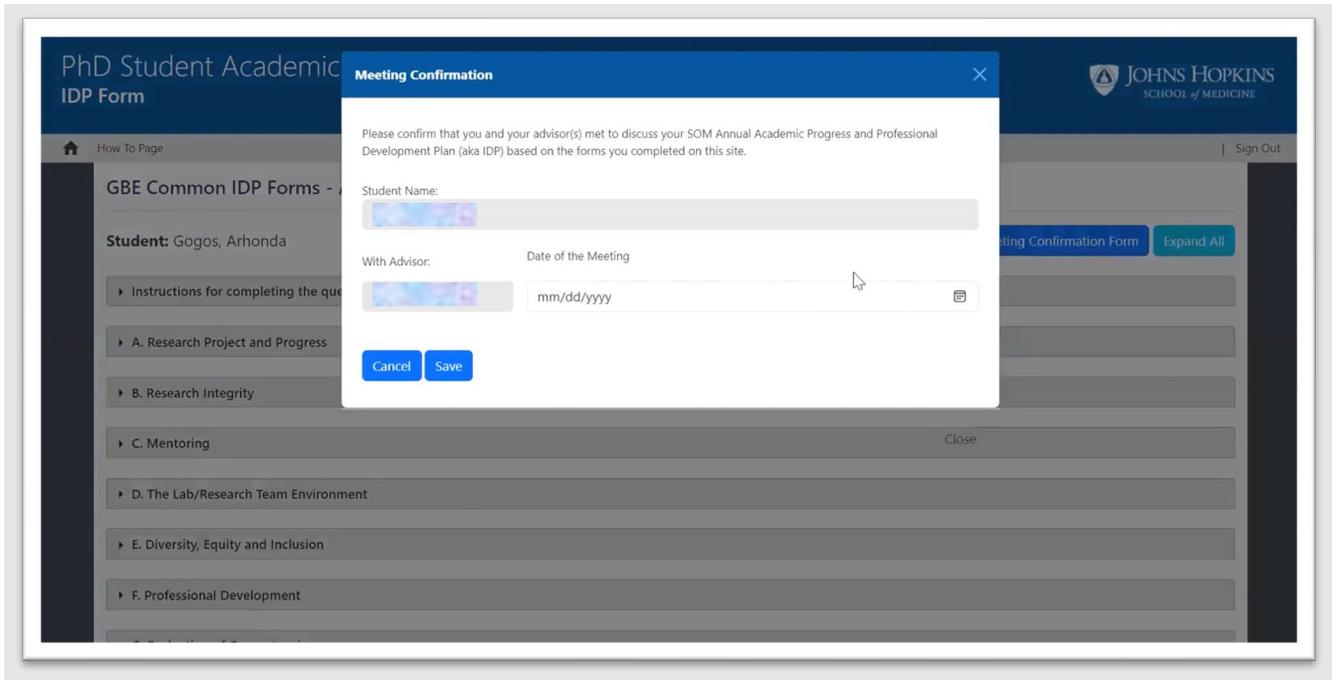
#### 4. Meeting Confirmation

It is a university requirement that students meet with their advisor to discuss their IDP, and so students need to report the date on which this meeting took place. The meeting date will appear under the corresponding column in the table list of IDP forms (in the screenshot below, the date has not been submitted yet).

▼ Advisor IDP Forms

Student Name	Academic Year	My Form	Submitted Date	Student/Advisor Responses	Meeting Date
[Redacted]	2024-2025	[Document Icon]	09/03/2024	[Document Icon]	

Advisors may also see the meeting date through the “Combined Student/Advisor Responses” view by clicking on the “Meeting Confirmation Form” button.



**Note that the student can report a meeting date only after both the advisor and the student submit their responses on their IDP forms.**

## 5. Notifications *[not yet available]*

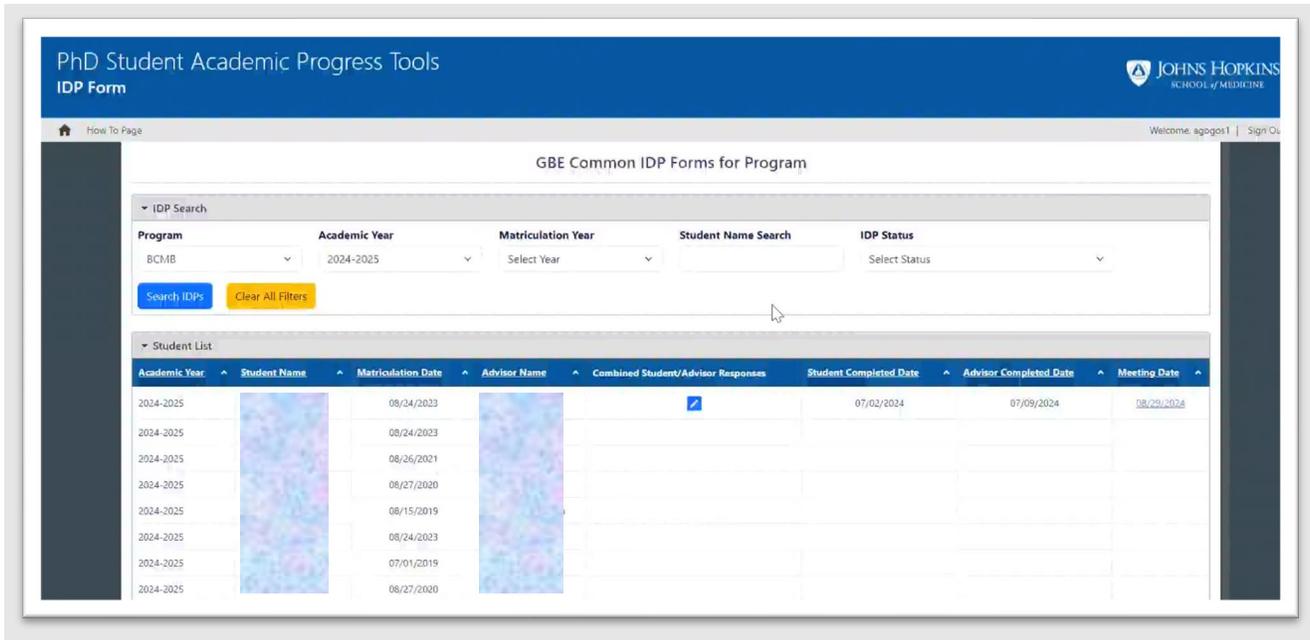
Individual programs will be able to activate/inactivate the following notifications for advisors:

- Notification when the IDP form for the new academic year becomes available (Sept 1)
- If the advisor has not completed their form, notification that their student submitted theirs.
- A week *after* both student and advisor submit their forms, reminder that they need to meet.
- If a meeting confirmation date has not been submitted, reminder that the IDP process must be completed by the end of the academic year (sent 2 months before the Aug 31 deadline).

## F. Administrator Portal

Administrators may access information on IDP forms for all the students in their program. On their program's landing page, there is a search tool at the top, and right below there is a listing of the IDP forms.

The same administrators who have access to the Thesis Committee Tracker tool have access to the IDP Forms area.

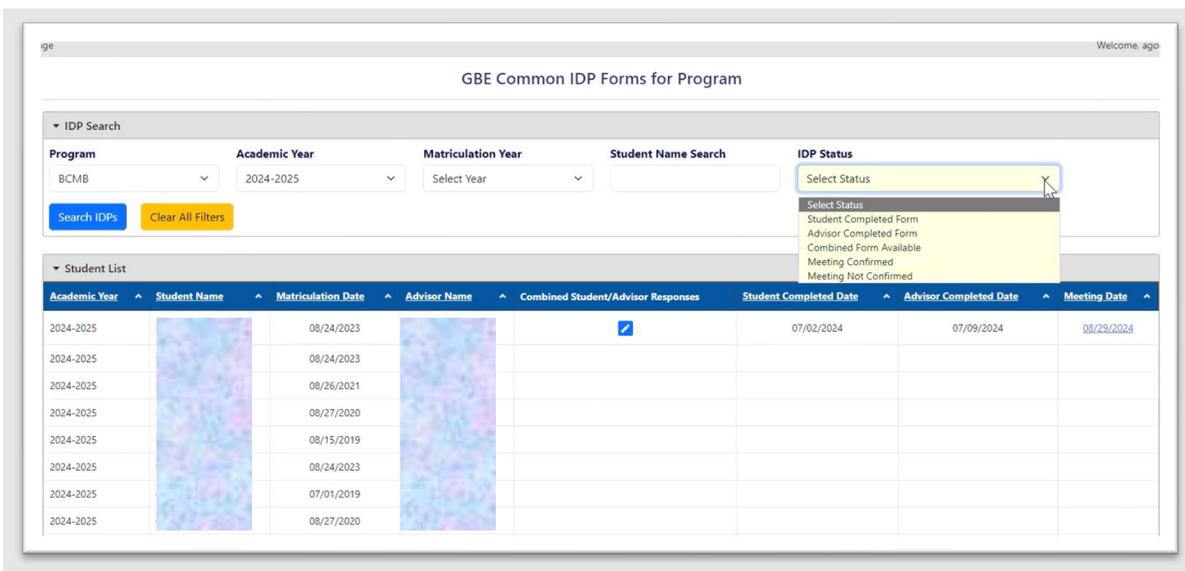


## 1. Search Tool

Administrators may search the IDP Forms by academic year, the student's matriculation year, or the student's name. They may also search by IDP status:

- Student Completed Form
- Advisor Completed Form
- Combined Form Available (i.e., both student and advisor have submitted their form)
- Meeting Confirmed
- Meeting Not Confirmed

For example if you would like to see all the students for whom a meeting confirmation has been submitted, select "Meeting Confirmed" from the drop down and click on "Search IDPs":



In this case, the search returns the one IDP form that has an associated meeting date submitted:

GBE Common IDP Forms for Program

▼ IDP Search

Program BCMB	Academic Year 2024-2025	Matriculation Year Select Year	Student Name Search	IDP Status Meeting Confirmed
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▼ Student List

Academic Year	Student Name	Matriculation Date	Advisor Name	Combined Student/Advisor Responses	Student Completed Date	Advisor Completed Date	Meeting Date
2024-2025	[blurred]	08/24/2023	[blurred]	✓	07/02/2024	07/09/2024	08/29/2024

## 2. IDP Forms List

In the listing of the IDP forms (see above), there are columns for the academic year, the student's matriculation date, and the advisor's name. The remaining columns indicate the stage of completion:

- Combined view of student and advisor responses, after both are submitted
- Completion date of the student form
- Completion date of the advisor form
- Meeting date

Administrators may use the headers of these columns to sort the table as needed.

The meeting date is submitted by the student, after both student and advisor complete their forms and meet to discuss their responses. Therefore a submitted meeting date indicates that the process has been completed.

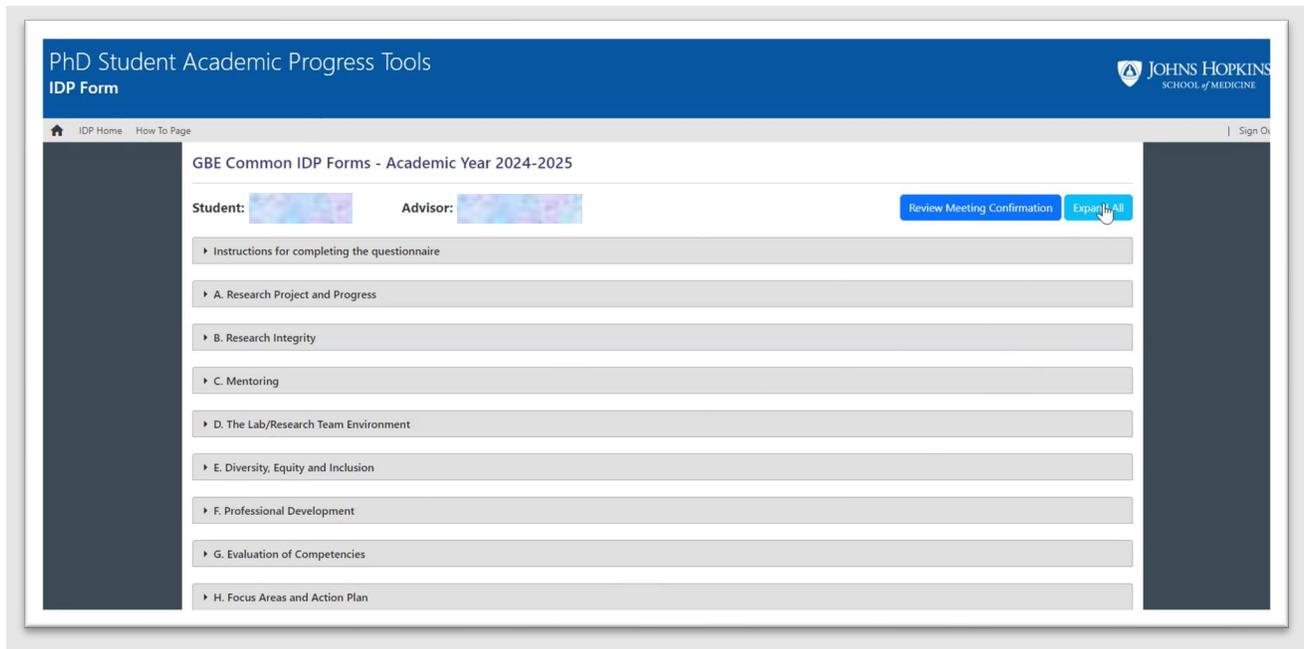
## 3. Combined View of Student-Advisor Responses

Administrators may access the student and advisor responses through a combined form by clicking on the icon under the corresponding column:

▼ Student List

Academic Year	Student Name	Matriculation Date	Advisor Name	Combined Student/Advisor Responses	Student Completed Date	Advisor Completed Date	Meeting Date
2024-2025	[blurred]	08/24/2023	[blurred]	✓	07/02/2024	07/09/2024	08/29/2024

Administrators can access the different sections of the form and collapse or expand them as needed. The student and advisor responses are shown next to each other within each section.



#### 4. Notifications and Email Management *[not yet available]*

Individual programs will be able to activate/inactivate the following notifications for students who have dissertation advisors listed in SIS and their dissertation advisors:

- a. Notification when the IDP form for the new academic year becomes available (Sept 1)
- b. If the user has not completed their form, notification that their counterpart submitted theirs.
- c. A week after both student and advisor submit their forms, reminder that they need to meet and submit the meeting date
- d. If the meeting confirmation date is not submitted, reminder that the IDP process for the academic year must be completed (sent two months before the August 31 deadline).

#### 5. Reports Tab *[not yet available]*

Administrators will be able to generate and export reports through this tab.

#### 6. Technical Support

Students and advisors are directed to contact the program administrators. In turn, administrators may contact OIT for technical support through the “Report a Problem” button at the bottom of each page (shown at the top of each page) or through the [Service Desk Portal](#).

If there are errors in the information shown in the system (e.g., wrong or missing advisor), please check that the information is correctly listed in SIS before opening a service ticket.